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Context Tools

Context Tools

Context tools are used to provide shortcuts to various functions in Nexsure and can be accessed on specified **CLIENT SEARCH**, **HOME > Home** menu screens (**ACTIONS**, **OPPORTUNITIES**, **MARKETING**, **BINDER LOG**, **EDITS**, **AUDITS**, **EXPIRATIONS**, **ENDORSEMENTS**, **CANCELLATIONS**, **CLAIMS**) or **HOME > Client** menu screens (**CLIENT PROFILE**, **OPPORTUNITIES**, **MARKETING**, **POLICIES**) in Nexsure by right-clicking the blue **Details** icon or the other **Details** icon. Below are definitions for the context tools.

Blue Details Icon

The blue **Details** icon directs the user to the **CLIENT PROFILE** screen. The following steps can be performed for each blue **Details** icon found on **HOME > Home/Client** menu screens:





Other Details Icons

The following steps can be performed for each **Details** icon within each **HOME** > **Home/Client** menu screen:

HOME > ACTIONS

1. On the I	Jtility menu, click HOME.			1
2. On the I	1ome menu, click ACTIONS .			
	SEARCH ORGANIZATION REPORTS MARKETING BINDER LOG EDITS AUDITS EXPIRATIO	DNS ENDORSEMENTS CANCELLA	He Bookmarks: E ATIONS CLAIMS INTERFAC	OME HELP SETUP LOI Expand Add Remove Sel E DELIVERY
Hello, Mary Oberlei	tner			Home
All Client Name Details Priority	MS Outlook K Showing Pag Action Topic Action Type Policy Info Status	e 1 of 1 Due Date Due Time (Overdue By)	Export] Filters: [: Create Assigned To Create	Show] [Add New Action ed By Updated By ed On Updated On
Winston Auto	Parts Call Client Call Client	10/31/2006 12:01 AM CST	Mary Ma Oberleitner 10/11/	ry Mary Oberleitner 10/11/2005
3. Right-cli screen t	ck the Details 🛃 icon on to o bring up the available optio	the HOME > A ns.	CTIONS	
4. Left-clic	k an option to access:			
 Oper 	1: Opens the current action to	o edit.		
Add	New Action: Opens the Add	New Persona	I Action scree	en.
 Mark the a 	As Closed: Allows the action.	on to be closed	without addin	g a new merr
Print	Application: If the action is	s associated wit	h a policy, clic	k this link to

the forms associated with the policy.



HOME > OPPORTUNITIES

1. On th	e Utility me	enu, click H	OME.				1	
2. On th	ie Home me	enu, click O	PPORTU	JNITIES.				
ne v sure	SEARCH ORGANIZ	ATION REPORTS			_	H Bookmarks:	OME HELP	SETUP LOGO
ACTIONS OPPORTUN Hello, Mary Obe	ITTES MARKETING BIN Prieitner	DER LOG EDITS AUC	DITS EXPIRATIO	INS ENDORSEMENTS	CANCELLATIONS CL	AIMS INTERFAC	E DELIVERY	•
All Client Nan	v ne Policy Type	User / System	Showing Page	e 1 of 1 D T	1 💌	X-Date		Filters: [Show]
Details Assign	Line of Business	Grade (Score)	Status	Updated Date	Commission	BOR Date	Program	Contacts
John Smith								
Open Add New Line	of Business	Silver/Bronze (60)	2 - Awaiting Inro	Timothy P Kanada 11/04/2003	\$05,000.00	10/15/0000	Roteil O	
Copen Add New Line Market Print	of Business	Silver/Bronze (60) Platinum/Platii (100)	2 - Awaiting Into Closed	Timothy P Y 11/04/2003 Mary Oberleitner 07/21/2005	\$05,000.00 \$1,000.00	10/15/0000 12/02/2003	0.stail 0 -	

- 4. Left-click an option to access:
 - **Open**: Opens the **qualification** screen.

screen to bring up the available options.

