Tips and Facts

Issue 8

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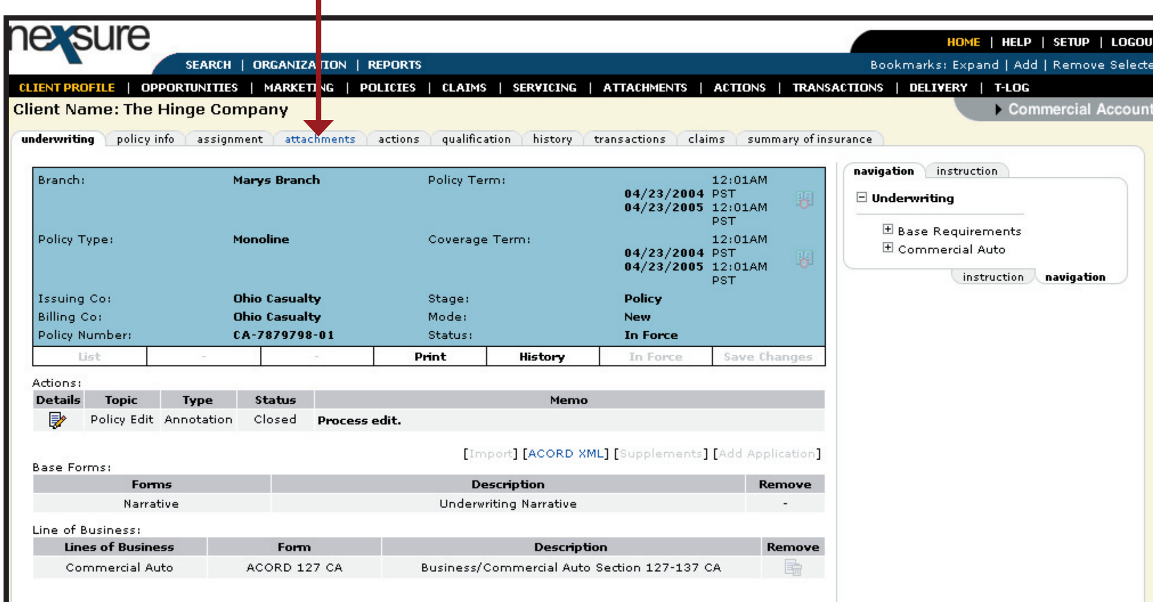
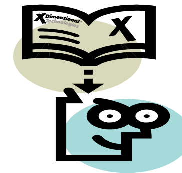
Creating Documents Without a Template

In many instances, it is not necessary to create a template when corresponding with a client. Correspondence with a client can be done with a quick letter. To create a document without a template, perform the following steps:

1. The first step is to select the client. After selecting the client, determine the level where the document is to be added. If the document is being created for one policy, it is easiest to add the attachment at the policy level. Since the policy will automatically appear by default, a search is not required. However, if doing the letter for multiple policies, add the document at the Client – Attachment level.

2. From Policy underwriting level, click the **attachments** tab to display the attachment summary for the selected policy.





