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:

   o   Description: The attachment is the Policy Renewal Instructions document

   o   Status: Draft

   o   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:**

   o Subject: Renewal Reminder

   o Recipient: Renee WellsXX

   o Status: Final

   o Security Type: Sensitive

   o Document Type: Letter Sent

   o Section: Correspondence

   o 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**

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