- Add New Line of Business: Opens the Add New LOB screen for the opportunity.
- **Market**: Moves the opportunity to the marketing stage.
- **Print**: Click this link to print the forms associated with the opportunity.



HOME > MARKETING

1. (On th	e Util i	ity menu, click	HOME.	-			1
2. (On th	e Hon	ne menu, click	MARKET	ING.			
ne (s	sure	SEARCH	ORGANIZATION REPORTS C.	AMPAIGNS	_		Bookmarks: Expa	HOME HELP SETUP LOGO
TIONS C lello, Be narketing	etsy Corr	TES MARKET nier	TING BINDER LOG EDITS AU	DITS EXPIRATIONS	6 Endorsements 0	CANCELLATIONS CLAIMS	INTERFACE D	ELIVERY Home
All		▼ Client Name	Policy Type	Stage	ge 1 of 1 🕨 🕅 Updated By	1		Filters: [Show] Billing Carrier
Details	Assign	Policy Numb	er Line of Business	Status	Updated Date	Estimated Premium	Policy Term	Issuing Carrier
2		John Powers	s (Personal Lines)					<u></u>
- Or	nen		Monoline	Marketing	Betsy Cormier	\$0.00 D	12/04/2008	Unassigned
1			Auto - Personal (PAU	Pending	12/17/2008		12/04/2009	Unassigned
AU	Julivew Line o	libusiriess	marketing application.					
Ma	arket Existing		scruccion (Commerciar Lines)					
Pri Pri	int	1	Workers Compensat	Pending	12/09/2008	20100 0	12/04/2009	Hartford Insurance G
Ra	ate 🗲 🗕		marketing application.	eanding	12, 33, 2008		22, 04, 2005	Hardold Harded
- Se	end To History	,						
	_							

- 3. Right-click the **Details** icon on the **HOME > MARKETING** screen to bring up the available options.
- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - Add New Line of Business: Opens the Add New LOB screen for the marketing submission.
 - Market Existing: Copies the forms and adds to marketing with the expiration date of the submission as the effective date to create a new marketing submission.
 - **Print**: Click this link to print the forms associated with the marketing submission.
 - **Rate**: Available only when integration with a **Rating Vendor System** is possible.

HOME > BINDER LOG

1. On the Utility	menu, click HOM	E		1	
2. On the Home	menu, click BIND	ER LOG.			
	ANIZATION REPORTS		Hi Bookmarks: B	OME HELP SETUP L Expand Add Remove S	OGOUT
ntons opportunifies Marketing tello, Mary Oberleitner inder log	BINDER LOG EDITS AUDITS EXP	IRATIONS ENDORSEMENTS	CANCELLATIONS CLAIMS INTERFAC	E DELIVERY	
ranch: All View: Agency Issued Binders Client Name Patrik Assion Palicy Number	V V Policy Type Line of Business Status	ng Page 1 of 1 D	1 Annualized \$ Coverage Eff Date Billed Premium Coverage Eff Date	Filters: [Sho Billing Carrier	ow]
Open Winston Auto Part Winston Auto Winston Winston Auto Winston Auto Winston Auto	Infeor posiness status Is (Commercial Lines) Monoline Policy Umprelia - Commerc In Porce	Mary Oberleith 907/22/2005	\$0.00 D 01/06/2006 \$0.00 D 05/07/2006	Hartford	<u>^</u>

- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - **Market Existing**: Copies the forms and adds to marketing with the expiration date of the submission as the effective date to create a new marketing submission.
 - **Print**: Click this link to print the forms associated with the policy.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

HOME > EDITS

1. On th	e Utility	menu, click	HOME.	-				
2. On th	ne Home r	menu, click I	EDITS.					
e sure)							ocou
	SEARCH ORG	ANIZATION REPORTS				Bookmarks: Ex	(pand Add Remove S	Selecte
iello, Mary Obe	erleitner	BINDER LUG EDITS A	UDITS EXPIRATIO	UNS ENDURSEMENTS	CANCELLA HUNS CL	AIMS INTERFACE	Home	
lits 4	~		Showing Pag	je 1 of 1 ▶ 🕅	1 🗸		Filters: [Sh	ow]
Details Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier	
Abort Edit Print	-click the	Details	icon on t	the HOME	> EDITS]		
scree	n to bring	up the avai	lable opt	ions.		J	- 1111	
4. Left-c	click an op	otion to acce	ss:				1111	
■ Op	pen : Oper	ns the unde	rwriting	tab.				
■ At	oort Edit:	Aborts this	edit.					
■ Po	ost Edit: A	Posts this ed	it.					
_				<i>c</i>				

• Print: Click this link to print the forms associated with the edit.

