



## TIPS AND FACTS

### Issue 15

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#### ***eServices***

The **eServices** option in Nexsure provides users real-time inquiry capabilities within a carrier's (or other third-party such as a MGA) secured Web site. This eliminates the need for the agency to log out of Nexsure or open another browser window to access the carrier's site. Users will have access to the very latest information directly from the carrier's Web site – the same information the underwriters see. Nexsure eServices can include direct links to such things as:

- Billing Inquiry
- Policy Inquiry
- Claims Inquiry
- Policy Documents

Automated login is also considered an eServices option. With automated login, another browser window is launched and the user is automatically logged into the carrier's secured site and control is transferred to the carrier's agent home page. From that point, the user can then navigate manually through the carrier site. Keep in mind that the active policy number from Nexsure is automatically copied to your PC clipboard when a carrier page is launched through Nexsure eServices. Therefore, when that policy number is needed, the user can just right mouse click on the policy number field in the carrier Web site and paste that policy number from the PC clipboard. There is no need to re-type that policy number.

The carrier information accessed through eServices will vary by carrier. Each employee of the agency, who has login rights to a carrier's site, must have their login information entered in Nexsure to access eServices. In rare situations, where an employee may have more than one login to a carrier's site, both should be entered in Nexsure. When an employee, with more than one login to a carrier's Web site, activates eServices they will be prompted to select which login they would like to use upon entering the carrier's site.

***Note: The eServices option is only available for in force business. It is not available for opportunities or marketing quotes.***



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### Setting Up Additional Logins

Click the **ORGANIZATION** link on the **Primary** menu.

Click the **employees** tab.

The screenshot displays the 'Additional Login Information' page for an employee named Eric Brehm. The page includes a navigation menu with 'employees', 'accounting', and 'vendors' tabs. The 'additional logins' tab is selected. A modal window titled 'Add a new Login' is open, showing the following fields:

- Additional Login Type: Abram Interstate
- Account Number: [Empty]
- Login ID: Eric1
- Password: [Empty]
- Confirm Password: [Empty]
- Department ID: [Empty] (optional)
- Description: [Empty]

The background shows a table of existing logins with columns: Details, Login Type, Account No., Login, Description, Date Created, and Remove.

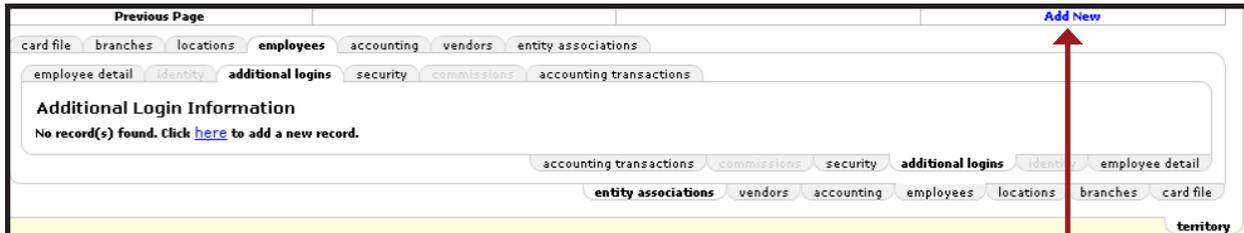
Details	Login Type	Account No.	Login	Description	Date Created	Remove
	Harleysville				3/22/2005	
	Hartford EBC				11/29/2004	
	Hartford Expressway				6/17/2005	
	Hastings Mutual				3/22/2005	
	Hawkeye-Security Insurance				9/7/2005	
	Homesite				3/31/2005	
	Hotmail-MSN Mail				9/6/2005	
	Hull & Company				3/22/2005	
	Humana Insurance				10/10/2005	
	IA&B Group				10/12/2005	

Click the **Details** icon of the appropriate employee.

Click the **additional logins** tab.



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Click the **Add New** link on the navigation toolbar.

