Customizing Action Menu Toolbar – Hot Buttons

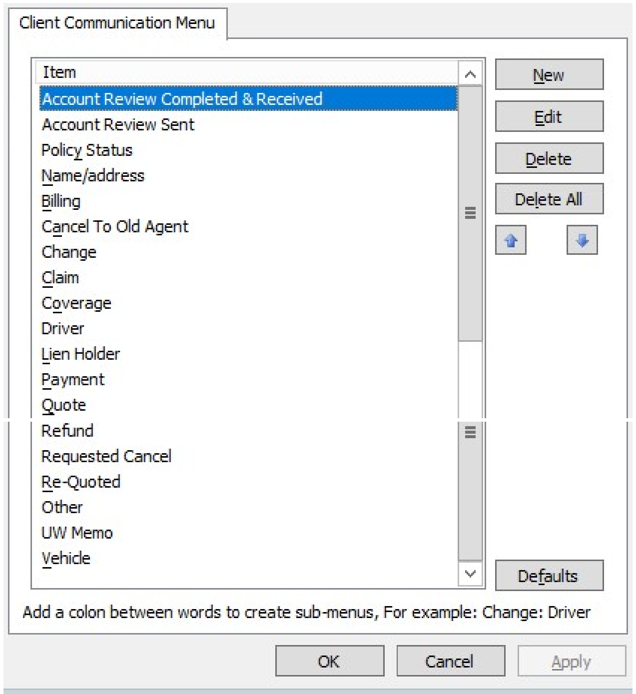
Button Title	Policy Type	Hotkey	Action
EM Req for Cert	Client & Policy		Email, From, Insured, ACORD Forms
PH Req for Cert	Client & Policy		Phone, From, Insured, ACORD Forms
SEPARATOR	All Types		
Update	Client & Policy	Ctrl + U	Internal, Change Client/Policy
PFIC	All Types	Ctrl + T	Phone, From, Insured, Communication
Billing Call	Client & Policy	Ctrl + 9	Phone, From, Insured, Communication, Billing
PFICQ	Client & Policy	Ctrl + Y	Phone, From, Insured, Communication, Quote
Claim Call	All Types	Ctrl + D	Phone, From, Insured, Communication, Claim
LH Verify	All Types	Ctrl + 2	Phone, From, Lien Holder/Mtg Company, Communication, Cov
SEPARATOR	All Types		
WFIP	Client & Policy	Ctrl + M	Walkin, From, Insured, Communication, Payment
Phone Payment	Client & Policy		Phone, From, Insured, Communication, Payment
SEPARATOR	All Types		
Sent Account Review	Client & Policy	Ctrl + Z	Email, To, Insured, Communication, Account Review Sent
Recd Acct Review	Client & Policy	Ctrl + 1	Online, From, Insured, Communication, Account Review Comp
SEPARATOR	All Types		
Email	All Types	Ctrl + H	Email, From, Insured, Communication
Cancel	All Types	Ctrl + X	Phone, From, Insured, Change Policy Status, Cancelled
Return Mail	All Types	Ctrl + 0	Mail, From, Company, Communication, Name/address
Reinst	All Types	Ctrl + R	Mail, From, Company, Change, Policy Status, Reinst
Renew	All Types	Ctrl + N	Mail, From, Company, Change, Policy Status, Renew
MFCC	All Types	Ctrl + G	Mail, From, Company, Communication

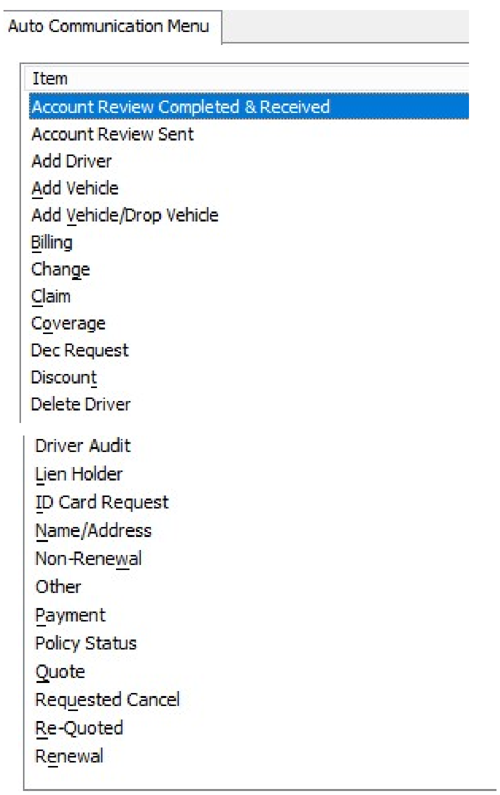
<u>Button Name</u>	<u>When to use…</u>
Em Req for Cert	Insured emailed a request for a certificate
PH Req fro Cert	Insured called in request for certificate
Update	Update the insureds contact info (name, number, address, email, etc.)
PFIC	Phone Call from Insured (will take you to menu to select what type of call)
Billing Call	Insured called with billing questions/concerns
PFICQ	Phone call from insured quote (replace auto w/new, new home, deds etc.)
Claim Call	Phone call from insured to report claim
LH Verify	Phone call from mortgage or leinholder to verify coverage or renewal
WFIP	Walkin from Insured to make payment
Phone Payment	Phone call from insured to make payment
Sent Account Review	Account Review Sent to Customer
Recd Acct Review	Received Account Review Back from customer
Email	Email from Customer (will take to you menu to select type of email)
Cancel	Insured called to request cancellation & will print cancel form
Return Mail	Received return mail from company
Reinst	Reintated customer (for policies that do not download)
Renew	Received Renewal Information (for policies that do not download)
MFCC	Mail from company (will take you to menu to select type of mail)
IL	Internal Log (only use for internal notes that no communcation took place)

Considerations:

- What type of activities do you enter the most?
  - Faxes, Emails, Phone calls, Mail, Text Messages?
- Is there a certain activity that you track?
- Are there different roles in the agency that use different actions?
  - Sales, Service, Office Admin, Clerks, Etc.

Customized Communication Menu Example





DID YOU KNOW? – You can quickly add activities by using the letter underlined to choose –You can also pick your own letter when adding communication