



TIPS AND FACTS

Issue 14

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- ✖ Understanding the Date and Icon Colors on Home Pages

Understanding the Date and Icon Colors on Home Pages

HOME > ACTIONS

The **HOME > ACTIONS** screen can be accessed by clicking the **HOME** link on the **Utility** menu.

When located in another area of the Home page, click the **ACTIONS** link to access the **HOME > ACTIONS** screen.

Showing Page 1 of 1

| Details | Client Name | Action Topic | Policy Info | Status | Due Date | Days Left (Overdue By) | Assigned To | Created By | Updated By |
|---|-----------------|--------------------|--------------------------------------|--------|-------------------------|------------------------|------------------|-----------------------------|-----------------------------|
| Beautiful World of FI | Conference call | Call Client | CPP-1123455-3; Commercial | Open | 10/10/2005 12:01 AM CST | (1) | Mary Oberleitner | Mary Oberleitner 08/17/2005 | Mary Oberleitner 10/11/2005 |
| Called and asked about Earthquake coverage. Told he has no coverage. I am to quote and call back. | | | | | | | | | |
| Henderson Hardware | Marketing | Annotation | Unassigned; Comm Property, Equipment | Open | 10/15/2005 1:04 PM CST | 4 | Mary Oberleitner | Mary Oberleitner 02/08/2005 | Mary Oberleitner 10/05/2005 |
| 10/15/05 quote by date. Re-market policy. | | | | | | | | | |
| Henderson Hardware | General Audit | Annotation | CP-78908908-2003; PROPC; (09/ | Open | 10/20/2005 9:02 AM CST | 9 | Mary Oberleitner | Mary Oberleitner 10/03/2005 | Mary Oberleitner 10/11/2005 |
| 10/20/05 call customer if money not received. | | | | | | | | | |
| Beautiful World of FI | Documentation | Phone Conversation | AU-789749749832; Coi | Open | 11/15/2005 12:01 AM CST | 35 | Mary Oberleitner | Mary Oberleitner 10/06/2005 | Mary Oberleitner 10/11/2005 |
| Note 9 1 2004 Ford Mustang 7.98798687676978E \$1,000 \$1,000 2 2003 Chevy Malibu 9.8978979797979E 3 2004 Ford Mustang | | | | | | | | | |

User: Mary Oberleitner [Administrator] Signed On At 10/11/2005 2:26:41 PM CST Status: In A Meeting

All actions on the **HOME > ACTIONS** page are displayed with a specific colored number to help determine visually when actions are getting closer to or past their due date.



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The **Days Left (Over Due By)** displays a number countdown of days the action is due or overdue. The number is displayed in one of three colors and changes based on what the current date is in relation to the due date of the action.

The definitions of these color coded numbers are as follows:

- **Green** indicates more than five days before the due date.
- **Orange** indicates five days or less before the due date.
- **(Red)** indicates the number of days past the due date.

Note: These same colors are seen on Client Actions as well as at Policy level and have the same meaning.

HOME > BINDER LOG

Use the Coverage Expiration date on the **HOME > BINDER LOG** to determine when binders should be extended and to follow-up on receipt of the policy or change. These color coded dates are to help you determine visually when binders are getting closer to their expiration date.

