

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

The screenshot shows a user interface for creating a new document. At the top, it says "Document Contents". Below that, there's a section titled "1 - Select Template". Underneath this, there's a field labeled "Document Template" with an asterisk (*) next to it. To the right of this field is a search bar containing a magnifying glass icon, which is highlighted with a red box. There are also other icons in the search bar area.

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