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- Context Tools

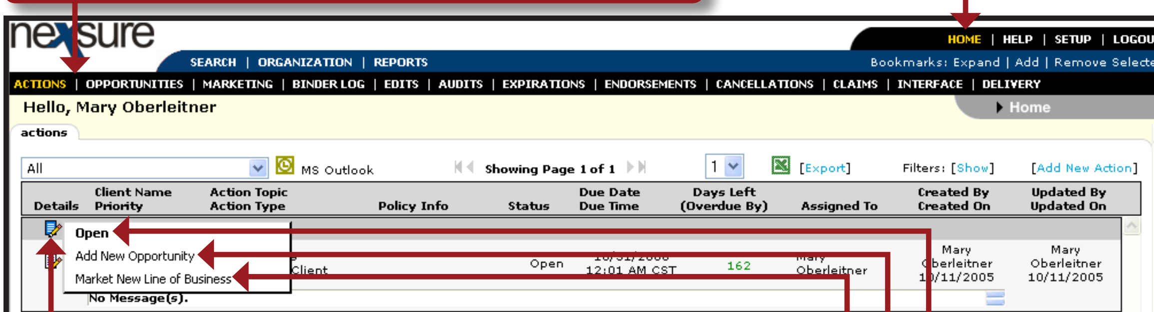
Context Tools

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:

1. On the **Utility** menu, click **HOME**.
2. On the **Home** menu, click the desired option.



3. Right-click the blue **Details** icon on any of the **Home** screens to bring up the available options.
4. Left-click an option to access:
   - **Open**: Opens the **Client Card File**.
   - **Add New Opportunity**: Opens the **Add New Opportunity** window to choose an LOB (Line of Businesses).
   - **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.

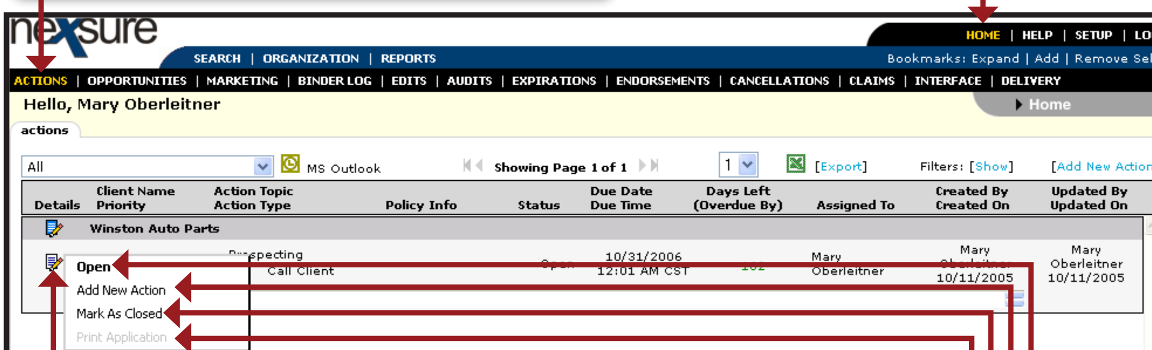
Other Details Icons

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

HOME > ACTIONS

1. On the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **ACTIONS**.



3. Right-click the **Details** icon on the **HOME > ACTIONS** screen to bring up the available options.

4. Left-click an option to access:
   - **Open**: Opens the current action to edit.
   - **Add New Action**: Opens the **Add New Personal Action** screen.
   - **Mark As Closed**: Allows the action to be closed without adding a new memo to the action.
   - **Print Application**: If the action is associated with a policy, click this link to print the forms associated with the policy.

