Lesson 10 Notes

10.1 Requirements

Create a general note and a sensitive note on an account. Verify that a user with limited permissions cannot view the sensitive note.

10.2 Creating a general note

Activity

1. **Log in as studentXX**
2. **Create a general note for an account**

   Use a known account (for example, Renee WellsXX) to create a general note for the account stating that the insured (for example, Renee WellsXX) will be on vacation for three weeks next month and cannot be contacted.

10.3 Creating a sensitive note

Activity

Create 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”.

10.4 Verification

1. **While logged in as studentXX, go to the Notes page on the account file**
   a) Verify that both created notes appear
   b) Write down the account number
2. **Log out of PolicyCenter and log in as Dennis Right, an underwriter assistant**
   - Username: dright
   - Password: gw
3. **Go to the same account and view the note page**

Verify that the vacation note is visible, however, the sensitive note is not visible since Dennis does not have permission to view sensitive notes.

Stop

10.5 Solutions

10.5.1 Creating a general note

Solution

Create a general note for an account

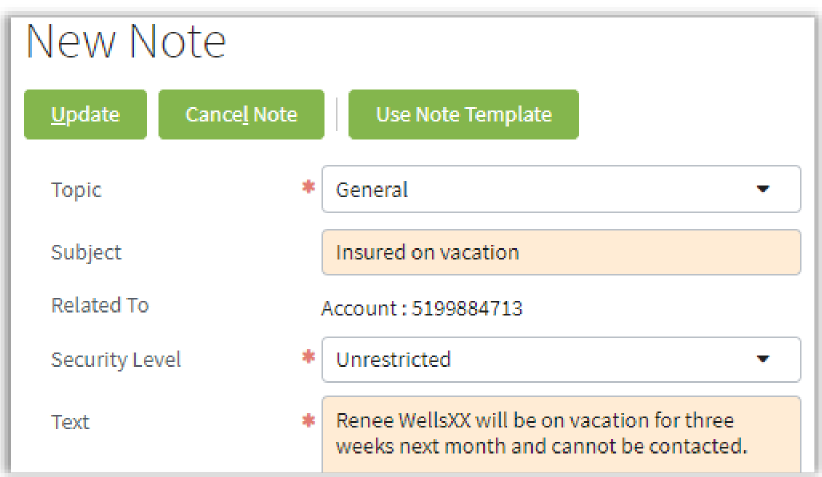
1. **Log in as studentXX**
2. **Create a general note for an account**

Use a known account (for example, Renee WellsXX) to create a general note for the account stating that the insured (for example, Renee WellsXX) will be on vacation for three weeks next month and cannot be contacted.

a) Click Actions → New Note

a) Enter note details

b) Click Update

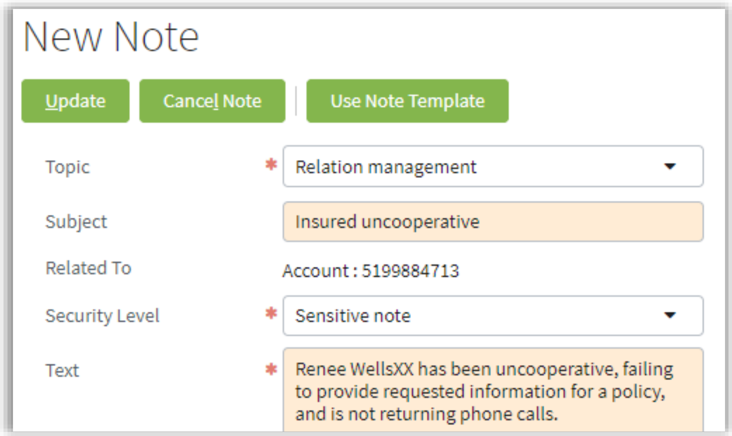


10.5.2 Creating a sensitive note

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