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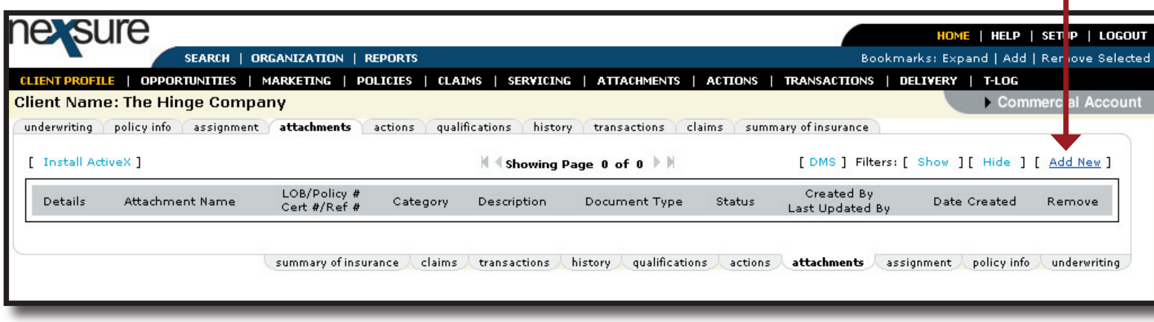
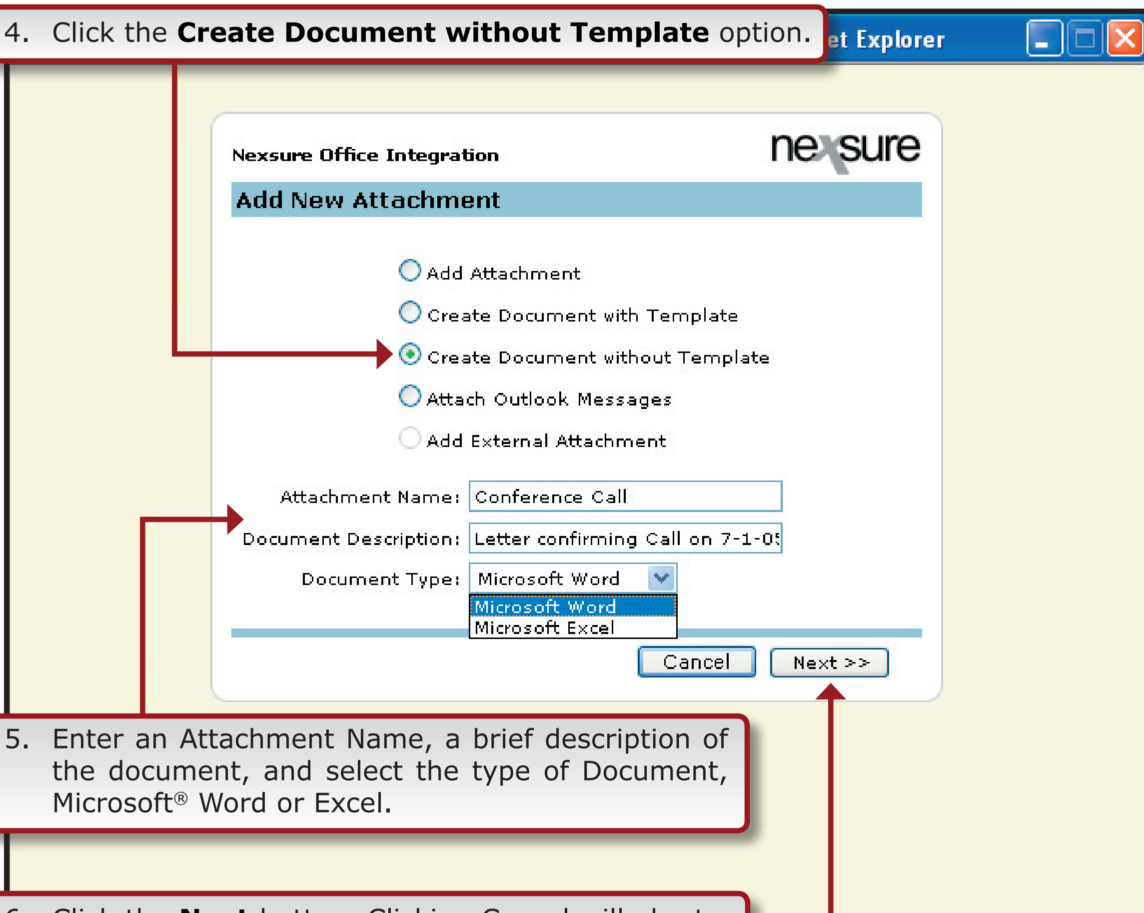
3. Click the **[Add New]** link.



4. Click the **Create Document without Template** option.



5. Enter an Attachment Name, a brief description of the document, and select the type of Document, Microsoft® Word or Excel.