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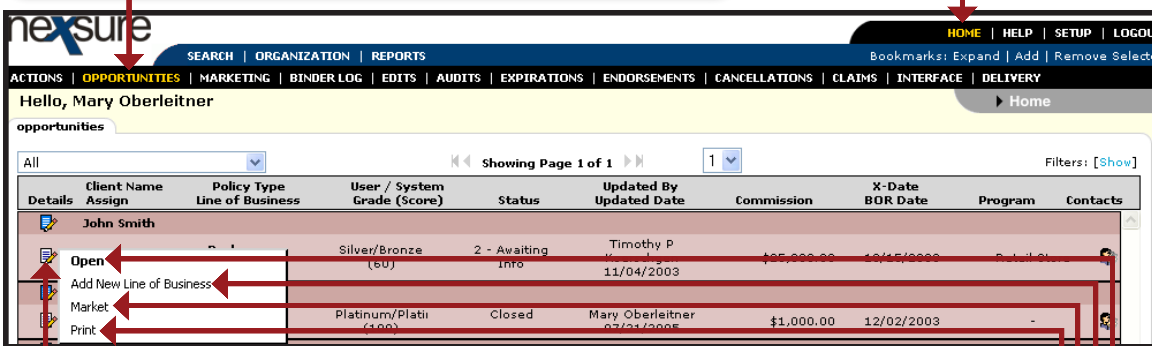
HOME > OPPORTUNITIES

1. On the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **OPPORTUNITIES**.



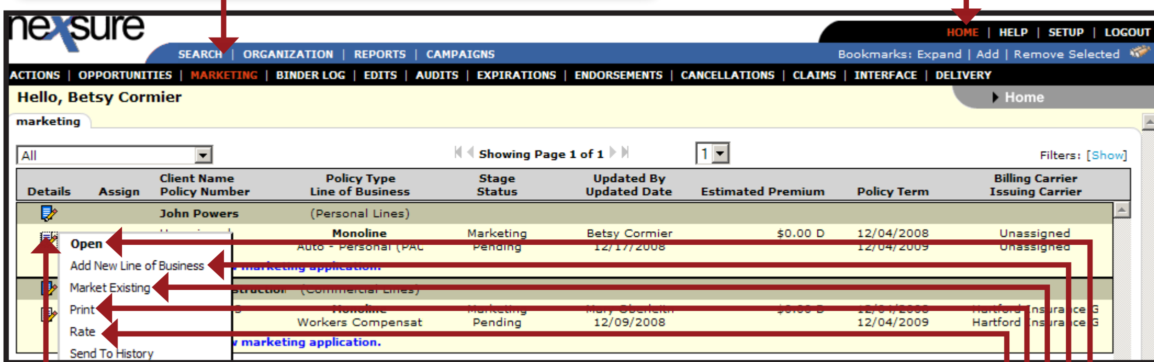
3. Right-click the **Details** icon on the **HOME > OPPORTUNITIES** screen to bring up the available options.

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

2. On the **Home** menu, click **MARKETING**.



3. Right-click the **Details** icon on the **HOME > MARKETING** screen to bring up the available options.

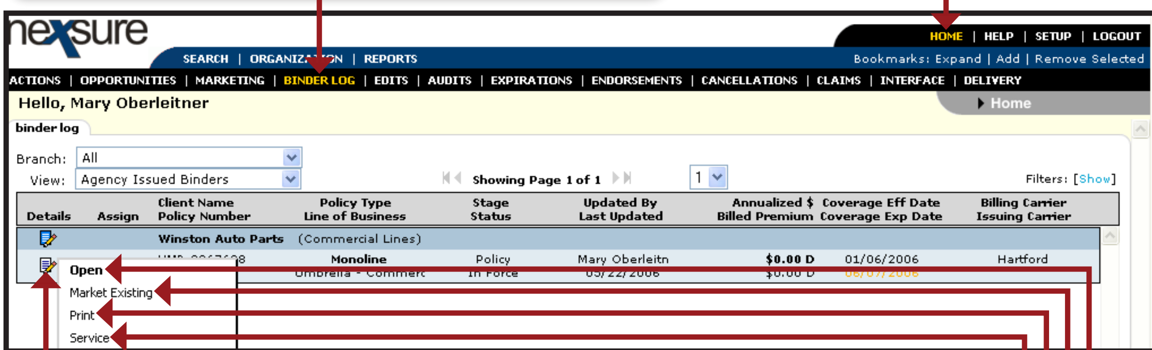
4. Left-click an option to access:

   - **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 **HOME**.

