

Lesson 2 Location Groups and Pages

2.1 Requirements

In this exercise, you add a new left menu link for policy terms to the Account File in PolicyCenter. Clicking the menu link opens a new page that displays a list of all the policy terms.

2.2 Configuration



Activity

1. Add a new Location Ref for Policy Terms in the Account File Location Group.
2. Create a new page for Policy Terms. The following are some tips.

- a) You can copy an existing page, for example `AccountFile_Roles.pcf`.

Note: It is recommended not to copy and reuse any portion on the `AccountFile_Summary` page because it uses the dashboard and tile elements, which are special for summary pages.

- b) Update the titles, entry points, etc.
- c) Remove the `Screen` element.
- d) Copy the `ScreenRef` element from `Policy_CurrentPoliciesPopup.pcf` and paste it into the new page for Policy Terms .

2.3 Verification

1. Log in to PolicyCenter as Alice Applegate with `aapplegate/gw`.
2. Reload PCF files.
3. Go to any account.
4. Policy Terms link on sidebar displays the Policies list view.s

The screenshot shows the PolicyCenter interface for the account "Wright Construction". The top navigation bar includes "Actions", "Account" (Wright Construction, Account # C000212105), and a search bar. The left sidebar has links for "Summary", "Policy Terms" (which is highlighted with a red box), "Contacts", and "Locations". The main content area is titled "Policy Terms" and displays a table of policies. The table has columns for "Policy #", "Product", "Status", and "Dates Effective". The data in the table is as follows:

Policy #	Product	Status	Dates Effective
1543488204	Businessowners	In Force	08/06/2018 - 08/06/2019
3054854630	Workers' Compensation	In Force	06/06/2018 - 06/06/2019
9565421286	Workers' Compensation	In Force	05/08/2018 - 05/08/2019