



TIPS AND FACTS

Issue 7

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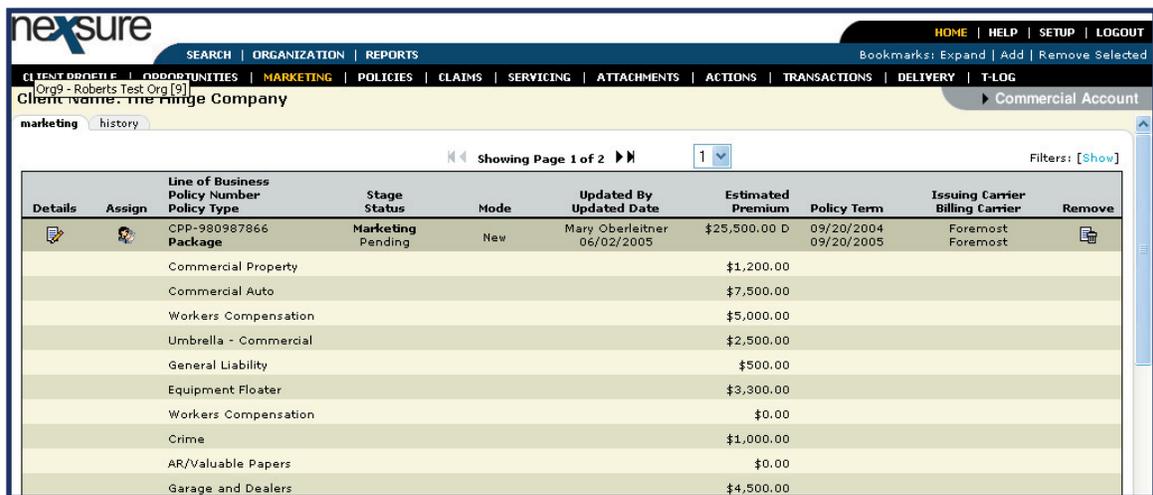
- ✘ Exporting and Importing Schedules
- ✘ Attaching Outlook Messages

Exporting and Importing Schedules

With large schedules there may be a need to have a client review the schedule for accuracy. Use the following information to Export and Import these schedules in Nexsure:

HOW to Export Schedules

Typically, updated schedules are obtained prior to renewal, while policies are marketed for the best quotes on behalf of the client. Active links are available on the schedules in this stage of marketing. After copying the policy to Marketing through Servicing, access the schedule using the Navigation tab on the underwriting page.



The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with links for HOME, HELP, SETUP, and LOGOUT. Below that, there is a search bar and a menu with options like ORGANIZATION, REPORTS, CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The main content area displays a table of policy schedules for a client named 'The Hinge Company'. The table has columns for Details, Assign, Line of Business, Policy Number, Policy Type, Stage Status, Mode, Updated By, Updated Date, Estimated Premium, Policy Term, Issuing Carrier, Billing Carrier, and Remove. The first row shows a policy with a status of 'Marketing Pending' and a premium of \$25,500.00. Below this, there is a list of line items with their respective premiums.

Details	Assign	Line of Business	Policy Number	Policy Type	Stage Status	Mode	Updated By	Updated Date	Estimated Premium	Policy Term	Issuing Carrier	Billing Carrier	Remove
		CPP-980987866		Package	Marketing Pending	New	Mary Oberleitner	06/02/2005	\$25,500.00	09/20/2004 - 09/20/2005	Foremost	Foremost	
		Commercial Property							\$1,200.00				
		Commercial Auto							\$7,500.00				
		Workers Compensation							\$5,000.00				
		Umbrella - Commercial							\$2,500.00				
		General Liability							\$500.00				
		Equipment Floater							\$3,300.00				
		Workers Compensation							\$0.00				
		Crime							\$1,000.00				
		AR/Valuable Papers							\$0.00				
		Garage and Dealers							\$4,500.00				



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1. After accessing the Schedule to be exported for client review, click the **Export** link.