2. On the **Home** menu, click **BINDER LOG**.



3. Right-click the **Details** icon on the **HOME > BINDER LOG** screen to bring up the available options.

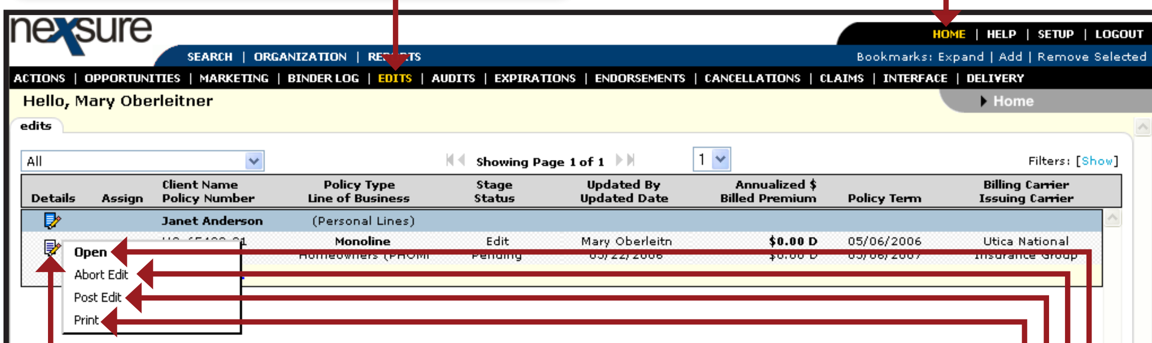
4. Left-click an option to access:

   - **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 the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **EDITS**.



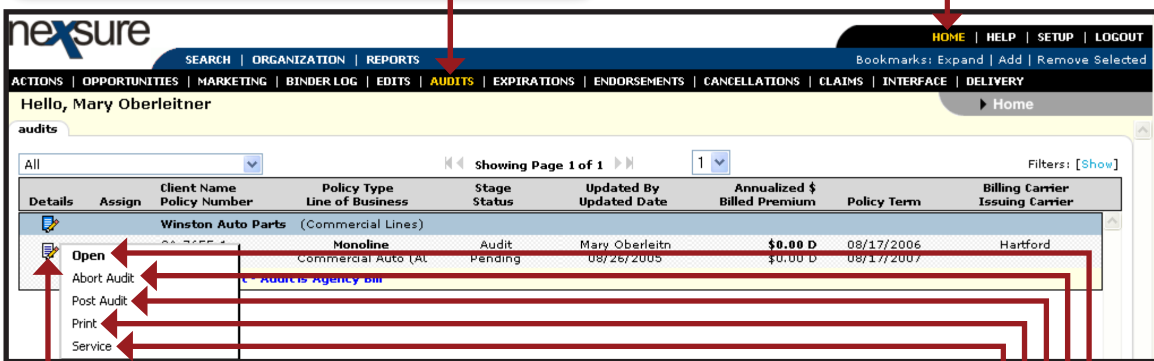
3. Right-click the **Details** icon on the **HOME > EDITS** screen to bring up the available options.

4. Left-click an option to access:
   - **Open**: Opens the **underwriting** tab.
   - **Abort Edit**: Aborts this edit.
   - **Post Edit**: Posts this edit.
   - **Print**: Click this link to print the forms associated with the edit.