| binder log | | | | | | | | |
|--|--------|------------------------------|---------------------------------|------------------------|------------------------------|---------------------------------|--|--|
| All | | Showing Page 1 of 2 | | | 1 | Filters: [Show] | | |
| Details | Assign | Client Name Policy Number | Policy Type Line of Business | Stage Status | Updated By Last Updated | Annualized \$ Billed Premium | Coverage Eff Date Coverage Exp Date | Billing Carrier Issuing Carrier |
| Janet Anderson (Personal Lines) | | | | | | | | |
| | | AL-10000-1 | Monoline Personal Auto | Policy Rewritten | Mary Oberleith 08/05/2004 | \$0.00 A \$0.00 A | 10/24/2003 10/24/2004 | United Fire & Cas United Fire & Cas |
| John Smith (Commercial Lines) | | | | | | | | |
| | | BA-7878789 | Monoline AUTOB | Policy Bound | Mary Oberleith 09/01/2004 | \$0.00 D \$0.00 D | 10/30/2003 10/30/2004 | Hartford Hartford |
| One Stop Shopping (Commercial Lines) | | | | | | | | |
| | | C-property | Monoline Commercial Property | Policy Future | Mary Oberleith 03/28/2005 | \$0.00 D \$0.00 D | 03/28/2005 05/27/2005 | AIG North America AIG North America |
| | | Eqpt-1 | Monoline Equipment Floater | Policy In Force | Mary Oberleith 07/21/2005 | \$0.00 D \$0.00 D | 07/21/2005 09/19/2005 | Travelers Travelers |
| | | Unassigned | Monoline Commercial Property | Policy Bound | Mary Oberleith 07/22/2005 | \$0.00 D \$0.00 D | 07/22/2005 09/20/2005 | Allied Insurance Allied Insurance |
| | | C-Property w-glass | Monoline Commercial Property | Endorsement Pending | Mary Oberleith 08/23/2005 | \$0.00 A \$0.00 A | 10/23/2005 12/22/2005 | Carriers Insurance Carriers Insurance |
| Brenda Maxim Sales (Commercial Lines) | | | | | | | | |
| | | gg-2472 | Monoline Commercial Property | Policy Bound | Mary Oberleith 08/31/2005 | \$0.00 A \$0.00 A | 08/20/2005 10/19/2005 | Travelers Travelers |
| Henderson Hardware (Commercial Lines) | | | | | | | | |
| | | CPP-34500-1 | Package Commercial Auto (AL | Policy In Force | Mary Oberleith 10/05/2005 | \$8,800.00 D \$8,800.00 D | 09/23/2005 11/22/2005 | Hartford Hartford |


The binder **Coverage Exp Date** is displayed in one of four colors and changes based on what the current date is in relation to the binders coverage expiration date.

- **Black** indicates that the binder will expire in 90 days or more.
- **Green** indicates that the binder will expire in the next 89 – 31 days.
- **Orange** indicates that the binder will expire in the next 30 days.
- **Red** indicates that the binder has expired.







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HOME > EXPIRATIONS

The **HOME > EXPIRATIONS** page shows policies that will be expiring within the selected date range. Both the **Detail**  icons and the policy term expiration dates are color coded to help you determine visually when the policy is getting closer to the expiration date.

When you first login to Nexsure the **HOME > ACTIONS** page is displayed, click the **EXPIRATIONS** link from any Home page.

The policy **Detail**  icons can display in one of three colors. Two of the three colors appear on the **HOME > EXPIRATIONS** page. The third color is only shown in Client Policy and history levels. That third color is green which indicates a renewed policy. When a policy is renewed it no longer appears on the **HOME > EXPIRATIONS** page. The two **Detail**  icons displayed on the **HOME > EXPIRATIONS** page are defined as follows:

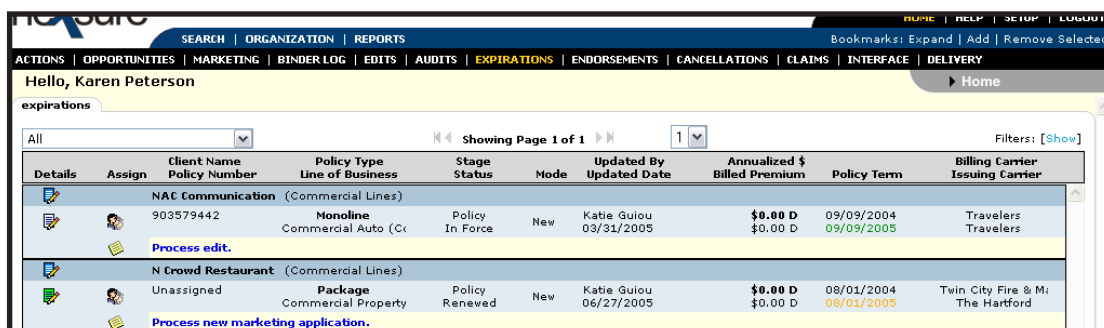
-  The **White** indicates that the policy status is still in force.
-  The **Red** indicates that the policy is expired and no longer in force.