Client Name: The Hinge Company

Branch: Marys Branch | Policy Term: 09/20/2004 12:01AM PST
09/20/2005 12:01AM PST

Policy Type: Package | Coverage Term:

Issuing Co: Foremost | Stage: Marketing
Billing Co: Foremost | Mode: New
Policy Number: CPP-980987866 | Status: Pending

Buttons: List, Rate, Bridge, Print, Compare Policies [On] [Off], Save Changes

Sort	Add Record	Search	Prev	Next			
Details	Vehicle Number	Year	Make	Model	Body Type	Vehicle Identification Number	Remove
	1	2003	Ford	F150	King Cab	7988YU798789HJ798	
	2	2003	Ford	Mustang	2D	54322316879878974	
	3	2003	Ford	F150	King Cab	75457987984654987	
	4	2003	Ford	F150	Pickup	76348763487634398	
	5	2003	Ford	Taurus	4D	3463456537678236	
	6	2005	Ford	Crown Victoria	4D	23466568469237403	
	7	2003	Ford	Explorer		54322316879878974	
	8	2004	Ford	Focus	2D	74623746126218961	

The File Download pop-up is displayed giving an opportunity to provide instructions for the download.

2. Click the **Open** button to display the schedule.

Client Name: The Hinge Company

The following data is for display

File Download

Do you want to open or save this file?

Name: data.xls
Type: Microsoft Excel Worksheet, 9.84 KB
From: rm0web1.nexsure.com

Buttons: Open, Save, Cancel

Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)



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3. Click the **Deliver** button to allow delivery of the schedule to the recipient.

The screenshot shows the Nexsure web interface for 'Client Name: The Hinge Company >> Vehicles'. A table displays vehicle details with columns for PolicyDetailsID, VehID, Veh_Order, Vehicle_ModelYear, Vehicle_Manufacturer, Vehicle_Model, and Vehicle. A red arrow points to the 'Deliver' button at the bottom of the table.

	A	B	C	D	E	F	
1	PolicyDetailsID	VehID	Veh_Order	Vehicle_ModelYear	Vehicle_Manufacturer	Vehicle_Model	Vehicle
2	18356	161	1	2003	Ford	F150	King Cab
3	18356	162	2	2003	Ford	Mustang	2D
4	18356	163	3	2003	Ford	F150	King Cab
5	18356	221	4	2003	Ford	F150	Pickup
6	18356	222	5	2003	Ford	Taurus	4D
7	18356	223	6	2005	Ford	Crown Victoria	4D
8	18356	224	7	2003	Ford	Explorer	
9	18356	225	8	2004	Ford	Focus	2D
10							
11							
12							

The Delivery e-mail screen is displayed automatically adding the schedule as an attachment.

Note: Do not change the Column header of the spreadsheet. If the headers are changed the schedule will not import into Nexsure.



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4. Complete the e-mail or fax details and click the **[Send]** link.

delivery

email fax

[Close][Send]

E-Mail Information

Title: *

From: Mary Oberleitner *

From Email Address: maryo@xdti.com *

To: *

To Email Address: *

CC:

BCC:

Regarding: *

Message: *

(* Required Field)

Schedule

Name	Description	Size	Date Created
Vehicles.xls	Vehicles		7/1/2005

Total Attachments: 1

fax email

delivery

5. Click the **OK** button.





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Monitor the Delivery from the Client or Home Delivery screen.

From Name From Email	To Name Client Name	Title Regarding	Sent To	Status Message	Date Time	Via
1 Mary Oberleitner maryo@xdti.com	Mary The Hinge Company	Auto Schedule for review Auto Schedule	maryo@xdti.com	Successful Email sent	7/1/2005 9:20:34 AM	Email

After the client has returned the revised schedule, attach the spreadsheet to the client's attachment list.

HOW to Attach Outlook Messages

1. Save the revised schedule to your local network or computer. If the Excel spreadsheet was sent via e-mail, it may be attached through Nexsure attachments or by saving the e-mail attachment only. If attaching the e-mail through attachments, make sure to save the attachment separately from the e-mail.