HOME > AUDITS

1. On the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **AUDITS**.



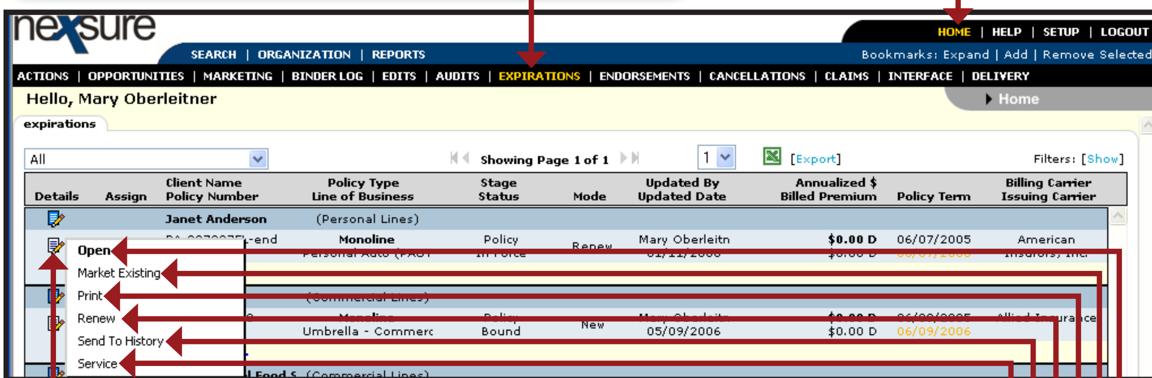
3. Right-click the **Details** icon on the **HOME > AUDITS** screen to bring up the available options.

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

1. On the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **EXPIRATIONS**.



3. Right-click the **Details** icon on the **HOME > EXPIRATIONS** screen to bring up the available options.

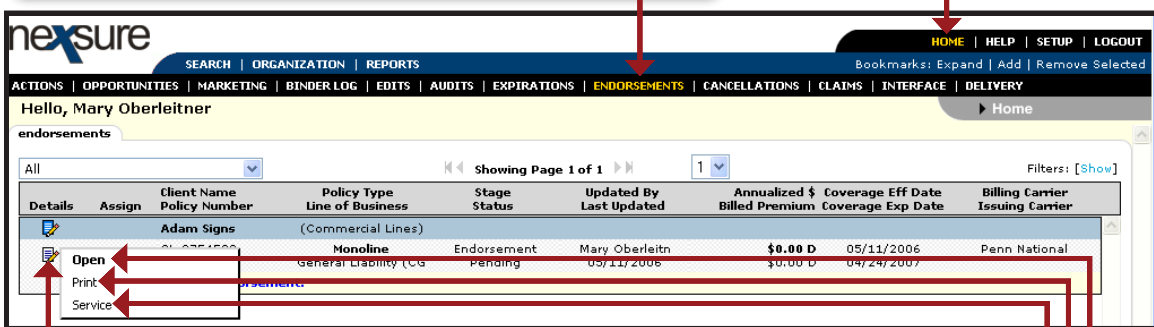
4. Left-click an option to access:

