Lesson 6   Policy Tools

6.1   Exploring policy tools

Activity

Policy tools are meant to provide basic information about the policy.

Explore the information about the policy you just issued.

a) What are the billing details for the policy?
b) Are there any notes associated with the policy? Is there a way to add notes through the Tools?
c) What information does the History provide?

Stop

6.2   Solutions

Solution

Policy tools are meant to provide basic information about the policy.

Explore the information about the policy you just issued.

a) What are the billing details for the policy?

   The Billing Info area lets you view the overall balance and balances for individual policy periods. You can also view the payment schedule.

b) Are there any notes associated with the policy? Is there a way to add notes through the Tools?

   There are no notes for the policy. You cannot add Notes through the Tools. You can add Notes using the Action Menu.

c) What information does the History provide?

   History gives you the option to search and view historical events pertaining to the policy.

6.3   References

Tip

Why would I use the Policy Tools?

Policy Tools provide useful summary information about the policy and give you quick access to billing information, notes, history and documents related to the policy. Together, the policy tools provide a snapshot of the policy.

Stop