Pro-Policy Module

From the Tools drop-down, click on Pro-Policy. Select the Company that you wish to submit policies for. Change the "Remit Policies As Of" date to the date you want to appear on the report submitted to the Title Company and click on "Preview Policies".

The following screen lists all of your outstanding policies. In order to include the policy(s) just check the "remit" button. Your first time through the module, this screen will include all of the policies you've ever written with GenX. We suggest that you click the "Remit All" tab when you first use the module, making sure to unclick the outstanding policies that haven't yet been remitted. Then print it and submit the report when prompted. This will give you a realistic starting point.

Finding policies

Policies may be sorted by clicking on any of the following column headings: **File Number**, **Owners Policy Number**, or **Loan Policy Number**. You can also find specific data by clicking in a column and then clicking on the binoculars. Windows will prompt you to "Find What:". Please note the other options that you can use on the popup, such as search "Any Part of Field", and select and search accordingly.

Getting Detail Information

If you double click on a particular file number, a screen will appear with all of the information available for that particular policy, including the property address.

The Icons

Hopefully, the icons at the bottom of the main screen are self explanatory.

The printer icon will print a report based on the policies checked off as being remitted. The report will display the **Closing File Number**, the **Lender's Policy Number and Amount**, the **Lender's Premium**, the **Owner's Policy Number and Amount**, the **Owner's Premium**, the **Total Premium**, the **Agent's Commission**, and the **Net to Underwriter**.

Please note that after printing the policies, a screen appears asking you "Do you want to submit this report?" If you indicate yes, the policies will not appear for your next session.

The icon that has a document with a magnifying glass lets you preview the report before you submit it.

The notepad icon allows you to create an output file in five different formats, including Microsoft Excel.

The "Show All" icon displays all policies ever produced. Policies with a blue background have not yet been remitted. A yellow background indicates they have been remitted.

The door with the arrow means you are all done!