



TIPS AND FACTS

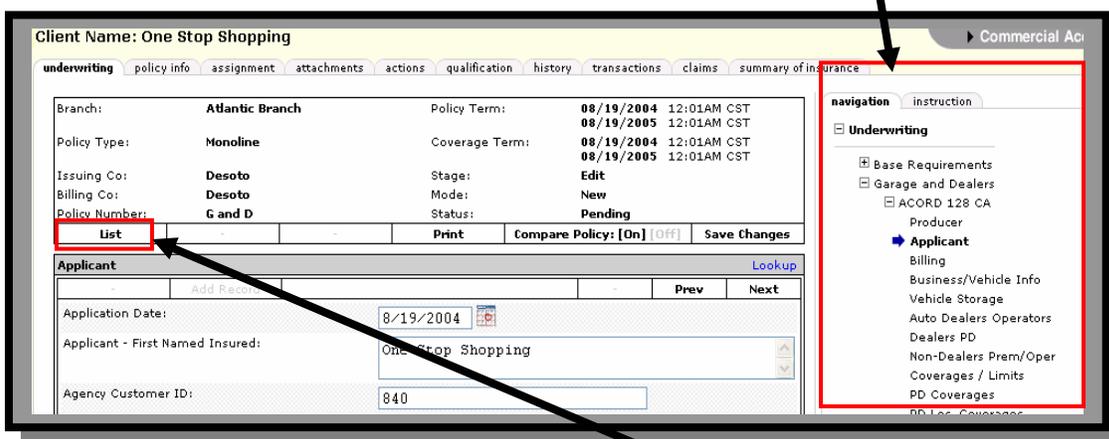
Version 1

IN THIS VERSION

- ✦ List View and how it can accelerate your workflow

List View and how it can accelerate your workflow

List View is a quick new way to enter data on the forms. In the past the only way to populate the forms was by using the Navigation tab located on the right side of the **Underwriting** screen.



Now with a recent Nexsure Service Pack, clicking on the **List** link on the Navigation Toolbar provides an entry screen allowing the user to very quickly **Tab** to the next field, or pressing the **Shift** and **Tab** keys together to go back to the previous field to enter data. Using the old method required that each section be saved when navigating to the next part of the form. Now when to save is entirely up to you. But remember to make sure to save prior to navigating elsewhere.

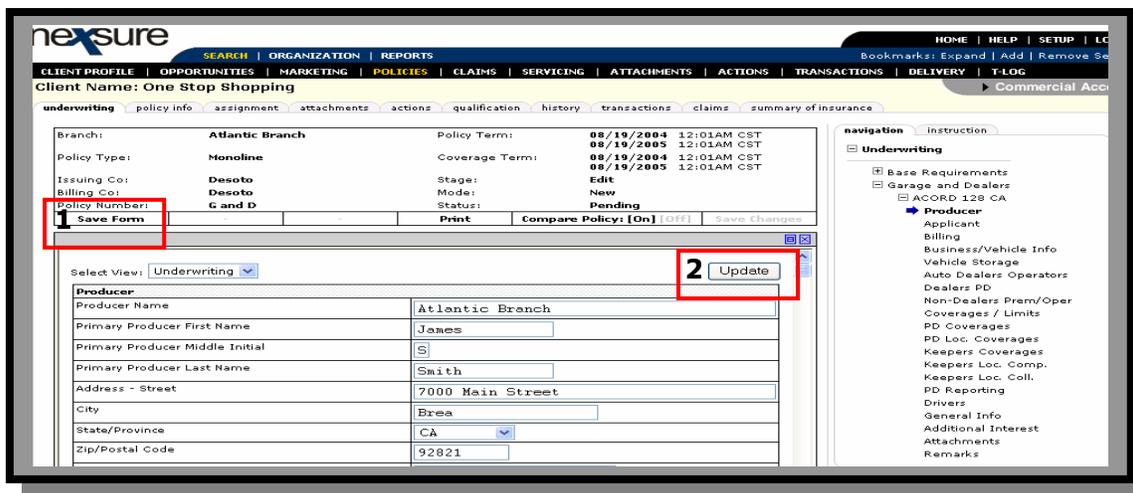


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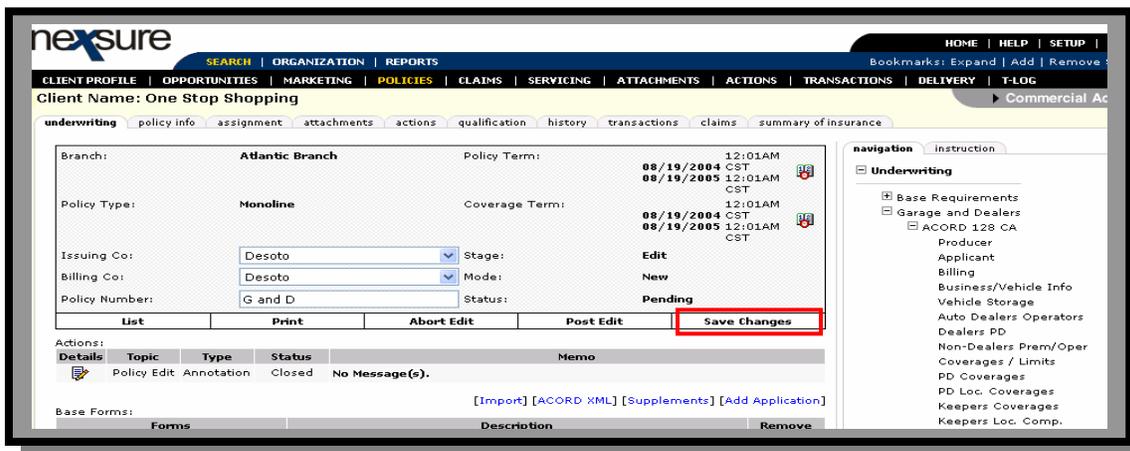
HOW to save the form from List View

Select either of the links below to save the form:

1. The **Save Form** link found on the Navigation Toolbar will remain visible no matter what part of the form you're on.
2. If you are at the top of the list view screen, selecting the **Update** button will also save the form.



If **List** is clicked without opening up the application as shown in the screen below, the **Save changes** link on the Navigation toolbar is available. The thing to remember here is that this link, while in List view, will not save the form, but instead will save only the header of the policy.





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If the **Save Changes** link is clicked while in List view, the following message will display warning that the form has not been saved:



Click the **Cancel** button to go back to the form and then click the **Save form** link to save the data.

Tip: The quickest way to enter schedules such as vehicles is still the Navigation tab so that the import/export and copy features may be leveraged.