2. After accessing the client file, click the **ATTACHMENTS** link.

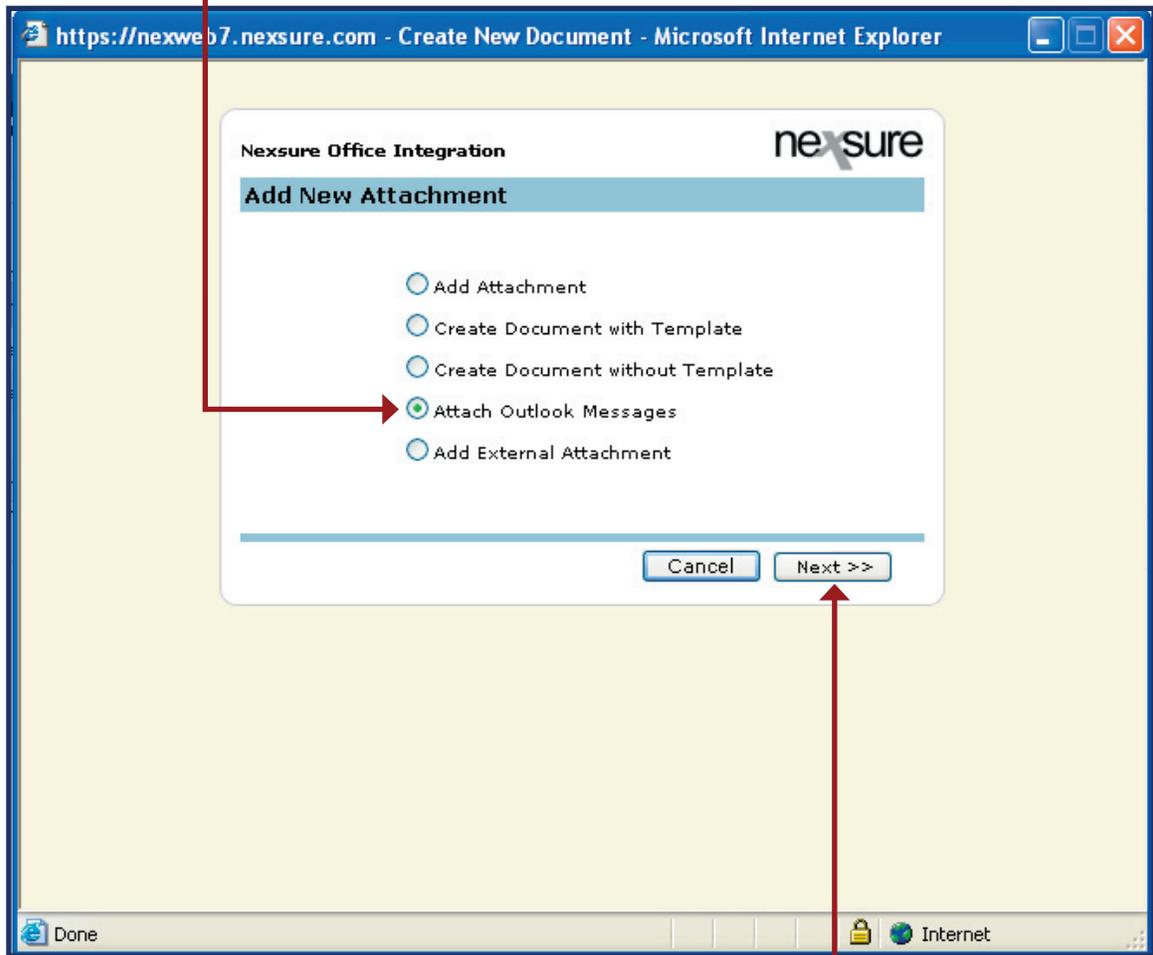
Install ActiveX	Showing Page 1 of 1	[DMS] Filters: [Show] [Hide] [Add New]
[Install ActiveX]	Showing Page 1 of 1	[DMS] Filters: [Show] [Hide] [Add New]

3. Click the **[Add New]** link.



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4. Select the **Attach Outlook Messages** option.



5. Click the **Next** button.



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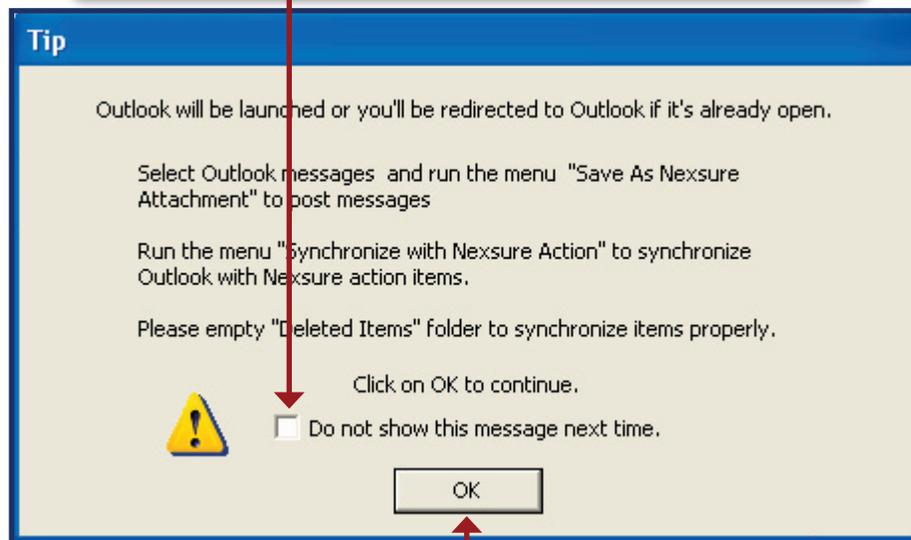
6. Make sure a check is in the *Allow access for* box and select a timeframe from the drop-down menu.



