

Creating Market Folders

In Sagitta create policy, either new or renewal. Prepare application. Bring application into ImageRight, either by printing, scanning or emailing in.

Save the document in Submission/Quote subfolder in the Policy Term - YYYY folder. Note the document highlighted below is filed in the **Submission/Quote** folder, not in the Market folder.

IMPORTED FROM PRINT DRIVER

Preview Import Into Task Task Note

File info : Current File

☐ Place at the beginning ☐ Update document date

Location :

Drawer: Commercial Lines - Commercial Lines

File type: Commercial Accounts - Commercial Accounts

Client Code: STEVCUS2

Client Name: Steven E Custode

Producer: OKA

Servicer: TMR

CustomerID: 132175

Tree view:

- New Mail - New Mail
- Core File - Core File
- Policy Term - Policy Term
- Policy Term - 2010
 - Policy - Policy
 - Policy - CAU - APP817278 - 01/15/2010 - 01/15/2011
 - Certificates - Certificates
 - Submission/Quote - Submission/Quote
 - Correspondence - Correspondence
 - Market - Market
 - Market - Market
 - Application - Application**
 - Loss History - Loss History

☐ Remember selection

Document Description: GLI application - 2010

Page Description:

☒ Create task ☒ Open the file : ☐ Associate Files :

Importing 2 page(s) total

Import/Task Cancel

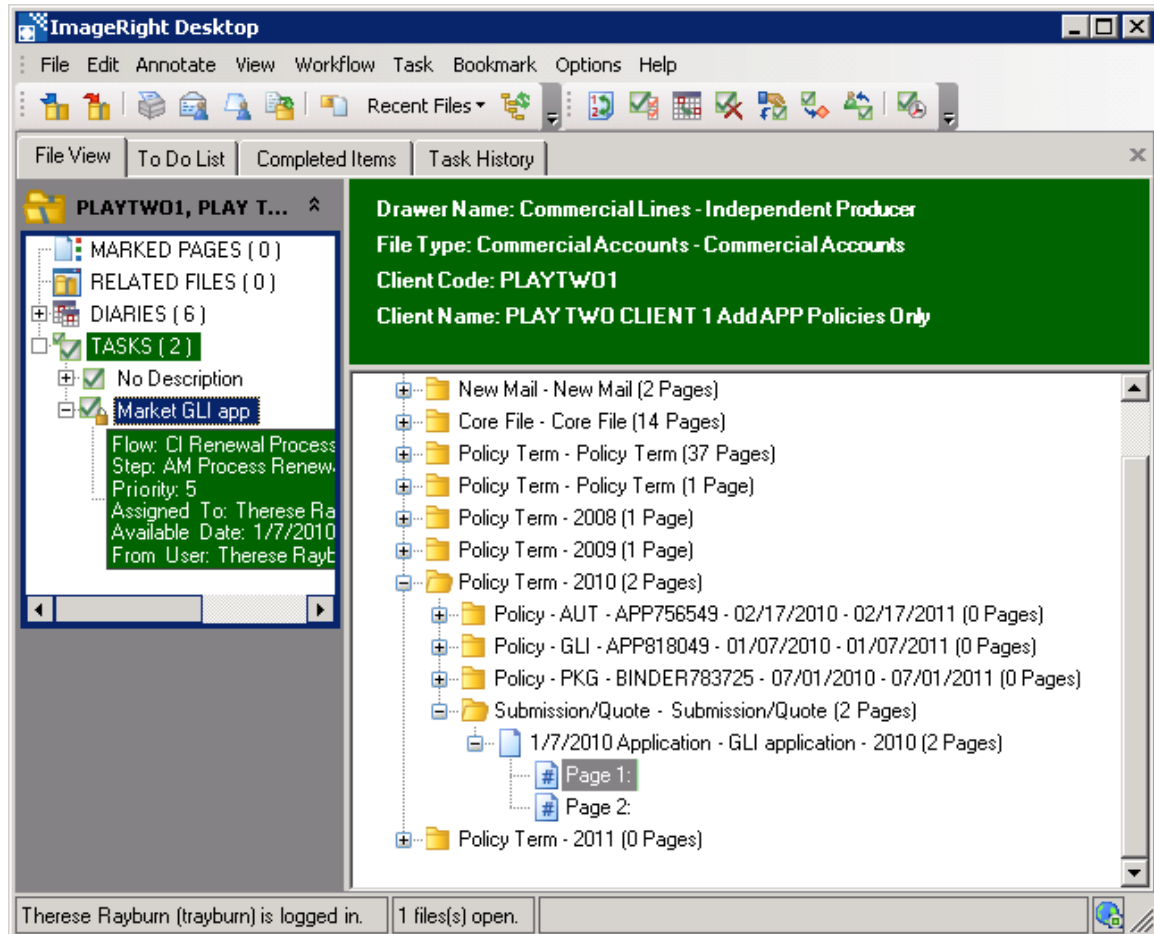
Make sure to remember to CREATE TASK!

