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Understanding Programs

Programs are used to identify whether an opportunity is used for program business. Programs are located on the **OPPORTUNITIES > qualification** tab. The drop-down boxes for these programs are populated by each organization and then associated with each branch in the organization as needed.

Where are Programs Used?

Programs are utilized at the **Client > OPPORTUNITIES** level. One method of accessing an existing opportunity is from the **HOME > OPPORTUNITIES** screen.

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

Details	Client Name	Policy Type	User / System	Status	Updated By	Commission	X-Date	Program	Contacts
	Rocky's Sports Cafe'	Empty	Platinum/Silver (0)	Empty	Jami Euper 09/06/2005	\$0.00	//	-	
		Monoline Accident	Bronze/Lump of Coal(0)	0 - N/A	Pamela9 Stein 01/06/2005	\$440.00	01/31/2005	-	

2. Click the **OPPORTUNITIES** link.

3. Click the **Details** icon to display the qualification tab.



underwriting | policy info | assignment | attachments | actions | **qualification** | history | transactions | claims | summary of insurance

Branch:	Atlantic Branch	Policy Term:	12/15/2005 12:01AM CST
Policy Type:	Monoline	Coverage Term:	12/15/2006 12:01AM CST
Issuing Co:	Unassigned	Stage:	Opportunity
Billing Co:	Unassigned	Mode:	New
Policy Number:	Unassigned	Status:	0 - N/A

List | Print | History | **Market** | Save Changes

Qualifying Information:

N/BOR Date: 12/15/2005

Program:

Buying Mode:

Opportunity Criteria:

Potential:

Profitability:

Proximity:

Presentation to Personnel:

Pressure on Prospect:

DUI?:

Opportunity Status:

Total: 82

System Grade: **Gold**

4. Any active program associated with the branch is available for selection from the **Program** drop-down box.

Note: After an opportunity has been added, details may be accessed from **either** the **HOME > OPPORTUNITIES** or **Client > OPPORTUNITIES** menus.

Modifying Programs

Modifying programs is done in setup. Selecting the **Programs** link in the **Setup Console** will display currently available programs. Default programs are not added to any organization.

nexsure

SEARCH | ORGANIZATION | REPORTS

HOME | HELP | **SETUP** | LOGOUT

Use the navigation below to access Nexsure setup information.

Bookmarks: Expand | Add | Remove Selected

Setup Console

Expand Minimize

- Actions
- Color Schemes
- Lookup Management
- Opportunities
- Print Blank Forms
- Programs
- Document Templates
- Security Administration

programs

Program Summary

Showing Page 1 of 2

Details	Description	Date Created	Status	Remove
	Auto Parts	02/18/2004	Active	
	Auto Parts Program	02/17/2004	Active	
	Bee Keepers	10/06/2003	Active	
	Car Dealer	11/04/2003	Active	
	Contractors	09/15/2003	Active	
	Engineers	03/03/2004	Active	
	Funeral Home	03/16/2004	Active	
	Home Builders	11/04/2003	Active	
	Lumber Suppliers	11/04/2003	Active	
	Oil Pipeline Risks	03/26/2004	Active	
	Recycling	04/27/2004	Active	
	Restaurants	02/18/2004	Active	



Editing an Existing Program

1. Click the **Details**  icon to display the **Associated Branches** screen.

Program Summary

Showing Page 1 of 2

Details	Description	Date Created	Status	Remove
	Auto Parts	02/18/2004	Active	
	Auto Parts Program	02/17/2004	Active	
	Bee Keepers	10/06/2003	Active	
	Car Dealer	11/04/2003	Active	
	Contractors	09/15/2003	Active	
	Engineers	03/03/2004	Active	
	Funeral Home	03/16/2004	Active	
	Home Builders	11/04/2003	Active	
	Lumber Suppliers	11/04/2003	Active	
	Oil Pipeline Risks	03/26/2004	Active	
	Recycling	04/27/2004	Active	
	Restaurants	02/18/2004	Active	
	Retail Sales	11/14/2003	Active	

2. Click the **[Edit]** link.

Program Details

Description: **Retail Sales**
Status: **Active**

[Back] [Edit]

Associated Branches

[Add New]

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Active	

Note: Modifying the program name will modify all programs currently in use at the Client > OPPORTUNITIES level.