- **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

1. On the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **ENDORSEMENTS**.



3. Right-click the **Details** icon on the **HOME > ENDORSEMENTS** screen to bring up the available options.

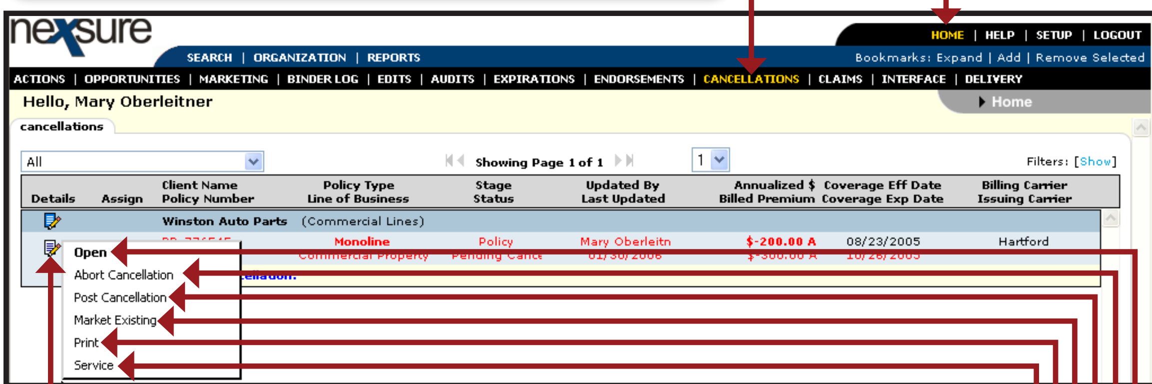
4. Left-click an option to access:

   - **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 the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **CANCELLATIONS**.



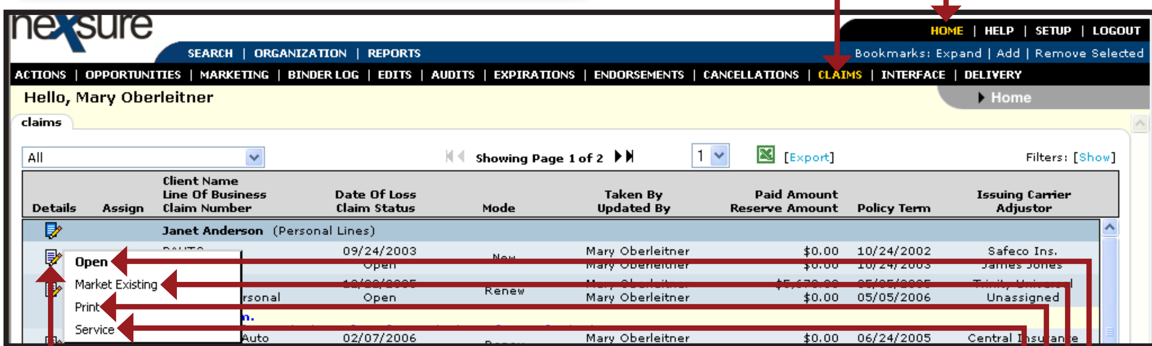
3. Right-click the **Details** icon on the **HOME > CANCELLATIONS** screen to bring up the availableoptions.

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

1. On the **Utility** menu, click **HOME**.

2. On the **Home** menu, click **CLAIMS**.



3. Right-click the **Details** icon on the **HOME > CLAIMS** screen to bring up the available options.

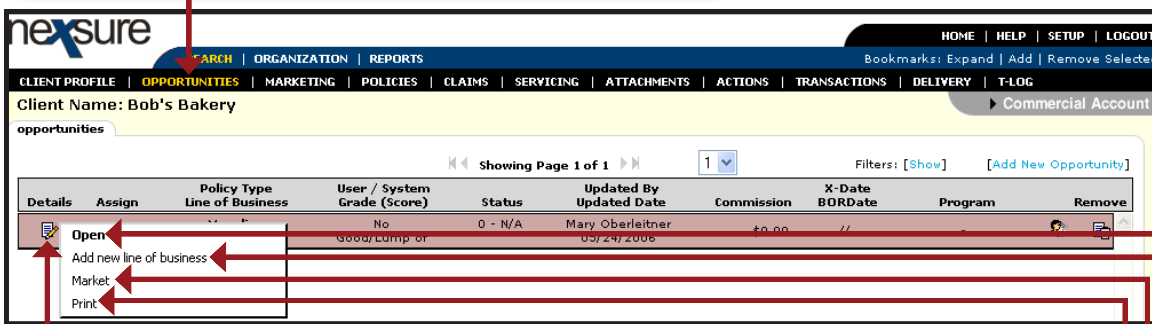
4. Left-click an option to access:

   - **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** menu, click **OPPORTUNITIES**.