**Note: It doesn't matter what level of the organization an employee's additional login information is added to.**

**Note: If a user is unable to locate an eServices provider in the Additional Login Type menu for which they would like to have Nexsure eServices available, feel free to email [Nexsure.Support@xdti.com](mailto:Nexsure.Support@xdti.com) with the request along with the URL link to the login page for that carrier/provider. Such requests will be evaluated and potentially queued for future Nexsure releases. Providers can include most any third-party secured Web site. If the login page does not contain a logo for the provider, please attach the logo to the email. Please indicate whether only automated login is desired or which other real-time inquiry functions are desired (billing inquiry, claims inquiry, policy inquiry, policy documents, etc...). If selected and deployed, this eService provider will appear in the additional login list for all Nexsure users (at all Nexsure agencies).**



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Select carrier/third-party eService provider from the **Additional Login Type** drop-down menu.

The required fields are the **Login ID**, **Password** and **Confirm Password**.

- **Note:** It is necessary to overwrite the Nexsure default Login ID with the correct Login ID for that carrier Web site.

The **Department ID** is an optional third field used to collect any additional login information other than login id or password. (IE: department code, group id, producer code, etc.)

Complete the **Description** field, this field is optional.

Click **Save** to save the Additional login information. Click **Cancel** to abort.

Repeat the above steps to add the additional login information for all carriers for the employee.

**Note:** Users now have the capability to change their passwords from the primary eServices pop-up window. However, the first time that a particular eServices provider is added, that needs to be done from this organization menu. Users that do not have rights to the organization menu will need to request that eServices provider be added by their system administrator.



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### Using eServices

Click the **SEARCH** link on the **Primary** menu.

The screenshot shows the Nexsure application header with the following navigation links: HOME | HELP | SETUP | LOGOUT. Below this is a secondary menu: SEARCH | ORGANIZATION | REPORTS. A third menu contains: ACTIONS | OPPORTUNITIES | MARKETING | BINDER LOG | EDITS | AUDITS | EXPIRATIONS | ENDORSEMENTS | CANCELLATIONS | CLAIMS | INTERFACE | DELIVERY. The user is logged in as 'Hello, Rob Rohm'. The main content area shows a search results page for 'actions' with a table of columns: Client Name, Action Topic, Policy Info, Due Date, Days Left, Assigned To, Created By, and Updated By. A message below the table states: 'Filter result found no record(s). Please modify search criteria and try again.'

The screenshot shows the search results page. On the left, there are search filters for Entity (Client), Search Type (Contains), Branch, Client Stage (All), Client Type (All), Code Class (All), Code Designation (All), Status (All), and Client. The main area displays 'HISTORY RESULTS - CLIENT' with '4 Record(s) Found'. A table lists the results:

Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
	Angie's Angles	Personal	Client		Pamela	NY	13637	
	Rob Morrison	Personal	Prospect					
	Joe Schmoie	Personal	Suspect	Home	Beverly Hills	CA	90210	
	Martin Ash	Personal	Client		Brea	CA	92821	

Click the **Details** of the appropriate client.

The screenshot shows the Nexsure application header with the following navigation links: HOME | HELP | SETUP | LOGOUT. Below this is a secondary menu: SEARCH | ORGANIZATION | REPORTS. A third menu contains: CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG.

Click the **POLICIES** link in the **Client** menu.



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### Option 1

Click the **carrier's** name to launch eServices.

Client Name: Angie's Angles

Details	Line Of Business Policy Number Policy Type	Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Billing Carrier Issuing Carrier	Remove
	Homeowners HO987654321	Policy In Force	New	Pamela63 Stein 05/06/2004	\$0.00 D \$0.00 D	05/06/2004 05/06/2005	05/06/2004 05/06/2005	Atlantic Mutual Atlantic Mutual	
	Commercial Auto,Dwelling Fire	Policy Renewed	New	Pamela63 Stein 09/01/2004	\$0.00 D \$0.00 D	05/06/2004 05/06/2005	05/06/2004 05/06/2005	Acme Carrier Acme Carrier	
	Dwelling Fire				\$0.00/\$0.00				
	Commercial Auto				\$0.00/\$0.00				
	Commercial Auto ABC123	Policy Future	Renew	Pamela63 Stein 09/01/2004	\$0.00 D \$0.00 D	05/06/2005 05/06/2006	05/06/2005 05/06/2006	Acme Carrier Acme Carrier	

### Option 2

Click the **Details** icon of the policy.