7. Click the **Yes** button.

The first time you attach an Outlook message, a Tip pop-up is displayed providing the steps to complete the addition of the attachment.

If you do not wish to see a tip every time, click the check box beside *Do not show this message next time*.

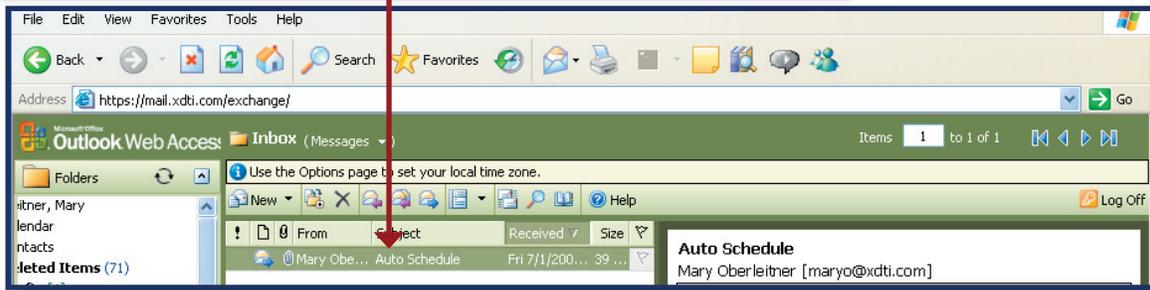


8. Click the **OK** button.

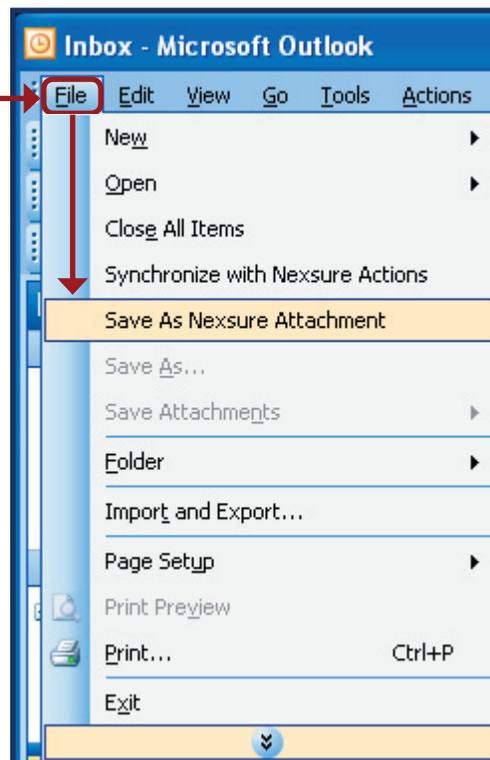


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9. Find the e-mail and highlight the message to be attached.



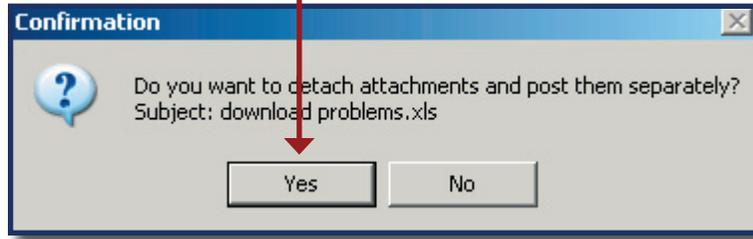
10. Go to **File** and select **Save as Nexsure Attachment**.





