

Policy - Policy Express Overview

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Overview:

Policy Express is designed to streamline day to day servicing of a policy including creating applications, claims, invoices, forms, documents, e-mails and more.

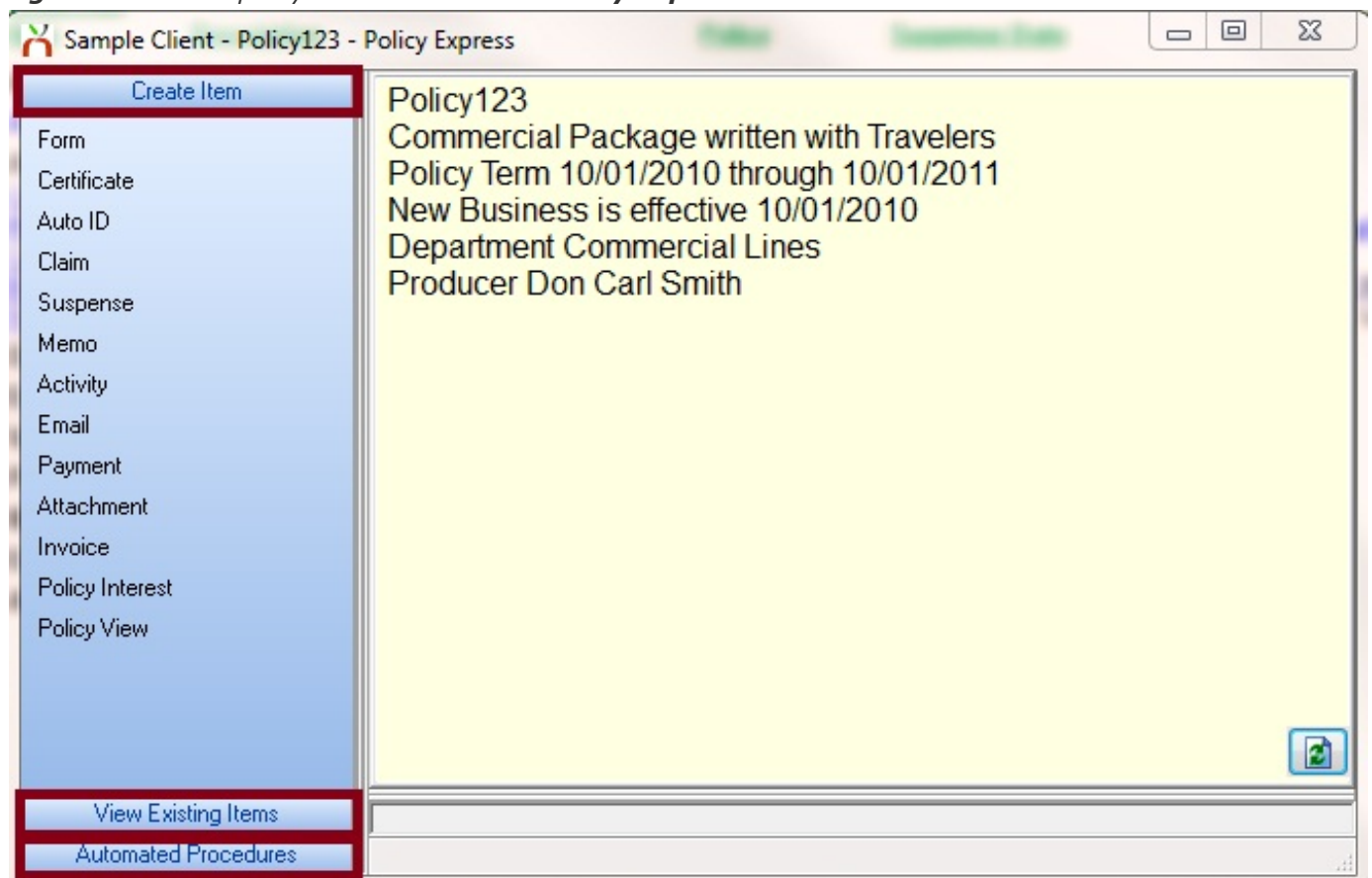
Before You Begin:

A policy or quote must exist on the client before Policy Express is available. See [How to Create a policy](#) for more information.

Process:

1. Load the **Client** on one of the four **Client Tabs**.
2. Select the **Policy** or **Quote** Number listed under **Active Policies**.

Note: If the policy is expired, it will **not** be under Active Policies. Select the **Policy tab** at the bottom and **right click** on the policy number and select **Policy Express**.