HOME > AUDITS

1. On	the Utility	menu, click	HOME.				1	
2. On	the Home	menu, click	AUDITS					
evsu	SEARCH OR	Ganization Reports				Bookmarks:	HOME HELP SETUP L Expand Add Remove S	.0GO Selec
IONS OPPO ello, Mary dits	RTUNITIES MARKETING Oberleitner	BINDER LOG EDITS A	UDITS EXPIRAT		CANCELLATIONS CL	AIMS INTERFA	CE DELIVERY	
Details As:	Client Name Fign Policy Number	Policy Type Line of Business	Stage Status	updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Filters: [Sho Billing Ca rrier Issuing Ca rrier	ow]
Open Abort Au Post Au Print Service	Winston Auto Par	45 (Commercial Lines) Monoline Commercial Auto (At auto is Agency Bill	Audit Pending	Mary Oberleitn 08/26/2005	\$0.00 D \$0.00 D	08/17/2006 08/17/2007	Hartford	
3 Rig	ht-click the	Dotaile 📑	icon on	the HOM				

- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - **Abort Audit**: Aborts this audit.
 - **Post Audit**: Posts this audit.
 - **Print**: Click this link to print the forms associated with the audit.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

HOME > EXPIRATIONS

	e Home r	nenu, click I	EXPIRA	TION	IS.			
Sure							HOME	HELP SETUP LO
ons opportuni	SEARCH ORG	ANIZATION REPORTS BINDER LOG EDITS A		TIONS END	ORSEMENTS CANCEI	Boo LATIONS CLAIMS	kmarks: Expand INTERFACE DE	d Add Remove Sel LIVERY
ello, Mary Obe	rleitner							Home
	~		Showing P	age 1 of 1		Export]		Filters: [Show
etails Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier
•	Janet Anderson	(Personal Lines)	Doligu		Mary Oberleita	\$0.00 D	06/07/2005	Amorican
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		(commercial cines) Manalian	Delieu		Manu Ohaula Ha	ta ao 5	0//00/0005	
Cond To 12	rv 🚽	Umbrella - Commerc	Bound	New	05/09/2006	\$0.00 D	06/09/2006	
Service								

- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - **Market Existing**: Copies the forms and adds to marketing with the expiration date of the submission as the effective date to create a new marketing submission.
 - **Print**: Click this link to print the forms associated with the policy.
 - Renew: Selects this version of the policy to renew. There is no opportunity to select policies from marketing, split or combine policies.
 - Send to History: Opens the underwriting tab and the Reasons window to select identifying why the policy is being sent to history.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

HOME > ENDORSEMENTS

2. On t	he Home	menu, click	ENDORS	EMENTS.)			
essure	SEABON L ORC				_	HOM	E HELP SETUP	
IONS OPPORT ello, Mary Ob dorsements	NITIES MARKETING perleitner	BINDER LOG EDITS A	UDITS EXPIRATIO	DNS ENDORSEMENTS	CANCELLATIONS CL	AIMS INTERFACE	DELIVERY Home	
			Showing Pag	e 1 of 1 🕨	1 🕶		Filters: [S	Show]
etails Assig	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ 0 Billed Premium 0	overage Eff Date	Billing Carrier Issuing Carrier	
etails Assign	Client Name Policy Number Adam Signs	Policy Type Line of Business (Commercial Lines) Monoline General Liability (Co	Stage Status Endorsement Pending	Updated By Last Updated Mary Oberleitn US/11/2006	Annualized \$ 0 Billed Premium 0 \$0.00 D \$0.00 D	Soverage Eff Date overage Exp Date 05/11/2006 04/24/2007	Billing Carrier Issuing Carrier Penn National	

- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - **Print**: Click this link to print the forms associated with the endorsement.
 - **Service**: Opens the **servicing** tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

HOME > CANCELLATIONS

1. On th	ne Utility I	menu, click	HOME.					
2. On th	ne Home r	menu, click (CANCELI	ATIONS				
nersure	SEARCH ORG/	ANIZATION REPORTS				HOM Bookmarks: Exp	F IE HELP SETUP Dand Add Remove	LOGO Select
Hello, Mary Obe	erleitner	BINDER LOG EDITS A					Home	
All Details Assign	Client Name Policy Number	Policy Type Line of Business	Showing Page Stage Status	1 of 1 Updated By Last Updated	1 Y Annualized \$ Billed Premium	Coverage Eff Date Coverage Exp Date	Filters: [8 Billing Carrier Issuing Carrier	Show]
Abort Cancella Post Cancella Market Existin Print Service	ation	s (Commercial Lines) Monoline Commercial Property	Policy Penang Cance	Mary Oberleitn 01/30/2008	\$-200.00 A \$*300.00 X	08/23/2005 10/26/2005	Hartford	
3 Right	-click the	Details 📝	icon on t	he HOM		ΕΠΑΤΙΟΙ		Ħ

- screen to bring up the availableoptions.
- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - **Abort Cancellation**: Aborts this cancellation.
 - **Post Cancellation**: Posts this cancellation.
 - Market Existing: Copies the forms and adds to marketing with the expiration date of the submission as the effective date to create a new marketing submission.
 - **Print**: Click this link to print the forms associated with the cancellation.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

HOME > CLAIMS

	e Utility me	enu, click i	HOME.	-				
2. On the	e Home me	nu, click (LAIMS					
Sule						но	ME HELP SETUP LO	.060
	SEARCH ORGANIZ	ATION REPORTS				Bookmarks: Ex	pand Add Remove Se	elect
ello, Mary Ober ims	leitner) Home	
	*	ŀ	Showing Pag	e 1 of 2 ▶ 1	Y [Export]		Filters: [Sho	ow]
Petails Assign	Client Name Line Of Business Claim Number	Date Of Loss Claim Status	Mode	Taken By Updated By	Paid Amount Reserve Amount	Policy Term	Issuing Carrier Adjustor	
P	Janet Anderson (Perso	nal Lines)						^
💱 Open 👉	PAUTO	09/24/2003	New	Mary Oberleitner	\$0.00	10/24/2002	Safeco Ins.	
Market Existing	4	10/00/0005	P	Mary Oberleither	\$0.00	05/05/2005	Tinit, United	
Print	rsonal	Open	Kenew	Mary Oberleitner	\$0.00	05/05/2006	Unassigned	
Service	n. Auto	02/07/2004		Mary Oberleiteer	*0.00	06/24/2005	Control Incurance	=
	Addo	02/07/2000	D	mary obeneither	\$0.00	30/24/2003	Central a ISC ance	

- Right-click the **Details** icon on the **HOME > CLAIMS** screen to bring up the available options.
- 4. Left-click an option to access:
 - **Open**: Opens the claim detail.
 - **Market Existing**: Copies the forms and adds to marketing with the expiration date of the submission as the effective date to create a new marketing submission.
 - **Print**: Click this link to print the forms associated with the policy.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

CLIENT PROFILE > OPPORTUNITIES

After accessing the appropriate client through **SEARCH**, perform the following steps:

