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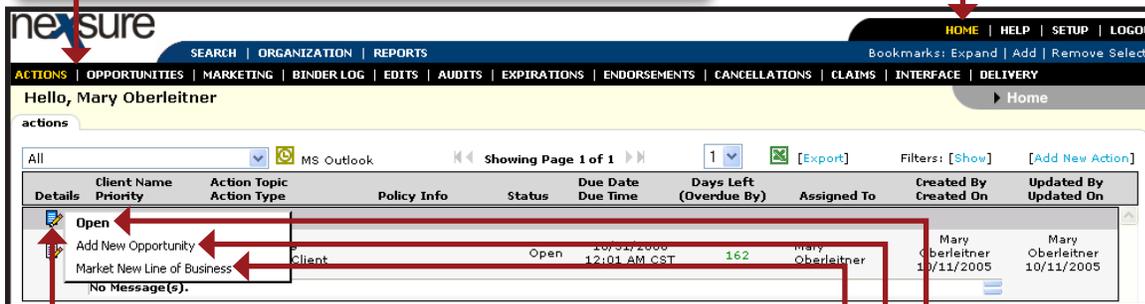
Context Tools

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**.

Client Name	Action Topic	Due Date	Days Left	Assigned To	Created By	Updated By
Details	Priority	Action Type	Policy Info	Status	Due Time	(Overdue By)
Winston Auto Parts	Inspecting	10/31/2006		Mary Oberleitner	Mary Oberleitner	Mary Oberleitner
	Call Client	12:01 AM CST	002		10/11/2005	10/11/2005

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.



HOME > OPPORTUNITIES

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

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

Details	Client Name	Policy Type	User / System	Status	Updated By	Commission	X-Date	BOR Date	Program	Contacts
Open	John Smith		Silver/Bronze (60)	2 - Awaiting Info	Timothy P	\$25,000.00	12/15/2003			
Market			Platinum/Plati (100)	Closed	Mary Oberleitner	\$1,000.00	12/02/2003			

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**.

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Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Estimated Premium	Policy Term	Billing Carrier Issuing Carrier
John Powers (Personal Lines)								
Open			Monoline	Marketing	Betsy Cormier 12/17/2008	\$0.00 D	12/04/2008	Unassigned
Add New Line of Business			Auto - Personal (PAC)	Pending			12/04/2009	Unassigned
Market Existing			Monoline (Commercial Lines)					
Print			Monoline	Marketing	Mary Steinlein 12/09/2008	\$0.00 D	12/04/2008	Hartford Insurance G
Rate			Workers Compensat	Pending			12/04/2009	Hartford Insurance G
Send 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 **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**.

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
		Janet Anderson	(Personal Lines) Monoline Homeowners (PHOM)	Edit Pending	Mary Oberleitn 05/22/2006	\$0.00 D \$0.00 D	05/06/2006 05/06/2007	Utica National Insurance Group

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**.

Winston Auto Parts (Commercial Lines)

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
			Monoline	Audit	Mary Oberleitn	\$0.00 D	08/17/2006	Hartford
			Commercial Auto (Al	Pending	08/26/2005	\$0.00 D	08/17/2007	

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**.

Details	Assign	Client Name	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)		Policy	Renew	Mary Oberleitn	05/11/2006	\$0.00 D	06/07/2005	American	Insurers, Inc.
			Monoline	Personal Auto (PAO)	In Force				\$0.00 D	06/07/2005		
			(Commercial Lines)									
			Umbrella - Commer		Bound	New	Mary Oberleitn	05/09/2006	\$0.00 D	06/09/2006	Allied Insurance	
			Lead 5 - (Commercial Lines)									

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**.

Screenshot of the Nexsure web application showing the 'HOME > ENDORSEMENTS' screen. The screen displays a table of endorsement records for 'Adam Signs'. A context menu is open over the 'Details' icon of the first row, showing options: 'Open', 'Print', and 'Service'. Red arrows point from the instructions to the 'HOME' link, the 'ENDORSEMENTS' link, the 'Details' icon, and the 'Open', 'Print', and 'Service' options.

Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Billed Premium	Coverage Eff Date Coverage Exp Date	Billing Carrier Issuing Carrier
		Adam Signs	(Commercial Lines)	Endorsement	Mary Oberleitn	\$0.00 D	05/11/2006	Penn National
			Monoline	Endorsement	Mary Oberleitn	\$0.00 D	04/24/2007	
			General Disability (CG)	Pending	05/11/2005	\$0.00 D		

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**.