	Commercial Auto ABC123	Policy Future	Renew	Pamela63 Stein 09/01/2004	\$0.00 D \$0.00 D	05/06/2005 05/06/2006	05/06/2005 05/06/2006	Acme Carrier Acme Carrier	
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Right mouse click on the **Print** option on the policy detail screen and select eServices.

Client Name: Angie's Angles

Branch: AAA Branch

Policy Type: Monoline

Issuing Co: Acme Carrier

Billing Co: Acme Carrier

Policy Number: ABC123

Policy Term: 05/06/2005 12:01AM PST, 05/06/2006 12:01AM PST

Coverage Term: 05/06/2005 12:01AM PST, 05/06/2006 12:01AM PST

Stage: Policy

Mode: Renew

Status: Future  Non-renewing

Buttons: List, -, -, **Print**, History, In Force, Save Changes



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### Option 3

- Click on the carrier names in the various Home menus (Expirations/Claims/Edits/Interface, etc).

The eServices pop-up window is displayed.

**Note: The inquiry capabilities are dependent upon each individual carrier's Web site.**

The screenshot displays the Nexsure eServices interface. On the left, a sidebar shows a 'CLIENT PROFILE' for 'eServices PL T' with various policy types listed, including 'Homeowners (PHOME)'. A red arrow points from the 'Homeowners (PHOME)' entry to the 'Auto-Login' button in the central pop-up window. The pop-up window is titled 'Central Insurance' and contains a 'Contact List' table, a login form, and a list of services.

Name	Title	City	State
Smith, Jim		Brea	CA

Below the table, the login form includes fields for 'Login: test', 'Password: [redacted]', 'Policy No: FMA 1111111', and 'Type: Personal'. A list of services is provided at the bottom of the pop-up:

- Billing Inquiry: Latest billing information
- Policy Lookup: Policy application information
- Claims Inquiry: Claims inquiry information
- DEC pages: DEC page listing
- Loss Run: Loss Run information
- Billing Statement: Billing Statement Information

Clicking on the **[Auto-Login]** option will take the user into the carriers' site. The active **policy number** of the client is copied to the clipboard for easy access while browsing on the carrier's Web site.



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The **eService Provider** is selected automatically based on the carrier name or NAIC code. To select a different eService provider for which an additional login has already been setup, just click on the drop-down box on the top of this window.

**[Search Web]** will initiate a Google search for the provider name.

**[Update]** will update the password for the eServices provider for the user. The user merely types in the new password over the hidden password shown and clicks the **Update** button. If the user wishes to update the **Login** they must also enter/re-enter the **Password** and then click the **Update** button. This feature allows users to update their eServices additional logins if they do not have access to the Nexsure Organization tab.

The screenshot shows the following elements:

- eService Provider:** Central Insurance (dropdown menu)
- NAICS Code:** 20230
- [Search Web]** and **[Update]** buttons
- Contact list** table:

Name	Title	City	State
Smith, Jim		Brea	CA

- eServices powered by** section:

- CENTRAL INSURANCE COMPANIES** logo
- Login:** test
- Password:** [hidden]
- Policy No:** FMA 1111111
- Type:** Personal (dropdown menu)
- [Auto-Login]** button

- Navigation menu:**

Billing Inquiry	Latest billing information
Policy Lookup	Policy application information
Claims Inquiry	Claims inquiry information
DEC pages	DEC page listing
Loss Run	Loss Run information
Billing Statement	Billing Statement Information

The **Policy No** field displays the active policy number from Nexsure. The policy number is formatted based on the needs of the carrier Web site. The assumed policy number format for the carrier is usually derived from a sample downloaded policy number from that carrier, if available. If policy numbers in Nexsure contain prefixes that are not used on the carrier Web site, this is the where they can be corrected. Users may correct the formatting of the policy number here before clicking **Auto-Login** or any of the other links. The policy number can also be completely overwritten in this window, if the inquiry functions are needed for a policy other than the one active in Nexsure. The eServices pop-up window will not affect the policy numbers in Nexsure.

The policy **Type** (personal vs. commercial) selection will normally default to the correct policy type. In certain cases, especially when accessing eServices through the Home/Interface menu, the policy type is not readily available to eServices. If the incorrect policy type is displayed, the user can then select the correct one. The policy formatting option will change to match the policy type.