1. On the Client me	enu, click OPPORTUNITIES .	
CLIENT PROFILE OPPORTUNITES MARKE	CATION REPORTS TTING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS	HOME HELP SETUP LOGOUT Bookmarks: Expand Add Remove Selecter TRANSACTIONS DELIVERY T-LOG
Client Name: Bob's Bakery opportunities	K 4 Showing Page 1 of 1 DM	Filters: [Show] [Add New Opportunity]
Petails Assign Direct Type Details Assign Une of Business Dpen Add new line of business Add new line of business Print	User / System Updated By Grade (Score) Status Updated Date Commissi No 0 - N/A Mary Oberlether <u>+n r</u> Good/Lump or US/ 24/ 2006	X-Date Program Remove
2. Right-click the D OPPORTUNITIE	etails 🛃 icon on the CLIENT PRO	OFILE > options.
3. Left-click an option	on to access:	
Open: Opens	the qualifications tab.	
 Add new lin opportunity. 	e of business: Opens the Add	d New LOB screen for the
Market: Move	es the opportunity to the marketing	j stage.
Print: Click the second sec	is link to print the forms associated	d with the opportunity.

CLIENT PROFILE > MARKETING

After accessing the appropriate client through **SEARCH**, perform the following steps:

1. On t	the Client me	enu, click M	IARKET	ING.				
essur	e							
Coloci	SEARCH ORGA	TION REPORTS CAM	PAIGNS			Bookmarks: E	<pre>xpand Add Remo</pre>	ve Selected 💖
ospect Name	OPPORTUNITIES MARKET 2: John Powers	ING POLICIES CLAI	IMS SERVICING	ATTACHMENTS ACT	TIONS TRANSA	CTIONS DELIVE	RY T-LOG ▶ Perso	onal Account
arketing history	y market analysis							
	Line of Business		Showing Pag	e1of1 №	<u> </u>		Fi	Iters: [Show]
Details Ass	Policy Number Policy Description sign Policy Type	Stage Status	Mode	Updated By Updated Date	Estimated Premium	Policy Term	Billing Carrier Issuing Carrier	Remove
U Open	Auto - Personal (PAU"	Marketing Pooding	New	Betsy Cormier	\$0.00 D	12/04/2008	Unassigned Unassigned	- Fa
Market Exi Mass Mark	isting w marketing	ng application.						
Print Rate	wmarketi	ng application.					het enclycic de histor,	
Re-rate Send to Hi	istory a							<u>, </u>
Submit	Story							
2. Rigi MA	RKETING scr	reen to brin	g up the	e available o	options.			
3. Left	-click an opti	on to acces	s:					
= 0	Dpen : Opens	the under	writing	tab.				
■ N C S	Market Exist date of the su submission.	ing: Copies bmission as	s the for s the eff	ms and add fective date	ls to ma to creat	rketing e a new	with the e marketir	expiration Ig
n N	Mass Market nultiple mark	ing: Copies eting record	s the for ds for su	rms and pol ubmission to	icy term o multip	dates t le carrie	o create a rs.	and add
• F	Print: Click th	nis link to p	rint the	forms asso	ciated w	ith the r	narketing	submissio
• F	Rate: Availab	le only whe	n integr	ation with a	a Rating	Vendor	System is	s possible.
■ F P	Re-rate : Avai possible.	ilable only v	when int	egration wi	th a Rat	ing Vend	dor Syste	m is
	Send to Hist	orv: Opens	the un	derwritina	tab and	the Re	asons wi	ndow to

select identifying why the policy is being sent to history.

CLIENT PROFILE > POLICIES

After accessing the appropriate client through **SEARCH**, perform the following steps:

1. Or	the Client me	nu, click POLICIES	.

nexsure							Home Help	Setup Logo
SEARCH	ORGANIZATION RE OF	RTS				Bookmar	ks: Expand Add	Remove Seled
CLIENT PROFILE OPPORTUNITIE	S MARKETING POLICI	ES CLAIMS	SERVICING ATT	ACHMENTS ACTI	ONS TRAN	SACTIONS D	ELIVERY T-LOG	
Client Name: Adam Signs							► Com	mercial Accour
policies history certificates	binders verifications sur	nmary of insurance	e					
		K 4 Show	wing Page 1 of 1 🕨	1 💌				Filters: [Show]
Line Of Busin Policy Numbe Details Policy Type	ess r Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Billing Carrier Issuing Carrier	Remove
Add New Opportunity	Policy In Force Priveraurc	r 	Mary Oberleitner 05/10/2006	\$0.00 D \$0.00 D	04/24/2006 04/24/2007	04/24/2006 04/24/2007	Penn National	
Market Existing Market New Line of Busines	Submitted	New	05/22/2006	\$0.00 \$0.00	04/24/2007	04/24/2007	Penn national	
Service						iene bindene		policies
		=.						Ш