Winston Auto Parts (Commercial Lines)

Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Billed Premium	Coverage Eff Date Coverage Exp Date	Billing Carrier Issuing Carrier
		00-336545	Monoline Commercial Property	Pending Cance	Mary Oberleitn 01/30/2006	\$-200.00 A \$-300.00 A	08/23/2005 10/26/2005	Hartford

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

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**.

Details	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
		Janet Anderson (Personal Lines)						
Open			09/24/2003 Open	New	Mary Oberleitner	\$0.00	10/24/2002	Safeco Ins.
Market Existing			08/28/2005 Open	Renew	Mary Oberleitner	\$0.00	10/24/2003	James Jones
Print		Personal	Open		Mary Oberleitner	\$0.00	05/05/2006	Unassigned
Service		Auto	02/07/2006		Mary Oberleitner	\$0.00	06/24/2005	Central Insurance

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**.

The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with 'SEARCH', 'ORGANIZATION', and 'REPORTS'. Below that, a breadcrumb trail shows 'CLIENT PROFILE > OPPORTUNITIES'. The main content area displays 'Client Name: Bob's Bakery' and a table of opportunities. The table has columns for 'Details', 'Assign', 'Policy Type Line of Business', 'User / System Grade (Score)', 'Status', 'Updated By Updated Date', 'Commission', 'X-Date BORDate', 'Program', and 'Remove'. A context menu is open over the first row, showing options: 'Open', 'Add new line of business', 'Market', and 'Print'. Red arrows from the instructions point to the 'OPPORTUNITIES' menu item, the 'Details' icon, and the 'Open', 'Add new line of business', 'Market', and 'Print' options in the context menu.

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**.

Prospect Name: John Powers

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Details	Assign	Line of Business	Policy Number	Policy Description	Policy Type	Stage	Status	Mode	Updated By	Updated Date	Estimated Premium	Policy Term	Billing Carrier	Issuing Carrier	Remove
Open		Auto - Personal (PAU)				Marketing	Ready	New	Betsy Cormier	12/17/2008	\$0.00 D	12/04/2008	Unassigned	Unassigned	
Market Existing															
Mass Marketing															
Print															
Rate															
Re-rate															
Send to History															
Submit															

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**.

Details	Line Of Business	Policy Number	Policy Type	Stage Status	Mode	Updated By	Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Billing Carrier	Issuing Carrier	Remove
Open	Policy			In Force	New	Mary Oberleitner	05/10/2006	\$0.00 D	04/24/2006	04/24/2006	Penn National		
Add New Opportunity													
Market Existing	Endorsement			Submitted	New	Mary Oberleitner	05/22/2006	\$0.00	04/24/2006	05/22/2006	Penn National		
Market New Line of Business								\$0.00	04/24/2007	04/24/2007			
Print													
Service													
Summary Of Insurance													

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.

The screenshot shows the Nexsure web interface. The top navigation bar includes 'HOME | HELP | SETUP | LOGOUT'. Below it is a search and organization menu. The main header shows 'CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG'. The client name is 'Adam Signs' and the account type is 'Commercial Account'. The 'underwriting' tab is active, showing policy details for 'Atlantic Branch' and 'Monoline' policy type. A context menu is open over the 'Print' link, with red arrows pointing to the following options: 'Add New Opportunity', 'e-Services', 'Market Existing', 'Market New Line of Business', 'Print', and 'Service'.

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.

Details	Line Of Business	Policy Number	Policy Type	Stage	Status	Mode Change	Updated By	Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Billing Carrier	Issuing Carrier	Remove
Open				Policy	New		Mary Oberleitner	05/22/2006	\$0.00 D	04/24/2006	04/24/2006	Penn National		
Add New Opportunity														
Market Existing														
Market New Line of Business														
Print														
Rewrite														
Service														

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.

Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
	Open	Commercial	Client	Headquarters	Manchester	NH	03108	
	New Market	Personal	Prospect	Residence	Hudson	NH	03051	
	New Certificate	Commercial	Client	Demo Bound / Renewal / Audit	Lone Tree	CO	80124	
	Binder Summary	Personal	Client	Demo Binder Issued and Related Acct	Denver	CO	80231	
	Certificate Summary	Commercial	Client	Group Benefits	Denver	CO	80202	
	Policy Summary	Personal	Suspect		Littleton	CO	80124	
	Verification Summary	Commercial	Suspect	Opportunity Demo	Denver	CO	80202	
	Actions	Personal	Client	Client to Demonstrate eServices	Denver	CO	80221	
	Attachments	Personal	Client	Individual Benefits	Littleton	CO	80128	
	Claims	Personal	Client					
	Delivery	Personal	Client	Fiduciary Bond	Denver	CO	80221	
	Opportunities							
	Servicing							
	Transactions							
	Inactivate							

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.