

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

Account Wright Construction Account # C000212105

Policy Terms

Status: All Product: All

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