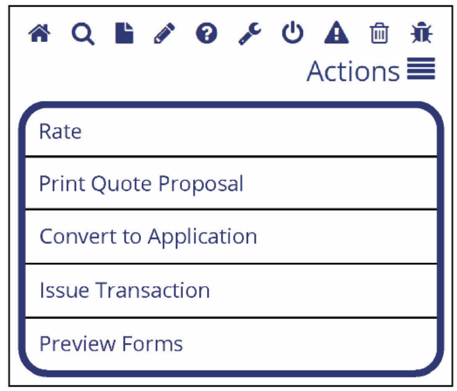
ACTIONS MENU

PolicyPro by Sapiens

COMMON ACTIONS TAKEN BY USERS

The **Actions** menu is located in the top right-hand corner of your screen (often called the hamburger icon. The displays of what is in the Action menu may differ depending on if you are in the **Quote**, **Application**, or **Policy** stage of the policy.

These "**Actions**" are actions you want to take on the policy. Common ones used are as follows:



RATE

Rate will rate the quote and is available once all the required fields are completed to provide a quote. Required fields are marked with a *red asterisk.

PRINT QUOTE PROPOSAL

Print Quote Proposal allows the agent or user to print a copy of the quote for the customer and your office files.

CONVERT TO APPLICATION

Once the customer has accepted the quote and wants to commit to the policy, you will select **Convert to Application**, at which point additional information will need to be completed before the policy can be issued.

Once you **Convert to Application**, <u>it is **VERY IMPORTANT** that you Print the Application for signatures</u>, because <u>you are **NOT** able to print the application once the policy has been issued</u>.

First, enter all the information required to complete the application. Next, click on **Rate** in the **Actions** menu, then go to the **Forms** screen and select **Preview Forms** in order to print the **Application** and any other signature documents.

ISSUE TRANSACTION (BINDING/BOUND)

Once all required fields are completed, necessary to issue a policy, you can select **Issue Transaction**, commonly referred to as "**Binding**" the policy. This will open the **Billing information** screen, which allows you to make a **Down Payment** and bind the policy for coverage.

For more information see **BILLING & PAYMENTS** for details.

PREVIEW FORMS

This allows the user to preview the endorsements, additional coverages, and exclusions that pertain to the coverages and structures that are listed on the policy.