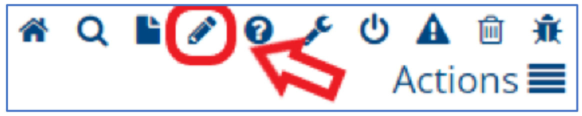
CUSTOMER AND POLICY NOTES

PolicyPro by Sapiens

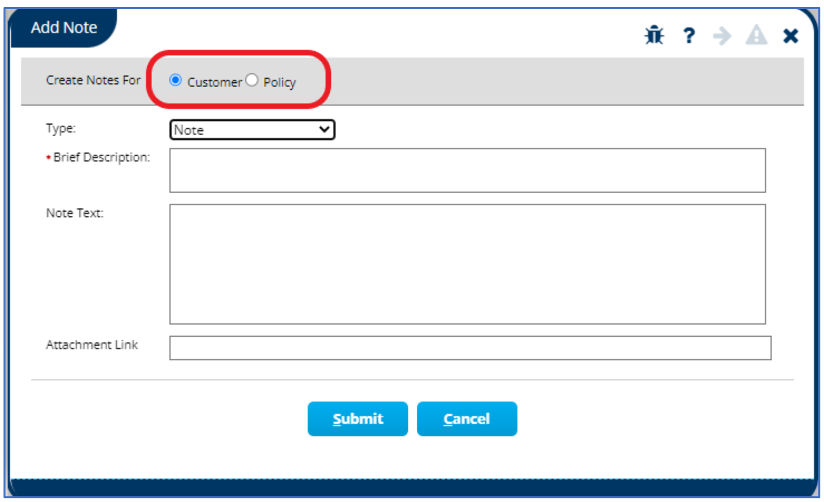
ADDING A NOTE

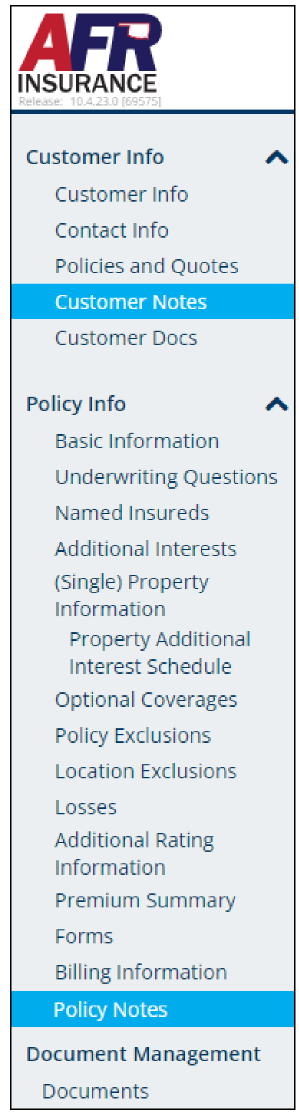
- Policy/Customer Notes is where AFR Internal Users and Agency Users can leave notes about the customer or policy.

- Click the **Pencil icon** in the top right-hand corner of the screen to add a Customer Note or a Policy Note, while in a quote, application, or policy. This will open the **Add Note** screen.



- From the **Add Note** screen, either select **Customer Note** or **Policy Note**, then complete the fields: Type, Brief Description, Note Text, and Attachment File if applicable.





- A **Customer Note** will appear on the Customer Notes screen of every policy owned by the Named Insured.
    - The **Customer Notes** section will also display **Policy Notes**.

- A **Policy Note** will only appear on the Policy Notes screen of the policy where the note was created.

UNDERWRITING NOTE:

Underwriting will not be reviewing every transaction completed by the Agent.

Adding a Customer or Policy Note should not be used to provide instructions or ask questions.

If you need to discuss or ask questions, please contact Underwriting or Customer Service by email.

IMPORTANT: Customer & Policy Notes are discoverable and may be used in a court of law. All comments should be factual and free from opinions.