- In the **Edit Program** pop-up window, change the program name in the **Description** field.

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Active	

- Click the **[Save]** link to save changes or **[Cancel]** to return to the **Program Details** screen.

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Active	

- Click the **[Add New]** link to associate other branches to the program.



Adding New Programs

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

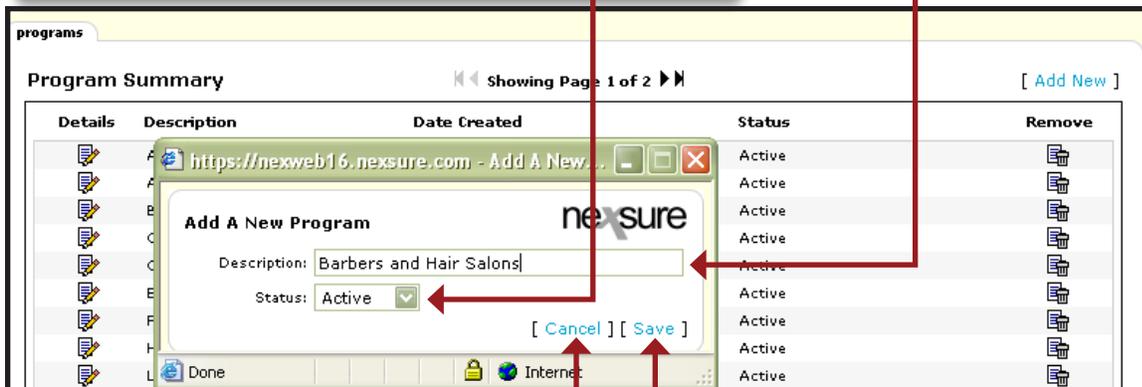


2. Click the **Programs** link to display the current programs.

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

4. Enter the description or name of the program in the **Description** field.

5. Leave the **Status** drop-down box set to **Active**.



6. Click the **[Save]** link to add the new program or **[Cancel]** to abort.

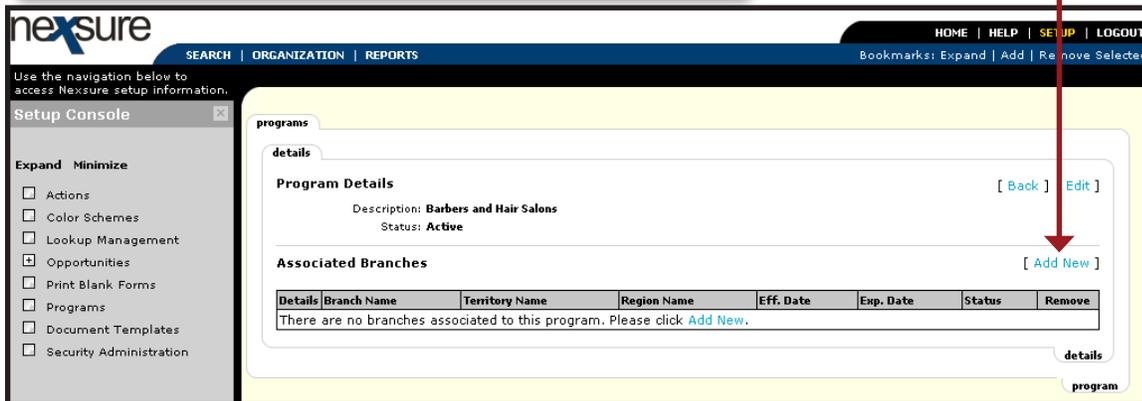


Associating Programs with Branches

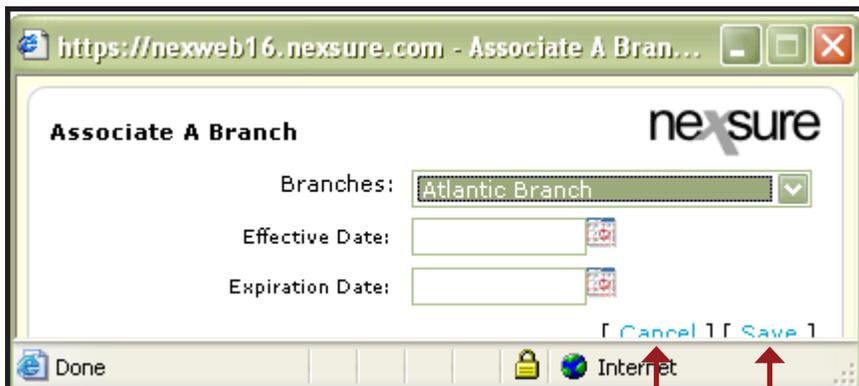
1. Click the **Details**  icon of the newly added program to associate it with branches.



2. Click the **[Add New]** link to choose a branch to associate with the new program.



The effective and expiration dates are used to identify the program timeframe. If there is no timeframe, leave the **Effective Date** and **Expiration Date** fields blank and the program will be available until its status is set to inactive.



3. Click the **[Save]** link to store the newly associated branch or **[Cancel]** to abort.



Once the record is stored, the **Program Details** summary screen is displayed, showing the **Branch Name** of the branch or branches associated to the program.

Use the navigation below to access Nexsure setup information.

Setup Console

Expand Minimize

- Actions
- Color Schemes
- Lookup Management
- Opportunities
- Print Blank Forms
- Programs
- Document Templates
- Security Administration

programs

details

Program Details [Back] [Edit]

Description: **Barbers and Hair Salons**
Status: **Active**

Associated Branches [Add New]

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Active	

details

program

Setting Program Status to Inactive