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Other available options are listed under the eServices provider's logo. Just click the link to access.

***Note: If an additional login has been added for a carrier and the eServices window for the carrier doesn't appear, double-check to see that the carrier's NAIC code(s) are listed in the carrier setup record. If this is a carrier for which you are currently downloading, please check with your Nexsure system administrator before adding or changing NAIC codes. If Nexsure does not save the NAIC code, it is likely that NAIC code is already in use in your Nexsure database. In that case, check with your system administrator. If the provider does not have an NAIC, match the format of the name with the name listed in the Additional Login Type menu. If that is a problem, please notify Nexsure Support.***

***Note: Nexsure eServices are highly dependent upon the layout of carrier Web sites. Therefore, when carriers make changes to their Web sites, it is likely that eServices will stop prematurely. If the URL for the agent login page changes, eServices will not be functional until that URL is updated in a future Nexsure release. If the carrier keeps the login URL the same but changes the login page, it is possible that eServices will stop on that login page and possibly not fill in the username and/or password. These changes are rare but please report them promptly to Nexsure Support.***

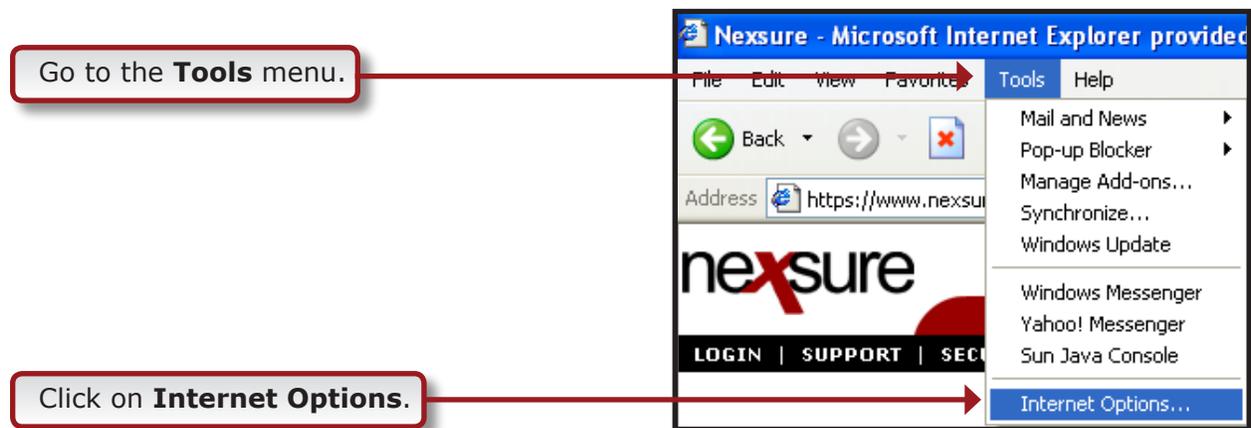
***If a link (billing inquiry, policy inquiry, etc.) does not go as far as it went the day before or if it stops well before the described function, please report that to Nexsure Support as well. Your help on this matter is greatly appreciated.***



## TIPS AND FACTS

### General Setup Considerations

Since Nexsure eServices provide automated access to real-time inquiry information from various carrier Web sites, Windows security setup is very important. Please see Windows XP Service Pack 2 security settings for further information. For each carrier Web site, enter the domain (Hartford.com, Travelers.com, Safeco.com) as a **Trusted Site**. Do not be more specific as you will want Windows to trust all content coming from that carrier site. To configure these settings, launch Microsoft® Internet Explorer and follow the instructions below:



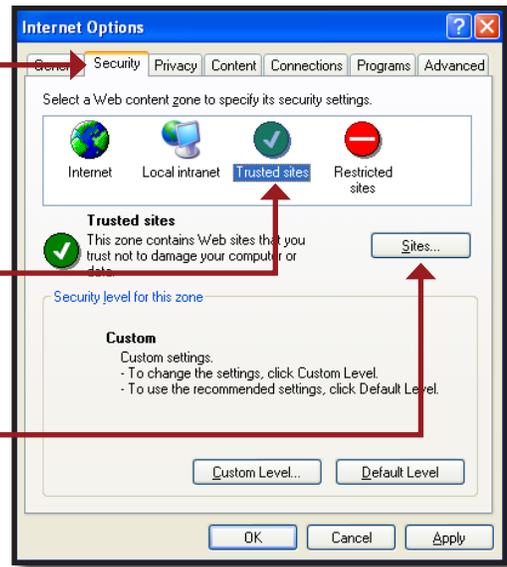


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Go to the **Security** tab.

