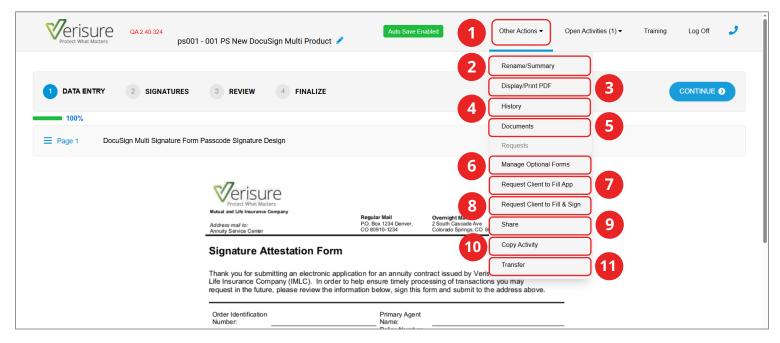


Using the Other Actions Menu

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.



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 availabe 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 **Mange 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 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.