

# 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

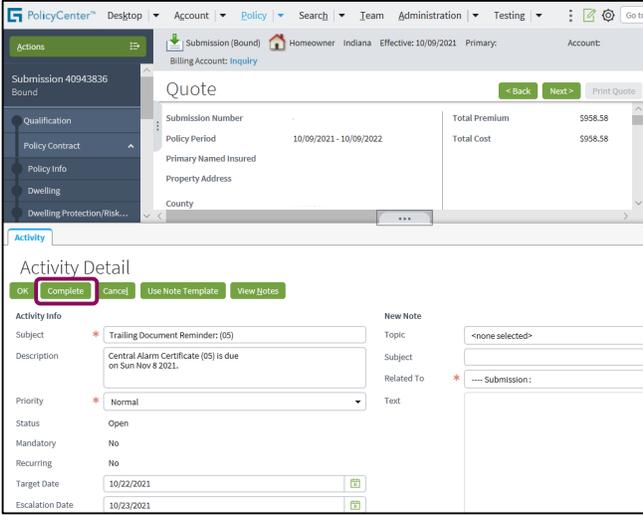
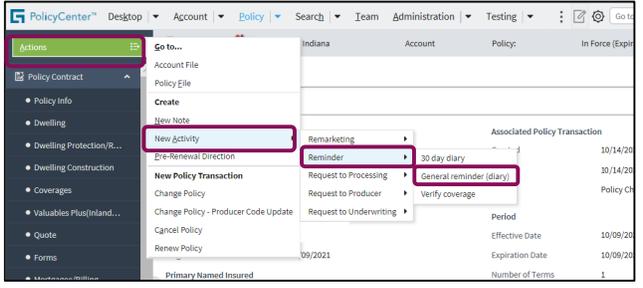
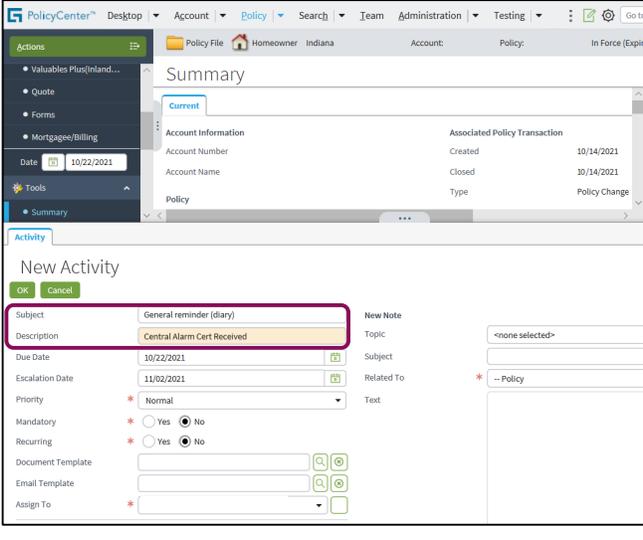
Action	Screen
<p>Navigate to the “My Activities” screen.</p> <p>Select the link of the activity on which you wish to follow up.</p>	

