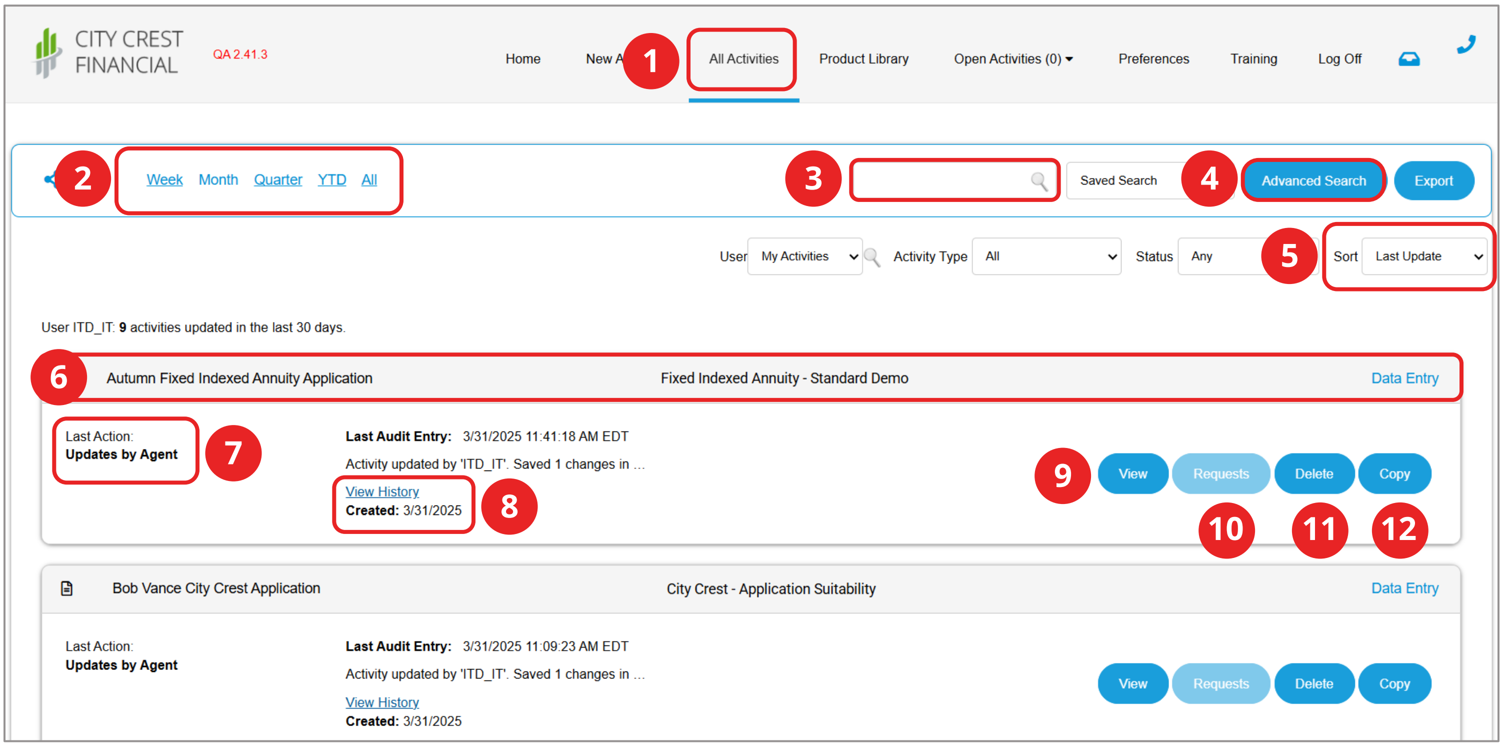
hexure

Search & Manage an Activity or Application

REFERENCE GUIDE

From the “All Activities” menu in Firelight, you can search for, view, and manage existing applications and activities.



1. All Activities

Select **All Activities** to view and manage current or completed applications or activities.

2. Date Range

Use the date range to view all applications or activities within a specific week, month, or year.

3. Search

Search for an application or activity by name or a portion of the name, then click the **search** icon.

4. Advanced Search

Use Advanced Search to find an application or activity by an agent’s name, activity or product type, status, policy number, and other details.

5. Sort

Sort the results of the list by **Latest Update, Owner, Activity,** and **Product Name**.

6. Activity or Application Name

View the application or activity name.

7. Last Action

View the **Last Action** on the application or activity.

8. View History

Click **View History** to view changes to this application or activity over time.

9. View

Click **View** to open and view the application or activity.

10. Requests

Click **Requests** to view a list of signatures and review requests.

11. Delete

To delete the activity entirely, click **Delete.**

12. Copy

Click **Copy** to clone the activity or application and use it as the basis for a new one.