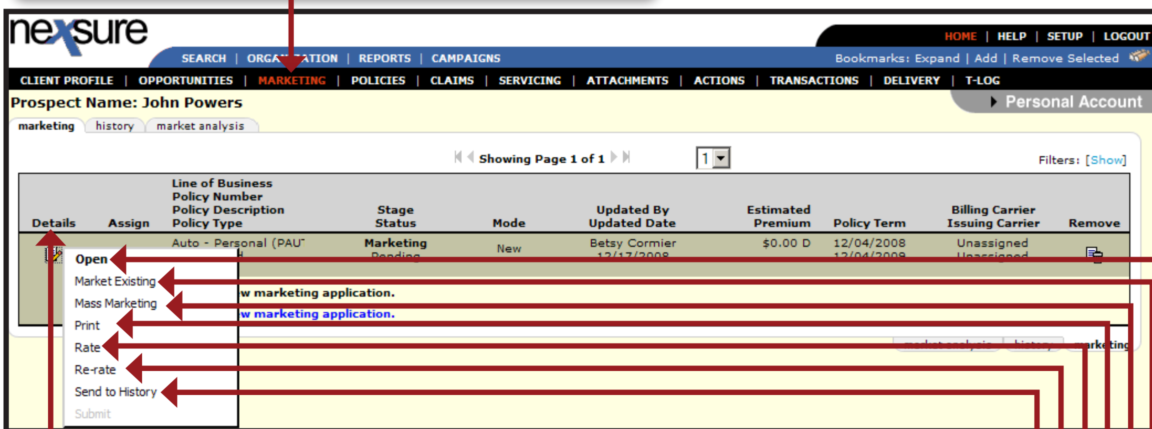
2. Right-click the **Details** icon on the **CLIENT PROFILE > OPPORTUNITIES** screen to bring up the available options.

3. Left-click an option to access:
   - **Open**: Opens the **qualifications** tab.
   - **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.

CLIENT PROFILE > MARKETING

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

1. On the **Client** menu, click **MARKETING**.



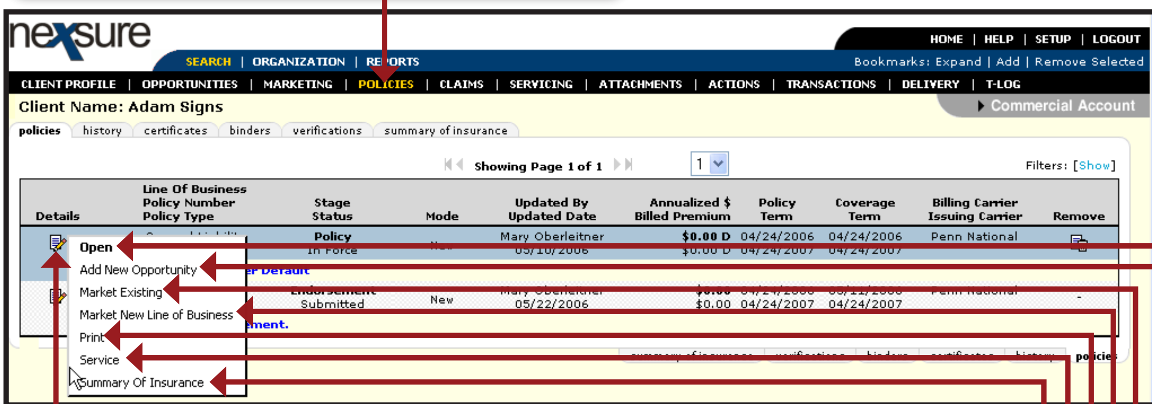
2. Right-click the **Details** icon on the **CLIENT PROFILE > MARKETING** screen to bring up the available options.