Note: These same icon colors are seen on other home pages as well as on the Policies Summary and have the same meaning.

The color coded **Policy Term** dates help visually determine when policies are getting closer to their expiration date. There are four expiration date colors and these are defined as follows:

- **Black** indicates that the policy is greater than 90 days from the expiration date.
- **Green** indicates that the policy will expire within 90 days or less.
- **Orange** indicates that the policy will expire is 30 days or less.
- **Red** indicates that the policy has expired.

Note: These same colors are seen on the Policies Summary and have the same meaning.




| Details | Assign | Client Name Policy Number | Policy Type Line of Business | Stage Status | Mode | Updated By Updated Date | Annualized \$ Billed Premium | Policy Term | Billing Carrier Issuing Carrier |
|---|---|----------------------------------|--|--------------------|------|----------------------------|---------------------------------|--------------------------|------------------------------------|
|  |  | NAC Communication 903579442 | (Commercial Lines) Monoline Commercial Auto (C | Policy In Force | New | Katie Guiou 03/31/2005 | \$0.00 D \$0.00 D | 09/09/2004 09/09/2005 | Travelers Travelers |
| Process edit. | | | | | | | | | |
|  |  | N Crowd Restaurant Unassigned | (Commercial Lines) Package Commercial Property | Policy Renewed | New | Katie Guiou 06/27/2005 | \$0.00 D \$0.00 D | 08/01/2004 08/01/2005 | Twin City Fire & M The Hartford |
| Process new marketing application. | | | | | | | | | |






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HOME > ENDORSEMENTS

The **HOME > ENDORSEMENTS** page shows the coverage term dates for unposted endorsements within the selected date range. Both **Detail**  icons and the coverage term expiration dates are color coded to help visually determine when the policy is nearing the expiration date. The last updated dates may be used in conjunction with the coverage term effective dates to determine when a second request from the carrier should be made.

When you first login to Nexsure, the **HOME > ACTIONS** page is displayed, click the **ENDORSEMENTS** link from any Home page.





The policy **Detail**  icons appear in one of two colors on the Home-Endorsements page and are defined as follows:

-  The **White** indicates that the policy status is still in force.
-  The **Red** indicates that the policy is expired and no longer in force.

The color coded **Coverage Exp Dates** help visually determine when coverage will expire. There are four expiration date colors and these are defined as follows:

- **Black** indicates that the policy is greater than 90 days from the coverage expiration date.
- **Green** indicates that the coverage will expire within 90 days or less.
- **Orange** indicates that the coverage will expire is 30 days or less.
- **Red** indicates that the coverage has expired.


Note: The Coverage Eff Date is when the change is effective and the Coverage Exp Date is when the coverage expires.

| endorsements | | | | | | | | | |
|---|---|------------------------------|-----------------------------------|------------------------|------------------------------|---------------------------------|--|--------------------------------------|--|
| All | | Showing Page 2 of 2 | | | 2 | | Filters: [Show] | | |
| Details | Assign | Client Name Policy Number | Policy Type Line of Business | Stage Status | Updated By Last Updated | Annualized \$ Billed Premium | Coverage Eff Date Coverage Exp Date | Billing Carrier Issuing Carrier | |
|  |  | Rugged Tires | (Commercial Lines) | | | | | | |
| | | EDP-98098908 | Monoline Electronic Data Proce | Endorsement Pending | Mary Oberleith 10/04/2005 | \$0.00 D \$0.00 D | 10/04/2005 04/27/2007 | Allied Insurance Allied Insurance | |
| No Message(s). | | | | | | | | | |
|  |  | Beautiful World of FI | (Commercial Lines) | | | | | | |
| | | AU-789749749832 | Monoline Commercial Auto (AL | Endorsement Pending | Mary Oberleith 10/10/2005 | \$0.00 A \$0.00 A | 11/10/2005 10/21/2005 | Auto Owners Auto Owners | |
| Process endorsement. | | | | | | | | | |