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11. A confirmation pop-up is displayed, click the **Yes** button to save the attachment separately from the e-mail.



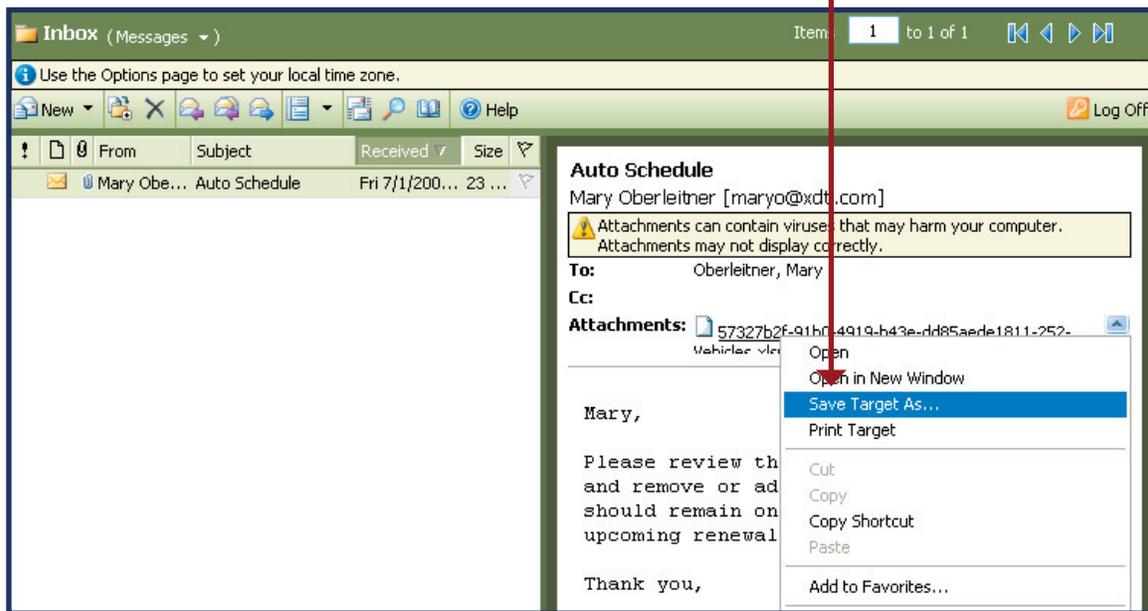
Note: *If the attachment is not saved separately, the schedule cannot be imported.*



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HOW to Save the E-mail Attachment