3. 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.
   - **Mass Marketing**: Copies the forms and policy term dates to create and add multiple marketing records for submission to multiple carriers.
   - **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.
   - **Re-rate**: Available only when integration with a Rating Vendor System is possible.
   - **Send to History**: Opens the **underwriting** tab and the **Reasons** window 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. On the **Client** menu, click **POLICIES**.

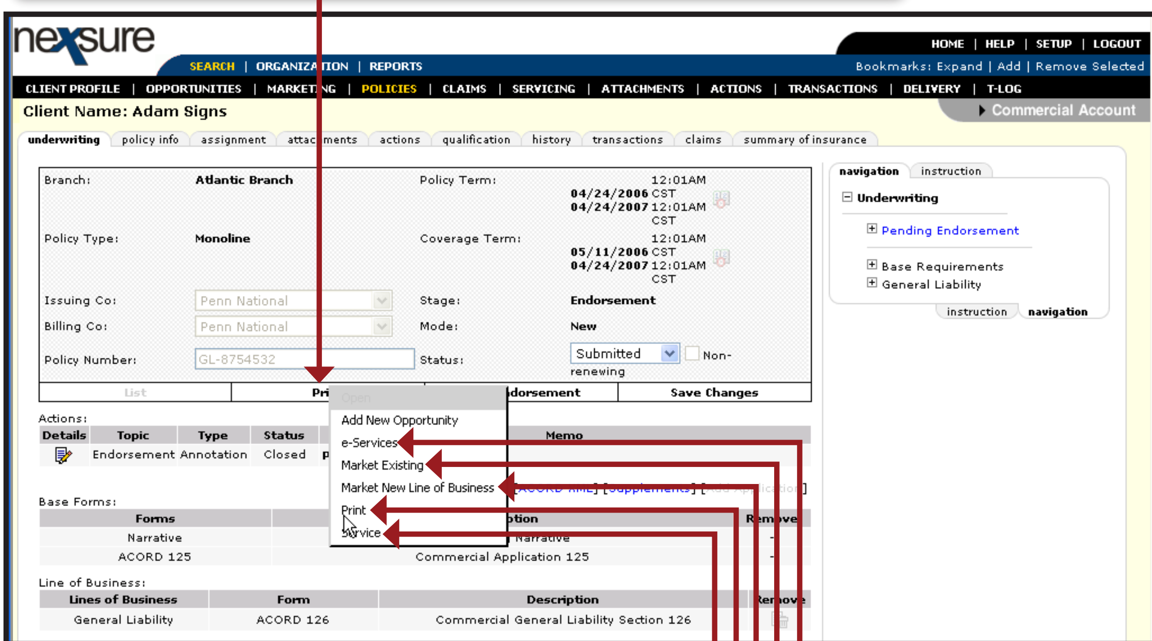


2. Right-click the **Details** icon on the **CLIENT PROFILE > POLICIES** screen to bring up the available options.

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** navigation toolbar to bring up the available options.



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.

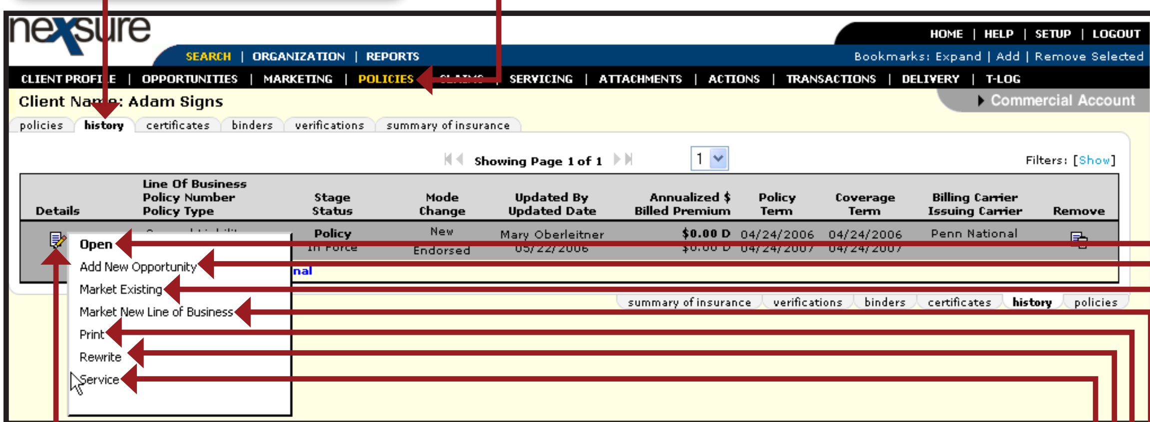
   - **Service**: Opens the **servicing** tab allowing a service option to be selected while maintaining this policy as the policy being serviced.

