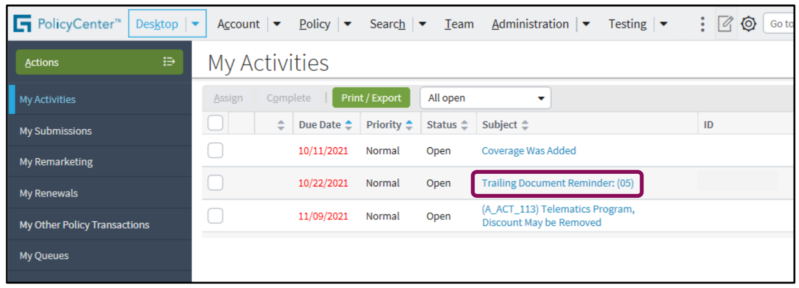
Follow-up Capabilities for Agents

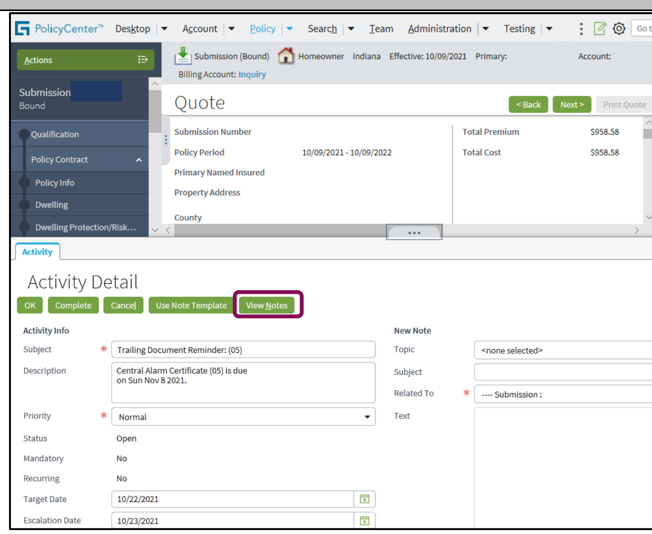
Description

This step-by-step job aid describes how to follow-up on an activity assigned to an agent.

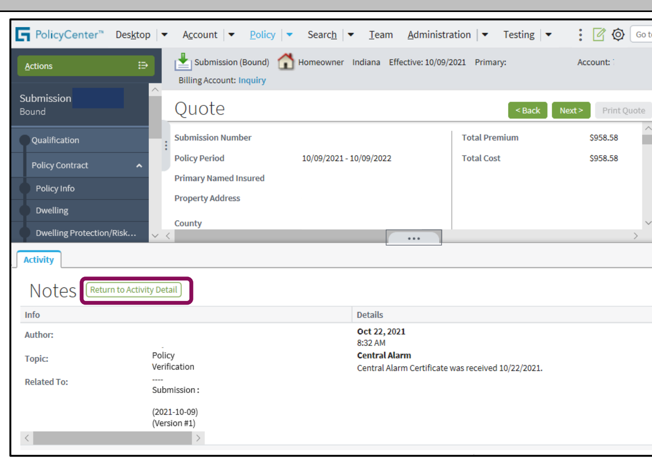
Step 1

Action	Screen
Navigate to the “My Activities” screen. Select the link of the activity on which you wish to follow up.	

Step 2

Action	Screen
In the “Activity Detail” section: • Select the “View Notes” button to view the note from the underwriter.	

Step 3

Action	Screen
In the “Notes” section: • Review the note from the underwriter. • Select the “Return to Activity Detail” button.	

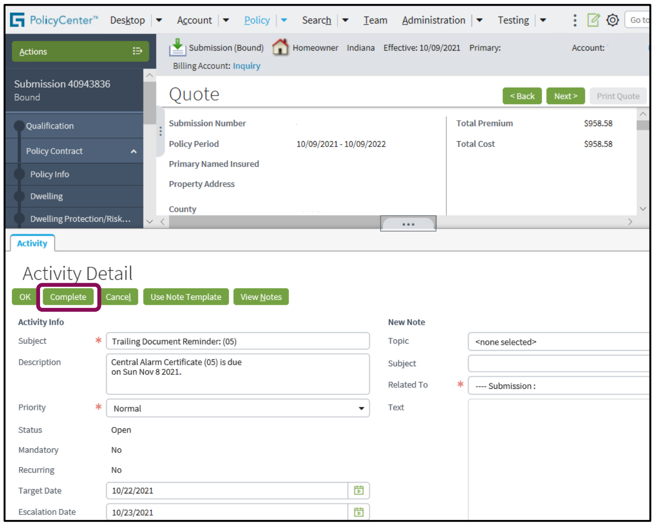
Step 4

Action

The activity from the underwriter requires action.

