POLICY SEARCH



Once selected, the page will update with the Search Policy and Search Result sections.

		🦕 Phone No: (456)	465-45644					+ Create	Quote English	• .	8
ŵ	Dashboard	Search Policy Policy No. Las			ast Name First Nam		Name		Select Product		
\$	Quotes & Applications	lications							Select Product	~	
٩	Policy Search				Q Sea	ch Policy					
	Activity Log & Notes										
۵	Commission Statement										
LM Statistics											=
		Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action	
0	Resources	2022-11-28 05:51:00	Flood Program	FLD3139002081	CANCEL RE-WRITE 5	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic	•
	Document Center	2022-11-28 05:45:27	Flood Program	FLD3139002061	CANCEL RE-WRITE 4	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic	~
0	Help Center	2022-11-28 05:40:39	Flood Program	FLD3139002049	CANCEL RE-WRITE 3	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic	~

1

Within the Search Policy section, enter the Policy No., Last Name, First Name or Product type to search for a policy.

Policy No.	Last Name	First Name	Select Product		
		TEST	Select Product ~		

After selecting the Search Policy button, the Search Result section will display the policies related to the search parameters.

	Policy No.		Last Name F				Select Prod	Select Product		
				TEST			Select Pro	oduct	~	
			Q Search	n Policy						
Search Result	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action		
022-11-30 20:59:49	Flood Program	FLD3139002241	TEST QUOTE	Issued	N/A	TEST TEST	TEST AGENCY	Select Action		
022-11-30 20:59:49 022-11-30 20:58:38	Flood Program	FLD3139002241 FLD3139002239	TEST QUOTE	Issued	N/A N/A	TEST TEST	TEST AGENCY	Select Action Select Action		

To open the policy, select the hyperlinked blue Policy No.

Search Result											
Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action			
2022-08-12 09:17:46	Flood Program	FLD2022000373	TEST DAVIS	Active	N/A	AGENT TEST	TEST NORTH ELEMENTARY	Select Action	~		
	373										

2