CLIENT PROFILE > POLICIES > history

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

1. On the **Client** menu, click **POLICIES**.

2. Click the **history** tab.



3. Right-click the **Details** icon on the **CLIENT PROFILE > POLICIES > history** screen to bring up the available options.

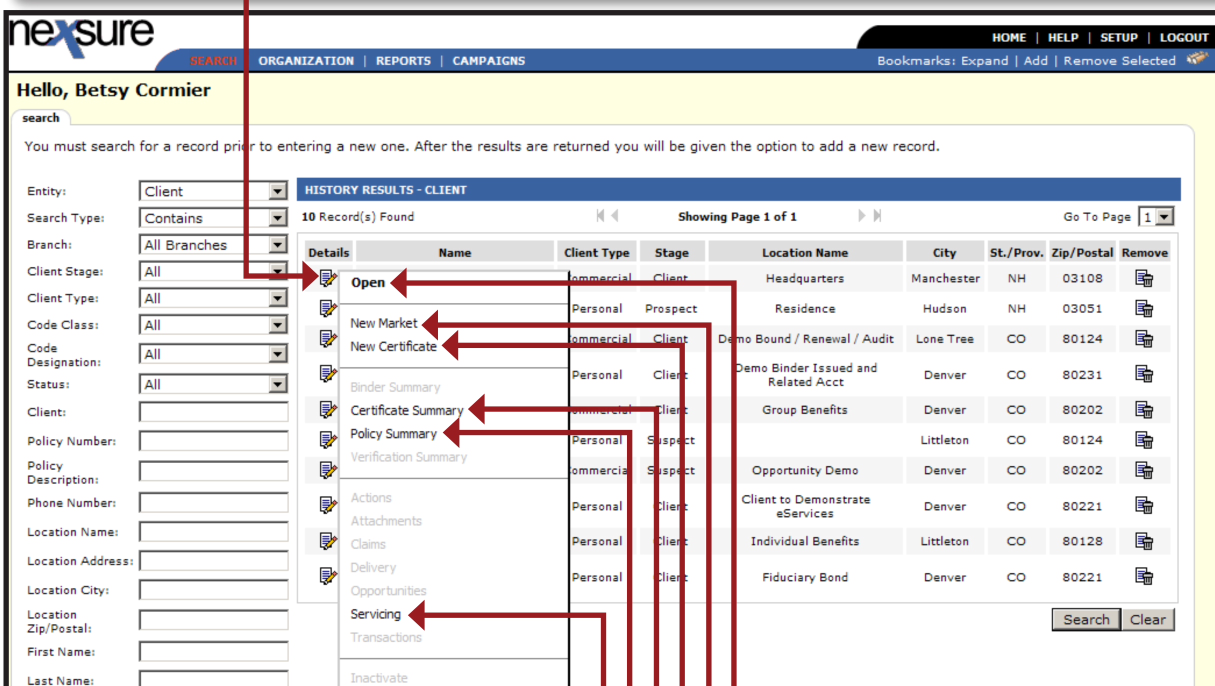
4. Left-click an option to access:

   - **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.



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.