



## Adding a Note

### 1 How to Add a Note

To add a note, click on **Actions**, then select **New Note**.

Actions

Go to...

Account File

Policy File

Create

New Note

New Document

New Activity

Pre-Renewal Direction

Copy Submission

New Policy Transaction

Change Policy

Cancel Policy

Renew Policy

New Payment

Make a Payment

Participants

Notes

Documents

Summary

HOW TO CHANGE A POLICY

HOW TO MAKE A PAYMENT

Set up an Online Account

<b>Account Information</b>		<b>Period</b>	
Account Number	0000000029	Effective Date	07/08/2015
Account Name	Sue Johnson	Expiration Date	07/08/2016
Address	65 Huntington	Number	1
County	Clermont	Premium	\$726.00
Address Type	Home	Taxes And Fees	-
Address Description		Total Cost	\$726.00
<b>Official IDs</b>		<b>Producer of Record</b>	
SSN		Producer Code	999006
<b>Policy</b>		Contracted Agency	Testing for Atlas Inc
Policy Type	Dwelling Basic	Producer	Testing for Atlas Inc
Number	600001040	<b>Producer of Service</b>	
Previous Policy Number		Producer Code	999006
Issued	Yes	Contracted Agency	Testing for Atlas Inc
First Issued Date	07/08/2015	Producer	<a href="#">Testing for Atlas Inc</a>

Select Action/New Note.