6. Click the **Next** button. Clicking Cancel will abort the process.

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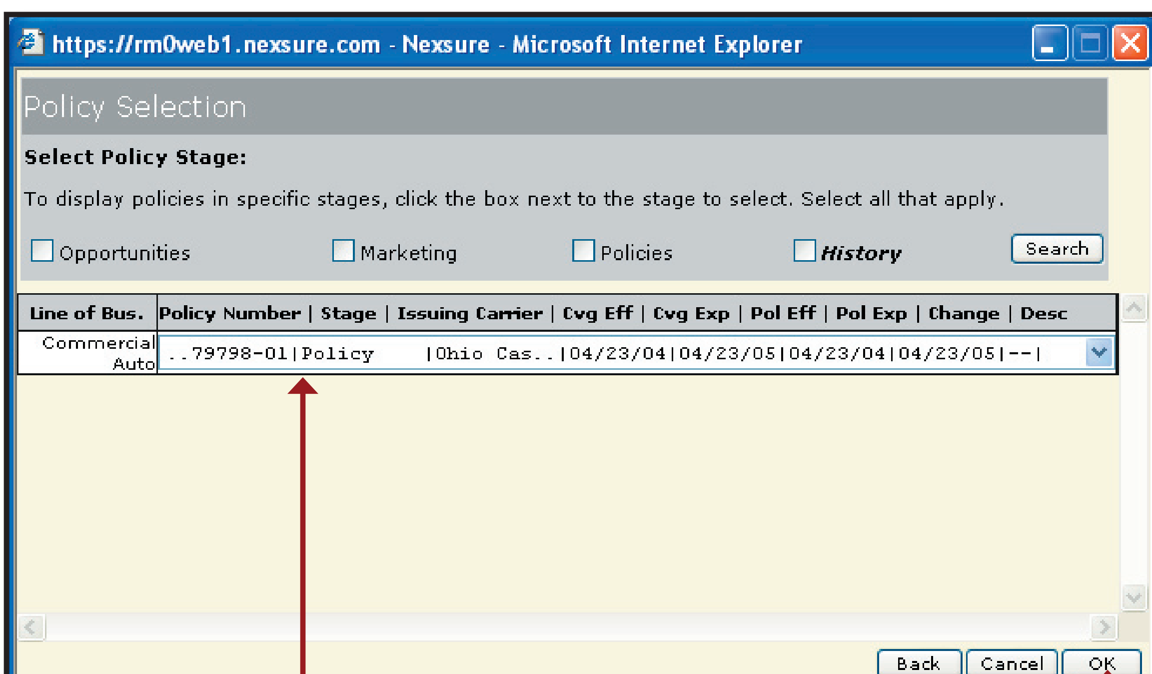
At the top of the Policy Selection screen, the Policy Stages that may be selected are displayed. These are generally only used when adding documents from client level. At the policy underwriting level, the policy is listed by default and a change is not necessary.

Policy Stage Selection	Description
Opportunities	This option displays all Opportunities.
Marketing	Displays all active Marketing quotes.
Policies	This option displays current in force Policies.
History	History is used in conjunction with one of the other selections. Selecting both **History** and **Policies** together and clicking the **Search** button displays all in force policies as well as those in history. Policies that include a description are policies found in history. Selecting both **History** and **Marketing** together and clicking the **Search** button displays all active Marketing Quotes and Marketing Quotes in history. If the quote is in history, the word **Archived** is displayed.



