

# 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**
  - o Username: dright
  - o 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.



## 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

### New Note

UpdateCancel NoteUse Note Template

Topic	* General
Subject	Insured on vacation
Related To	Account : 5199884713
Security Level	* Unrestricted
Text	* Renee WellsXX will be on vacation for three weeks next month and cannot be contacted.