- Select the “Complete” button to mark the activity as complete.

Screen



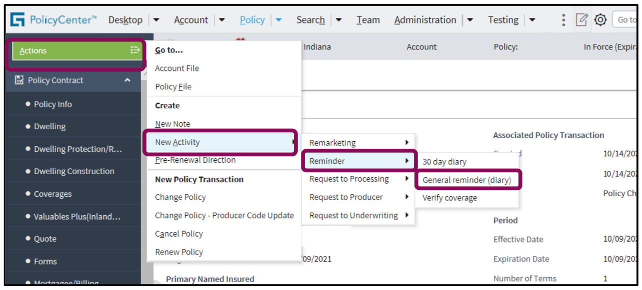
Step 5

Action

Next, you will assign a new activity to the underwriter.

- Select “Actions” > “New Activity” > “Reminder” > “General reminder (diary)” from the drop-down menus.

Screen



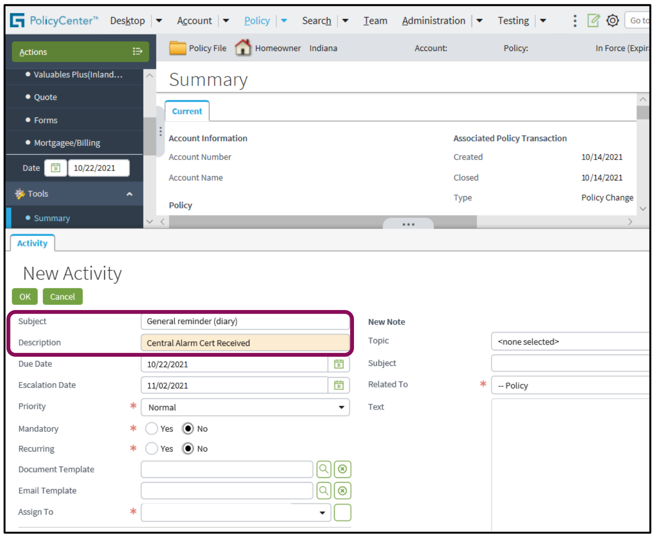
Step 6

Action

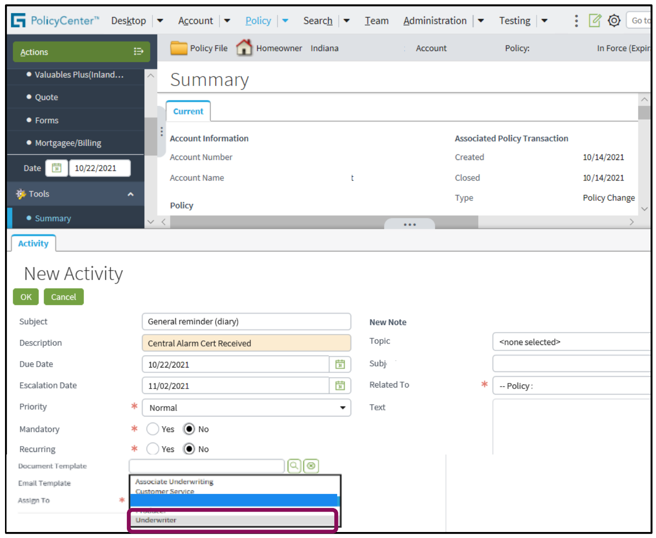
In the “New Activity” section:

- Enter the appropriate information in the activity fields. For example, enter information into the “Subject” and “Description” fields.

Screen



Step 7

Action	Screen
To assign the activity to an underwriter: • Select the button to the right of the “Assign To” field. • Select “Underwriter” from the drop-down list.	

Step 8

Action	Screen
To complete the note: • Enter the appropriate information in the “New Note” fields. For example, enter desired information into the “Topic”, “Subject” and “Text” fields. • Select the “OK” button to send the activity to the underwriter.