



Nexsure Release Notes

Version 1.76

Authors:

Business Analyst Team

QA Team

Documentation Department

Release Date: 06/03/05

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Section 1: Introduction

About This Document

This document contains information about Nexsure 1.76, including operational requirements, system enhancements, known issues, resolved issues and contact information.

Welcome to Nexsure

Nexsure, developed by XDimensional Technologies, is a comprehensive and intuitive web-architected agency management solution. The only product of its kind, Nexsure has been engineered for the web from the ground up, and is based completely on the Microsoft technology platform and takes full advantage of the XML data format. Nexsure offers the sophisticated features and functions that insurance professionals have not found in traditional management system offerings. These advanced features translate into a more efficient agency workflow and a superior service experience for their clients.

With no requirement other than an Internet connection, Nexsure liberates the professional agency system from the burdens and costs associated with traditional agency management products and offers the ultimate flexibility for remote offices and/or telecommuters. More importantly, Nexsure provides opportunities for carrier system interoperability, collaborative data gathering, and consumer “engagement” that traditional systems simply cannot match.

Nexsure also alleviates the perpetual and overwhelming upgrade and administration demands of managing an in-house agency network. Nexsure has been deployed via XDimensional Technologies state-of-the-art ASPN Data Center, located in Brea, California. ASPN removes the burden of maintaining an in-house network for your agency management system by eliminating the need for a server and network at your agency. Nexsure is the first ASP-deployed / web-architected application, based on Microsoft® technologies, to be offered to insurance agencies as their agency management solution. When deployed in this fashion, it represents an extremely efficient and cost effective solution whereby agencies can access their system anywhere, any time, and from virtually any PC.

Section 2: System Requirements

Nexsure® was created to leverage the capabilities of Microsoft's latest released products. Please refer to the Microsoft site for specific hardware requirements of their products.

Minimum System Requirements for CRM / Policy Use

Microsoft® Windows 2000 or XP Professional with Internet Explorer 5.5 or higher.**

Refer to Microsoft hardware requirements, Personal Computer with 133MHz or higher Pentium compatible CPU for Windows 2000 or 233MHz or higher Pentium-compatible CPU for Microsoft® Windows XP Professional. 64MB of RAM; more memory generally improves responsiveness.

Display: Super VGA (1024 x 768) or higher resolution monitor with 256 colors.

Keyboard and Mouse required.

Recommended System Requirements for full use of Nexsure including Office Integration

Microsoft® Windows 2000 Professional or Microsoft® Windows XP Professional only with Microsoft® Office (2000 or XP) added.

Adobe® Reader® - Version 6.0 or higher
(Free download from <http://www.adobe.com/products/acrobat/readstep2.html>)

128MB of RAM plus an additional 8MB of RAM for each Microsoft® Office application (such as Microsoft® Word) running simultaneously.

Connectivity requirements

Broadband connection (Cable, DSL, etc) or dedicated Internet connection

Instant Messaging

Instant Messaging requires network traffic to flow thru ports 2000 and 2001

Java™ Virtual Machine for Internet Explorer
(free download from SUN Microsystems at <http://www.java.com>)

Office Integration

Requires Microsoft® Office 2000 or Microsoft® Office XP

MICR Check Printing

Designed using PrintTerm MICR 2300 (modified HP 2300). All printers will have to be verified for production use.

** If upgrading from Microsoft® Windows 98, a fresh install must be performed (not a version upgrade)

**Verify existing Hardware meets Microsoft® Windows 2000/XP Pro requirements

Contact Information

Please forward any comments, suggestions, or questions about the information contained in this document to the document author listed on the cover page.



Corporate Headquarters

145 South State College Blvd. Suite 160
Brea, California 92821

Toll-Free Phone: (800) 789-2567

Phone: (714) 672-8900

Fax: (714) 672-8908



Technology Center

450A Apollo St.
Brea, California 92821

Toll-Free Phone: (800) 789-2567

Phone: (714) 672-8900

Fax: (714) 672-8908

World Wide Web

<http://www.xdti.com>

Section 3: What's New in Nexsure 1.76

Nexsure Enhancements

E-ID	Category	Sub-Topic	Description
341	Office Integration	Templates	Commercial Lines Proposal Template (Note: Do not edit the XDTI commercial proposal template. Be sure to use the Save As button to save a copy for editing after clicking the Details icon.)
515	CRM	Actions	Policy Actions – Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
516	CRM	Actions	Client Actions – Add on/off check box to hold search criteria in all filter areas (Save Filter Settings)
1841	Delivery		Default address book search criteria
1907	CRM		Re-focus list view screen to the last modified area upon update.
1933	Accounting		Client Transaction Summary
1978	eServices		Mercury Insurance DMS PrintMail
1979	eServices		Safeco Single Sign On
1980	eServices		Central Insurance Single Sign On
1981	eServices		Firemans Fund Single Sign On
1982	eServices		Benefit Point Single Sign On
1983	eServices		Auto Owners Single Sign On
1984	eServices		Access AIG Single Sign On
1985	eServices		Continental Western Single Sign On
1986	eServices		Frankenmuth Mutual Single Sign On
1987	eServices		Merchants Insurance Group Single Sign On
1988	eServices		Unitrin Specialty - Financial Indemnity Single Sign On
1989	eServices		Victoria Single Sign On
1990	eServices		Oregon Single Sign On
1991	eServices		Travelers Single Sign On
1992	eServices		Farmers Insurance Single Sign On
1993	eServices		Allstate Single Sign On
1994	eServices		Metlife Single Sign On
1995	eServices		Republic Group Single Sign On
1996	eServices		Main Street America Single Sign On
1997	eServices		Peerless Single Sign On
1998	eServices		America Single Sign On
1999	eServices		Insurmark Single Sign On
2000	eServices		Fidelity Flood Single Sign On
2001	eServices		Bristol West Single Sign On
2002	eServices		Orion Auto Single Sign On
2003	eServices		Western United Single Sign On
2004	eServices		West Bend Commercial & Personal Policy Inquiry
2005	eServices		Selective Billing & Claims Inquiry
2006	eServices		E-Service Menus accessed by NAIC Code in Carrier Setup
2007	Downloads		Merchants - Workers Comp
2008	Downloads		Kemper – Personal Auto
2009	Downloads		Union – Commercial Property
2010	Downloads		Auto Owners – Inland Marine
2011	Downloads		Auto Owners – Watercraft
2012	Downloads		Hasting Mutual - Commercial Property

E-ID	Category	Sub-Topic	Description
2013	Downloads		Hasting Mutual – General Liability
2015	Accounting	Receive Payment	When going in to apply cash to the client or disburse to them, only receivables for that client that belong to that territory should display. Per RB: I was trying to apply cash to some receivables that belonged to the other territory and I think Nexsure was going to allow me to do it.
2016	Accounting	Disbursement	When disbursing to a client only show the receivables for that client that belong to that territory.
n/a	Downloads		Change xdQUE & xdCNV to use xdDBA again rather than the Host name xdglobal.nexsure.local
n/a	Downloads		Modified ACORD 140 Commercial Property Download Functionality for Certification with Hartford Commercial Lines
n/a	Downloads/Delivery		Modifications for new XSession Security (Office Integration)

Resolved Issues

Ref#	Heat#	Description
5765	4761	New Business Report - reported a discrepancy with the new business report, and current client records.
7620	6778	Professional invoice> No space after "to">after policy term
7784	7037	What causes the error message>Server error '/OI' Application
7931	7186	We need to add the bigger description at the time of adding the attachment.
8100	7458	Actions - Same policy number showing for almost every client on actions summary screen
8514	8058	Customer Statement - change business rules re: assignment information returned
8575	8086	Error returned attaching document
8913	8203	Enhancement: Office Integration: add option in OI templates to create doc as PDF files as an option under templates
8807	8403	Name Insured not showing on Summary of Insurance - Updating contact information does not update on Summary of Insurance
8853	8484	Outlook Icon is not appearing when an Outlook message is attached to a client record.
9263	8534	Downloaded Inland marine policy from Safeco is not creating property schedule
8901	8562	Unable to attach an Attachment
9042	8670	Posted carrier reconciliations include invoices that are nowhere to be found possibly because it was created by Add Carrier Statement Transactions link.
9200	8693	AR Reports
9019	8696	Unable to edit Additional Interest record
9043	8720	Updated By field of a cancelled policy in history does not show the name of the person who cancelled it
9091	8782	Servicing-Edit: Add Application link is grayed out when editing a policy with REINSTATED status
9131	8838	Unable to delete the 159 Schedule of Property Limit and the 139 Statement of Values.
9152	8861	Downloads - Package policy totals not showing on policy info
9167	8873	Lookup - When using lookup to prefill drivers on an app if you have more than 1 driver the information is incorrect
9223	8961	Agency name is being formatted in lower case after the first letter within the application
9250	8965	Inland Marine (Personal) removing property via endorsement does not delete from LOB after submitting
9258	8987	Client downloaded into Nexsure have no info in the card file.
9291	9049	Line of business sort does not work on the Invoice Transaction Register report
9292	9050	Account Current Report does not have a grand total at the end of the report
9293	9051	Current Period display totals on Account Summary tab at Territory Level are incorrect
9295	9052	Journal entry sort order does not work when you return more than 200 records.
9310	9068	Auto ACORD Application, under the Vehicle Details for this client, the Policy Premium for Statutory Uninsured Motorist Bodily Injury did not flow over from the AL3
9338	9092	Downloads - Mapping issue with New York Central Mutual and Progressive > Uninsured/Underinsured Motorist & Supplementary
9259	9107	Clients unavailable for selection at territory level to receive payment
9384	9139	Wrong info is entered when using lookup to prefill contact info for driver record on PAUTO

Ref#	Heat#	Description
9388	9151	If a client has receivables in two territories, you can only call them up in the territory where their primary assignment is
9428	9205	Searching for vender produces an error and a blank record at the vendor search summary screen
9478	9251	Cash Receipt 642 is posted to recon clearing account but is not available to select in reconciliation 353
9743	9618	People Payable Report is OOB.
9811	9700	Florida Commercial auto 127 Personal Injury Protection Benefits/Property Damage Liability: Bodily Injury Liability: fields are not populating to Verifications
9866	9741	Application prints data that is not visible from the QN menu
7961	7311 7641	Changing the Bill to Address on a client invoice and the address is OK, but a different client name is shown
8285	7789 9206	Reinstated policy in mode of renew cannot be put in force
9120	8842 8837 8834 8898 8910	Error message says "Unable to create an invoice for the policy"
9244	8986 8960 9041 9224	Client stage is not being updated after download comes through
9407	9155 9078 9244	Word Hangs when saving
9007	9183 9185	Download Reinstatement - Reinstatements are unable to find the currently cancelled policy to reinstate
9534	9355 9637	Related Accounts - Commercial/Personal relationship type not working properly
9867	9742 9743	Info changed or imported does not populate PDF unless print or save changes is selected first. (Print all apps from underwriting link shows wrong info)
8941	N/A	Add Additional Interest - If a ' or " is entered in the name the pre-populated name field on the add will truncate anything after the special characters.

Section 4: New Features in Detail

Office Integration with Microsoft Word

Office Integration Setup

Items denoted with a red asterisk (*) indicate they are New with this release.

WHAT Document Templates are

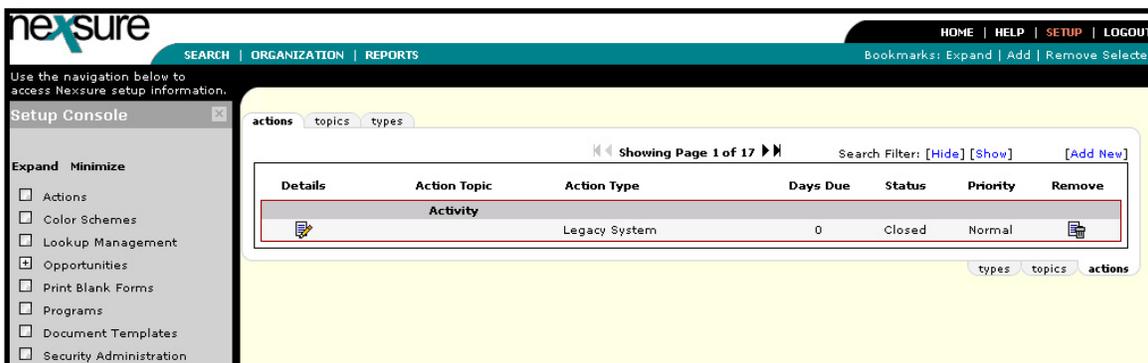
Document templates are either Microsoft Word or Excel documents created by each Organization to help speed up work processes and provide a way to implement document consistency and branding. Merge fields may be placed in the document from the standard forms using the easily accessible XML tree. When these templates are added at client/policy level the merge fields placed in the template are replaced with data from these policy forms.

WHERE to go to add Document Templates

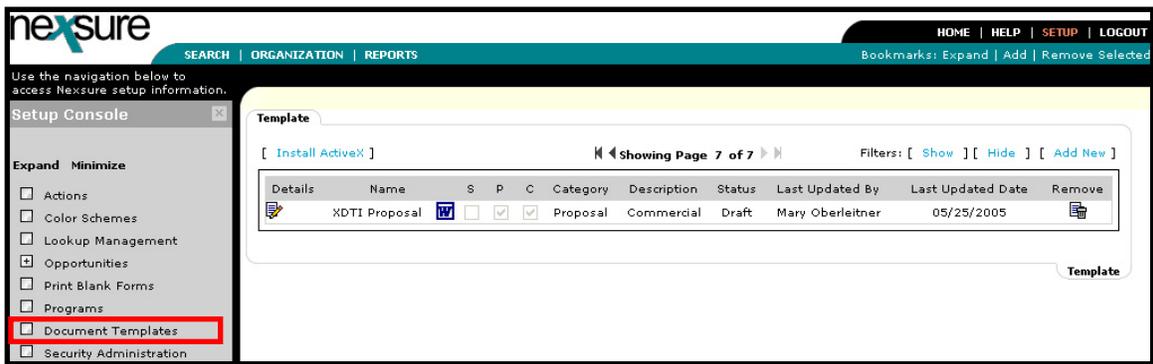
1. On the Utility Menu, click the **Setup** link.



