



Fetch: Policy Document Retriever

Automate document retrieval, storage, and distribution.

Fetch automatically retrieves requested documents from carrier sites. Once retrieved, Fetch emails the document to the named recipient and records the event in the form of a service request.

Fetch Capabilities:

Fetch requests are set up by CSRs to retrieve policy documents from a carrier's website, fetch requests automatically generate a service request in the background, which tracks the status of the document retrieval process.

Batch Fetch Requests can be set up to handle numerous requests at once in the form of a .CSV file, as might be needed when working an activity list provided by a carrier.

Service Request Integration allows a CSR to set up a fetch request as part of a service request. Once the documents are retrieved, they are programmatically attached to the service request and the request is closed as complete.

Automatic Follow Up means Fetch continues to search for requested documents for five consecutive days following the initial request. If the documents are still not available on the carrier's site and manual work is required, a service request appears in the CSR's queue with a status of "Policy Documents Requested."

5 items found, displaying 1 to 5

Request #	Batch #	Carrier	Policy Id	Customer Name	Effective Date	LOB	Request Type	Date Requested	Doc. #	Status	Document	Date Delivered
201125	17264	Progressive	012744523	Star Sponsorship Program	12/19/16	Personal Boat	Renewal	12/21/16	2	Fetch	View	01/05/17
	17264								1	Fetch	View	12/25/16

Sample View of the Fetch Dashboard