

# PRINTING DOCUMENTS

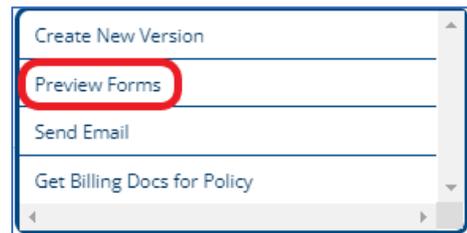
PolicyPro by Sapiens



This document will help the user utilize the printing feature in Sapiens. Printing documents will allow the user to print documents to file, show insured a quote summary, print an application, or sign necessary documents associated with their policy.

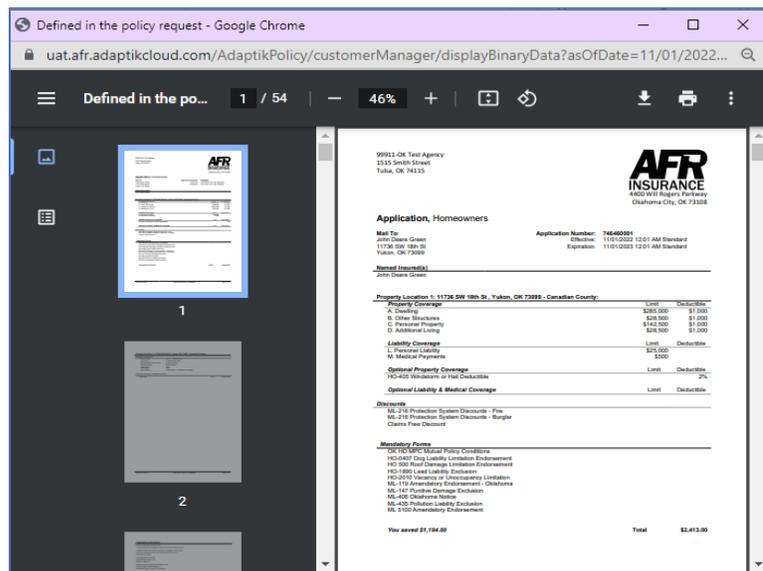
## HOW TO PRINT COMPLETED POLICY DOCUMENTS

After a user has completed a quote, application, and issued their transaction, they can go to the action menu located in the top right hand corner to find **Preview Forms**.



When a user clicks the **Preview Forms** option, the system will automatically generate a PDF file containing the documents in the following order:

- Application
  - After **Convert to Application**, an **Application MUST be printed and signed BEFORE issuing the policy.**
  - Once the policy has been issued, you can no longer print the Application.
- Declarations
- Exclusions Requiring Signatures
- Policy Forms
- Endorsements
- Privacy Policy
- Fair Credit Reporting Act
- Evidence of Insurance

