

Lesson 3 Policy Files

3.1 Searching for policies



Activity

Searching for policies

1. Log in as studentXX/gw
2. Select Search → Policies from the menu
3. Go to the Advanced tab
 - a) Enter the search criteria (for example, company name = Wright Construction)
 - b) Click the Search button.

Search Policies

Primary Insured Information

First name

Last name

First name is an exact match ☒

Last name is an exact match ☒

Country

City

State

ZIP Code

Phone

Company Name

Company name is an exact match ☒

Official ID

Account Number

Policy Number

Assigned Risk ☐ Yes ☒ No

Underwriting Company

4. At the bottom of the screen, several returned policy files can be seen. Answer the following questions about the returned policy files:
 - a) How many policies are returned from this search?
 - b) Describe the column titled "Status".