7. Select the appropriate policy and click the **OK** button.

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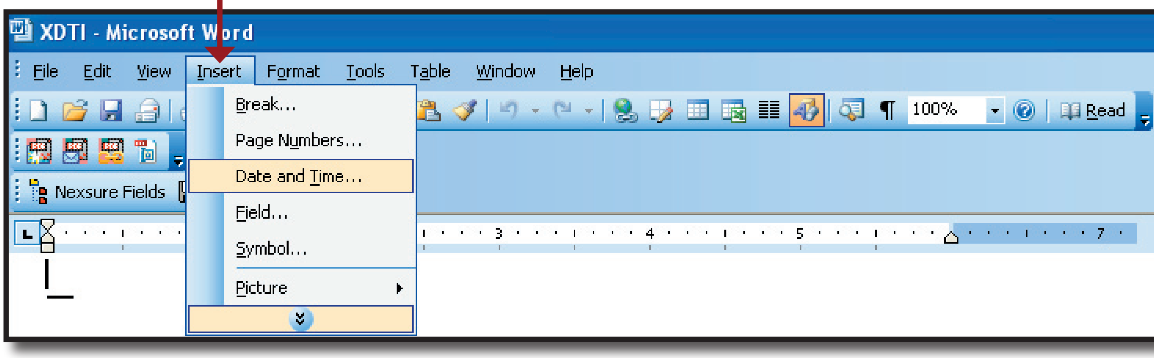
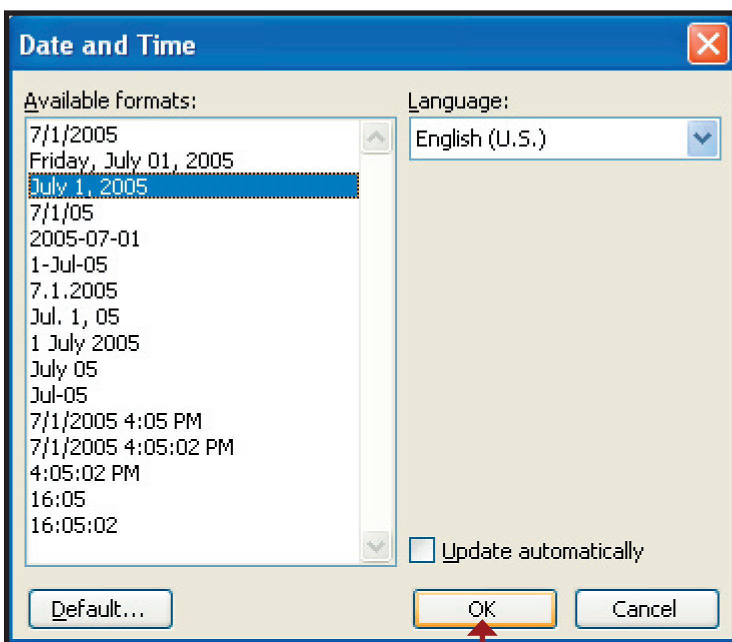
Microsoft Word will launch.

8. Insert the date by selecting **Date and Time** from the **Insert** menu.





9. Select the appropriate date format and click the **OK** button.

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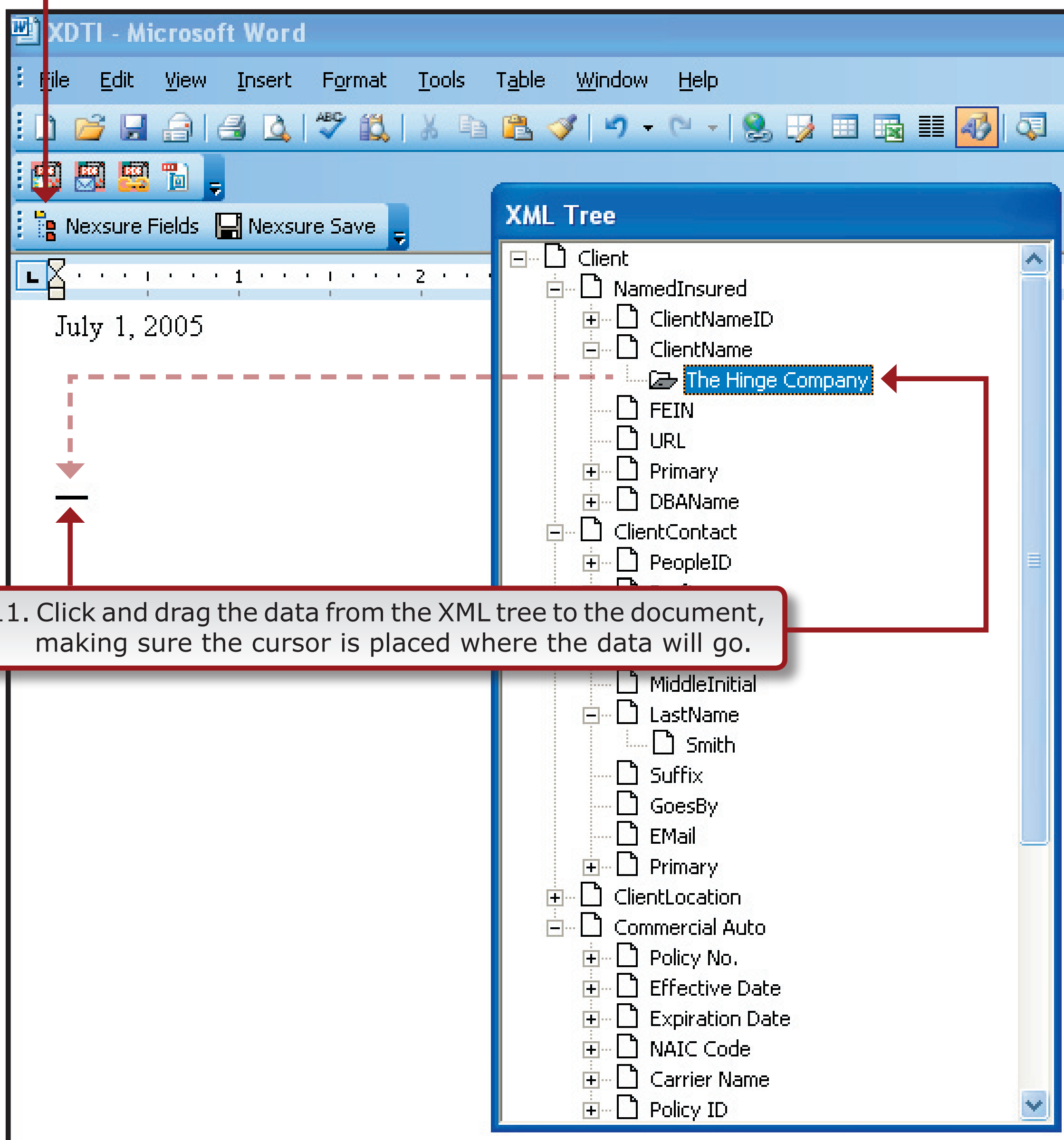
10. Click the **Nexsure Fields** button to pull data into the document from the client and policy data.