The screenshot shows a software window titled "IMPORTED FROM PRINT DRIVER" with a standard Windows interface (minimize, maximize, close buttons). The window has four tabs: "Preview", "Import Into", "Task", and "Task Note". The "Task" tab is currently selected. Inside the "Task" tab, there is a checkbox labeled "Create Task" which is checked. To its right is a dropdown menu showing "On First Page". Below these are several input fields: "Available on:" with a date picker set to "01/07/2010" and a time picker set to "12:01:00 AM"; "Description:" with a text box containing "Market GLI app"; "Workflow:" with a dropdown menu set to "CI Renewal Process"; "Step:" with a dropdown menu set to "AM Process Renewal Updates"; "SEND_TO" with a red error icon and an empty dropdown; "Assign To AM" with a dropdown menu set to "None"; "Assign to:" with a dropdown menu set to "Therese Rayburn (trayburn)"; and "Priority:" with a dropdown menu set to "5". At the bottom left, there is a "Lock Task:" checkbox which is unchecked. At the bottom right, there is a "Debug Task:" checkbox which is also unchecked. Below the "Lock Task:" checkbox, the text "Importing 2 page(s) total" is displayed. At the very bottom right, there are two buttons: "Import/Task" and "Cancel".

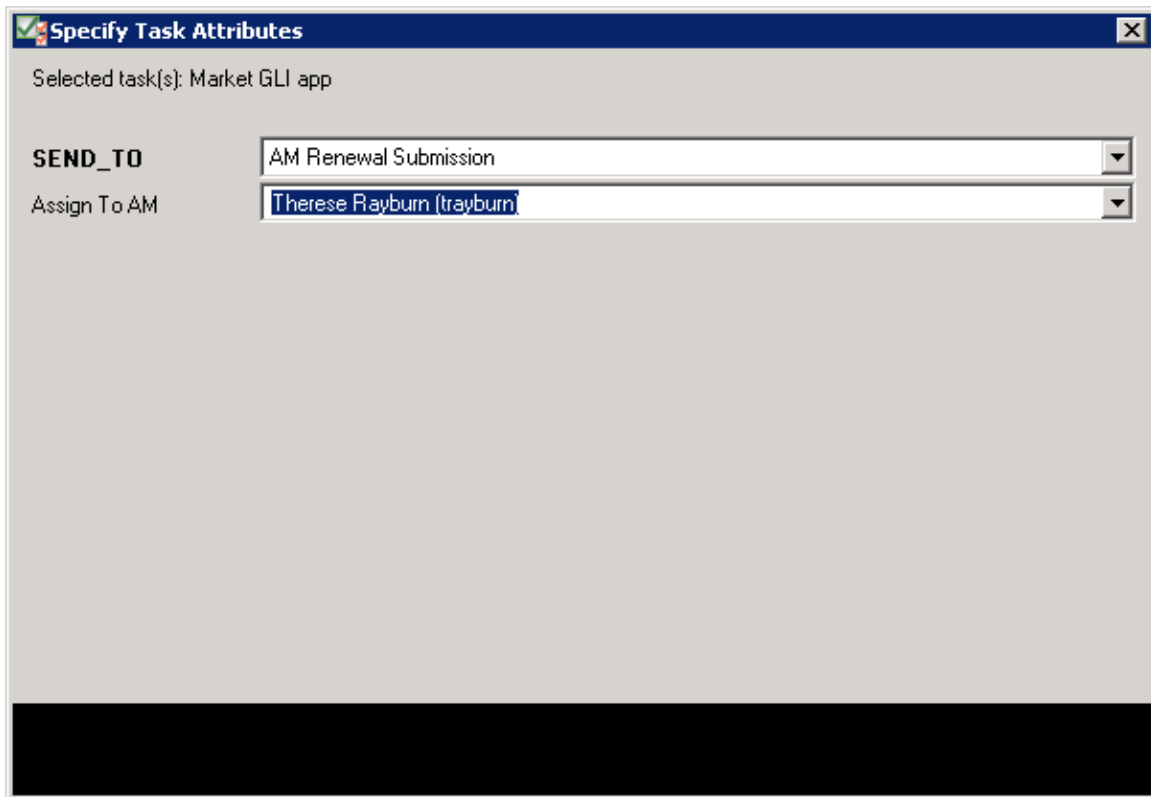
Click on Import

After application is imported, LOCK & OPEN task.

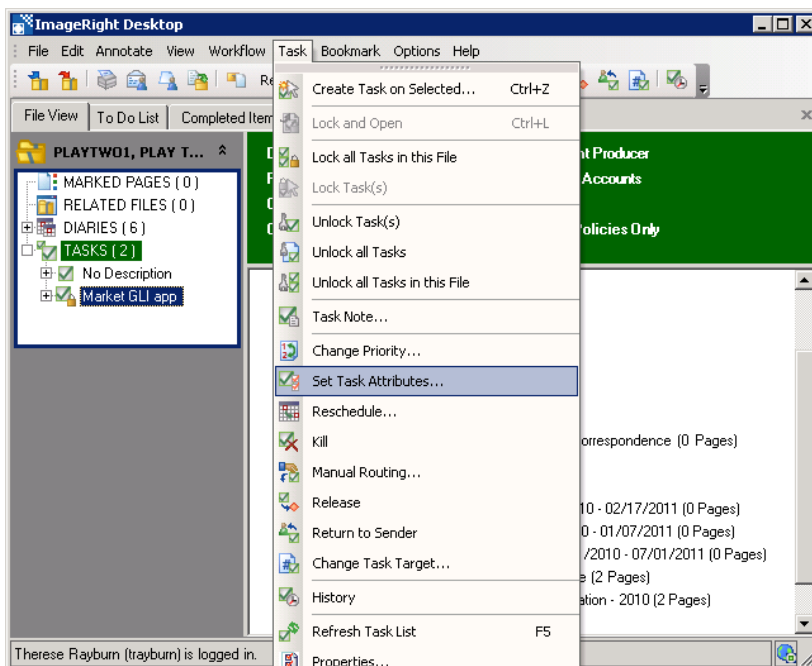
Note the task you created is set at the **page** level.

