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Employee Availability

After logging into Nexsure your name is displayed as an active link at the bottom of the screen and is present on most screens.

The screenshot shows the Nexsure web application interface for a client profile. The client name is 'Masons Grill'. The interface includes a navigation menu with options like SEARCH, ORGANIZATION, and REPORTS. The primary contact information is displayed, including the name 'Mr. Dante Mason' and his title 'Owner'. The mailing address is '125 Main Street Suite 390, Brea, CA 92821'. The assignment table shows the following data:

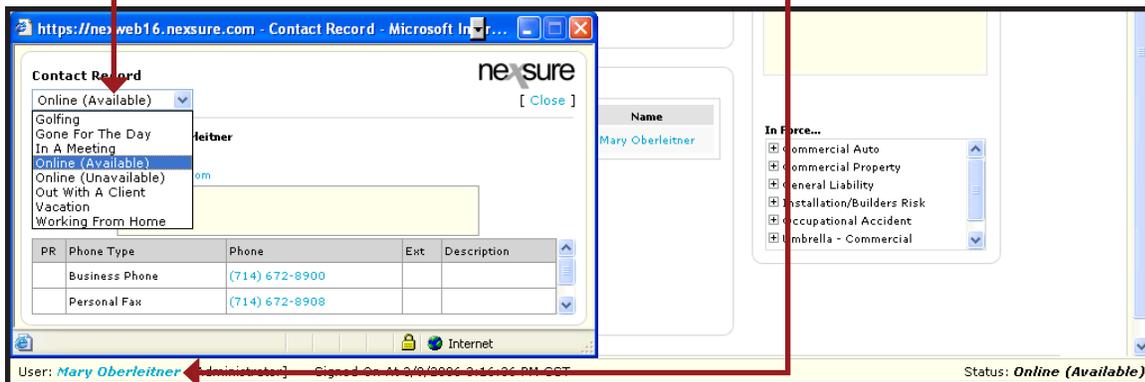
Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Atlantic Branch	Commercial Lines	Unassigned	Producer	Mary Oberleitner

The bottom of the screen shows the user's name 'Mary Oberleitner' and the status 'Online (Available)'. A red box highlights the user's name in the bottom left corner, and a red arrow points from the text box above to this name. Another red arrow points from the text box below to the name 'Mary Oberleitner' in the assignment table.

If your name is added as an assignment to a client or policy, these will be active links as well.

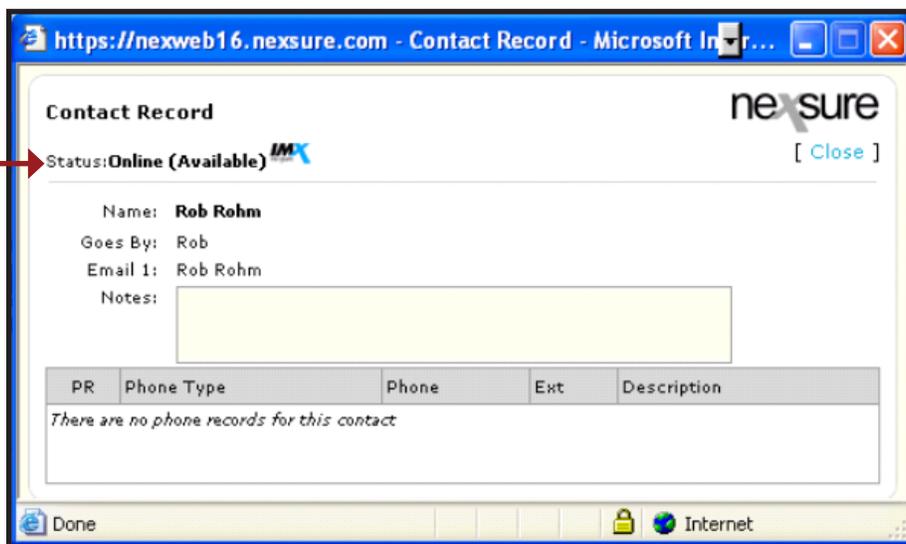
1. Click on your name when the link is active.