Click on **Trusted sites**.

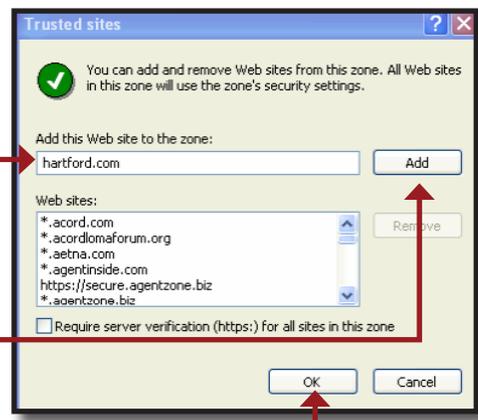
Click on the **Sites** button.



For each carrier Web site, enter the domain (such as **hartford.com**) name. Do not be more specific as you will want Windows to trust all content coming from that carrier site. Be sure to include **nexsure.com** in the list of Web sites.

Click the **Add** button after each domain name and the domain will appear in the list of Web sites.

Click the **OK** button after adding all of the necessary domain names.



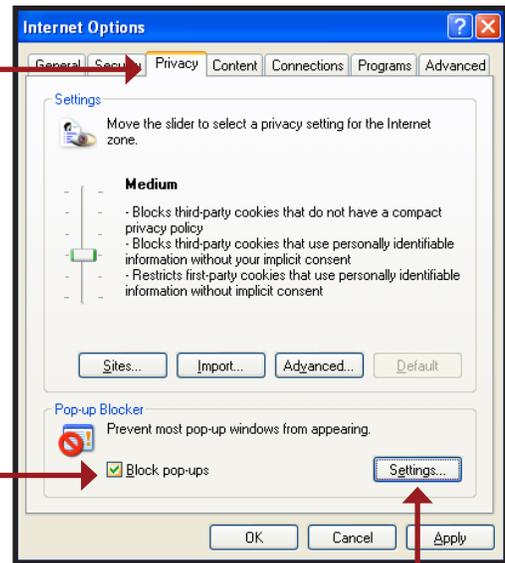


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Go to the **Privacy** tab.

If the **Block pop-ups** option is enabled, it is necessary to add **nexsure.com** and the carrier domains to the list of allowed sites.

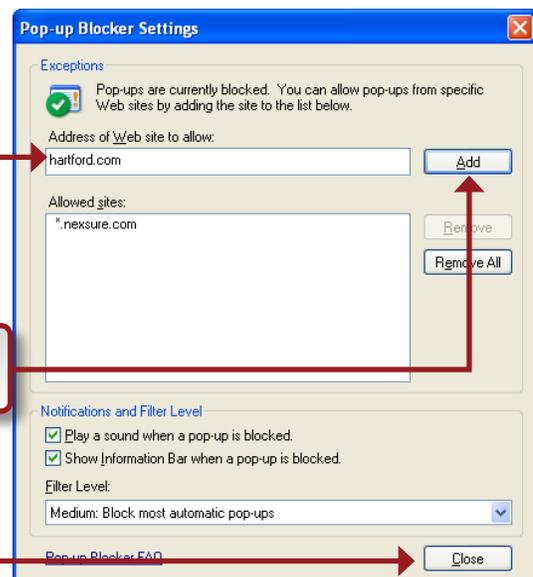
Click the **Settings** button to add the necessary domain names.



For each carrier Web site, enter the domain (such as **hartford.com**) name. Do not be more specific as you will want Windows to allow all content coming from that carrier site. Be sure to include **nexsure.com** in the list of Web sites.

Click the **Add** button after each domain name and the domain will appear in the list of Allowed sites.

Click **Close** after adding all of the necessary domain names.



If these security settings are not enabled, it is likely that eServices will not be able to automatically launch any pop-up windows once inside the carrier site and the eService will not appear to be working.