

Review and Complete an Activity

In Brief

In this Quick Card, you will review and complete an activity using a Property policy.

Quick Card

IMPORTANT: This is a test environment. The next seven (7) steps are ONLY used in the VTO.

Clone a Policy

- 1. In the PolicyCenter VTO, click the down arrow to the right of the **Training** button on the **Tab Bar**. Select "**Create your own policy for training**" from the drop-down list.
- 2. Enter "9113K 500358" in the Policy Number field exactly as it is shown, including spaces and capital letters.
- 3. Click the Search Work Orders button.
- 4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction **#381629**.

Create your own policy for training				
Clone Export Import				
Account Number				
Work Order Number				
Policy Number	9113K 500358			
	Search Work Orders Reset			
Originals Copy Selection Copy Account				
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04/14/2021 381629	9113K 500358 Submission	Bound Bound	Ⅰ ▼	Personal Auto
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. 04/29/2021 1889520	Submission Bound	d 9113K 502388 9063441378	Personal Auto Elizabeth A Steve	ns

- 5. Click the Copy Selection button.
- 6. Scroll down, if necessary, to the *Copies* section.
- 7. Click the link in the **New Policy #** column.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.



Summary screen

NOTE: The activities on the policy appear in the *Current Activities* section of the cloned policy. Activities also appear on the *My Activities* screen. You can complete the activity from either of these screens. In this example, you will complete the activity from the *Summary* screen.

8. Click a Trailing Documents Reminder link in the *Current Activities* section.

NOTE: The activity opened on the *Quote* screen. The *Activity Detail* section displays at the bottom of the screen.

- 9. Review the activity.
- 10. Click the View <u>Notes</u> button to review the notes.
- 11. Click the Return to Activity Detail button
- 12. Click the **Complete** button.

NOTE: When the activity is completed, the *Activity Detail* section closes.

- 13. Click the **Policy #** link on the PolicyCenter Info Bar.
- 14. The activity is no longer listed in the *Current Activities* section of the policy.