11. Click and drag the data from the XML tree to the document, making sure the cursor is placed where the data will go.

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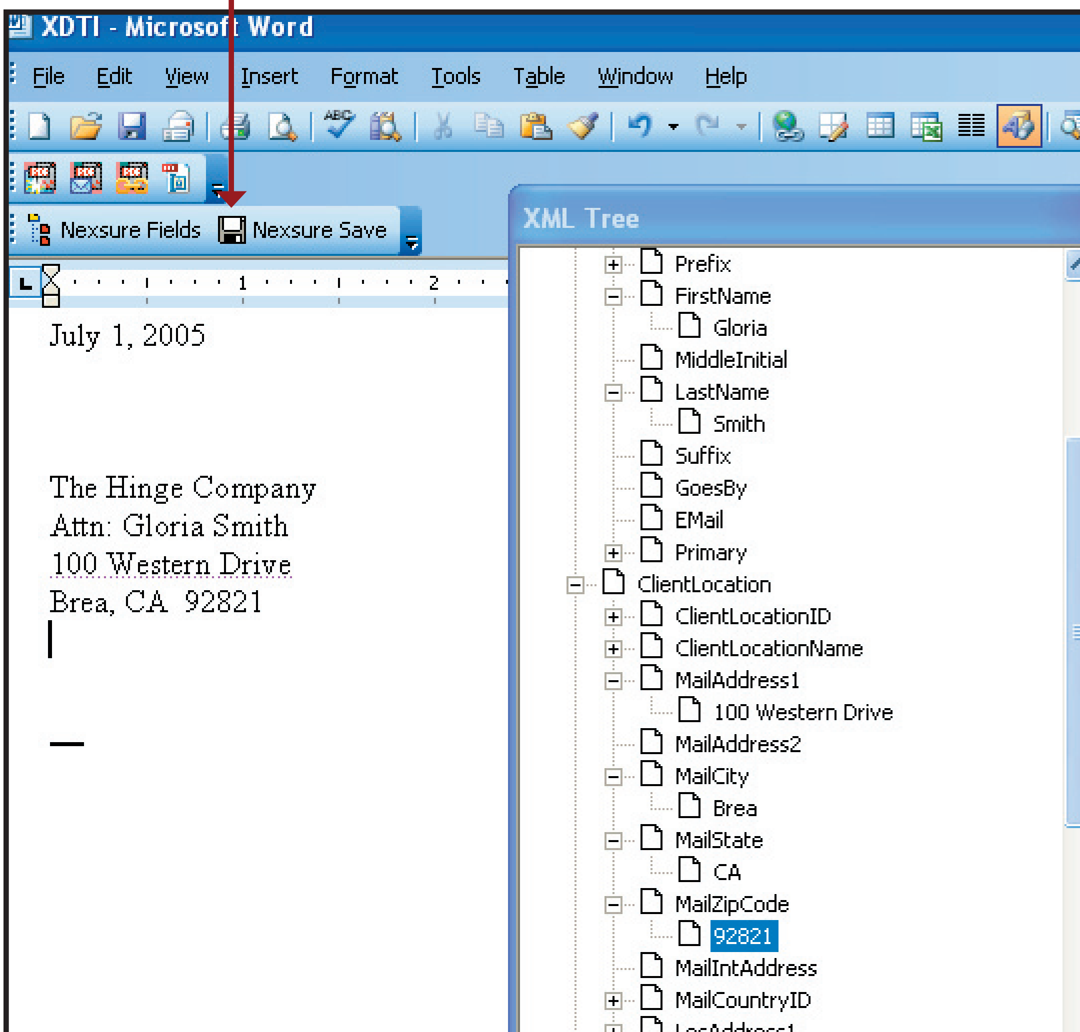
12. After completing the document, click the **Nexsure Save** button to display the Save Document As options.