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HOME > CANCELLATIONS

The **HOME > CANCELLATIONS** page shows the coverage term dates for the pending cancellations within the selected date range. Both **Detail**  icons and the coverage term expiration dates are color coded to help determine visually when the policy is getting closer to the expiration date. The last updated dates in conjunction with the coverage term expiration dates may be used to determine when to request a second request from the carrier or call them.

When you first login to Nexsure the **HOME > ACTIONS** page is displayed, click the **CANCELLATIONS** link from any Home page.













The policy **Detail**  icons appear in one of two colors on the **HOME > CANCELLATIONS** page and are defined as follows:

-  The **White** indicates that the policy status is still in force.
-  The **Red** indicates that the policy is expired and no longer in force.

The color coded **Coverage Exp Dates** help visually determine when coverage will expire. There are four expiration date colors and these are defined as follows:

- **Black** indicates that the policy is greater than 90 days from the coverage expiration date.
- **Green** indicates that the coverage will expire within 90 days or less.
- **Orange** indicates that the coverage will expire is 30 days or less.
- **Red** indicates that the coverage has expired.

Note: The Coverage Term Expiration Date is when the coverage expires.

| cancellations | | | | | | | | | |
|---|---|------------------------------|----------------------------------|-------------------------|------------------------------|---------------------------------|--|--|--|
| All | | Showing Page 1 of 1 | | 1 | | Filters: [Show] | | | |
| Details | Assign | Client Name Policy Number | Policy Type Line of Business | Stage Status | Updated By Last Updated | Annualized \$ Billed Premium | Coverage Eff Date Coverage Exp Date | Billing Carrier Issuing Carrier | |
|  |  | Rugged Tires | (Commercial Lines) | | | | | | |
| | | BOP | Monoline BOP | Policy Pending Cance | Mary Oberleith 07/20/2005 | \$0.00 D \$0.00 D | 07/11/2005 09/20/2005 | Auto Owners Auto Owners | |
| Process cancellation. | | | | | | | | | |
|  |  | Janet Anderson | (Personal Lines) | | | | | | |
| | | GL-4654564 | Monoline Commercial Auto (AL) | Policy Pending Cance | Mary Oberleith 10/12/2005 | \$0.00 D \$0.00 D | 11/11/2004 10/12/2005 | Safeco Ins. Safeco Ins. | |
| No Message(s). | | | | | | | | | |
|  |  | Boat-7987348 | Monoline Watercraft (small bo | Policy Pending Cance | Mary Oberleith 08/22/2005 | \$0.00 D \$0.00 D | 08/07/2005 10/15/2005 | American Superior American Superior | |
| No Message(s). | | | | | | | | | |
|  |  | Winston Auto Parts | (Commercial Lines) | | | | | | |
| | | PR-776545 | Monoline Commercial Property | Policy Pending Cance | Mary Oberleith 08/26/2005 | \$0.00 A \$0.00 A | 08/23/2005 10/26/2005 | Hartford Hartford | |
| Process cancellation. | | | | | | | | | |
|  |  | Block Buster | (Commercial Lines) | | | | | | |
| | | 1234567 | Monoline Commercial Auto | Policy Pending Cance | Mary Oberleith 01/11/2005 | \$1,000.00 D \$1,000.00 D | 01/11/2005 01/11/2006 | Allied Insurance Allied Insurance | |
| Added 2004 Ford Mustang | | | | | | | | | |
|  |  | Masons Grill | (Commercial Lines) | | | | | | |
| | | Contract#893478386 | Monoline Other (OTHER) | Policy Pending Cance | Mary Oberleith 08/24/2005 | \$0.00 A \$0.00 A | 01/14/2005 01/14/2006 | Premium Assignm Premium Assignm | |