2. After clicking on your name, use the drop-down box to indicate your availability to others.



Employee availability may be found in two different places. If the user has changed their status to unavailable, they prefer not to be disturbed by instant messages.

Clicking on any employee name will bring up the Contact Record. The status of the employee is located at the top of the pop-up window.





The other place where availability can be seen is at Organization level.

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

Organization Name: XDTI-Training Org 972003

Organization

employees

Employee Summary

Showing Page 1 of 1

Details	Name	Availability	Goes By	E-Mail	Log Off
	Oberleitner, Mary	Online (Available)	Mary	maryo@xdti.com	<input type="checkbox"/>
	Rohm, Rob	Online (Available)	Rob		<input type="checkbox"/>

[Log Off] [Clear]

employees

Click the **ALL EMPLOYEES** link.

By default, all employees with an availability status of online are displayed.

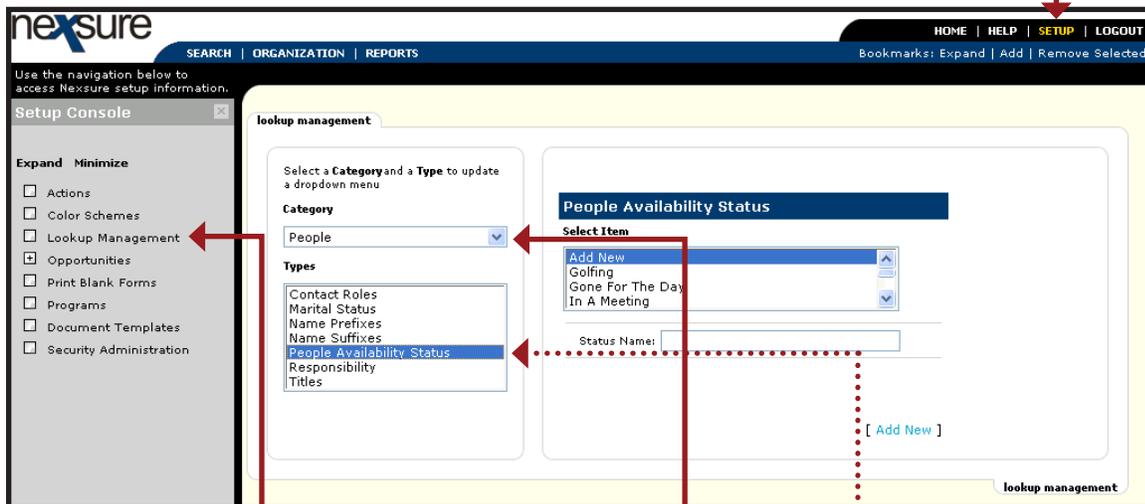


Adding or Modifying People Availability Selections

Lookup Management contains fields that may be modified by the organization. Keep in mind when making additions or modifications that these affect everyone in your organization. Once status has been used, it may not be removed from Nexsure. Instead of being deleted, a warning message will be displayed advising that the status is in use. The status name may be changed, but it will be changed on all records that are currently in use.