2. The Setup Console displays defaulting to Actions summary.

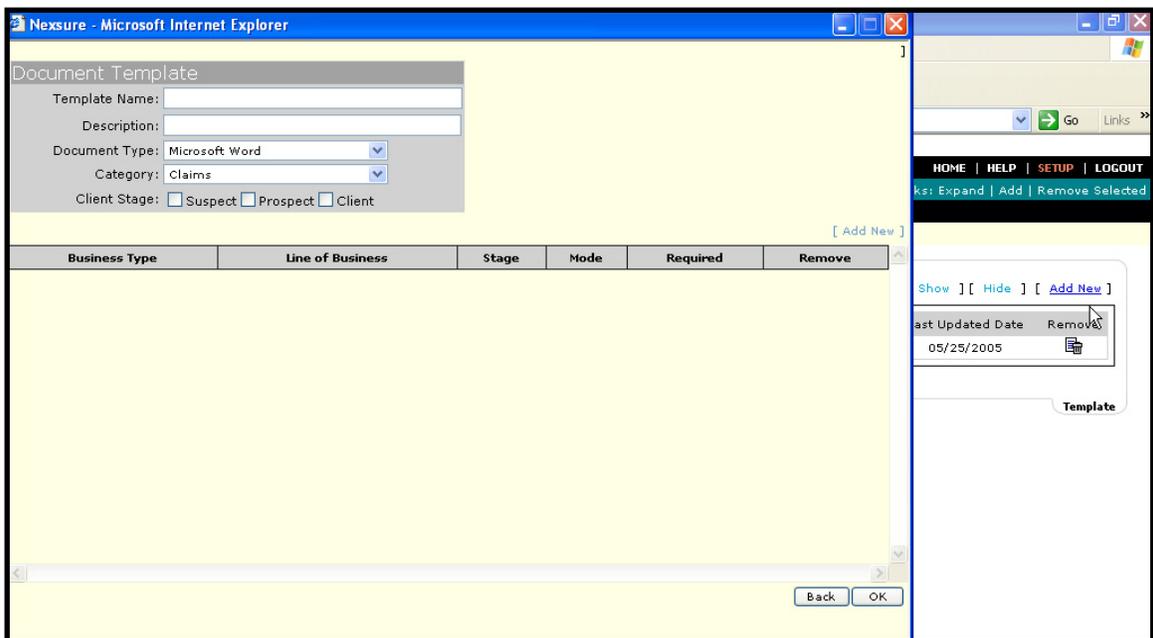


- On the Setup Console, click the **Document Templates** link to display the Document Templates summary.

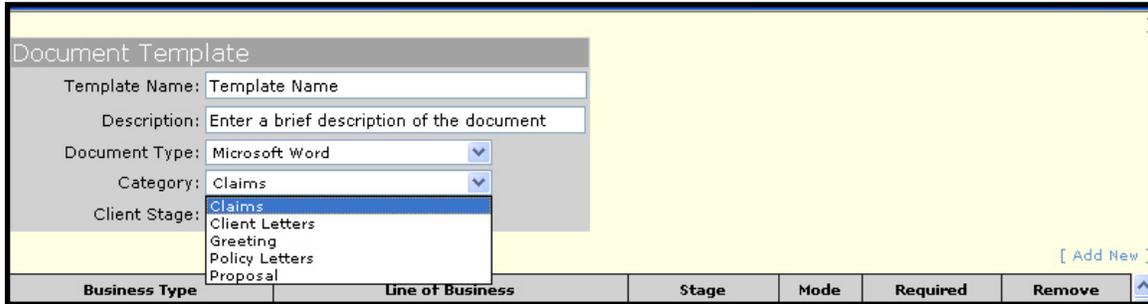


HOW to Add Document Templates

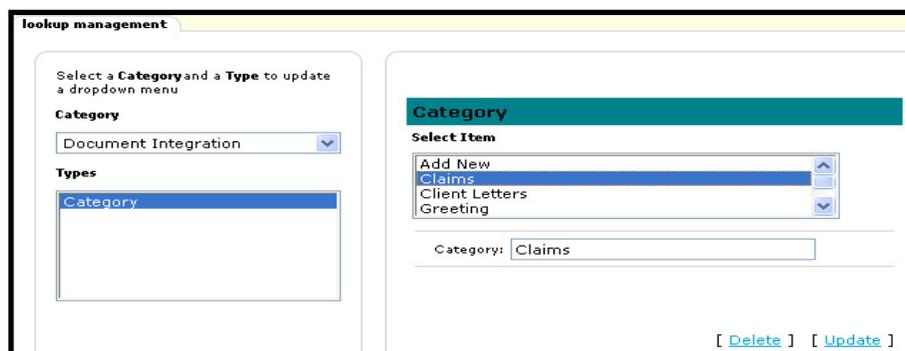
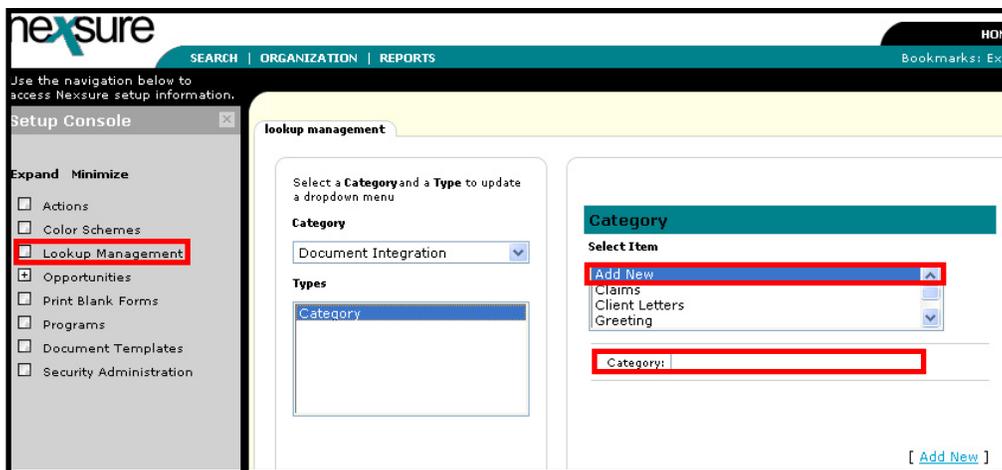
- Click on the [**Add New**] link located in the upper right corner of the screen to display the Document Template setup page.



2. Enter a brief name of the type of document that is being added so it can be easily recognized from client/policy level. The description should describe briefly what the document is to be used for. After the document has been created the template name and description may be modified if necessary.



3. The Document type includes two choices, Microsoft Word and Excel. Depending on the type of document being created, select one from the drop down box.
4. The Category drop down box may be modified under **Lookup Management** on the Setup Console to fit the Organizations needs. Use the drop down box to find the category **Document Integration** and on the right side of the screen, make sure **Add New** is selected and click the [**Add New**] link after typing in the new category. Categories may also be edited by clicking the category to modify, enter the correction and select update. Categories are used at Client/ Policy level to narrow down the large list of documents.



5. Since the document will be used at client/policy level it is important to indicate at what client stage the document will be utilized. There are three client stages and if necessary all one or two may be selected:
 - a. Select Suspect if the document is to be used for suspects, although make sure to keep in mind that no forms exist for suspects. Any suspect documents should be basic information regarding the account just prior to creating a form, such as name, address and/contact name.
 - b. Select Prospect if the document is to be used for prospects. Those entities who have never had an in force policy.
 - c. Select Client if the document is to be used for clients. Those entities who have in force policies.

The screenshot shows a web browser window titled "Nexsure - Microsoft Internet Explorer". The main content area displays a "Document Template" form. The form has the following fields and controls:

- Template Name:
- Description:
- Document Type:
- Category:
- Client Stage: Suspect Prospect Client
- [Add New] (link)

Below the form is a table with the following headers: Business Type, Line of Business, Stage, Mode, Required, and Remove.

6. If the document requires coverage data or just policy header data, the lines of Business must be added next. Click the [[Add New](#)] link on the right side of the screen to add the lines of businesses.

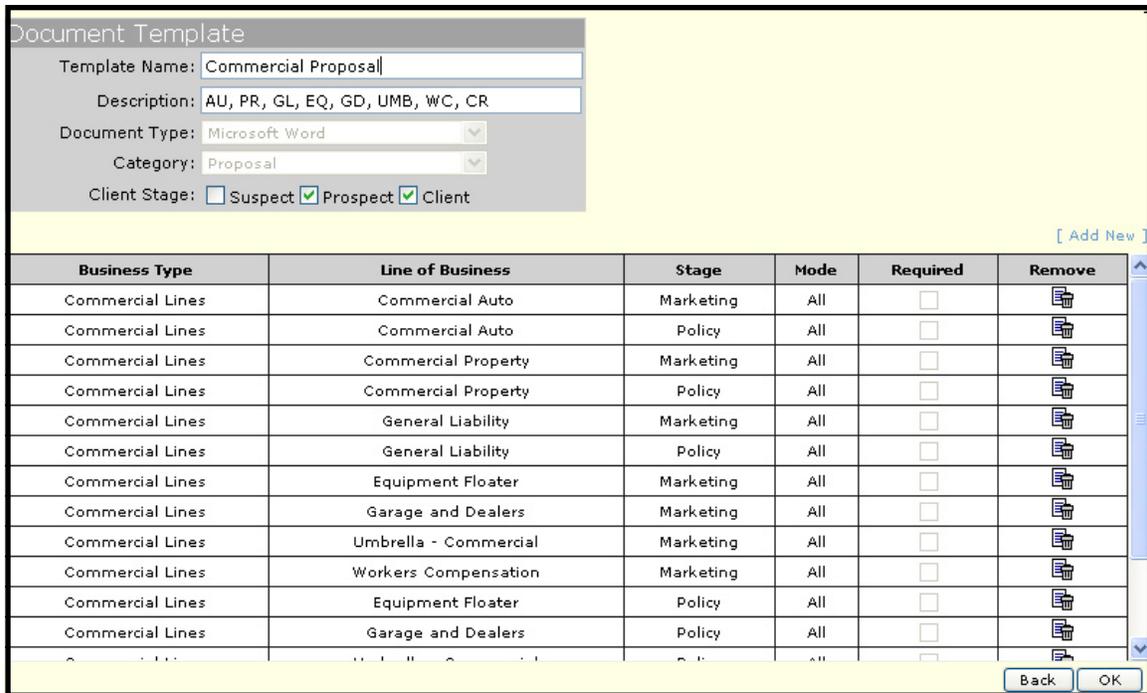
The screenshot shows a dialog box titled "Nexsure Office Integration" with the "nexsure" logo. The "Document Template" section contains the following fields and controls:

- Stage:
- Mode:
- Business Type:
- Line of Business:
- Tip: CTRL+Click to select multiple lines of business.
- Required:
- Buttons: Cancel, OK

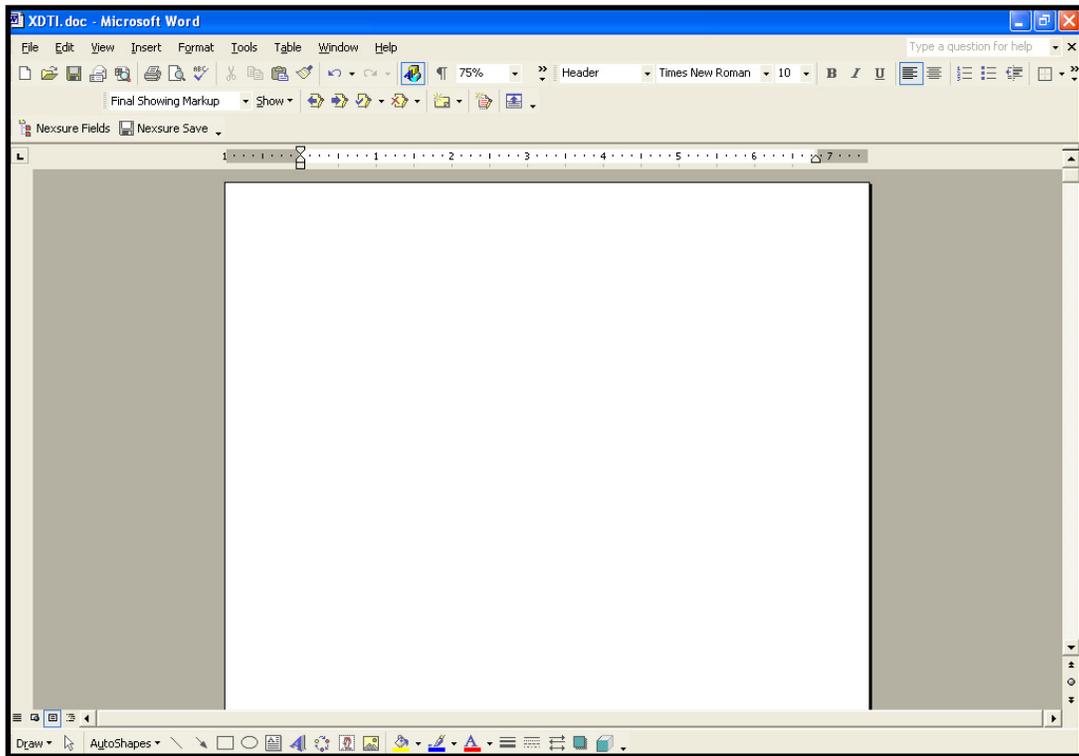
To make correct choices use the following information as a guide:

Description	Definition
Stage	<p>There are 3 policy Stages:</p> <ol style="list-style-type: none"> 1. Opportunities – No form data included 2. Marketing – Only form data from marketing included 3. Policies – Only form data from policies included
Mode	<p>There are 3 policy modes including an option for all:</p> <ol style="list-style-type: none"> 1. New – Select if the document is exclusively used for policies newly written and have a policy mode of New. 2. Renew – Select if the document is exclusively used for renewal policies and have a policy mode of Renew. 3. Re-new-co – Select if the document is exclusively used for policies that are a renewal to the agency but new to the carrier and have a policy mode of re-new-co. <p>Many documents will be for all modes but there will be exceptions such as new business letters. A mode of new would only be selected.</p>
Business Type	<p>This relates to the group that the form can be found in. There are 5 types:</p> <ol style="list-style-type: none"> 1. Benefits 2. Bonds 3. Commercial Lines 4. Financial Services 5. Personal Lines <p>Use these to help filter through the Line of Business list.</p>
Line of Business	<p>After selecting the specific type select the line of businesses that the document will be used on by holding down the control key and clicking with the right mouse button. The line of business must be added in order to use the document on that line of business at client/policy level.</p>
Required Check Box	<p>Use this check box only if it is required to have the selected line of businesses in order to access the letter at client/policy level.</p>

7. If both Marketing and Policy stages are required, select all the Line of Businesses for one first, then select the [[Add New](#)] link again and add the other stage line of businesses. The screen should look something like the illustration below after adding the Lines of Business:



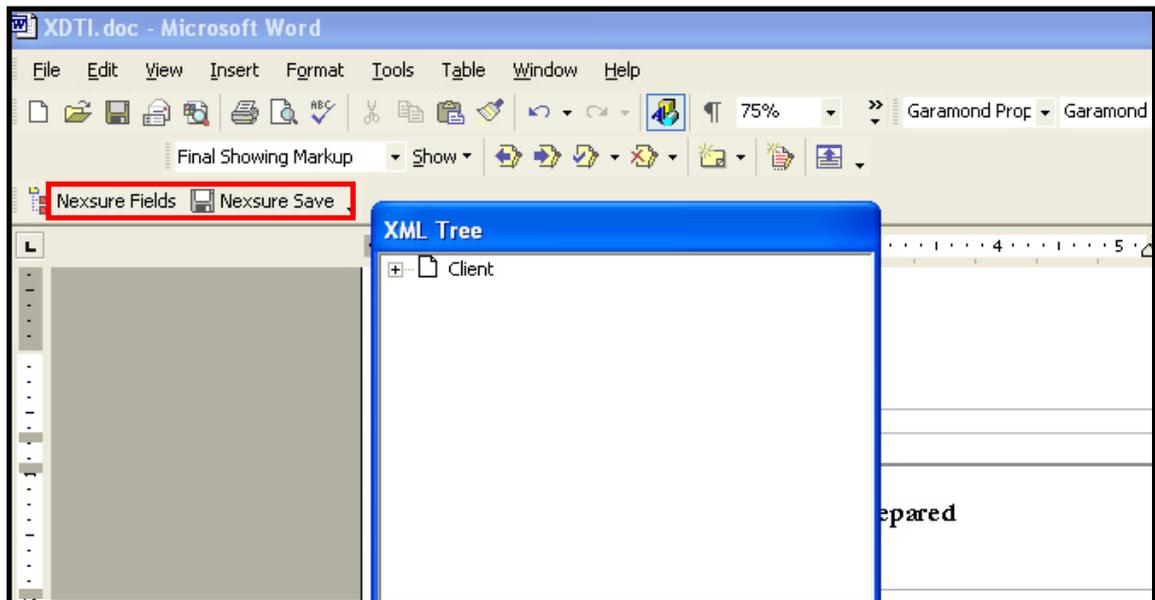
8. After adding all the lines of business, click the OK button to launch the document.