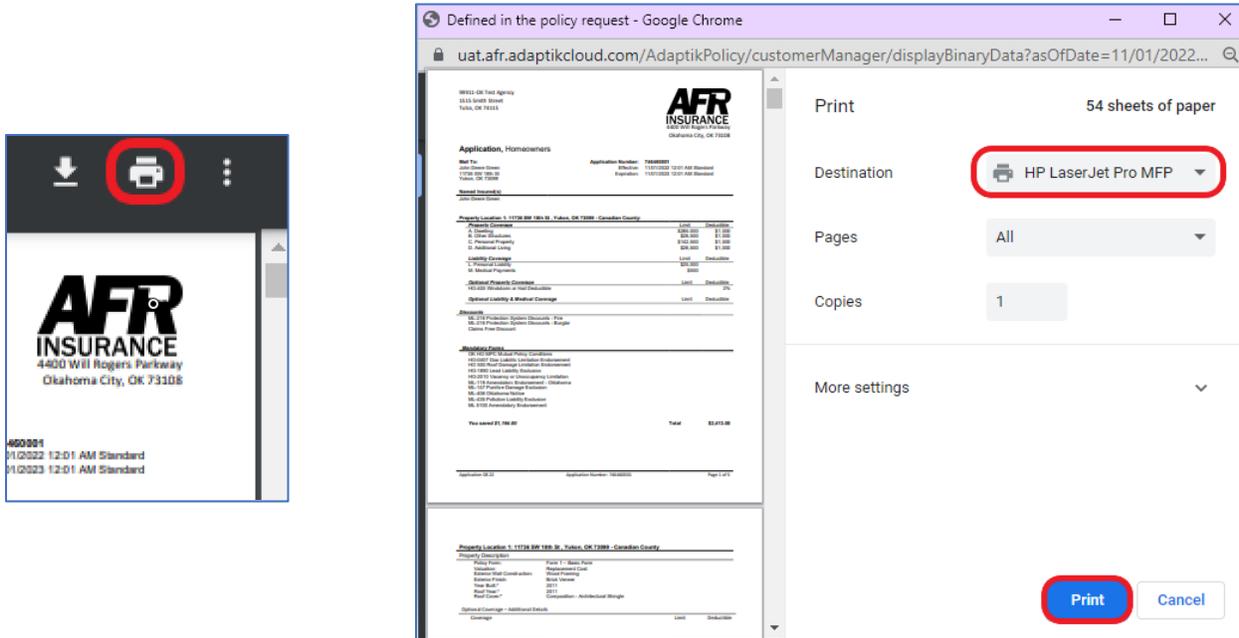


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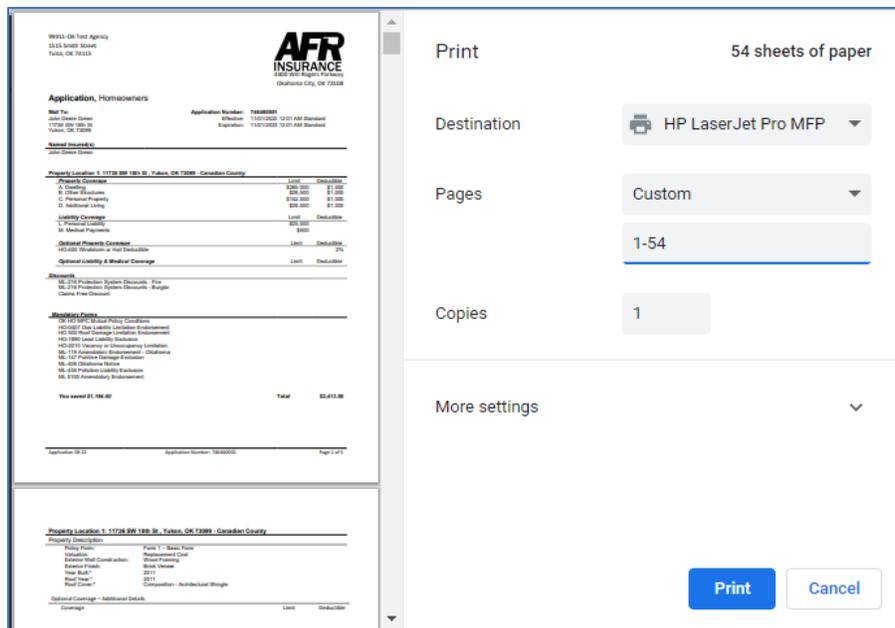
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If a user would like to print out the whole bundle of documents, simply press the **printer icon** in the top right-hand corner of the PDF screen, select the correct printer, and press **Print**.



If a user would like to select a few pages to print instead of the whole document, select the **printer icon** in the top right-hand corner. Change the **Pages** drop down menu to **Custom** and type in the page numbers you'd like printed. From here the steps are the same as above. Make sure you have the correct printer selected and click **Print**.



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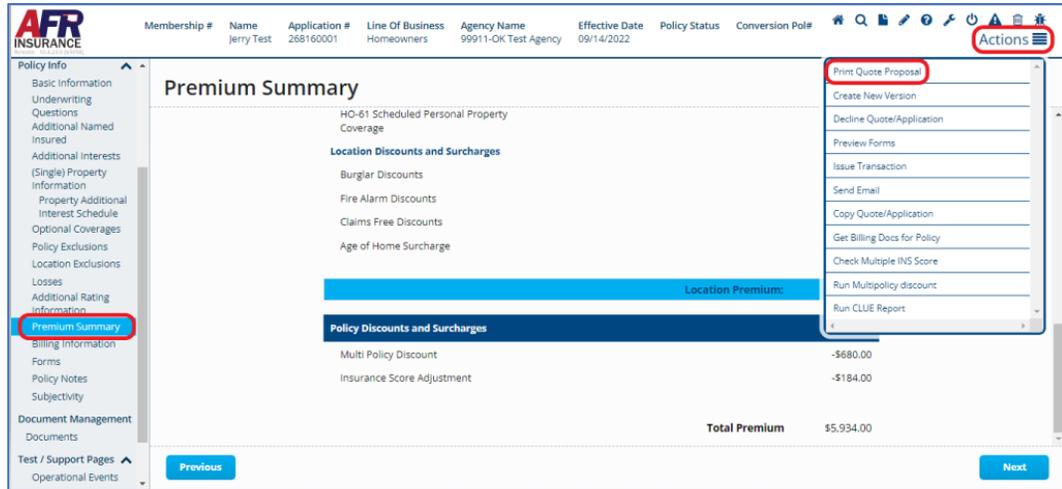
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## HOW TO PRINT A QUOTE SUMMARY FOR A CUSTOMER

Once a user has the quote completed, they can access the **Premium Summary** page located on the left-hand side of the screen to verify if all the information is correct. If all information is correct, the user will click the **Action** menu icon, and select **Print Quote Proposal**.

From here the user will follow the same printing instructions previously described.



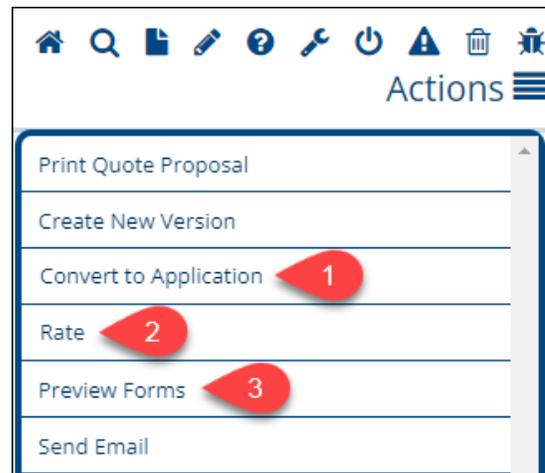
## HOW TO PRINT AN APPLICATION

Again, **an Application MUST be printed BEFORE you Issue the policy**. You will not be able to print the application once the policy has been issued.

After you **Convert to Application** from the **Actions** menu, make any necessary changes to the policy.

Next, click **RATE** to save and calculate any changes in coverage and premium.

Then, click **Preview Forms** from the **Actions** menu, or go to the Forms screen in the left-hand navigation pane, then click the blue **Preview Forms** button.



A PDF will open which contains the **Application** which must be printed and signed by your customer before you issue the policy. The **Application is NOT available after issuance**.

**REMINDER:** When you have the required documents signed and completed, be sure to upload the copies to the **Documents** folder in the **Document Management** section of Sapiens.

For more assistance, reference the [DOCUMENT MANAGEMENT](#) training.