

IN THIS ISSUE

X Understanding Programs

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.

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2. (Click the	OPPORTUI	NITIES link							
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Branch:	Atlantic Branch	P	olicy Term:	12/15/2005 12/15/2006	12:01AM CST 12:01AM CST		
Policy Type:	Monoline	c	overage Term:				
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Program: Buying Mode: Potential Profitability: Presentation to Personnel: Pressure on Prospect: DUI7:	Auto Parts Car Dealer Contractors Home Builders Restaurants Restaurants Restail Sales Trucking 25 - Diffunction Presentant 25 - Definitely will ad 0 - Yes	from agency office on to decision maker opt new product/prov	der V				
pportunity Status Total: 8 System Grade: 0	: interproduction	ram assoc	ated wit	h the hr	anch is ava	ilable	_

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.

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Lookup Management	P	Auto Parts Program	02/17/2004	Active	E
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Print Blank Forms		Car Dealer	11/04/2003	Active	E
Programs		Contractors	09/15/2003	Active	E
Document Templates		Engineers	03/03/2004	Active	E
Security Administration		Funeral Home	03/16/2004	Active	E
		Home Builders	11/04/2003	Active	E
		Lumber Suppliers	11/04/2003	Active	B
		Oil Pipeline Risks	03/26/2004	Active	B
		Recycling	04/27/2004	Active	E
		Restaurants	02/18/2004	Active	En l



Editing an Existing Program

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



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

grams						<u> </u>			
details		Edit	t Program		ne sur	e			
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other branches to the program.



Adding New Programs

1. Click the SET	'UP link located on the U	tlility menu.	
nexsure			HOME HELP SETUP LOGOUT
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Associating Programs with Branches

1. Click the Deprogram to	etails 📑 icor associate it wi	n of the new ith branches.	vly added				
Barbers and H	lair Salons 1	10/24/2005		Active		_	<u> </u>
2. Click the [A associate w	dd New] link ith the new pr	to choose a ogram.	branch to	}—			7
SEARCH Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION REPORTS				Bookmarks:	HOME HELP Expand Add	SETUP LOGOUT Re nove Selected
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Opportunities Print Blank Forms Programs	Associated Branches	S Territory Name	Region Name	Eff. Date	Exp. Date	[Status	Add New] Remove
 Document Templates Security Administration 	Inere are no branches	s associated to this progra	m. Please click add Ne	sw.			details

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.

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Associate A Branch	ne sure					
Branches:	Atlantic Branch 🔽					
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3. Click the [Save] link to associated branch or [Ca	o store the newly ncel] 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.

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Print Blank Forms	Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
Document Templates	*	Atlantic Branch	Atlantic Territory	Atlantic Region			Active	B
Security Administration								details

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.

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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.

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Branch D	etails	ne sure
	Region Name:	Atlantic Region
-	erritory Name:	Atlantic Territory
	Branch Name:	Atlantic Branch
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E	xpiration Date:	6
	Status:	Inactive 🐱
		Active Inactive
1		🔒 🔮 Internet
4. Click th or [Car	ne [Save] li ncel] to abo	ink to store the change

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**.

rogra	am Details					[Ba	ck] [Edit
	Description: Bart Status: Acti	bers and Hair Salons ive					
\ssoc	iated Branches				F B I	[Add New
Dotaile	Branch Name	Territory Name	Region Name	Ett Date	I-VD IIJTO	STATIC	Romono
Details	Branch Name Atlantic Branch	Territory Name Atlantic Territory	Region Name Atlantic Region	Eff. Date	Exp. Date	Inactive	Remove

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 o screen.	n the Program Details		
programs details Program Details Description: Barbers and Hair Salor	s	[Back][Edit	
Associated Branches Details Branch Name Territor Image: Atlantic Branch Atlantic Branch Atlantic Branch	Edit Program Description: Barbers and Status: Inactive	Hair Salons	re
McClellan Branch MdClell	Active Inactive	[Cancel] [Sav	ye] gram
6. Select the Inactive o drop-down box.	ption from the Status		
Click the [Save] link t or [Cancel] to abort.	o store the change		



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

progra	am Details					[Bac	k] [Edit]
	Description: Bart	ers and Hair Salons					
	Status: Acti	ve					
Assoc	iated Branches					٦	Add New 1
Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
>	Atlantic Branch	Atlantic Territory	Atlantic Region			Inactive	
		the of the state of	MaChallan Panian			Inactive	

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.

rogra	am Details Description: Bart Status: Acti	eers and Hair Salons ve				[Ba	ck] [Edit]
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Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
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Assoc Details There	Branch Name are no branches	Territory Name associated to this progra	Region Name am. Please click Add N	Eff. Date	Exp. Date	Status	Remove
Assoc Details There	Branch Name are no branches	Territory Name associated to this progra	Region Name am. Please click Add N	Eff. Date	Exp. Date	Status	Remove

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.



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