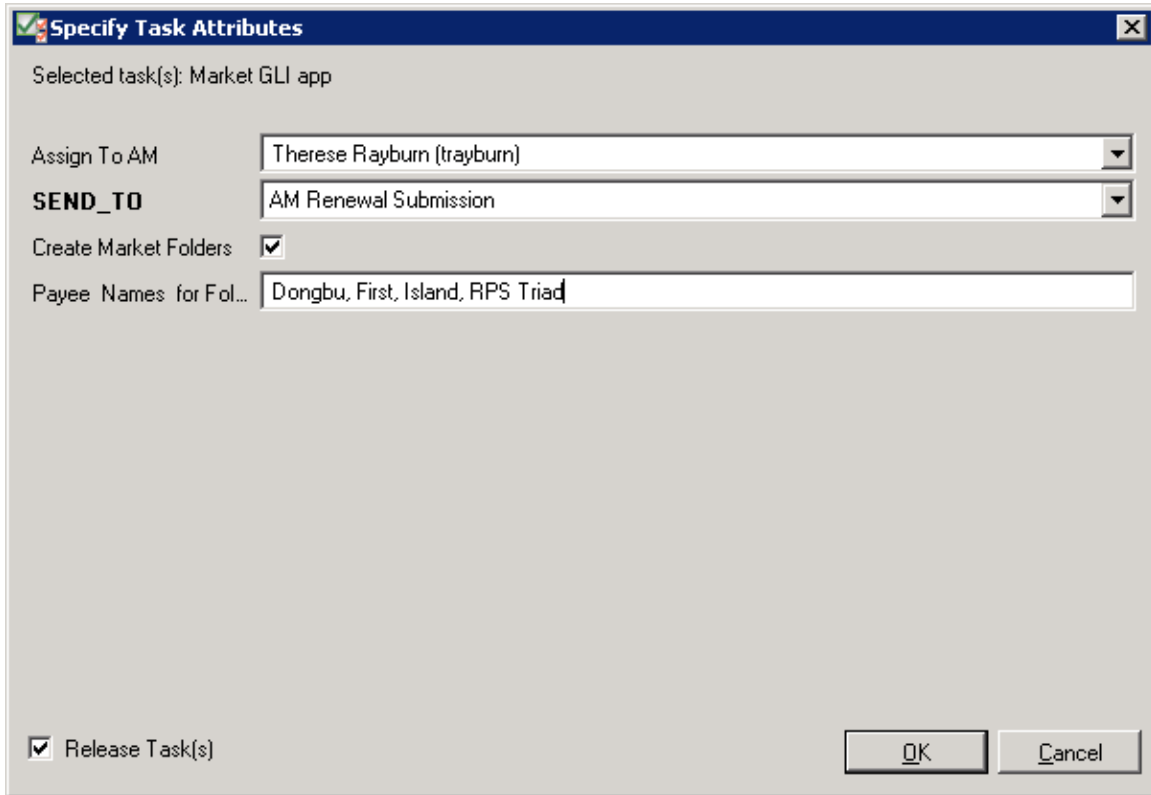


Go to SET TASK ATTRIBUTES & complete info as needed



Click OK & again....lock & open task, go to Set Task Attributes again.





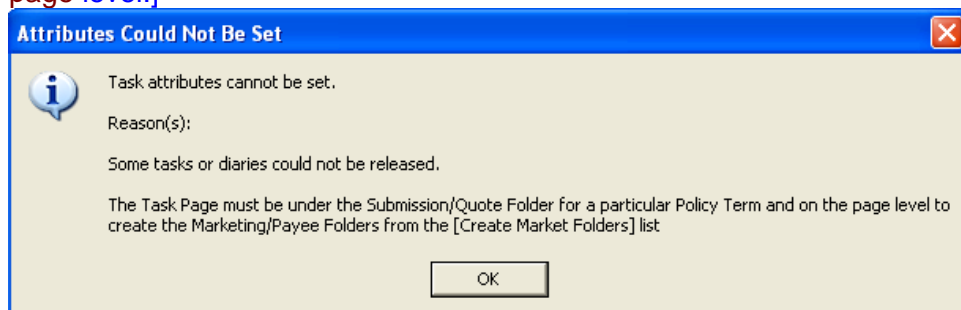
The 'Specify Task Attributes' dialog box has a title bar with a green checkmark icon and a close button. The main area contains the following fields and controls:

- 'Selected task(s): Market GLI app' is displayed at the top.
- 'Assign To AM' is a dropdown menu showing 'Therese Rayburn (trayburn)'.
- 'SEND_TO' is a dropdown menu showing 'AM Renewal Submission'.
- 'Create Market Folders' is a checked checkbox.
- 'Payee Names for Fol...' is a text box containing 'Dongbu, First, Island, RPS Triad'.
- At the bottom left, 'Release Task(s)' is a checked checkbox.
- At the bottom right are 'OK' and 'Cancel' buttons.

Make sure to insert YOUR name, SEND TO: AM Renewal Submission,
CHECK the Create Market Folders box (important!)
Insert market names with commas to separate
Click box to Release Task

Click OK.....and VOILA.....

