

View Prior Term Transactions



Description

This job aid reviews how to view transactions effective the prior term.

To complete a transaction effective the prior term, use the **How to Enter a Prior Term Change** job aid for instructions.

Step 1

Action

On the "Summary" screen:

- Update the "Date" field to the appropriate date.

Note: The "Date" field is used to view the policy as it was on the date it was entered. This policy is in its third term.

Screen

The screenshot shows the PolicyCenter interface. On the left is a navigation menu with options like Policy Contract, Drivers, Accidents/Violations, Vehicles, Usage Based Insurance, Coverages, Lienholder/Additional..., Quote, and Tools. The 'Summary' option is selected. The main area displays the 'Summary' screen for a 'Personal Auto' policy. A red box highlights the 'Date' field in the left sidebar, which currently shows '10/25/2021'. The right sidebar shows 'Associated Policy Transaction' details, including 'Created' (10/25/2021), 'Closed' (10/25/2021), 'Type' (Policy Change), 'Effective Date' (10/20/2021), 'Expiration Date' (04/20/2022), 'Number of Terms' (3), 'Total Cost' (\$657.72), 'Billing Status', 'Producer of Record', and 'Producer Code'.

Step 2

Action

All information will revert automatically to the date entered. Review the specific screens to show information on the date specified.

Note: If you need to make a change to a prior term, refer to the **How to Enter a Prior Term Change** job aid.

Screen

The screenshot shows the PolicyCenter interface. On the left is a navigation menu with options like Policy Contract, Drivers, Accidents/Violations, Vehicles, Usage Based Insurance, Coverages, Lienholder/Additional..., Quote, and Tools. The 'Summary' option is selected. The main area displays the 'Summary' screen for a 'Personal Auto' policy. A red box highlights the 'Date' field in the left sidebar, which currently shows '09/25/2021'. The right sidebar shows 'Associated Policy Transaction' details, including 'Created' (04/20/2021), 'Closed' (04/20/2021), 'Type' (Renewal), 'Effective Date' (04/20/2021), 'Expiration Date' (10/20/2021), 'Number of Terms' (2), 'Total Cost' (\$657.72), 'Billing Status', 'Producer of Record', and 'Producer Code'.

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