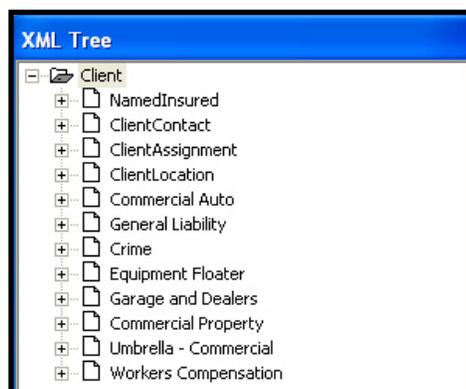
Working in Word to Create a Document Template

HOW to Add Nexsure Fields

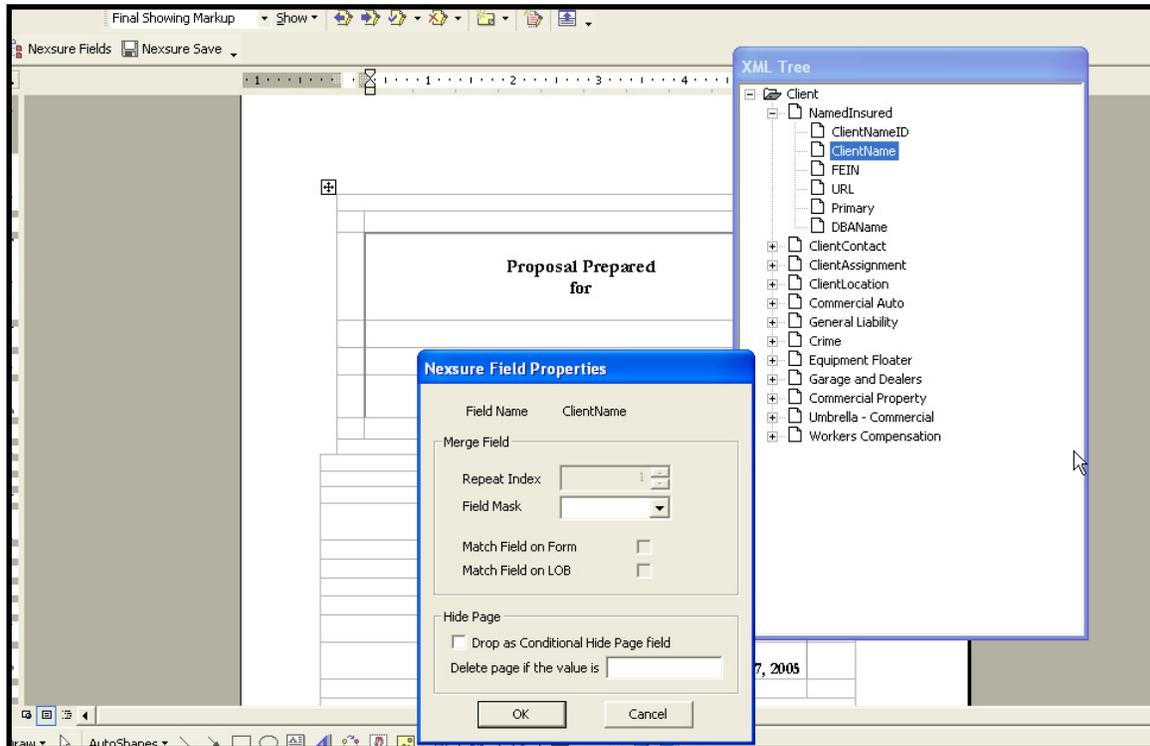
1. Once the document has been launched notice there are two buttons not normally found in a Microsoft Word document:
 - a. **Nexsure Fields** button
 - b. ***Nexsure Save** button – Nexsure save as removed from the File menuThe **Nexsure Fields** button launches the XML tree that contains the data fields. Click this button to launch or close the XML Tree. The XML Tree will always conveniently stay on top and may be resized as needed.



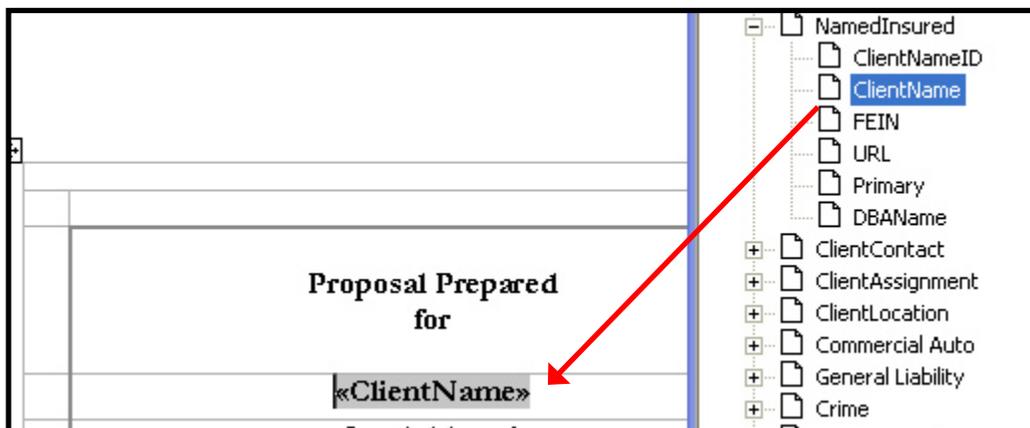
2. Before placing Nexsure fields in the document, position the cursor where the field will need to be in the document.
3. Open files in the XML tree by clicking on the "+" and navigate to the section where the data resides. The XML tree is built in the same way Nexsure is to make it easy to find the fields. Notice the labels in the forms are the same as the policy form is.



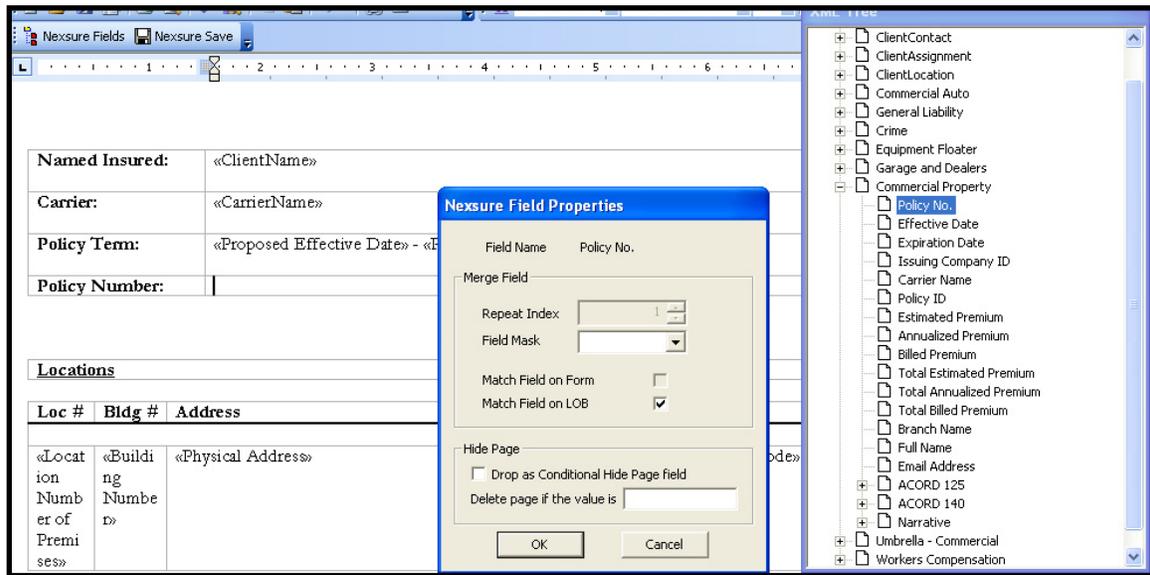
- To insert the Named Insured into the document, click on the “+” beside Named insured folder to open. Click on Client name and drag toward the document to display the Nexsure Field Properties window. The choices made here are very important and depending on whether the field is from client level, policy or form level determines any available options.



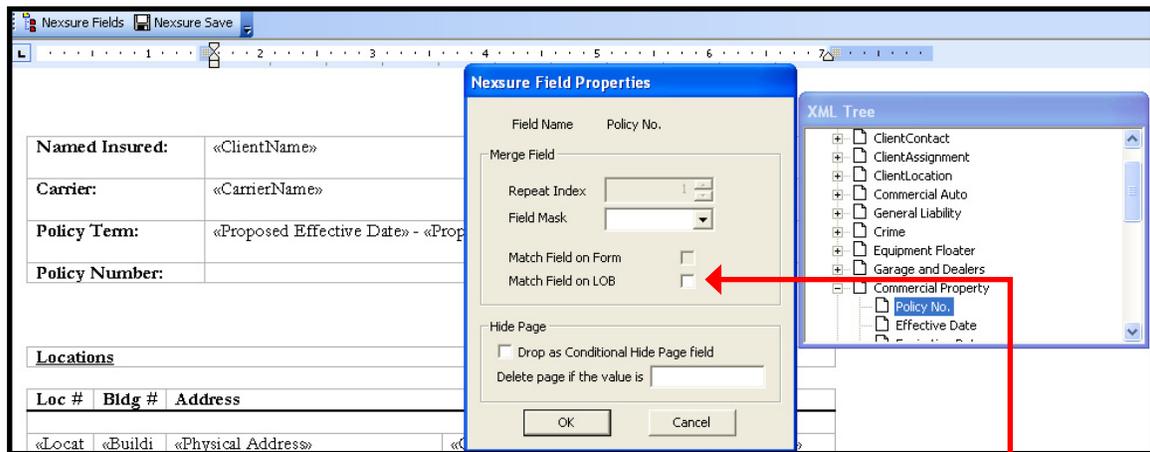
- When any field is selected that is neither from a form nor policy the only options available are Field Mask and the Hide Page option. The Hide page option will be discussed later in this document. Mask is only used to format numeric values if needed, which means it will not be used when dropping a character containing field into the document such as in this case.
- To complete the process, click the OK button on the Field Properties window. The field is now in the document where the cursor was placed when the field was dropped.



- *When adding fields from the policy header, one of the first things to determine is will the field populate only a specific line of business. If this is the case then the **Match Field on LOB** check box must remain checked. If the field is to be used in a document that will not require specific data from a particular form and only one policy at a time will be used, the **Match Field on LOB** check box should be unchecked. The unchecked box means that the field will populate with the selected line of business data (as long as that line of business is associated with the template in setup) when merged at client/policy level. If the box is checked the Line of business must exist (and must be associated with the template in setup) in order for the data to populate in the document.



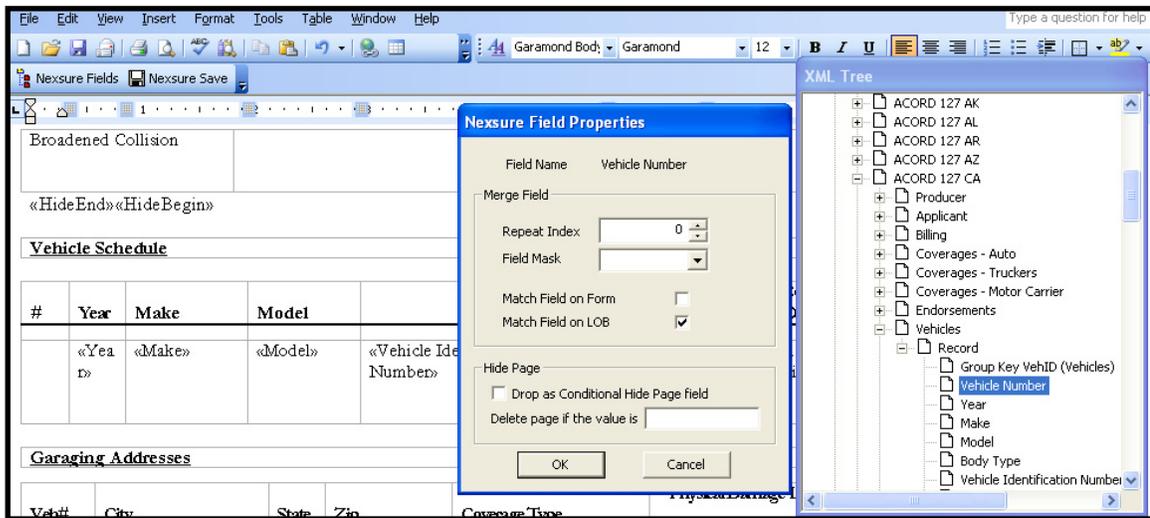
*Note: If the policy number field is placed into the template with the Match Field on LOB not checked, the policy number will populate the document on merging with any Line of Business added to the template. Keep in mind that only single policy documents should be used when merging to obtain the desired result. To keep these documents separate from other a Document Category of Single Policy documents is recommended so users will know automatically how these documents are to be used.



Unchecked = Find the closest LOB match

- 8. *The next check box to consider is the **Match Field on Form**. This is used to isolate or not for state specific forms such as Auto. When adding fields from the state specific form, one of the first things to determine is will the field populate only a specific form type. If this is the case then the **Match Field on Form** check box must remain checked. What this means is that if you try to merge the document with a state where the fields were not used in the creation of the template, no data will merge to the document.

If the field is to be used in a document that will not require specific data from a particular form, the **Match Field on Form** check box should be unchecked. The unchecked box means that the field will populate with the selected line of business data regardless of state if the field matches when merged at client/policy level.