1. Open the e-mail and right-click on the attachment and select **Save Target As...**

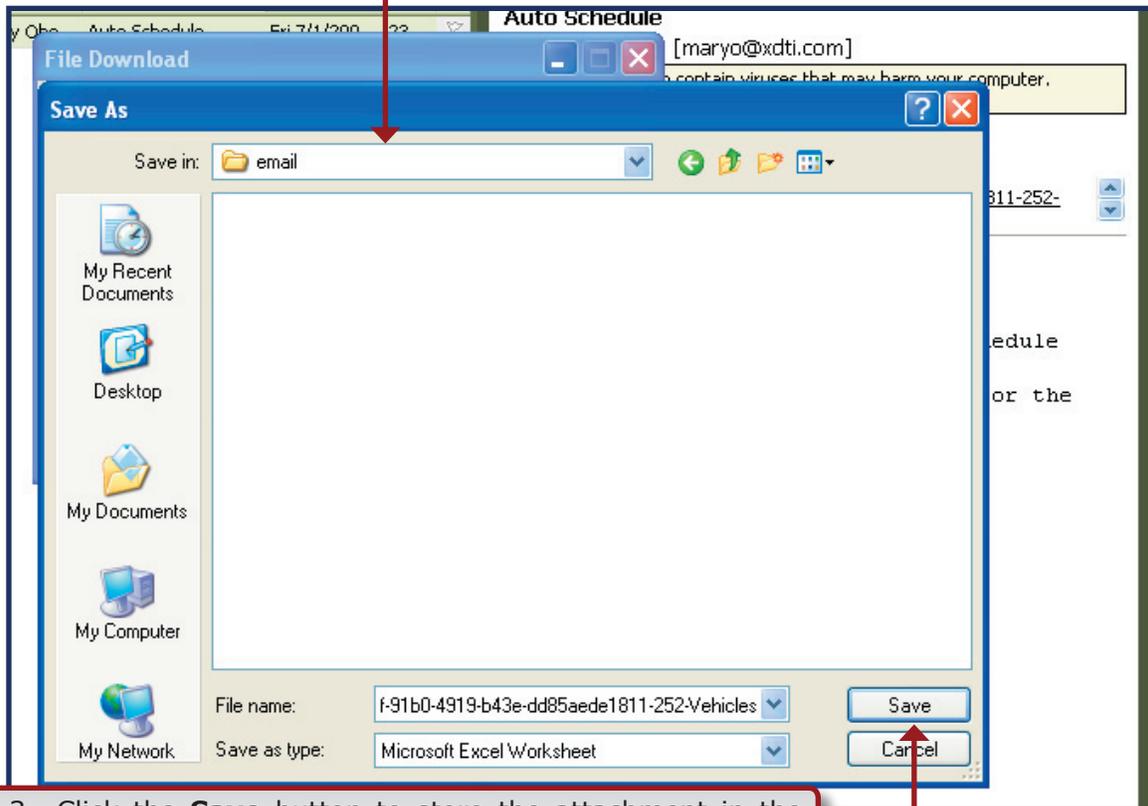


Note: Depending upon how your e-mail is accessed, it may be necessary to select the file and select **Save Attachment** instead of right-clicking.



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2. Find an appropriate folder location to store the attachment.



3. Click the **Save** button to store the attachment in the designated location on the local network or computer.

4. Search for the client and then click the **Details**  icon of the appropriate client.





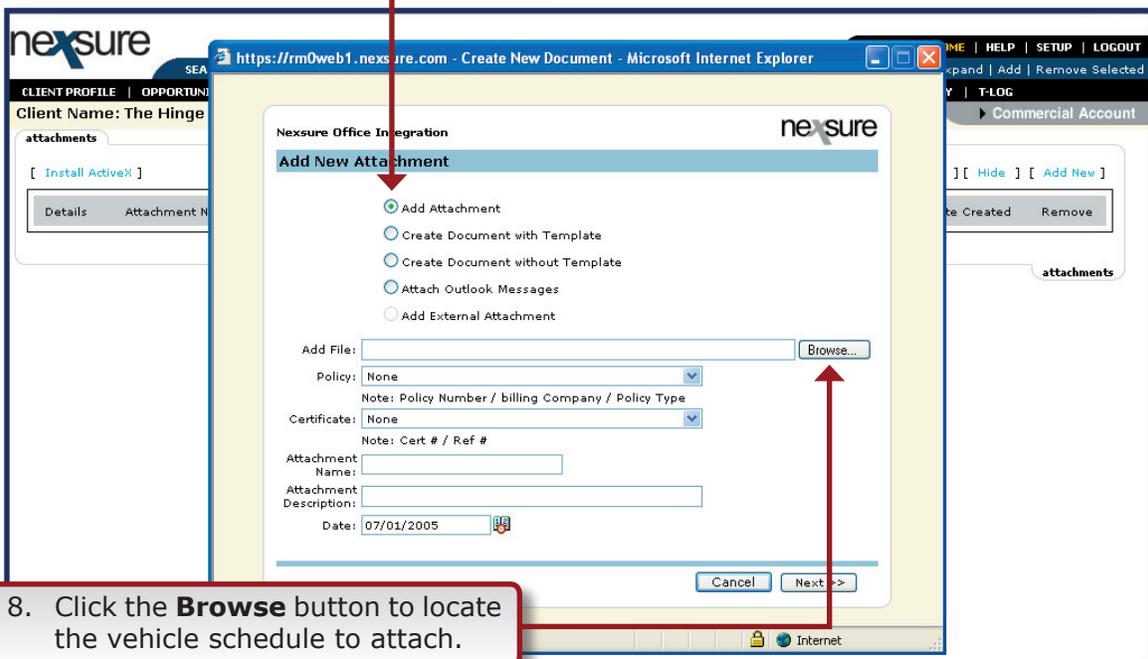
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5. Click the **ATTACHMENTS** link to display the Attachment Summary page.