If a program is no longer valid, it may be identified as inactive so it is no longer an available selection on the **Client > OPPORTUNITIES** detail screen.

1. Click the **Details** icon of the program.

Use the navigation below to access Nexsure setup information.

Setup Console

Expand Minimize

- Actions
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programs

Program Summary [Add New]

Showing Page 1 of 2

Details	Description	Date Created	Status	Remove
	Auto Parts	02/18/2004	Active	
	Auto Parts Program	02/17/2004	Active	
	Barbers and Hair Salons	10/24/2005	Active	
	Bee Keepers	10/06/2003	Active	
	Car Dealer	11/04/2003	Active	
	Contractors	09/15/2003	Active	
	Engineers	03/03/2004	Active	
	Funeral Home	03/16/2004	Active	
	Home Builders	11/04/2003	Active	
	Lumber Suppliers	11/04/2003	Active	
	Oil Pipeline Risks	03/26/2004	Active	
	Recycling	04/27/2004	Active	
	Restaurants	02/18/2004	Active	
	Retail Sales	11/14/2003	Active	
	RV Programs	05/05/2004	Active	

program



Use the navigation below to access Nexsure setup information.

Setup Console

Expand Minimize

- Actions
- Color Schemes
- Lookup Management
- Opportunities
- Print Blank Forms
- Programs
- Document Templates
- Security Administration

programs

details

Program Details [Back] [Edit]

Description: **Barbers and Hair Salons**
Status: **Active**

Associated Branches [Add New]

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Active	
	McClellan Branch	McClellan Territory	McClellan Region			Active	

2. Click the **Details** icon on the associated branch.

3. On the **Branch Details** pop-up window, select **Inactive** from the **Status** drop-down box.

https://nexweb17.nexsure.com - E... [Minimize] [Maximize] [Close]

Branch Details nexsure

Region Name: **Atlantic Region**

Territory Name: **Atlantic Territory**

Branch Name: **Atlantic Branch**

Effective Date:

Expiration Date:

Status: **Inactive** (dropdown menu open showing Active, Inactive)

[Cancel] [Save]

4. Click the **[Save]** link to store the change or **[Cancel]** to abort.

Note: Programs must be set to inactive by the branch in order to disable use at the **Client > OPPORTUNITIES** level.