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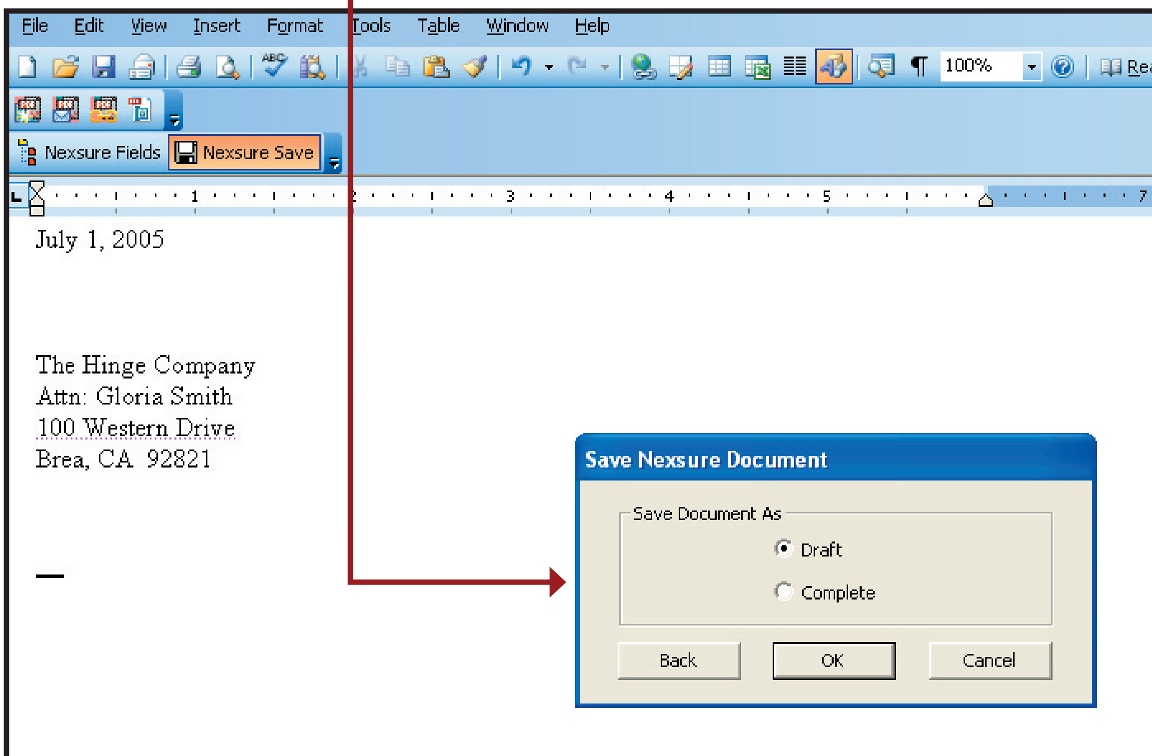
13. Select **Complete** to save the document without edit functionality. Select **Draft** to come back and complete the document later. Clicking the **Back** button will close the save window and display the document again. Clicking **Cancel** will close out the document without saving it.



Note: Do not click on the "X" in the upper right corner to exit the document unless you want to abort the document entirely.

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After the document is saved, it is displayed on the Attachments list with the associated version of the policy or at the Client Attachments level.