

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.



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

New Note

Actions		Use Note Template
Update	Cancel Note	
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.