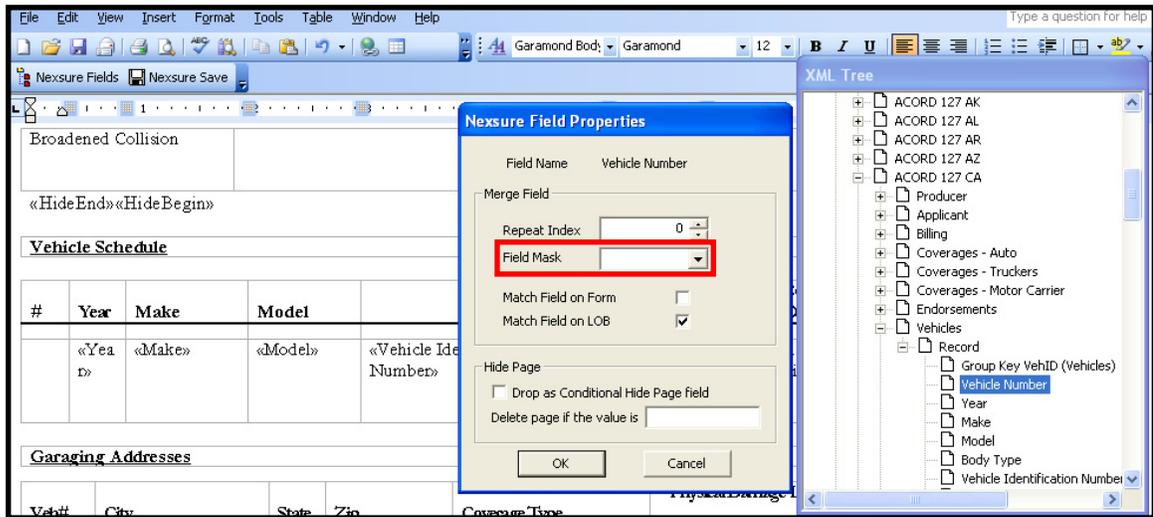


- a. Example: If the Uninsured limit field was selected to populate the document. Below the results are shown with the boxes checked and unchecked to get a feel for how these boxes work.

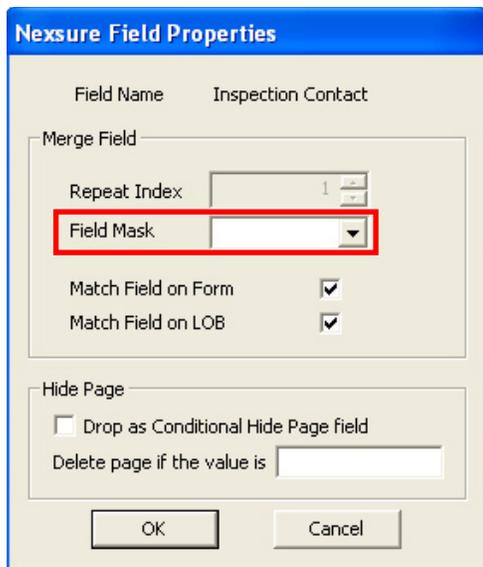
SAMPLE OF RESULTS:

Description	Limit
Uninsured Match Field on form box unchecked	\$100,000
Uninsured Match Field on form box checked	
Uninsured Match Field on form and Match Field on LOB box unchecked	\$100,000
Uninsured Match Field on form and Match Field on LOB box checked	

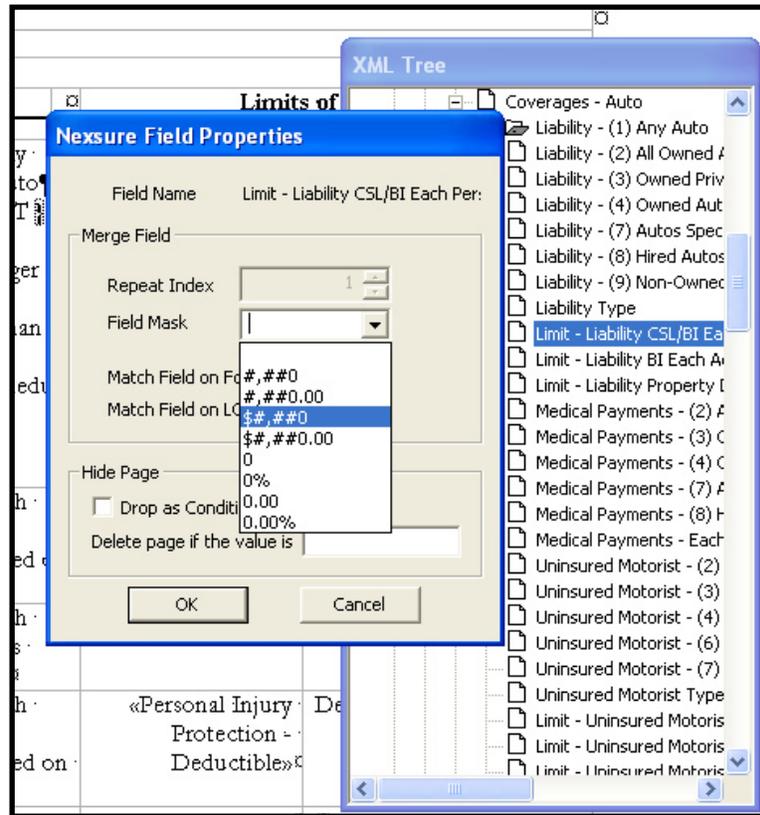
9. The next important item in the Nexsure Field Properties window is the Repeat Index. This option is only available on scheduled items, such as a schedule of vehicles. By default, the Repeat Index will automatically show a 0 when the field comes from a schedule. When set to 0, all items in the schedule are returned when the document is merged at client/policy level. If the Repeat Index is set to any other number then the data return is restricted to that number of items from the schedule starting with the first item in the schedule.



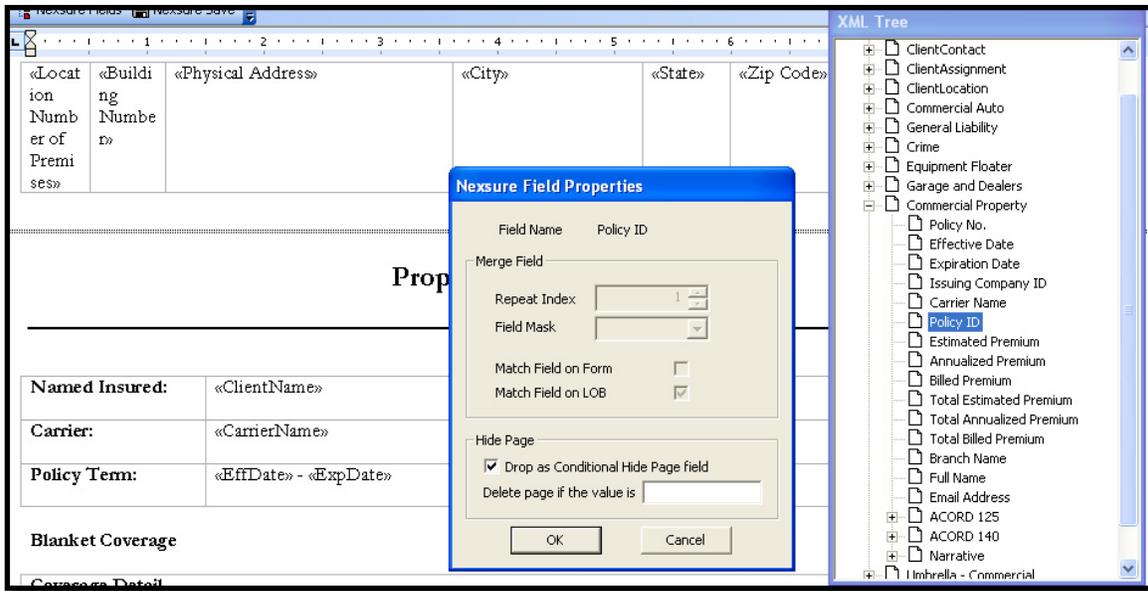
- a. *The Repeat Index is not available on any fields not found in a form or not a scheduled item.



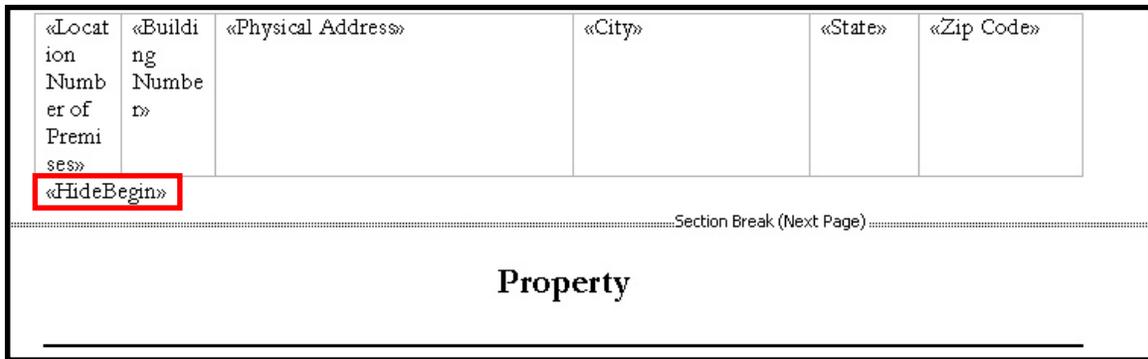
10. With some fields numeric formatting may be desired. In Nexsure, this formatting is possible simply by selecting the format type when the field is selected to be placed in the document.
 - a. After dragging the selected field toward the document the Nexsure Field Properties displays. In the Field Mask field, choose the format type desired. If no formatting desired, leave the field without a mask. When the document merges and data exists, the numeric value will automatically format according to the selection made here.



11. *This feature in the Nexsure Field Properties window is the **Hide Page** option which is used to hide entire pages if the line of business is not present like in a proposal. It can also be used around tables to hide data that does not exist.
 - a. To use this feature it is easiest to view the document in Normal mode. (Select View from the menu and normal). This view will display all the page breaks so they may be included above or below the HideBegin/HideEnd markers. Place the cursor where the HideBegin is to be placed. (The starting marker where the page is to be hidden.)
 - b. Second to hide a page, select something that will identify the page. For this example, **Policy ID** will be used. So find this field for the page that will need to be hidden if the line of business does not exist for the client when merging the document. Drag the field toward the document to display the Nexsure Field Properties. Click the checkbox beside **Drop as Conditional Hide Page Field**. In this scenario, if the field has no data we do not want the page to populate, so we will leave the **Delete page if the value is** field blank.

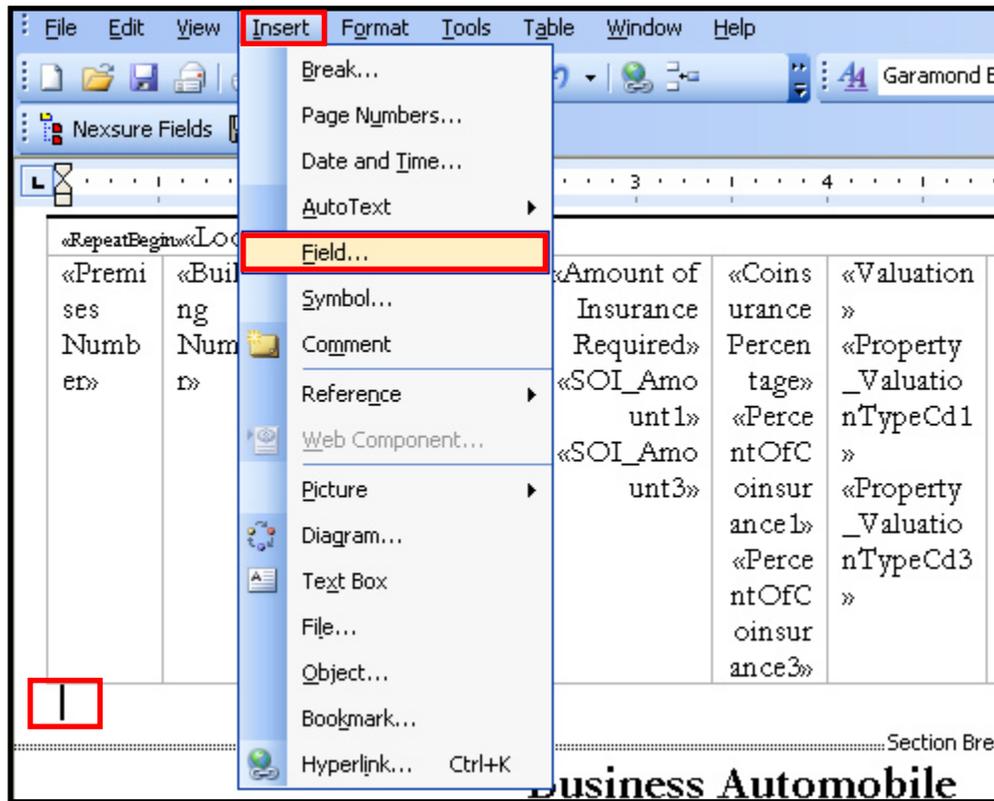


c. The HideBegin is dropped into the document.

