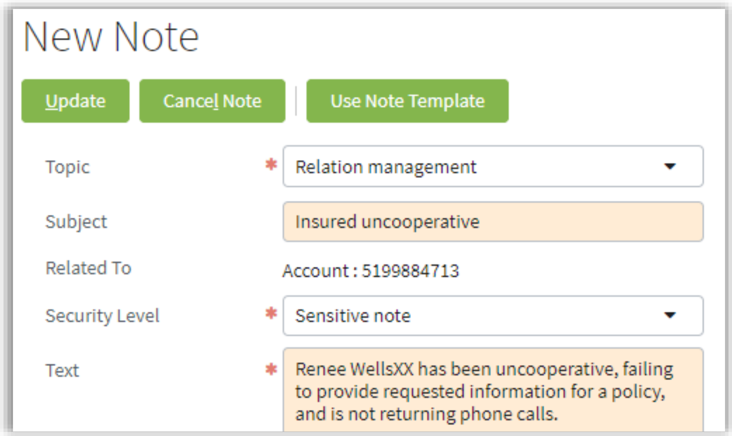
10.5.2 Creating a sensitive note

Solution

Creating a sensitive note for an account.

Create a relation management note indicating that the insured (for example, Renee WellsXX) has been uncooperative, failing to provide requested information for a policy, and is not returning phone calls. Mark the note “sensitive”.



10.6 Reference

Review

Why would I use a Note?

The common business case for a Note is that an end user enters a detailed record of actions related to a policy, account, job or other entity such as a contingency or underwriting referral reason. Notes can also be created in business rules. In some cases, it may make sense for a given business rule to create and attach a note to a job or account after an automatic action has been taken.

Tip

Notes attributes

- **Topic:** General category of note
- **Subject:** A short description of the note’s contents
- **Security Level:** Unrestricted, Internal, Sensitive
- **Text:** The note contents

Stop