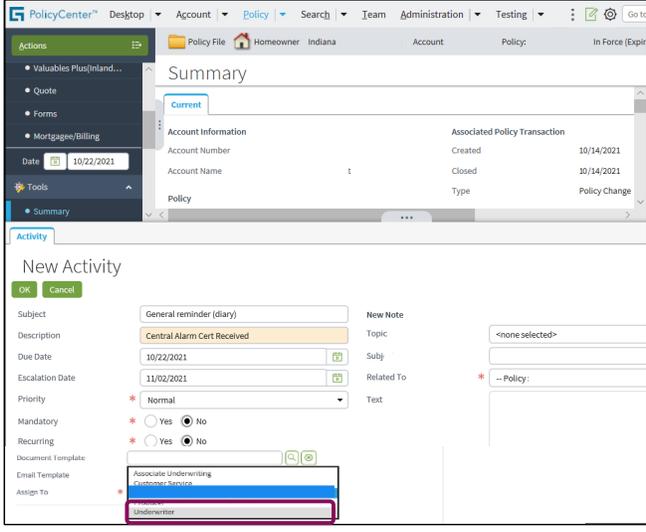
### Step 2

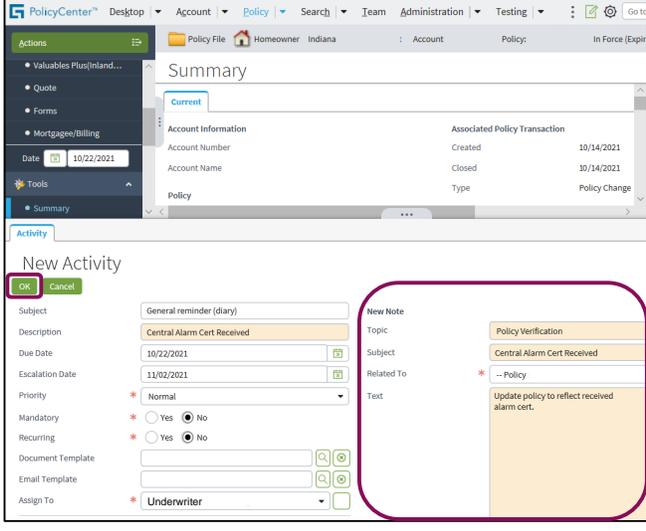
Action	Screen
<p>In the “Activity Detail” section:</p> <ul style="list-style-type: none"> <li>Select the “View Notes” button to view the note from the underwriter.</li> </ul>	

### Step 3

Action	Screen
<p>In the “Notes” section:</p> <ul style="list-style-type: none"> <li>Review the note from the underwriter.</li> <li>Select the “Return to Activity Detail” button.</li> </ul>	

Step 4	
Action	Screen
<p>The activity from the underwriter requires action.</p> <ul style="list-style-type: none"> <li>Select the “Complete” button to mark the activity as complete.</li> </ul>	 <p>The screenshot shows the PolicyCenter interface. At the top, there's a navigation bar with 'PolicyCenter' and various menu items. Below that, a 'Quote' page is displayed with fields for Submission Number, Policy Period, Primary Named Insured, Property Address, and County. A table shows Total Premium (\$958.58) and Total Cost (\$958.58). Below the quote, the 'Activity Detail' section is visible, with a red box highlighting the 'Complete' button. Other fields in the activity detail include Subject, Description, Priority, Status, Mandatory, Recurring, Target Date, and Escalation Date.</p>
Step 5	
Action	Screen
<p>Next, you will assign a new activity to the underwriter.</p> <ul style="list-style-type: none"> <li>Select “Actions” &gt; “New Activity” &gt; “Reminder” &gt; “General reminder (diary)” from the drop-down menus.</li> </ul>	 <p>The screenshot shows the PolicyCenter interface with a dropdown menu open. The path 'Actions &gt; New Activity &gt; Reminder &gt; General reminder (diary)' is highlighted with red boxes. The 'New Activity' menu item is also highlighted. The background shows a 'Summary' page with account information and associated policy transactions.</p>
Step 6	
Action	Screen
<p>In the “New Activity” section:</p> <ul style="list-style-type: none"> <li>Enter the appropriate information in the activity fields. For example, enter information into the “Subject” and “Description” fields.</li> </ul>	 <p>The screenshot shows the PolicyCenter interface with the 'New Activity' form open. The 'Subject' field is filled with 'General reminder (diary)' and the 'Description' field is filled with 'Central Alarm Cert Received'. Both fields are highlighted with red boxes. Other fields include Due Date, Escalation Date, Priority, Mandatory, Recurring, Document Template, Email Template, and Assign To.</p>

Step 7		
Action	Screen	
<p>To assign the activity to an underwriter:</p> <ul style="list-style-type: none"> <li>Select the button to the right of the "Assign To" field.</li> <li>Select "Underwriter" from the drop-down list.</li> </ul>		

Step 8		
Action	Screen	
<p>To complete the note:</p> <ul style="list-style-type: none"> <li>Enter the appropriate information in the "New Note" fields. For example, enter desired information into the "Topic", "Subject" and "Text" fields.</li> <li>Select the "OK" button to send the activity to the underwriter.</li> </ul>		

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