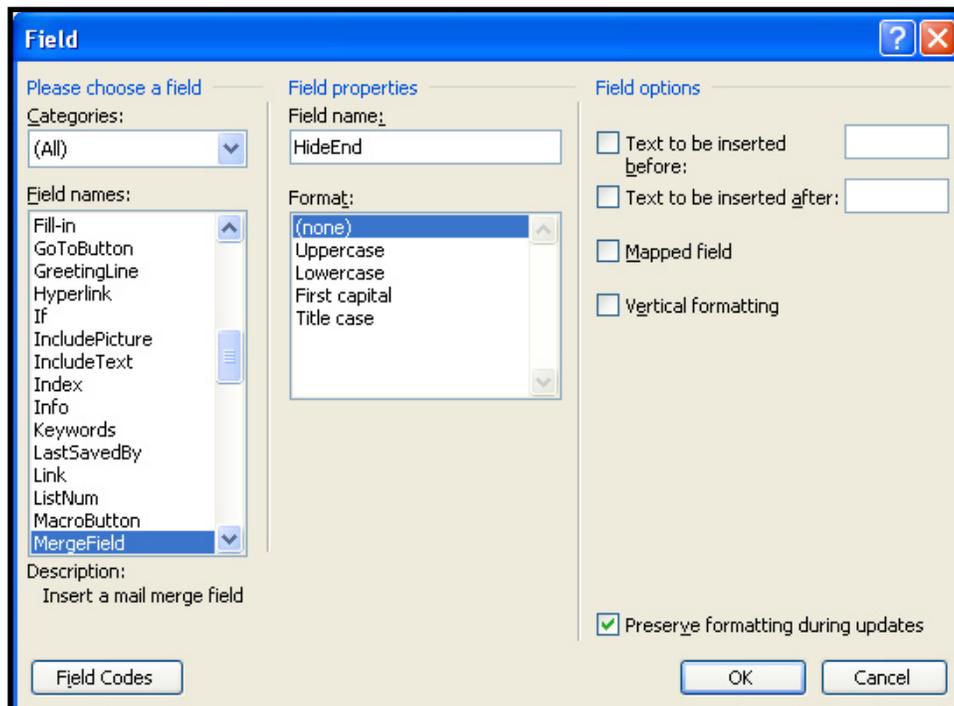


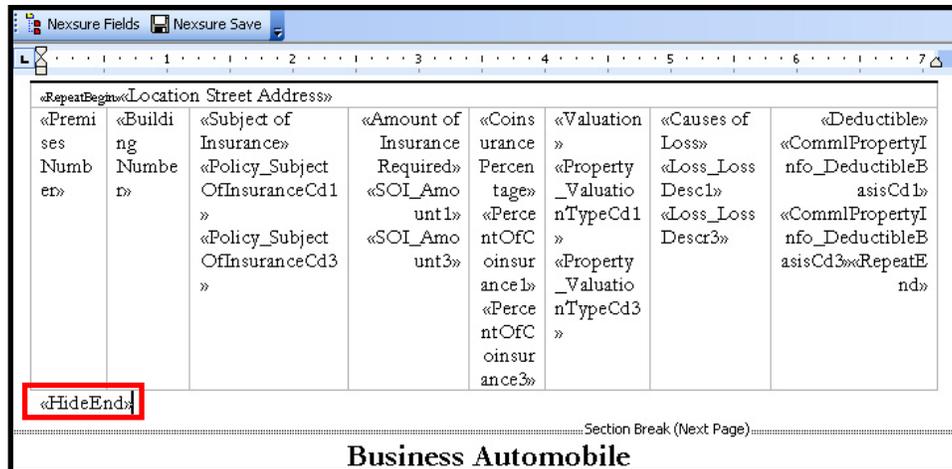
d. To complete the Hide Page, the HideEnd must be placed where the hidden section should end. To do this, go to the end of where the page should be hidden and click to place the cursor in this spot.

- e. Next, click Insert from the menu and Field.



- f. Next, from the list select MergeField and type **HideEnd** in the field name and click the OK button to insert into the document. The HideEnd marker is placed into the document.

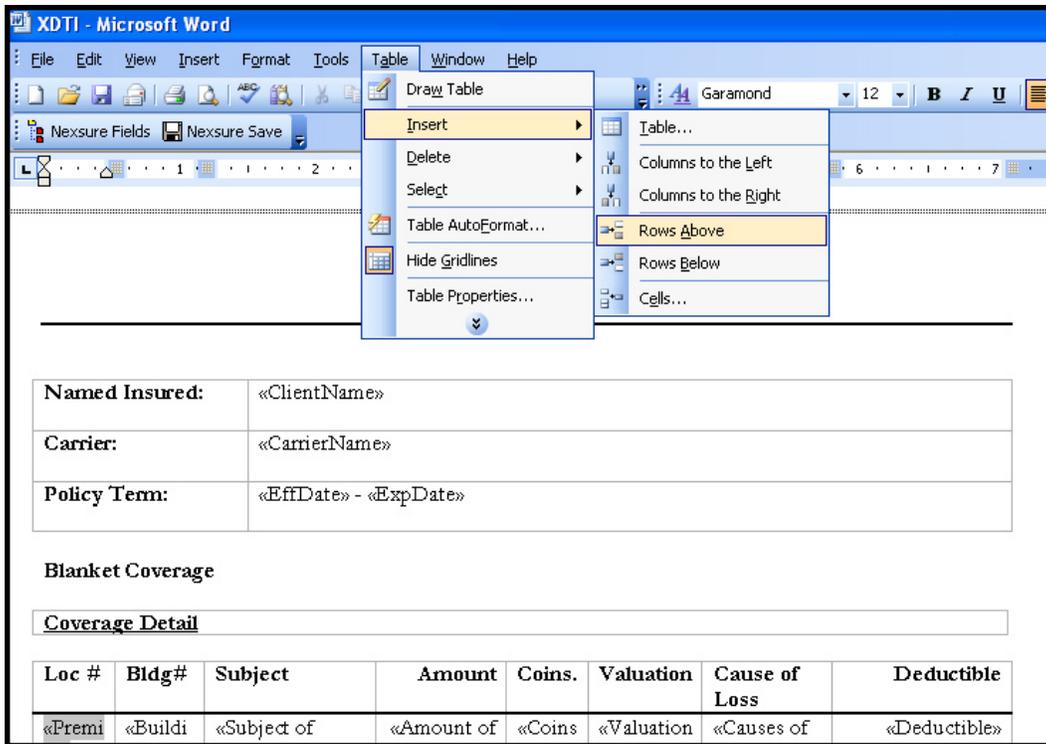




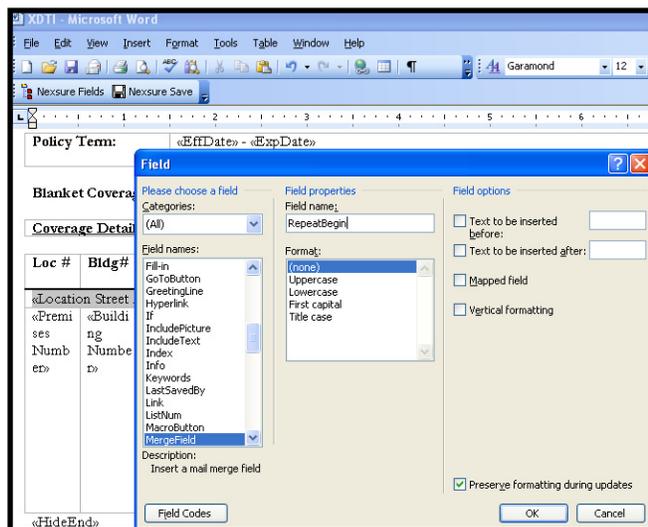
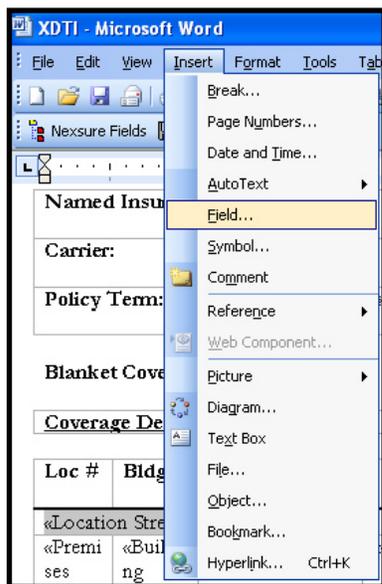
*Note: For every HideBegin there must be a corresponding HideEnd. If not when the document is merged these HideEnd markers will print on the merged document. Use these printed merge fields to help troubleshoot where missing markers may be.

***HOW to use Repeat merge fields**

1. Another feature that may be needed when creating documents is the RepeatBegin/RepeatEnd option. This is only used in the event scheduled items need to merge in a format slightly different than just a listing of data.
 - a. In this example, it is desired to have the address in the Commercial Property display above the coverages. In order for this to work properly, the RepeatBegin and End must be used.
 - b. After adding all the fields for the property inside the table, place the cursor in the first column under the header row and click Table on the menu and insert a row above the coverages. Next click the Nexsure Fields and locate the ACORD 140 Premises Info section. Open and then click and **drag location street address** into the newly inserted row.



- c. Next place the cursor in front of the Location Street address field and click Insert from the menu and Field. Select MergeField from the list and in the space provided under Field Name type **RepeatBegin**. Make sure to type a Capital R and B and the rest lower case with no spaces. Click OK to insert the field.



- d. To insert the RepeatEnd, place the cursor in the last column after the last field and Select MergeField from the list and in the space provided under Field Name type RepeatEnd. Make sure to type a Capital R and E and the rest lower case with no spaces. Click OK to insert the field. When the template is merged at client level the locations will print above the coverages.

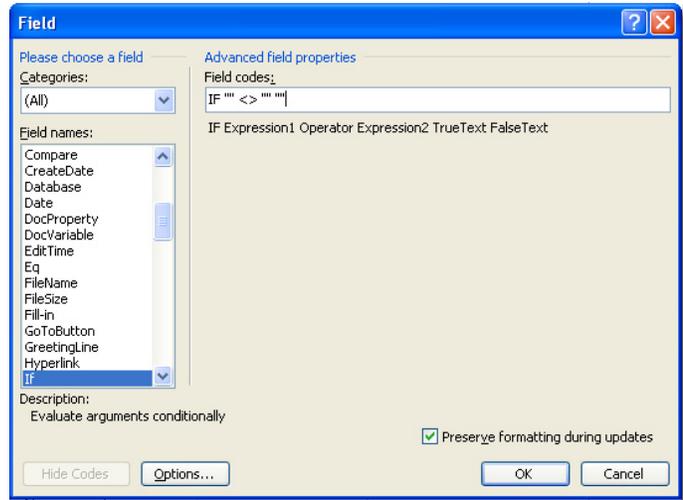
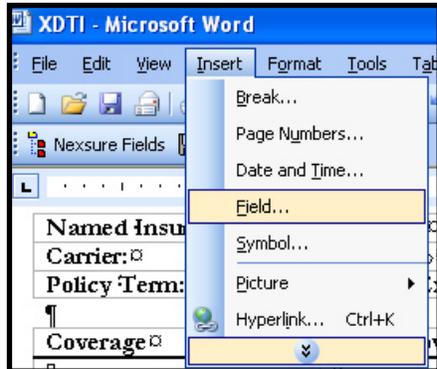
<u>Coverage Detail</u>							
Loc #	Bldg#	Subject	Amount	Coins.	Valuation	Cause of Loss	Deductible
«RepeatBegin»	«Location Street Address»						
«Premises Number»	«Building Number»	«Subject of Insurance» «Policy_SubjectOfInsuranceCd1» » «Policy_SubjectOfInsuranceCd3» »	«Amount of Insurance Required» «SOI_Amount1» » «SOI_Amount3»	«Coinsurance Percentage» «PercentOfCoinsurance1» » «PercentOfCoinsurance3»	«Valuation» «Property_ValuationTypeCd1» » «Property_ValuationTypeCd3» »	«Causes of Loss» «Loss_LossDesc1» » «Loss_LossDescr3»	«Deductible» «CommPropertyInfo_DeductibleBasisCd1» » «CommPropertyInfo_DeductibleBasisCd3» » «RepeatEnd»

RepeatBegin/End Merged example:

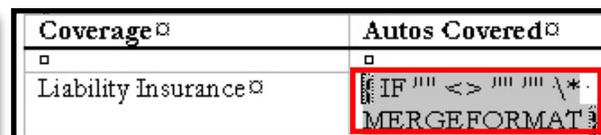
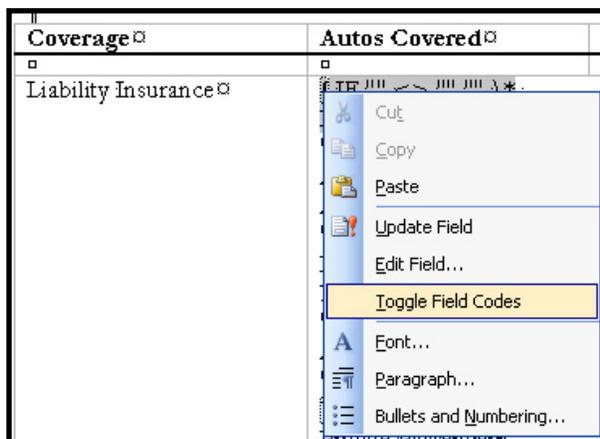
<u>Coverage Detail</u>							
Loc #	Bldg#	Subject	Amount	Coins.	Valuation	Cause of Loss	Deductible
1000 Main Street Boulevard Drive Av							
1	1	Building	\$1,000,000	8%	RC	Special	\$ 500
		Contents	\$350,000	80%	RC	Special	\$ 500
2000 Main Street Boulevard Drive Av							
2	1	Building	\$2,000,000	8%	RC	Special	\$ 200
		Contents	\$250,000	20%	RC	Special	\$ 200
3000 Main Street Boulevard Drive Av							
3	1	Building	\$3,000,000	30%	RC	Special	\$ 300
		Contents	\$33,333	33%	RC	Special	\$ 333

HOW to use Conditional Statements

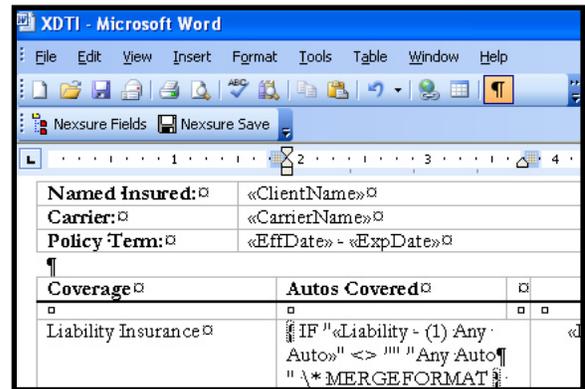
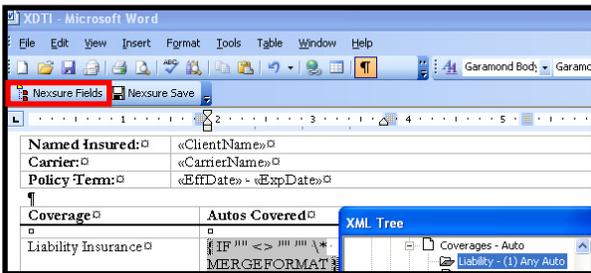
1. In some instances it may be necessary to translate what is actually in a field to something more meaningful such as the checkboxes for the auto symbols. To do this conditional statements built into Microsoft Word may be used.
 - a. To add a conditional statement, click on Insert from the menu and click Field to display the field options. Click on the **If** field name and in Field Codes after IF, type "" <> "" "" (make sure to add a space between the operator and quotes: ""space<>space"", you get the idea) and press the OK button. If you have a false answer you will need to add an extra set of quotes at the end. In this example there is no false answer other than do not do anything if false.



- b. The conditional statement is placed into the document but it cannot be seen. To display the statement, right click where the statement should be and select toggle field codes.

