

Lesson 9 Documents

9.1 Requirements

Create documents two different ways and attach the documents to an account.

9.2 Document A: Word processor document



Activity

Upload an existing document

1. Log in to PolicyCenter as studentXX/gw
2. Navigate to an account (for example, Renee WellsXX)
3. Create the document

Note: If you are working on a VM, create the document directly on the VM. The files created outside of the VM cannot be transferred to the VM.

Using any word processing application, create a text document named “Policy Renewal Instructions”. Copy the following content (list of steps) into the document.

- a) Select Renew Policy
 - b) Edit Contract
 - c) View Quote
 - d) Forms
 - e) Billing Info
 - f) Bind Renewal
4. Save the document to the Desktop or any folder
 5. Upload the existing document to PolicyCenter to add it to the account

The document should have these attributes:

- Description: The attachment is the Policy Renewal Instructions document
- Status: Draft
- Type: Letter Sent

6. Click Update in the Upload Documents worksheet to save the document



Stop

9.3 Document B: Template document



Activity

Create a document from a template

1. Add a second document in to the account using the *Gosu Sample Account Email Sent Record* template (default option in the Search results)
2. In the Upload Documents worksheet, set the following:
 - Subject: Renewal Reminder
 - Recipient: Renee WellsXX
 - Status: Final
 - Security Type: Sensitive
 - Document Type: Letter Sent
 - Section: Correspondence
 - Hidden: No
3. Click Create Document. What happens?
4. Click Update to attach the file to the account



Stop

9.4 Solutions

9.4.1 Document A: Word processor document



Solutions

Upload an existing document

1. Click Actions → New Document → Upload Document
2. Click Add Files, locate the file, and click open
3. Set document attributes
4. Click Update to save the document