

Using the Other Actions Menu

REFERENCE GUIDE

The Other Actions menu appears once you have started the data entry on an application. You can use Other Actions to rename an activity, print a PDF, view the history, and more.

The screenshot displays the Verisure application interface. At the top, the Verisure logo and 'Protect What Matters' tagline are visible. The user ID 'QA 2.40.324' and the application title 'ps001 - 001 PS New DocuSign Multi Product' are shown. A green 'Auto Save Enabled' button is present. The 'Other Actions' menu is open, showing a list of actions: Rename/Summary, Display/Print PDF, History, Documents, Requests, Manage Optional Forms, Request Client to Fill App, Request Client to Fill & Sign, Share, Copy Activity, and Transfer. The background shows a progress bar at 100% and a 'DocuSign Multi Signature Form' document. The document includes the Verisure logo, 'Mutual and Life Insurance Company', and a 'Signature Attestation Form' section with a thank you message and contact information for the Annuity Service Center.

1. Other Actions

Select **Other Actions** from the top menu.

2. Rename/Summary

Select **Rename/Summary** to change the name of an activity, view the application status, carrier, product, activity type, jurisdiction, and other information.

3. Display/Print PDF

Select **Display/Print PDF** to view selected forms and print copies. This option is only available after data entry is complete.

4. History

Select **History** to view changes and updates from inception to current date.

5. Documents

Select **Documents** to view uploaded documents.

6. Manage Optional Forms

Use **Manage Optional Forms** to enable or disable optional forms via a checkbox.

7. Request Client to Fill App

Request Client to Fill App can be used to send a pre-formatted email to the customer to fill out the remaining portions of the application.

8. Request Client to Fill & Sign

Use **Request Client to Fill & Sign** to send a preformatted email to the customer, prompting them to fill out the remaining portions and providing them with instructions to sign the application.

9. Share

Use **Share** to share the application with another advisor.

10. Copy Activity

To clone an activity, select **Copy Activity**.

11. Transfer

Select **Transfer** to transfer the application to another authorized advisor.