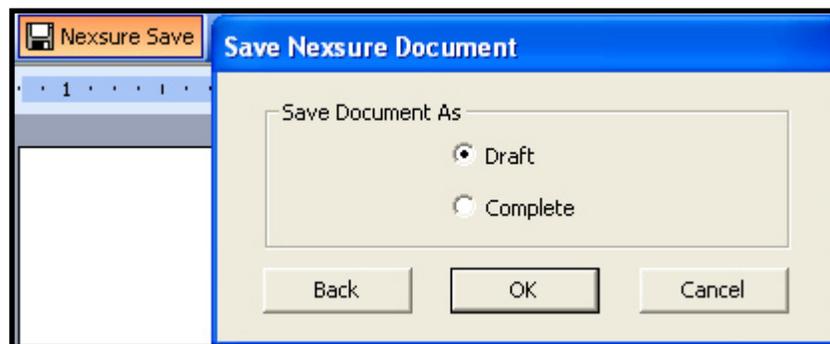


- c. Since the conditional statement has no fields placed between the quotes, it is incomplete. To complete, place the cursor between the first set of quotes immediately after the word IF. Click the Nexsure Fields button and find the field to place between the quotes. In this example, open a Commercial Auto line of business, any state, and click on Coverages-Auto folder and click and drag Liability – (1) Any Auto. Make sure to clear the check box for Match Field on Form if writing business in multiple states, if not leave checked. Click OK, the field is placed between the first set of quotes but the conditional statement does not display. Right click where the statement is sitting and select toggle field codes to display the statement. So far the statement says “If “Any Auto field” is not equal to “blank” “blank”. To have the words any auto return if the field is not blank, place the cursor between the last set of quotes and type Any Auto. If a carriage return is needed as well press the enter key. The Any Auto and carrier return will only occur if the field is not blank.

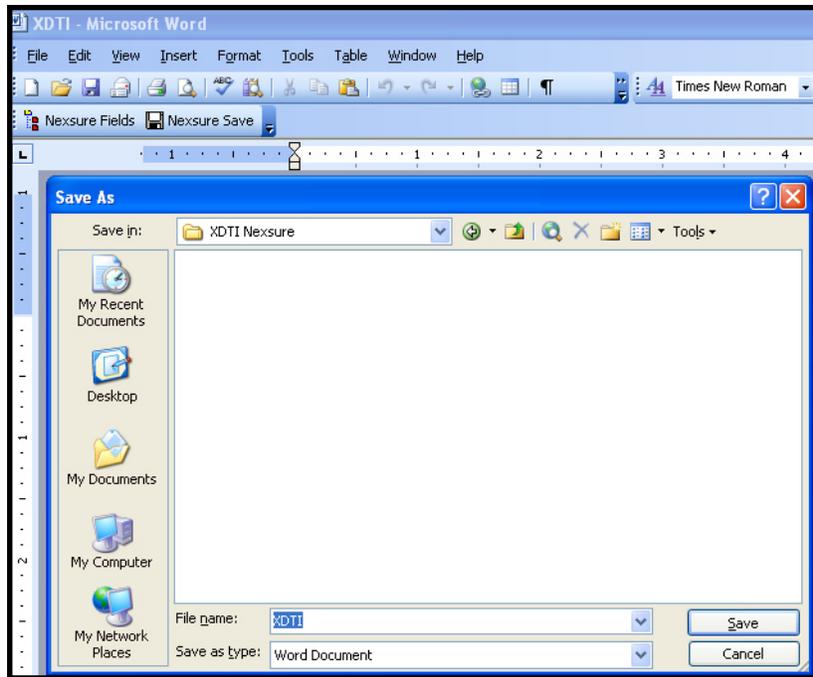


HOW to Save the Document

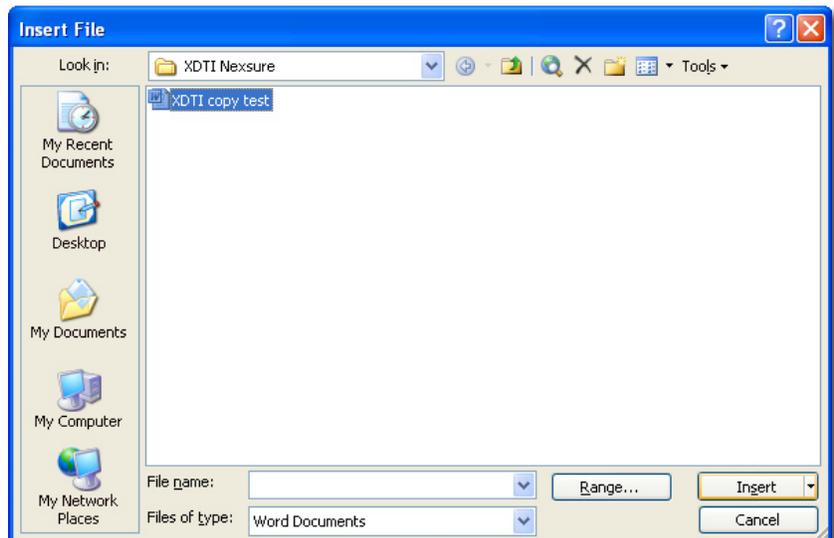
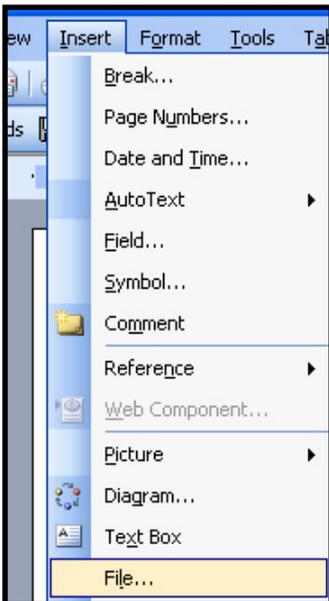
1. To save the document, click the **Nexsure Save** button and OK to save. To abort the save process and go back to the document select Back. To Abort the document entirely, click Cancel button and on the next popup the OK button. Selecting Draft or Complete is merely an indicator at this time to show whether the document is considered complete or draft (still in the works).



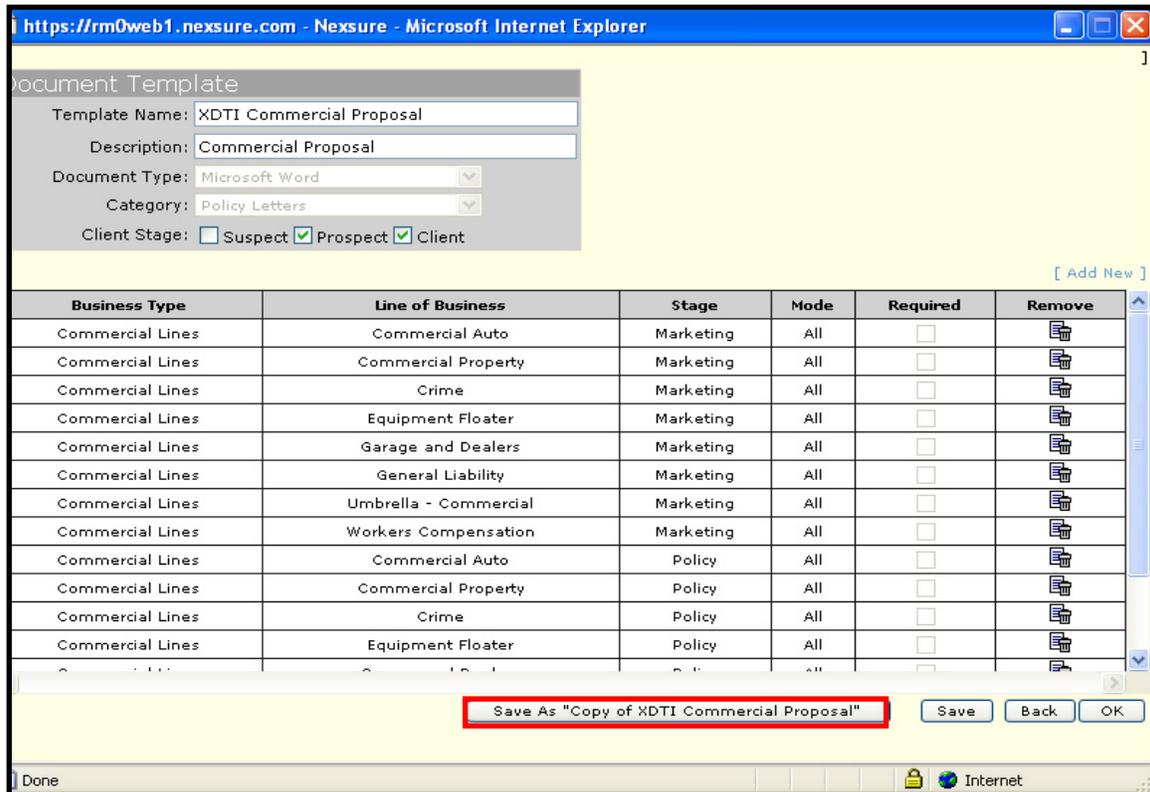
- a. *The document may also be saved locally and will still retain the validity of all the Nexsure fields by clicking File from the menu and Save As. Browse to store the document locally.



- b. Once the document is saved, it may be inserted into a template created in Nexsure by first adding the template and launching. Click, Insert on the menu and then file. Find where you stored the document and insert it into the document. No need to replace the fields as they will be fully functional. Do not open Nexsure Office Integration and then try to open another session of word and copy/paste. This does not work well and could result in loss of your document. The best method is Insert – File option.



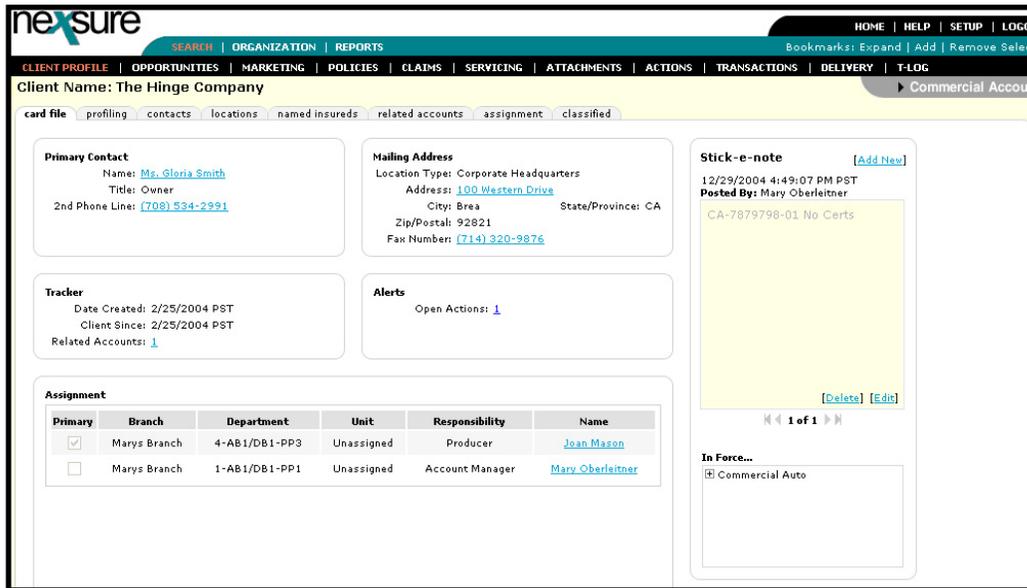
2. To make a copy of an existing Template do the following:
 - a. Click Setup from the Utility Menu
 - b. Click Document Templates from the Setup Console
 - c. Locate the document Template to copy
 - d. Click the Details icon from the summary screen
 - e. At the bottom of the screen, click the Save As "XXXX XXXX" button to save a copy of the template. The template will be given the exact name except that it has the words Copy of added to the front of the name.
 - f. This feature is used when you have a template that you may want to upgrade but allow staff to continue using while upgrading a newer version or another one almost exactly like this one needs to be added.



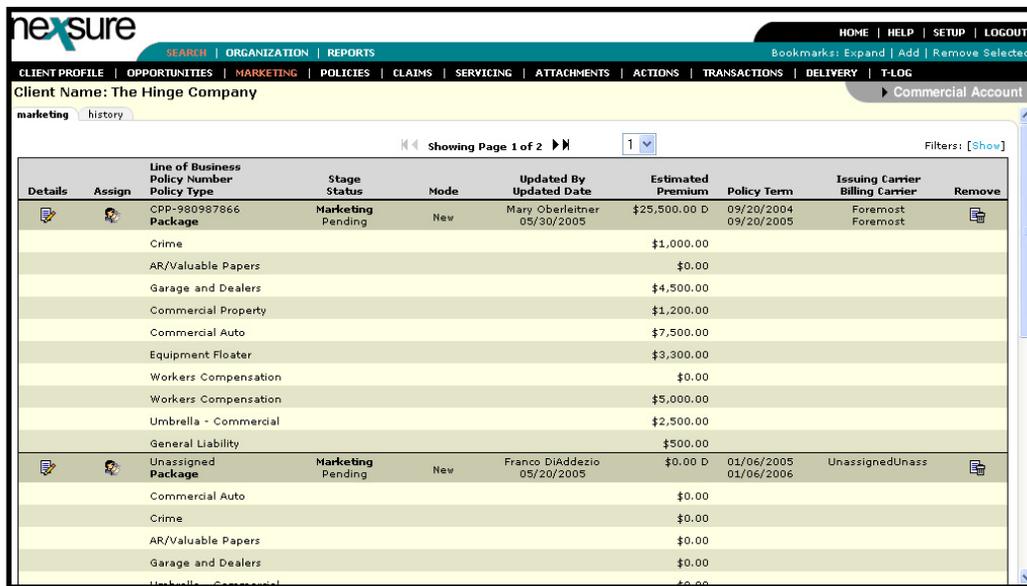
Merging the Document Template at Client/Policy Level

HOW to merge a Document Template at Client/Policy Level

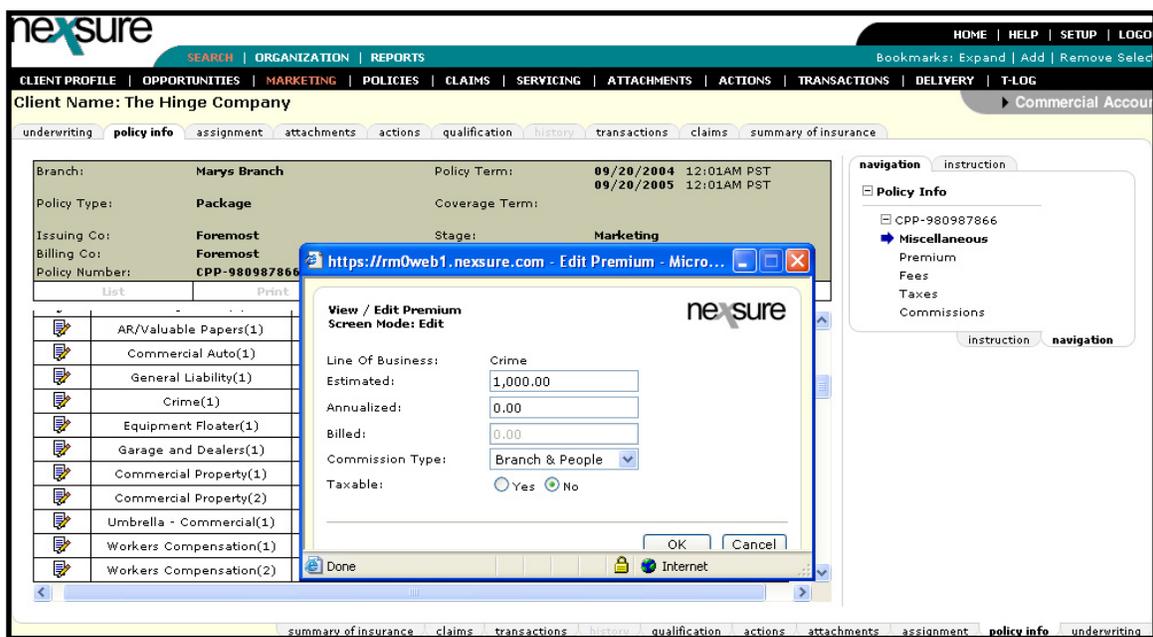
1. After searching for the client from Search on the Primary menu, click the details icon beside the entity (Suspect, Prospect or Client). The clients Card file is displayed.