- **POLICIES** screen to bring up the available options.
- 3. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - Add New Opportunity: Brings up the Add New Opportunity window to choose LOB's.
 - Market Existing: Copies the forms and adds to marketing with the expiration date of the selected policy as the effective date for the new marketing submission.
 - Market New Line of Business: Adds a marketing record with the current date as the effective date for the submission and brings up the Add LOB screen.
 - **Print**: Click this link to print the forms associated with the policy.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.
 - **Summary Of Insurance**: Opens the summary of insurance tab of the policy.

After accessing the **underwriting** tab through the **CLIENT PROFILE > POLICIES** screen, perform the following steps:

1. Right-click the **Print** link on the **POLICIES > underwriting**

sure				HOME HELP SETUP LOGO				
	SEARCH ORGANIZATI	on Reports		Bookmarks: Expand Add Remove Select				
NT PROFILE OPP	ORTUNITIES MARKETING	G <mark>POLICIES</mark> CLAIMS SER	VICING ATTACHMENTS ACTIONS T	RANSACTIONS DELIVERY T-LOG				
ent Name: Adar	n Signs			Commercial Accourt				
erwriting policy in	fo assignment attac m	ents actions qualification H	nistory transactions claims summary	of insurance				
				navigation instruction				
ranch:	Atlantic Branch	Policy Term:	12:01AM 04/24/2006 CST					
			04/24/2007 12:01AM					
olicy Type:	Monoline	Coverage Term:	12:01AM	Pending Endorsement				
			05/11/2006 CST 04/24/2007 12:01AM	T Base Requirements				
			CST	General Liability				
ssuing Co: Penn National		Stage:	Endorsement	instruction navigation				
illing Co:	Penn National	Mode:	New					
olicy Number:	GL-8754532	Status:	Submitted 🔽 🗌 Non-					
		· · · · · · · · · · · · · · · · · · ·	renewing					
List	Pri	Open	sement Save Changes					
tions:	Tuno Status	Add New Opportunity	Mama					
Endorsemen	t Annotation Closed P	e-Services	Heno					
*		Market Existing						
ase Forms:		Market New Line of Business	ore which to obtain the set of th					
Form	s	princ	n Remove					
Narrati	ve	Nar Nar	-					
ACORD	125	Commercial Applica	100H 125					
ne of Business: Lines of Busines	s Form	D	escription Remov					
		-						

- 2. Left-click an option to access:
 - e-Services: Opens the Carrier Interface screen to access policy details from the carrier site. (User must have additional log-ins setup on the Branch Employee file to access.)
 - **Market Existing**: Copies the forms and adds to marketing with the expiration date of the selected policy as the effective date for the new marketing submission.
 - Market New Line of Business: Adds a marketing record with the current date as the effective date for the submission and brings up the Add LOB screen.
 - **Print**: Click this link to print the forms associated with the Policy.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

CLIENT PROFILE > POLICIES > history

After accessing the appropriate client through **SEARCH**, perform the following steps:

1. On the Client menu, click POL	ICIES.
2. Click the history tab.	
SEARCH ORGANIZATION REPORTS CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES	HOME HELP SETUP LOGOUT Bookmarks: Expand Add Remove Selected SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVERY T-LOG
policies history certificates binders verifications summary of insurar K Sho Line Of Business Policy Number Stage Mode	ce wing Page 1 of 1 D Filters: [Shov] Updated By Annualized \$ Policy Coverage Billing Carrier
Details Policy Type Status Change Open Policy New New Add New Opportunity nal Market Existing	Updated Date Billed Premium Term Term Issuing Carrier Remove Mary Oberleitner \$0.00 D 04/24/2006 04/24/2006 Penn National
Market New Line of Business	
3. Right-click the Details in POLICIES > history screen to	con on the CLIENT PROFILE > b bring up the available options.