After saving the newly modified status, the **Program Details** screen is displayed. The red font indicates that a program's status has been set to **Inactive**.

programs

details

Program Details [\[Back \]](#) [\[Edit \]](#)

Description: **Barbers and Hair Salons**
Status: **Inactive**

Associated Branches [\[Add New \]](#)

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Inactive	
	McClellan Branch	McClellan Territory	McClellan Region			Active	

details

program

If the entire program is no longer valid for all branches, make sure to set all branches' status to **Inactive** individually.

5. Click the **[Edit]** link on the Program Details screen.

programs

details

Program Details [\[Back \]](#) [\[Edit \]](#)

Description: **Barbers and Hair Salons**
Status: **Inactive**

Associated Branches

Details	Branch Name	Territory Name
	Atlantic Branch	Atlantic T
	McClellan Branch	McClellan

https://nexweb17.nexsure.com - Edit Program

Edit Program nexsure

Description: Barbers and Hair Salons

Status: **Inactive** ▼
Active
Inactive

[\[Cancel \]](#) [\[Save \]](#)

Done Internet

program

6. Select the **Inactive** option from the **Status** drop-down box.

7. Click the **[Save]** link to store the change or **[Cancel]** to abort.



Once saved, the program displays on the **Program Details** screen with a red font indicating it is an inactive program.

programs

details

Program Details [Back] [Edit]

Description: **Barbers and Hair Salons**
Status: **Active**

Associated Branches [Add New]

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Inactive	
	McClellan Branch	McClellan Territory	McClellan Region			Inactive	

details

program

Removing Associated Branches

In order to remove a program (the program must not have been used), all associated branches must first be removed from the **Program Details** screen.

programs

details

Program Details [Back] [Edit]

Description: **Barbers and Hair Salons**
Status: **Active**

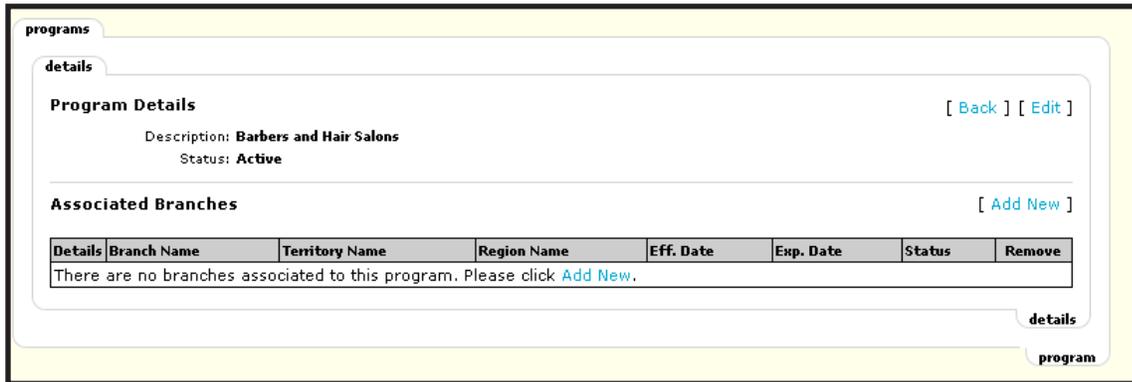
Associated Branches [Add New]

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Inactive	
	McClellan Branch	McClellan Territory	McClellan Region			Inactive	

details

program

1. Click the **Remove** icon on the **Program Details** screen. Repeat for all associated branches.



The program may now be removed.

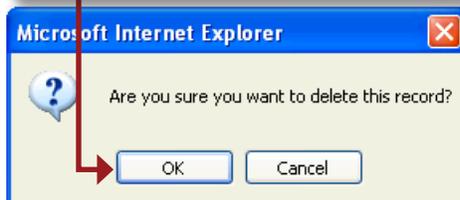
Removing a Program

If a program was added but never used and all associated branches have been removed, the entire program can be removed from the **Program Summary** screen.



1. Click the **Remove** icon on the **Program Summary** screen.

2. Click **OK** to confirm removal.



Note: If the program has been used, it cannot be removed. It can only be disabled by setting its status to **Inactive**.