2. Document templates may either be added from Client or policy level. To add from client level, click the Attachments link on the Client menu. To add from policy level, click on Marketing to access marketing or Policies to access policies. In this example a proposal for marketing quotes will be shown.
3. After clicking on the Marketing link on the Client menu the Marketing summary displays.



- Click the Details icon of the quote to merge the template with to display the underwriting screen. Since the estimated premium is now included in the fields that can be merged to the template, make sure to enter the estimated premium on the policy info page.



- After completing all form and policy info fields, click the attachments tab to display the attachments summary view.



- To add a new document, click the [**Add New**] link located in the upper right corner of the screen to launch the **Add New Attachment** window.
- Click the radio button beside **Create Document with Template** to merge data with a template created in Setup.
- Enter an Attachment Name that identifies the document and then a brief Document Description.

The screenshot shows a dialog box titled "Nexsure Office Integration" with the "nexsure" logo in the top right corner. Below the title bar is a section header "Add New Attachment". There are five radio button options: "Add Attachment", "Create Document with Template" (which is selected), "Create Document without Template", "Attach Outlook Messages", and "Add External Attachment". Below these options are two text input fields: "Attachment Name:" with the value "New Business" and "Document Description:" with the value "Commercial Proposal". At the bottom right, there are two buttons: "Cancel" and "Next >>".

9. Click the **Next** button to display the document template search screen.

The screenshot shows a dialog box titled "Nexsure Office Integration" with the "nexsure" logo in the top right corner. Below the title bar is a section header "New Document". There are five input fields: "Template Name:" with the value "xdt", "Template Description:" (empty), "Document Type:" with a dropdown menu showing "MS Word", "Category:" with a dropdown menu showing "Proposal", and "Business Type:" with a dropdown menu showing "Commercial Lines". To the right of these fields is a "Search" button. Below a horizontal line, there is an "Available Templates:" label and a list box containing one item, "XDTI Proposal", which is highlighted. At the bottom right, there are two buttons: "Cancel" and "Next >>".

10. Use the drop down boxes, Template Name and Template Description to help filter through the list of document templates that have been created. Click the Search button to search for the document. The available template matches are displayed in the Available Templates window. Select the template by clicking it once. Click next to display the lines Policy Selection window.

Policy Selection
Select criteria to default into the document.

Named Insured:

Contact:

Location:

Assignment:

Line of Bus.	Policy Number	Stage	Issuing Carrier	Cvg Eff	Cvg Exp	Pol Eff	Pol Exp	Change	Desc
Commercial Auto	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	
Commercial Property	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	
Crime	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	
Equipment Floater	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	
Garage and Dealers	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	
General Liability	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	
Umbrella	..80987866	Marketing	Foremost	10/9/2004	10/9/2005	10/9/2004	10/9/2005	--	

Back Cancel OK

11. At the top of the screen, make sure to select if multiples exist, the following:
 - a. Named Insured
 - b. Contact
 - c. Location
 - d. Assignment

It is important to make these selections because these are the choices that will be available in the XML tree for selection as well as what will merge into the document template if these fields were used.

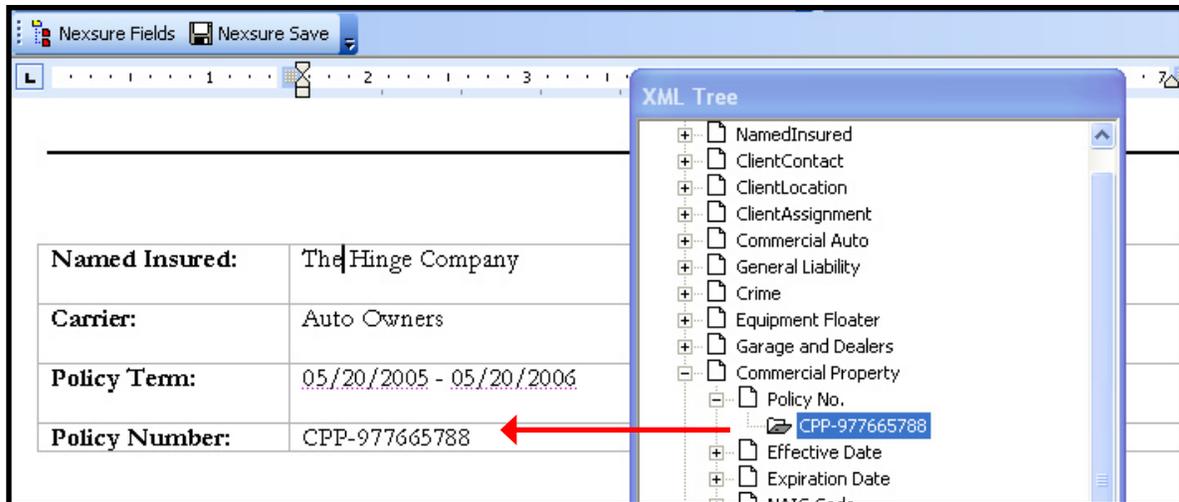
12. Clicking on the OK button will launch Microsoft word and begin the data merge. Clicking the **Back** button will display the previous screen and clicking the **cancel** button will abort the process.

Nexsure Fields Nexsure Save

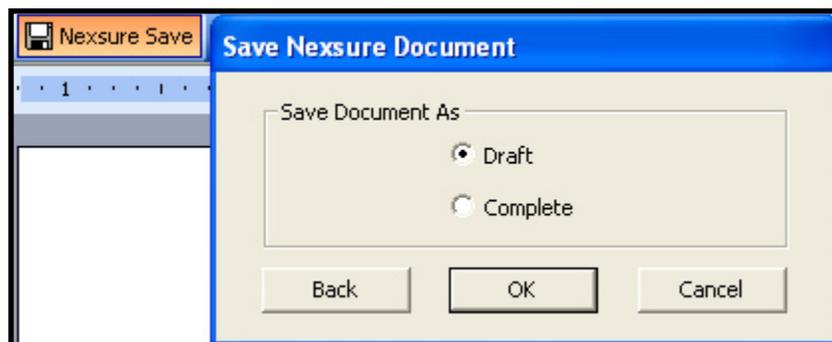
1 2 3 4 5 6

<p>Proposal Prepared for</p> <p>The Hinge Company</p> <p>100 Western Drive</p> <p>Brea, CA 92821</p>		
--	--	--

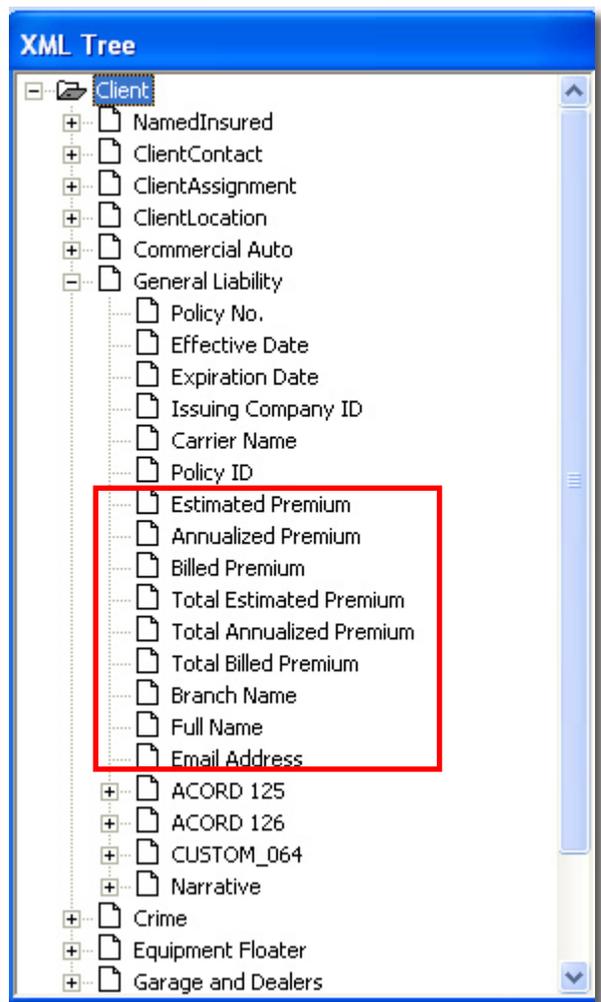
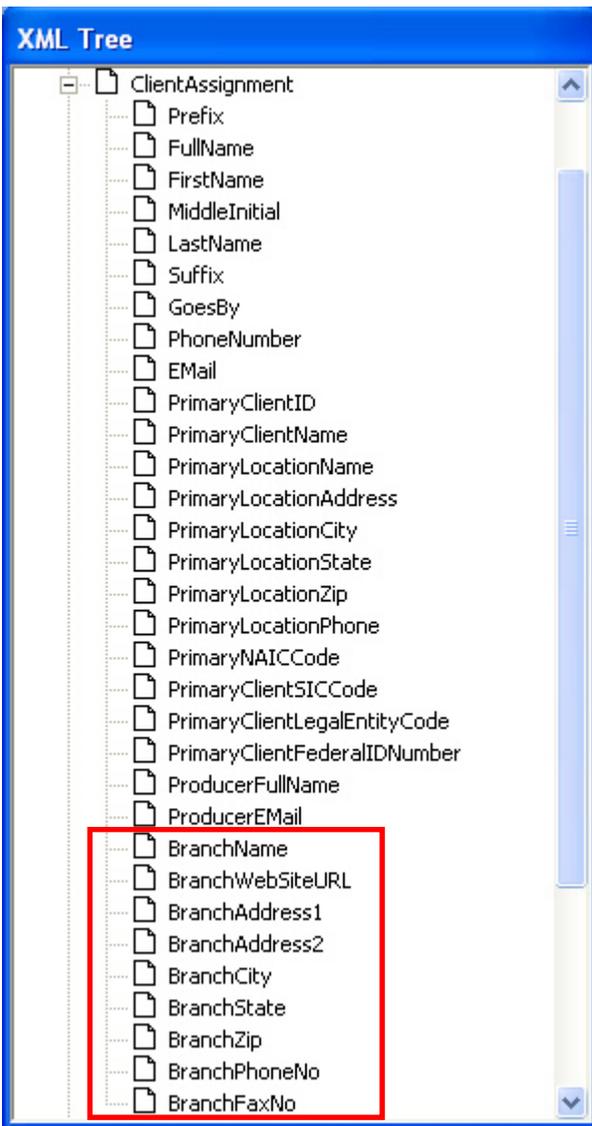
13. Click the **Nexsure Fields** button to display XML tree which contains the data from the form, client and policy header. Click on the + to open the tree, then click the data and drag it into the document.



14. Make any other modifications necessary. The document may be printed normally by clicking the printer icon or clicking File from the menu and Print.
15. To save the document to the client account, click the Nexsure Save As button. Selecting Draft allows further editing of the document at a later time. Selecting Complete saves the document so that the next time it is opened in an internet explorer window and no edits to this document may be updated to the existing document. To abort the save process and go back to the document select the **Back** button. To abort the document entirely, click Cancel button and on the next popup the OK button, none of the document will be kept.



New XML Fields



Section 5: Sample Nexsure XDTI Commercial Proposal

The following is a Sample of the Commercial Proposal feature released in Nexsure version 1.76.

Note: Do not edit the XDTI commercial proposal template. Be sure to use the Save As button to save a copy for editing after clicking the Details icon.

**Proposal Prepared
for
The Hinge Company
100 Western Drive
Brea, CA 92821**

**Presented By
Joan Mason
Nexsure Agency
78000 Main Street Suite 125
Birmingham, AL 35051**

Date: June 2, 2005

Premium Summary

Named Insured: The Hinge Company

Coverage Type	EXPIRING POLICY	CURRENT PROPOSAL
Commercial Package		\$0.00
Commercial Property		\$1,200.00
Garage		\$4,500.00
Equipment Floater		\$3,300.00
Commercial Crime		\$1,000.00
General Liability		\$ 500.00
Business Auto		\$7,500.00
Umbrella		\$2,500.00
Workers' Compensation		283,345.40
Fully Earned Fee (If any)		\$0.00
	GRAND TOTAL	\$303,845.40

Insured Locations

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Locations

Loc #	Bldg #	Address			
1	1	1000 Main Street Boulevard Drive Avenue	San Francisco City	CA	85264-4589
2	1	2000 Main Street Boulevard Drive Avenue	San Francisco City	CA	85264-4589
3	1	3000 Main Street Boulevard Drive Avenue	San Francisco City	CA	85264-4589
4	1	4000 Main Street Boulevard Drive Avenue	San Francisco City	CA	85264-4589
5	1	7865 Gregerson Way	Brea	CA	92821

Property

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Coverage Detail

Loc #	Bldg#	Subject	Amount	Coins.	Valuation	Cause of Loss	Deductible
1000 Main Street Boulevard Drive Av							
1	1	Building	\$1,000,000	8%	RC	Special	\$ 500
		Contents	\$350,000	80%	RC	Special	\$ 500
2000 Main Street Boulevard Drive Av							
2	1	Building	\$2,000,000	8%	RC	Special	\$ 200
		Contents	\$250,000	20%	RC	Special	\$ 200
3000 Main Street Boulevard Drive Av							
3	1	Building	\$3,000,000	30%	RC	Special	\$ 300
		Contents	\$33,333	33%	RC	Special	\$ 333
4000 Main Street Boulevard Drive Av							
4	1	Building	\$444,444	44%	RC	Special	\$ 44
		Contents	\$400,000	40%	RC	Special	\$4,400
7865 Gregerson Way							
5	1	Building	\$55,555	55%	ACV	Special	\$5,500
		Business	\$124,000	80%	ACV	Special	\$ 500
		Personal Prop.					