6. Click the **[Add New]** link.

7. Select the **Add Attachment** option.

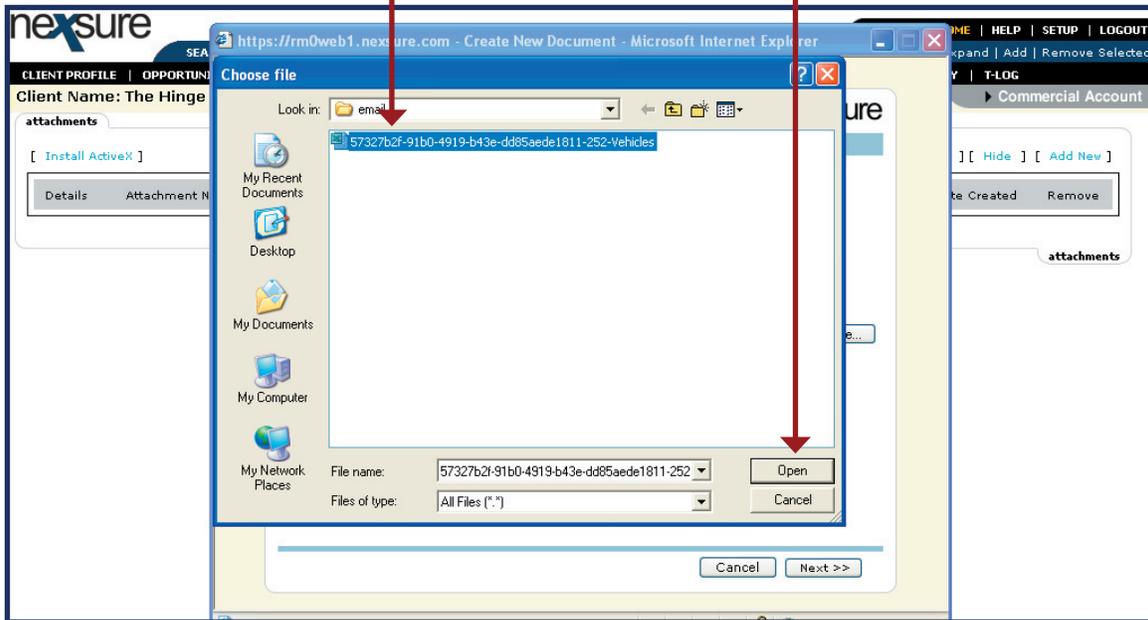


8. Click the **Browse** button to locate the vehicle schedule to attach.



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9. Highlight the schedule and click the **Open** button.





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10. Complete the remaining fields on the pop-up so that it is easy to identify the attachment from summary view or when importing the schedule.

Nexsure Office Integration

Add New Attachment

Add Attachment
 Create Document with Template
 Create Document without Template
 Attach Outlook Messages
 Add External Attachment

Add File: C:\Documents and Settings\Mary Oberleitner\My Documents\email [Browse...]

Policy: None
Note: Policy Number / billing Company / Policy Type

Certificate: None
Note: Cert # / Ref #

Attachment Name: Revised Veh Schedule

Attachment Description: Veh Schedule revised by client for upcoming renewal

Date: 07/01/2005

Cancel Next >>

11. To save the schedule, click the **Next** button. Selecting the Cancel button will abort the process.



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HOW to Import the Attached Schedule

1. After attaching the schedule, click on the marketing policy **Details**  icon to display the underwriting screen.

Client Name: The Hinge Company

Search Criteria:

Description: Created From: Date: Created To: Date: Created By:

Document Type: Policy No.: Attachment Name: Last Updated By:

Status: Issuing Carrier: LOB:

Sort Filters:

Sort Field 1: Sort Order 1: Sort Field 2: Sort Order 2:

[Install ActiveX] << Showing Page 1 of 1 >> [DMS] Filters: [Show] [Hide] [Add New]

Details	Attachment Name	LOB/Policy # Cert #/Ref #	Category	Description	Document Type	Status	Created By Last Updated By	Date Created	Remove
	Revised Veh Schedule			Veh Schedule revised by client for upcom	Microsoft Excel		Mary Oberleitner Mary Oberleitner	07/01/2005	

2. Open the schedule that will be imported (such as vehicles) and click on the **Import** link located just above the navigation toolbar to display the Attachments.