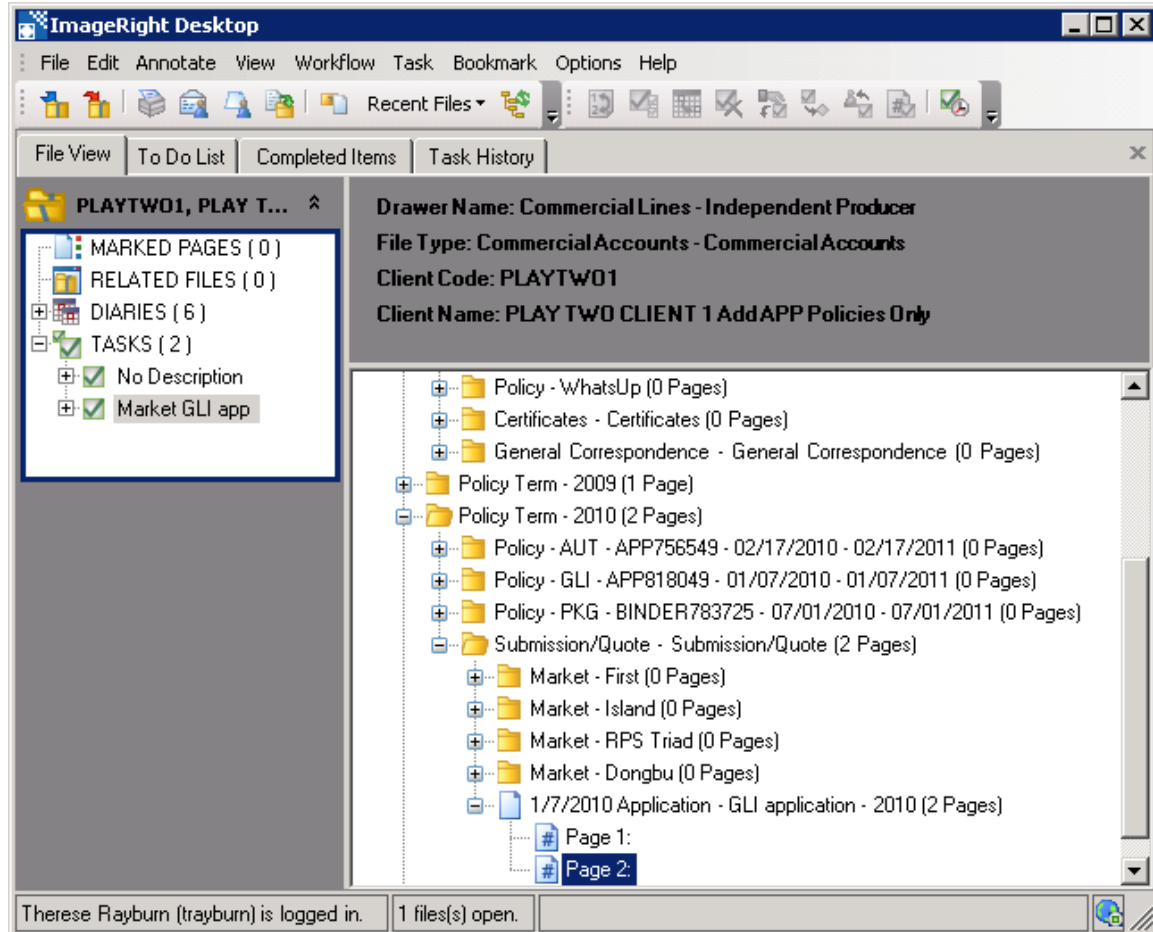
[If you get an error that looks like this, then the document is not filed in the Submission/Quote folder or the task is not on the page level. This feature works only if the document is at the Submission/Quote folder level and task is on the page level.]



The 'Attributes Could Not Be Set' error dialog box has a blue title bar with an information icon and a close button. The main area contains the following text:

- 'Task attributes cannot be set.'
- 'Reason(s):'
- 'Some tasks or diaries could not be released.'
- 'The Task Page must be under the Submission/Quote Folder for a particular Policy Term and on the page level to create the Marketing/Payee Folders from the [Create Market Folders] list'
- An 'OK' button is at the bottom center.