Business Automobile

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Coverage	Autos Covered	Limits of Liability	
Liability Insurance	Any Auto Hired Autos Non-Owned Autos	\$1,000,000	Combined Single Limit
Medical Payments	All Owned Autos Hired Autos Only	\$50,000	Each Person
Uninsured Motorists	All Owned Autos	\$100,000 \$500,000 \$50,000	BI Each Person Each Accident Property Damage
Hired Auto Liability	If any Basis		
Non-Owned Liability	States: If any		

Vehicle Schedule

#	Year	Make	Model	Vin #	COMP DED.	COLL DED.
1	2003	Ford	F150	7988YU798789HJ798	\$ 500	\$ 500
2	2003	Ford	Mustang	54322316879878974	\$ 500	\$ 500
3	2003	Ford	F150	75457987984654987	\$ 500	\$ 500
4	2003	Ford	F150	76348763487634398	\$ 500	\$ 500
5	2003	Ford	Taurus	34634565537678236	\$ 500	\$ 500
6	2005	Ford	Crown Victoria	23466568469237403	\$ 500	\$ 500
7	2003	Ford	Explorer	54322316879878974	\$ 500	\$ 500
8	2004	Ford	Focus	74623746126218961	\$ 500	\$ 500

Garaging Addresses

Veh#	City	State	Zip	Coverage Type	Physical Damage Limit
1	Brea	CA	92821	Agreed Amount	\$50,000
2	Los Angeles	CA	92820	Stated Amount	\$50,000
3	Brea	CA	92821	Actual Cash Value	
4	Los Angeles	CA	92820	Stated Amount	\$50,000
5	Los Angeles	CA	92820	Stated Amount	\$50,000
6	Los Angeles	CA	92820	Stated Amount	\$50,000
7	Los Angeles	CA	92820	Stated Amount	\$50,000
8	Los Angeles	CA	92820	Stated Amount	\$50,000

Drivers

Name		Date of Birth	Drivers License Number
Gloria	Smith	04/07/1964	4987984654465798798
James	Johnson	04/12/1958	5487988546498798745
Joan	Smith	08/05/1963	4598782134879876554
Henritta	Morgan	02/03/1981	

Commercial Liability

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005
Coverage Type: Occurrence

Coverages

Each Occurrence	\$1,000,000
Personal Injury & Advertising Injury	\$1,000,000
General Aggregate	\$2,000,000
Products/Completed Operations Aggregate	\$1,000,000
Medical Expense – any one person	\$50,000
Damage to Rented Premises – Per Occurrence	\$25,000
other	\$30,000
Bodily Injury Deductible - Per Occurrence	\$3,000
other Deductible - Per Occurrence	\$1,000

Employee Benefit Liability

Limit: \$100,000
 Deductible: \$25,000 per claim
 Retro Date: 12/06/2004

Rating Basis: Subject to Audit

Loc #	Classifications	Prem. Basis	Prem/Ops Rate	Prem/Op s Prem.	Products Rate	Products Prem.
1	Factory	S	120.00	\$75,000.00	25.16	\$12,000.00
2	Office	S	120.00	\$35,620.00	2.58	\$12,000.00
3	Warehouse	S	12.18	\$2,567.00	7.25	\$12,000.00

Equipment

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Operations

Type of Operation	Territory of Operation
-------------------	------------------------

Descriptions of Operation

Calhoun

Coverage Deductible: 500.00

Coinsurance on Scheduled Equipment: 80%

Scheduled Equipment

#	Model Year	Manufacturer	Type	Model	Serial #	Purchase Date	Amt of Insurance
1	2000	Manufacture	Type	model	097878AB87982343431X	12/11/2000	\$4,500
2	2002	Manufacture	Type	model	097878AB8798234	12/11/2000	\$7,600
3	2004	Manufacture	Type	model	546536	12/11/2004	\$4,500
4	2003	Manufacture	Type	model	09AB87982343431X	12/11/2000	\$4,500
5	1999	Manufacture	Type	model	097878AB8723434	12/11/2000	\$4,500
6	1998	Manufacture	Type	model	123448AB8798234	12/11/1998	\$4,500
7	2002	Manufacture	Type	model	0948357983457	12/11/2002	\$4,500
8	2001	Kubota	Type	model	087945745erh	12/11/2001	\$4,500
9	2003	John Deere	Type	model	0948095uer984	12/11/2003	\$4,500
10	2004	Manufacture	Type	model	091232387982343431q	12/11/2004	\$4,500
TOTAL VALUE:							\$48,100.

Unscheduled Equipment

Description	Maximum Item	Coins. %	Amt of Insurance
Equipment	\$120,000	80%	\$300,000
Office Equipment	\$1,000	80%	\$75,000

Umbrella

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Coverages

Limits

Limit of Liability	\$3,000,000	Each Occurrence
Retained Limit	\$5,000	
First Dollar Defense	Yes	

Underlying Insurance

Type of Insurance	Eff Date	Exp Date	Limit
Auto Liability	09/20/2004	09/20/2005	\$2,000,000 Each Occurrence
Auto Liability	09/20/2004	09/20/2005	\$2,000,000 Bodily Injury - Each Occurrence \$1,000,000 Bodily Injury - Each Accident \$500,000 Property Damage - Each Accident
General Liability Occurrence	09/20/2004	09/20/2005	\$1,000,000 Each Occurrence \$2,000,000 General Aggregate \$2,000,000 Products & Completed Operations Aggregate \$100,000 Personal and Advertising Injury \$50,000 Damage to Rented Prem Ea Occ. \$25,000 Medical Expense (any one person)
Employers Liability	09/20/2004	09/20/2005	\$100,000 Each Accident \$100,000 Disease Each Employee \$100,000 Disease Policy Limit
Descrip	09/20/2004	09/20/2005	\$7,000

Workers Compensation Prior Carrier Information and Loss History

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Year	Annual Premium	Mod	# Claims	Losses paid	Reserve
1999	\$450,000	1.23	45	\$123,000	\$ 0
2000	\$56,000	1.00	1	\$5,000	\$10,000
2001	\$65,000	1.34	2	\$12,300	\$1,000

<u>Description</u>	<u>Factor</u>	<u>Premium</u>
Increased Limits	2.25	\$12,000.00
Deductible	1.23	\$ 234.90
other fact descripti	8.90	\$ 790.00
Experience Modification	5.09	\$ 123.00
Loss Constant		\$ 125.00
Assigned Risk Surcharge	1.88	\$ 190.00
ARAP	0.25	\$ 34.00
other factor descri2	4.33	\$7,500.00
Schedule Rating	2.43	\$2,4300.00
CCPAP	34.78	\$ 345.98
Standard Premium	1.45	\$ 125.00
Premium Discount	0.35	\$- 343.00
Expense Constant		\$ 0.35
Taxes/Assessments		\$ 98.00
other factor descri3	3.22	\$2,556.00
Estimated Annual Premium		283,345.40

Included/Excluded Officers, Partners, Relatives

<u>Name</u>	<u>Title/Relationship</u>	<u>Ownership %</u>	<u>Include/Excluded</u>	
Kelly	Nelson	Owner	25%	INC
Jason	Nelson	Owner	25%	EXC

Garage

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Garage Operations

<u>Coverage</u>	<u>Limits of Liability</u>
Auto Only	\$1,000,000 Each Accident
Medical Payments	\$50,000 Applies to Autos

Autos Covered

<u>Coverage</u>	<u>Applicable to</u>
Liability:	Any Auto Hired Autos Only Non-Owned Autos used in Garage Business

Physical Damage

Comprehensive	All Owned Autos Hired Autos Only
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<u>Location #</u>	<u>Location Limit</u>	<u>Deductible per Auto</u>	<u>Max Deductible per Loss</u>
1	\$50,000	\$ 250	\$1,000
Collision		Hired Autos Only	
		<u>Deductible per Auto</u>	
		\$5,000	

Garage Keepers

Direct Basis Primary

Comprehensive

Autos Left for Service/Repair/Storage

<u>Location #</u>	<u>Location Limit</u>	<u># of Autos</u>	<u>Ded per Auto</u>	<u>Max Deductible per Loss</u>
1	\$500,000	250	\$1,000	\$5,000

Collision

Autos Left for Service/Repair/Storage

<u>Location #</u>	<u>Location Limit</u>	<u># of Autos</u>	<u>Ded per Auto</u>
1	\$5,000	25	\$ 500

Crime

Named Insured: The Hinge Company
Carrier: Foremost
Policy Term: 09/20/2004 - 09/20/2005

Coverage

Form	Coverage Description	Basis	Limit	Deductible
A	Employee Dishonesty ERISA Total Asset Value - \$13,111	Blanket	\$1,111 \$14,111	\$12,111 \$15,111
B	Forgery and Alteration		\$150,000	\$3,000
C	Theft, Disappearance & Destruction Inside The premises Outside the Premises	Schedule	\$3,333 \$34,333	\$32,333 \$35,333
D	Robbery and Safe Burglary Inside Robbery of Custodians Safe Burglary Outside the Premises	Blanket	\$4,444 \$42,444 \$45,444	\$41,444 \$43,444 \$46,444
E	Premises Burglary	Schedule	\$5,555	\$5,155
F	Computer Fraud		\$66,666	\$6,166
G	Extortion Insured's Loss Participation 77%		\$71,777	\$72,777
H	Premises Theft & Robbery Outside Theft Robbery Outside	Blanket	\$88,888 \$82,888	\$8,188 \$83,888
Q	Robbery & Safe Burglary Money & Securities Inside the Premises Outside the Premises	Schedule	\$99,999 \$92,999	\$91,999 \$93,999

Section 6: Nexsure XDTI Commercial Proposal User Notes

General Notes

Every effort has been made to ensure the appropriate fields merge in the document based on standard ACORD application completion. It is critical that every user review the proposals after the merge for accuracy. Data downloads and user entry to the ACORD applications can affect the way a field merges. Ultimately it is the responsibility of the user to verify the accuracy of the proposal.

We recommend that no changes be made to this template. If changes are desired, click the Details icon of this template and click the *Save As "Copy of XXXX"* button at the bottom of this window and edit the newly created copy.

"Limit" and "Deductible" fields where alpha characters are allowed will not populate the proposal properly since a mask is used to format output to include commas and dollar sign.

Most numerical coverage limits are in the format \$#,###,### with no trailing decimals, however there are some exceptions such as on Workers Compensation rates and premiums. If a text entry exists in a numerically formatted field, an error message will be returned. The user will need to delete and replace error with the proper data. Since it is not likely the user will know what to populate the field with, use the "Nexsure Fields" button to find the data to input. Whenever possible, correct the ACORD application with a numeric value to avoid the error in the future.

All pages except the Cover Page, Premium Summary and Insured Locations include a *HideBegin* merge field to exclude the page if the Policy ID for that line of business does not exist when the document is merged.

Cover Page

The customer name and address under "Proposal Prepared for" is pulling from the *Client* named insured and locations screen. The default after the document is selected is the primary assignments, so if primary is not desired use the drop down boxes to select the appropriate fields for the merge.

Under "Presented By" the primary *Client* Producer assignment will default. To change, use the drop down boxes to select the appropriate name for the producer just prior to merging the document. The agency name is pulling from Branch information.

Premium Summary

Named Insured is pulling from the *Client* named insured.

Comparison Dates: If desired would be typed in by the user after the document is merged on the Client/Prospect account.

Coverage Type descriptions have been typed in and may be modified after the document has been merged on the Customer/Prospect account.

The user should type the next column *Expiring Policy*. The *Current Policy* column populates from estimated premium entered on the Policy Info tab at underwriting level. If no amounts are entered, zeros will display and may be replaced with a numeric value. If an amount is replaced, make sure to do the following:

To calculate the Grand total after merging the document:

- Click in the Grand total amount field
- Right click and choose to update field.

This will only work if every column has an amount entered. The small rows separating the Line of Businesses has a zero already entered using a white font color, so it will not print.

Insured Locations

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling from Issuing Company on the Line of Business Policy Header.

Policy Term is pulling from Effective and Expiration Dates on the Line of Business Policy Header.

Location #, Building # and address are pulling from the standard *ACORD 125 Commercial General Application* when accompanied by the *ACORD 140 Commercial Property*. If the Commercial Property *ACORD 140* is not selected, this section of the proposal will be empty.

Property

Standard *ACORD 140 Commercial Property* is used for the Property section of the proposal.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the *XDTI Commercial Proposal* template.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

If the blanket check box is selected on the first subject of insurance, blanket coverage populates on the proposal above the coverage details.

If anything except numbers and decimals exist in the Amount and Deductible fields an error message is returned. The user will need to delete and replace error with the proper data. Since it is not likely the user will know what to populate the field with, use the "Nexsure Fields" button to find the data to input. Whenever possible, correct the *ACORD* application with a numeric value to avoid the error in the future.

Amount fields are formatted for a numeric value and should be edited if text is entered instead.

General Liability

Standard *ACORD Commercial General Liability 126* is used for the General Liability section of the proposal.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Rating Basis refers to a policy that is subject to an audit. If the Audit field is blank no rating basis is returned on the proposal. If the Audit field is not blank the proposal will populate with the selected rating basis derived from the ACORD application, such as “subject to audit”.

Premium Basis is dependent on the premium code. If not entered in the premium code field on the application, the premium basis will not populate the proposal.

Amount fields are formatted for a numeric value and should be edited if text is entered instead.

Equipment

Standard *ACORD Equipment Floater Application 146* is used for the Equipment section of the proposal.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Amount fields are formatted for a numeric value and should be edited if text is entered instead. (No alpha characters). The “Total Value” that automatically totals the schedule amount is based on the autosum “above” command in word. To get the sum to calculate, delete the blank space above the total, then right click on the error message and choose update field. The amount will display. A blank amount of insurance will prevent autosum from totaling correctly. Either “0” or the correct value would need to be on the application.

Business Auto

Standard *ACORD Business Auto Application 127 CA, 127 TX and 127 MI* were used for the Business Automobile section of the proposal; therefore, some desired coverage information may not be included. To edit, make a copy of this template and edit the copy.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Amount fields are formatted for a numeric value and should be edited if text is entered instead.

Garage

Standard *ACORD Garage and Dealers Application 128 CA and 128 MI* were used for the Garage section of the proposal; therefore, some desired coverage information may not be included. To edit, make a copy of this template and edit the copy.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Amount fields are formatted for a numeric value and should be edited if text is entered instead.

Crime

Standard *ACORD Crime Application 141* is used for the Crime section of the proposal.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Amount fields are formatted for a numeric value and should be edited if text is entered instead.

Workers Compensation

Standard *ACORD Workers Compensation Application 130* is used for the Workers Compensation section of the proposal; therefore, some desired coverage information may not be included. To edit, make a copy of this template and edit the copy.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Amount fields such as rates, premiums and limits include formatting for currency. The field can be modified as necessary after merging the document on the client/prospect account.

“Coverage A” will always return “Statutory”. If coverage is other than statutory, the user is responsible to modify after merging the document on a client/prospect account to reflect accurate coverage information.

Umbrella

Standard *ACORD Commercial Umbrella Application 131* is associated with the Umbrella Proposal.

Named Insured is pulling from the *Client* named insured as selected in the drop down box prior to merging the document.

Company is pulling the Issuing Company on the Line of Business Policy Header.

Policy Term is pulling the Effective and Expiration Dates on the Line of Business Policy Header.

Amount fields are formatted for a numeric value and should be edited if text is entered instead.