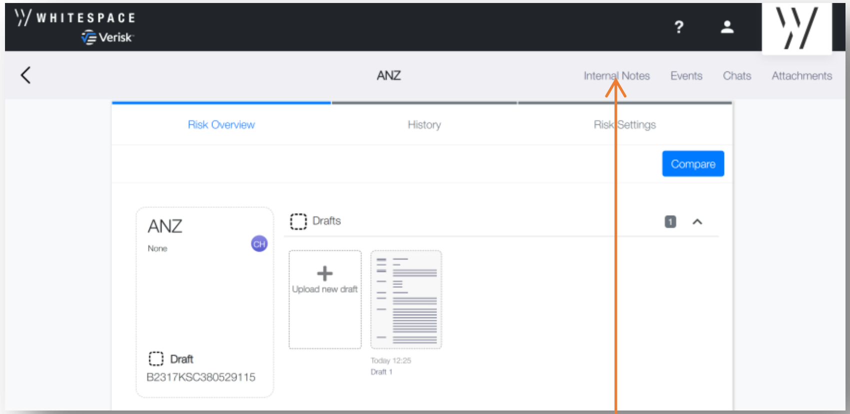
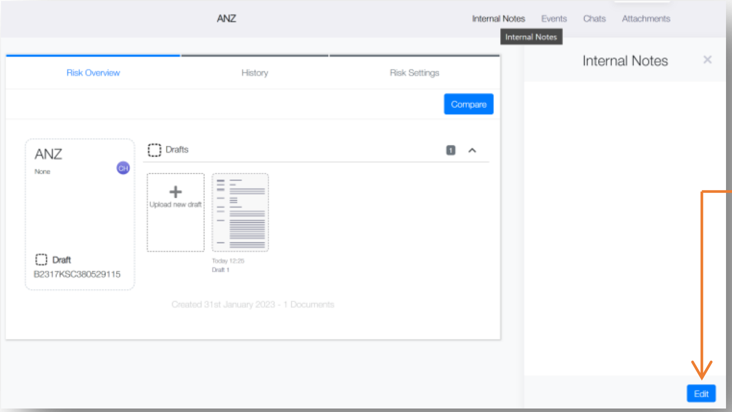
Adding Internal Notes to a Contract (Broker Only)

1.



To open the internal notes tab, click on the ‘Internal Notes’ button towards the top right corner

2.



Click ‘Edit’ to enable typing and deletion in the tab window

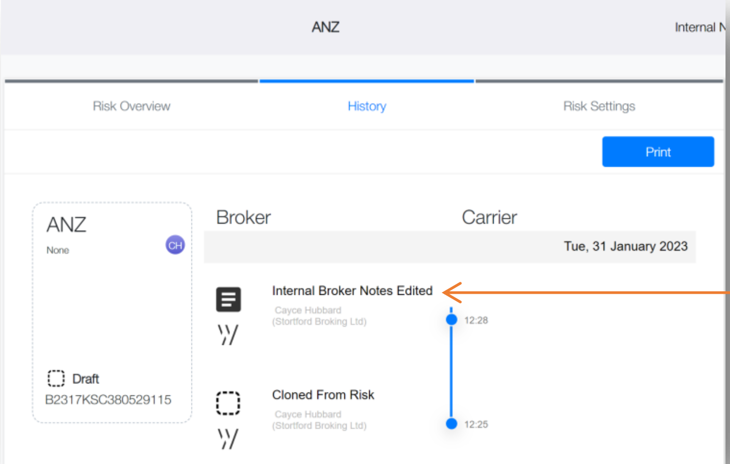
The ‘Internal Notes’ tab is a single, unformatted text window that can be viewed and edited by team members

3.

Enter or revise your notes and click ‘Update’

Please note:
Internal notes do not form part of the contract or its documentation, and cannot be shared with underwriters

4.



Changes to the internal notes are listed in the contract’s history. These history record items are not shared with underwriters