Accessing Lookup Management

1. Click the **SETUP** link located on the Utility menu.



2. Click the **Lookup Management** link.

3. Use the drop-down Category box to select **People**.

4. In the Types list, select **People Availability Status**.

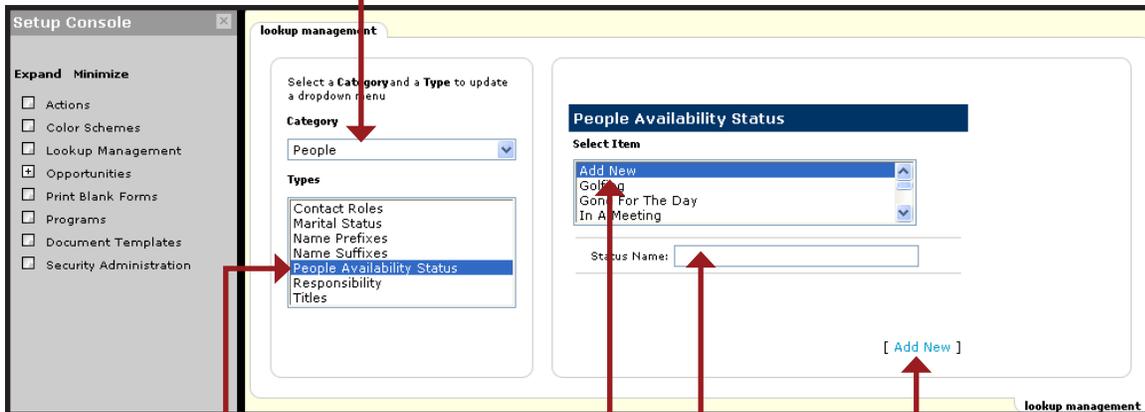
TIP: If your staff uses the Employee Availability status feature, you may want to include the word "online" as part of the Status Name such as "Vacation - Online". By doing this, any employee currently online will be displayed in the summary view on the Organization > All Employee screen without changing the default view.



Only those items in the **Select Item** box that do not have a gray font may be modified. Use the following directions to add, modify or delete items for all Categories:

Adding an Item

1. Begin by selecting the Category titled **People**.



2. Select **People Availability Status** as the Type.

3. To add a new status, at the top of the select items list, click **Add New**.

4. Below the list is an empty field labeled Status Name. Click in the field and enter the new status.

5. Click the **[Add New]** link below the field to add the status.



Modifying an Item

1. Begin by selecting the Category titled **People**.

The screenshot shows the 'lookup management' interface. On the left is a 'Setup Console' with a tree view containing items like 'Actions', 'Color Schemes', 'Lookup Management', 'Opportunities', 'Print Blank Forms', 'Programs', 'Document Templates', and 'Security Administration'. The main area is titled 'lookup management' and contains a 'Category' dropdown set to 'People' and a 'Types' list. The 'Types' list includes 'Contact Roles', 'Marital Status', 'Name Prefixes', 'Name Suffixes', 'People Availability Status' (highlighted), 'Responsibility', and 'Titles'. To the right, under 'People Availability Status', there is a 'Select Item' dropdown with options 'Add New', 'Golfing', 'Gone For The Day', and 'In A Meeting' (highlighted). Below this is a 'Status Name' text box containing 'In A Meeting'. At the bottom right of the main area are '[Delete]' and '[Update]' links.

2. Select **People Availability Status** as the Type for modification.

3. Locate the appropriate status in the list and click on it to highlight it.

4. The name is now displayed in the field below the list beside the type label, modify as necessary.

5. Click the **[Update]** link to save the changes.



Deleting an Item

1. Begin by selecting the Category titled **People**.

The screenshot shows the 'lookup management' interface. On the left is a 'Setup Console' sidebar with a tree view containing: Actions, Color Schemes, Lookup Management, Opportunities, Print Blank Forms, Programs, Document Templates, and Security Administration. The main area is titled 'lookup management' and contains a form with the following elements:

- A heading: "Select a **Category** and a **Type** to update a dropdown menu"
- A "Category" dropdown menu with "People" selected.
- A "Types" list with the following items: Contact Roles, Marital Status, Name Prefixes, Name Suffixes, **People Availability Status** (highlighted), Responsibility, and Titles.
- A "Select Item" dropdown menu with the following items: Add New, Golfing, Gone For The Day, and **In A Meeting** (highlighted).
- A "Status Name:" text input field containing "In A Meeting".
- Buttons for "[Delete]" and "[Update]".

2. Select **People Availability Status** as the Type for deletion.

3. Locate the appropriate status in the list and click on it to highlight it.

4. The name is now displayed in the field below the list beside the type label, modify as necessary.

5. Click the [**Delete**] link to remove.



- If the status has been used, a message is displayed advising that the status is in use and may not be deleted.



- If the status is not in use, a message is displayed asking for deletion confirmation. After confirmation is provided the status is removed.

