

Hot Buttons Sequence

Action Menu Customize ToolBar			
Button Title	Policy Type	Hotkey	Action
Cx/Rew	All Types		Internal, Change Policy Status, Replaced
Renew	All Types	Ctrl + N	Mail, From, Company, Change, Policy Status, Renew
Paym...	All Types	Ctrl + 4/\$	Walkin, From, Insured, Payment Rec'd
Ins Called	All Types		Phone, From, Insured, Communication
Ins EmlId	All Types		Email, From, Insured, Communication
Ins Wlk In	All Types		Walkin, From, Insured, Communication
IDC Ph	Auto		Phone, From, Insured, Print/Create, IDCard
IDC Eml	Auto		Email, From, Insured, Print/Create, IDCard
IDC WI	Auto		Walkin, From, Insured, Print/Create, IDCard
Called Ins	All Types		Phone, To, Insured, Communication
EmlId Ins	All Types		Email, To, Insured, Communication
Call From..	All Types		Phone, From
Eml From...	All Types		Email, From
Log Note	All Types		Internal, Log
Call To	All Types		Phone, To
Eml To	All Types		Email, To
Cx Reason	All Types		Chat, From, Insured, Change Policy Status, Cancelled
GL Acct	All Types		Chat, From, Insured, Payment Rec'd
Pd Inv	Commercial / All Other		Mail, To, Company, Communication, Paid Invoice

Hot Buttons

When to use...

Cx/Rew	Policy is being rewritten - either by company or agency
Renew	Mostly commercial, but also for manual (non download) policies
Payment	Walk in payments from insured -mostly commercial
Ins Called	Any call from an insured
Ins EmlId	Any email from an insured
Ins WkIn	Any walk in service for an insured
IDC Ph	ID cards requested by phone (prints ID cards with one click)
IDC Eml	ID cards requested by email (prints ID cards with one click)
IDC WI	ID cards requested by walk in (prints ID cards with one click)
Called Ins	Outbound call to insured
EmlId Ins	Outbound email to insured
Call From	Inbound call from anyone other than an insured**
Email From	Inbound email from anyone other than an insured**
Log Note	Internal log - action you are creating to follow up, etc
Call To	Outbound call to anyone other than an insured**
Eml To	Outbound email to anyone other than an insured**
Cx Reason	Anytime a policy cancels - prints cancel form AND updates policy status
GL Acct	Commercial only- used for Accounting
Pd Inv	Commercial only- used for Accounting

**AI, Adjuster, Cert Holder, Claimant, Company, Impact, Lienholder, Mortgagee, UW