3. Once the **Policy Express** window is opened, the first Category, **Create Item** allows the following actions.

Form [Start a new ACORD application, form, or other schedule.](#)

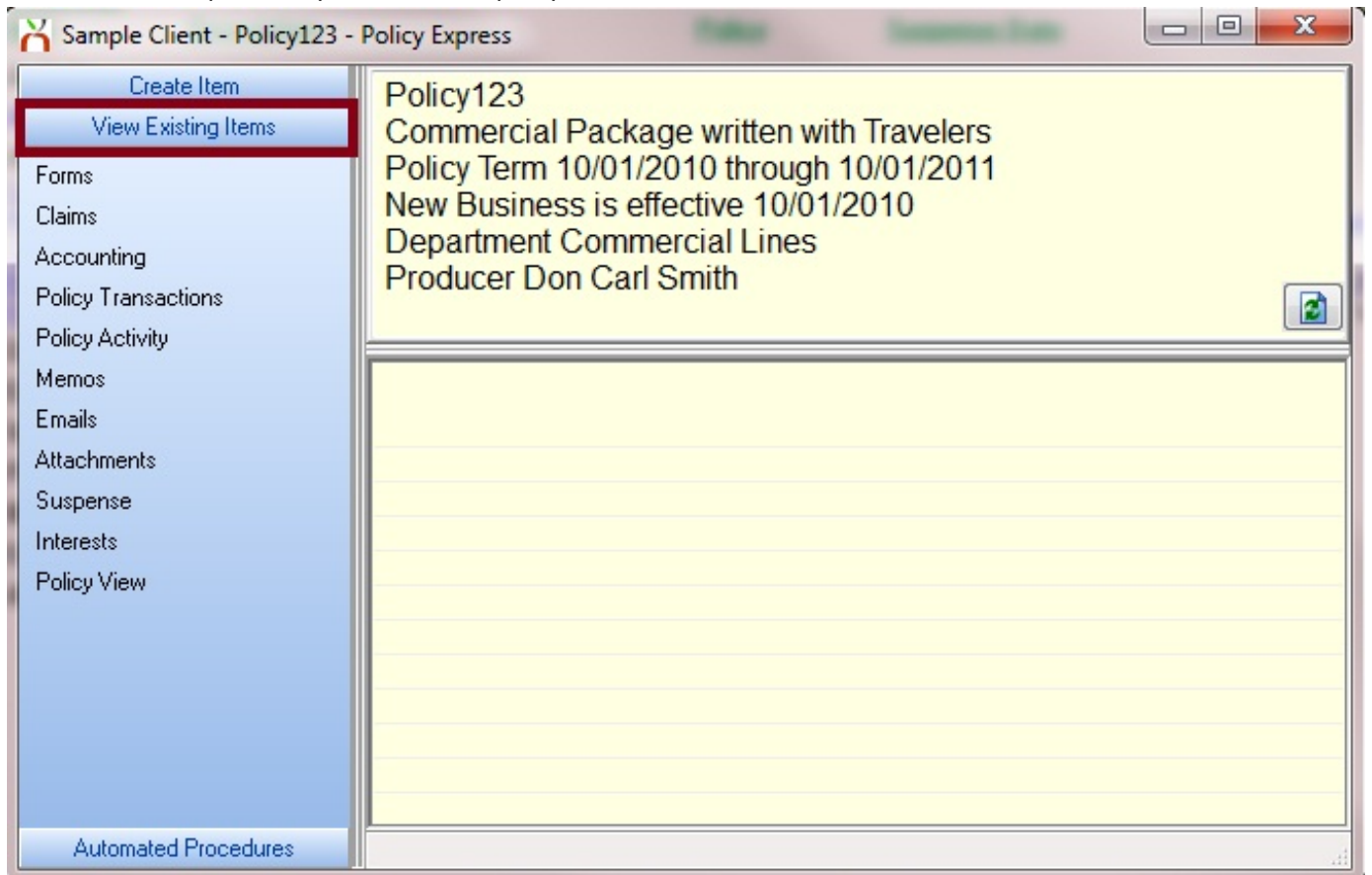
Certificate [Start a new ACORD Certificate of Liability.](#)

Auto ID [Start a new ACORD Driver ID Card.](#)

Claim [Enter a new claim.](#)

- Suspense** [Start a new ToDo Diary item.](#)
- Memo** [Start a new Memo document and merge client or policy information.](#)
- Activity** Add a permanent policy activity.
- Email** [Start the Compose E-mail window.](#)
- Payment** Create a [cash receipt](#) or [cash transmittal](#) payment for a policy.
- Attachment** [Attach an Image or PDF file to the policy.](#)
- Invoice** [Open Express Billing to create an Invoice for the policy.](#)
- Policy Interest** [Select or add a Policy level Interest.](#)
- Policy View** [Start the Policy View module and open the insurance company website.](#)

4. The **Second** Category listed on the left is **View Existing Items**. This will list any Forms, Claims, E-mails and other items previously saved to the policy.



5. The **Third** Category listed on the left is **Automated Procedures**. These are automated system tasks for performing policy changes and other correspondence.

- Batch Print
- Endorse Policy
- Renew Policy
- Cancel Policy

Reinstate Policy

Change Policy Number

Move to New Client - Will not be listed if the policy is invoiced

Charge Fee

Policy View

Convert Quote/Binder - Will not be listed if already a Policy

Published in Policy / Client Service

Tagged under Policy Express

Related items (by tag)

Policy - Reinstate a Policy

Policy - Convert Quote to a Policy

Batch Print - Print or Email Memos, Acord forms, and other Attachments

Policy - Renew a Policy

Policy - Move Policy to a New Client

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