- 4. Left-click an option to access:
 - **Open**: Opens the **underwriting** tab.
 - Add New Opportunity: Opens the Add New Opportunity window to choose LOB's.
 - Market Existing: Copies the forms and adds to marketing with the expiration date of the selected policy as the effective date for the new marketing submission.
 - Market New Line of Business: Adds a marketing record with the current date as the effective date for the submission and brings up the Add LOB screen.
 - **Print**: Select this link to print the forms associated with the policy.
 - Rewrite: Copies the forms and adds to marketing with the same expiration date of the selected policy with a status of Rewritten.
 - Service: Opens the servicing tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

CLIENT SEARCH

After locating the client record through **SEARCH** perform the following steps:

1. Right-click the client record **Details** icon on the **HISTORY RESULTS - CLIENT** or **SEARCH RESULTS - CLIENT** screens to display the available options.

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	e										HOME	HELP SE	TUP LOGOUT
	SEARCH	ORGA	NIZATIO	on Reports Can	MPAIGNS				Boo	kmarks: Exp	and Add	Remove	Selected 🖤
Hello, Betsy Cormier													
search													
You must search	n for a record prio	r to ent	tering a	a new one. After the	results are return	ed you	will be	give	en the option to add a new n	ecord.			
			-					-					
Entity:	Client	•	HISTO	RY RESULTS - CLIENT									
Search Type:	Contains	•	10 Record(s) Found Go To Page 1 of 1 Go To Page 1										
Branch:	All Branches	•	Detai	is Name	Client	Type	Stan		Location Name	City	St./Prov.	Zin/Postal	Remove
Client Stage:	All	Ţ			lomm	arcial	Clien		Headquarters	Manchester	NH	03108	B
Client Type:	All	•	9	Open									
Code Class:	All	•	\$	New Market	Pers	onal	Prospe	ct	Residence	Hudson	NH	03051	
Code		-	*	New Certificate	lomm	ercial	Clien	:	Demo Bound / Renewal / Audit	Lone Tree	со	80124	
Designation:				•	Pers	onal	Clier		Demo Binder Issued and	Denver	со	80231	En l
Status:	All	_		Binder Summary			- 11		Related Acct				-
Client:			7	Certificate Summary			lier	-	Group Benefits	Denver	со	80202	
Policy Number:				Vosification Summary	Pers	onal	Suspe	ct		Littleton	co	80124	
Policy Description:			P	venncauon summary	iomn	ercia	Sispe	ct	Opportunity Demo	Denver	со	80202	B
Phone Number:			Þ	Actions	Dere	on al	lier		Client to Demonstrate	Denver	<u></u>	80221	R.
Location Name			- 24	Attachments	Pera	onar	- Iner		eServices	Deliver	00	00221	
Location Name.			Þ	Claims	Pers	onal	Clier	:	Individual Benefits	Littleton	со	80128	
Location Address	·			Delivery	Pers	onal	Clier		Fiduciary Bond	Denver	со	80221	En l
Location City:			Ľ	Opportunities		_							
Location Zip/Postal:				Servicing		1 I						Search	Clear
First Name:				Transactions									
Last Name:				Inactivate									
Cost wellie:	1	_	_								_		_

- 2. Left-click an option to access:
 - **Open**: Opens the **card file** tab.
 - New Market: Adds a marketing record with the current date as the effective date for the submission and displays the New Application Selection dialog box for application selection.
 - New Certificate: Opens the new certificate tab to begin creating a new certificate for the client.
 - Certificate Summary: Opens the certificates tab to view certificates for the selected client.
 - Policy Summary: Opens the policies tab to display a summary of policies for the selected client.
 - **Servicing**: Opens the **servicing** tab allowing a service option to be selected.