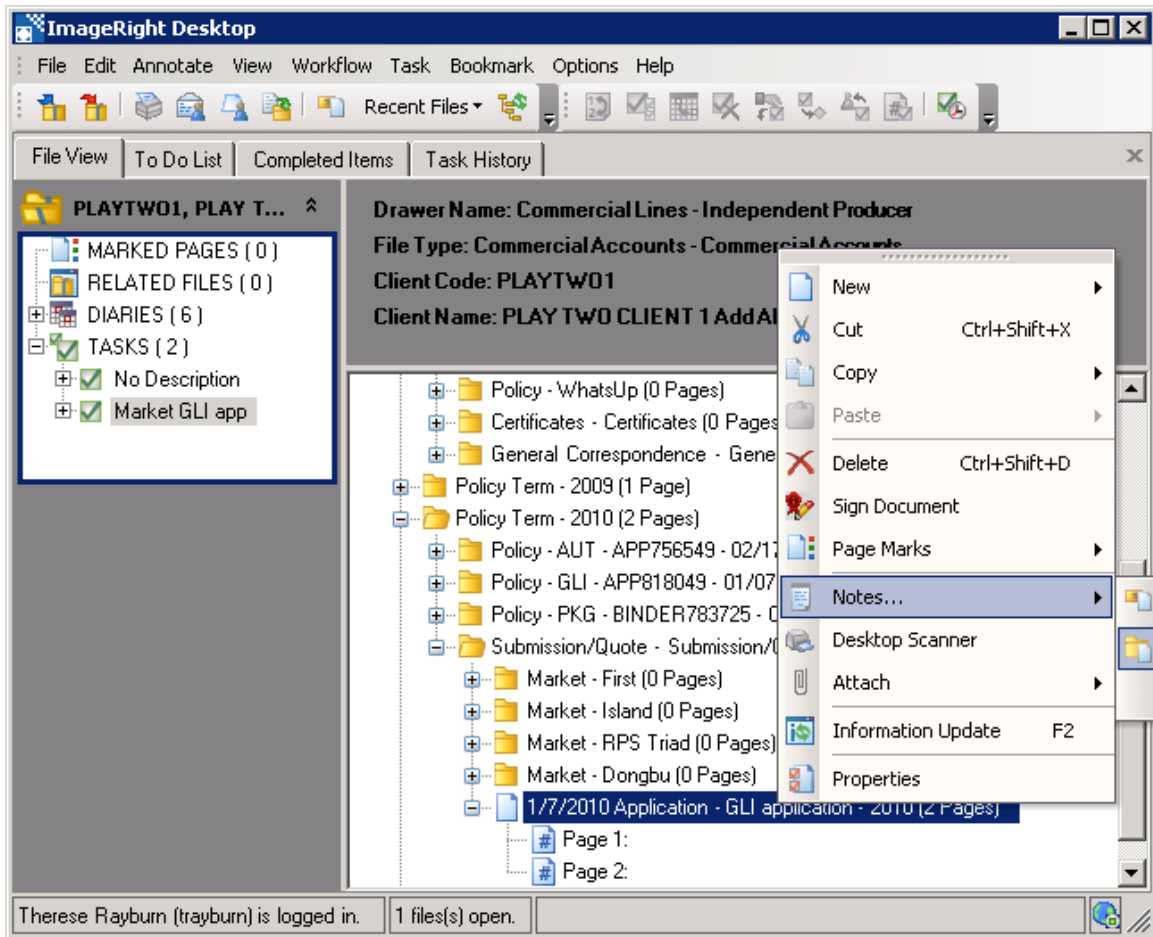
And if you didn't get an error, then

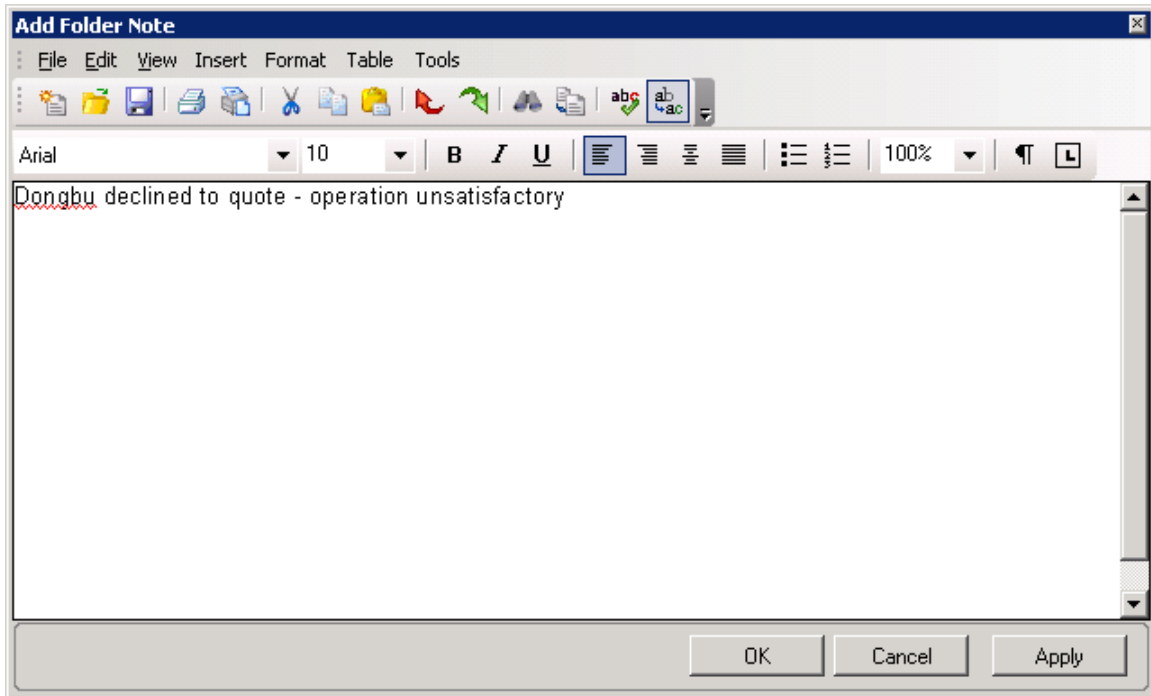


You have now created your Market folders!

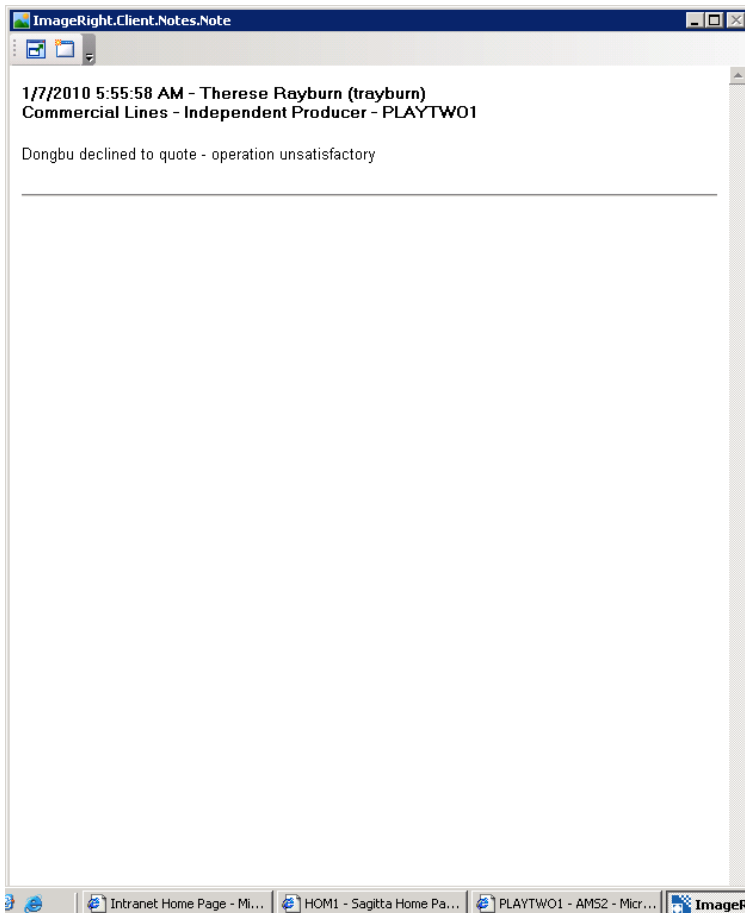
Now you can insert whatever correspondence you may have for each of the respective companies in their own folders.

NOTE: You may want to create a **FOLDER NOTE**, to keep a short running diary of activity or status for quick review without having to open each market folder.





Click ok.



The Note will automatically date & add your name. You can then just add notes to this as you continue to receive

your quotes or other info back from the companies, or final status.