Client Name: The Hinge Company

Branch: Marys Branch Policy Term: 09/20/2004 12:01AM PST
09/20/2005 12:01AM PST

Policy Type: Package Coverage Term:

Issuing Co: Foremost Stage: Marketing

Billing Co: Foremost Mode: New

Policy Number: CPP-980987866 Status: Pending

List Rate Bridge Print Compare Policy: [On] [Off] Save Changes

Vehicles Lookup | Import | Export

Sort	Add Record						Search	Prev	Next
Details	Vehicle Number	Year	Make	Model	Body Type	Vehicle Identification Number	Remove		
	1	2003	Ford	F150	King Cab	7988YU79879HJ798			

navigation instruction

Underwriting

- Base Requirements
- AR/Valuable Papers
- Commercial Auto
 - ACORD 127 CA
 - Producer
 - Applicant
 - Billing
 - Coverages - Auto
 - Coverages - Truckers
 - Coverages - Motor Carrier
 - Endorsements



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Client Name: The Hir

https://rm0web1.nexsure.com/efiles/clients/services/F...

attachments

Please select attachment that you would like to import schedule information from.

Select	Attachment Name	Description	Document Type	Date Created	Created By
<input checked="" type="radio"/>	Revised Veh Schedule	Veh Schedule revised by	Excel	07/01/2005	Oberleitner

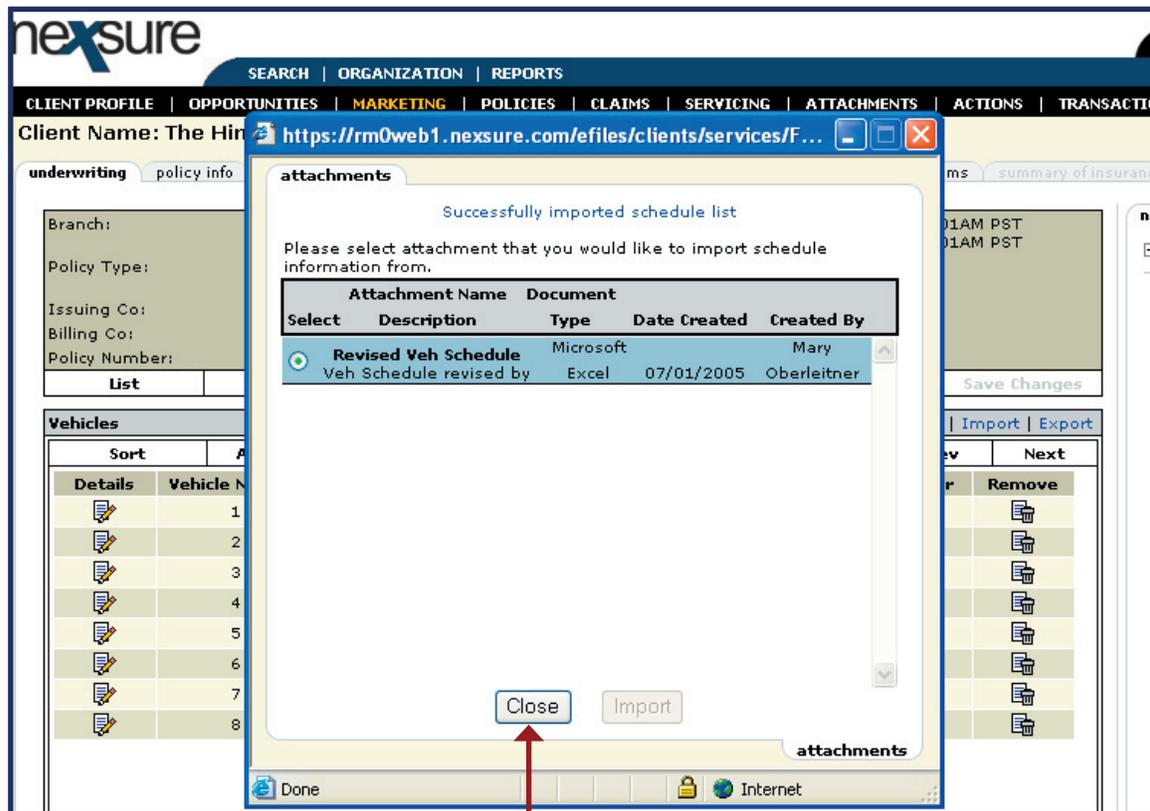
Close Import

3. Find and select the appropriate schedule and then click the **Import** button.



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At the top of the Attachments import pop-up a message displays **Successfully imported schedule list**. The Import button is no longer active and all previously entered data on the schedule is overwritten.



4. Click the **Close** button.