9.4.2   Document B: Template document

Solutions

Create a document from a template

1. **Click Actions → New Document → Create from a template**
2. **Click the magnifying icon in the Document Template field to search for a template**

Document Contents

1 - Select Template

Document Template   *   [🔍 ⊗]

3. **Select the option in the search result:** *Gosu Sample Account Email Sent Record*
4. **Set the document attributes**
5. **Click Update to save the document**
6. **Within the account, navigate to the Documents page. Verify that the documents appear in the document list.**

9.5   Reference

Review

What exactly is a document, how can it be generated and where do I find it?

Documents are electronic files that contain information relevant to an account, a policy or a job. Documents are not part of the contractual portion of a policy. Some examples of how documents are used in PolicyCenter include:

- Physical pieces of paper that document the assets covered by the policy (i.e., photographs of jewelry, floorplan diagrams for a workplace)

- Physical pieces of paper that are used to rate the policy (i.e., assessments from property inspectors)

- Emails between the insurer and the insured

Stop