



IN THIS ISSUE

- ✖ Sorting Schedules in Forms

Sorting Schedules in Forms

When a client has a large schedule, sorting is an easy way to temporarily change the view to quickly verify what is in the list. To change the view of any schedule on a form, click the link of the schedule on the **navigation** tab to display the items entered on the form.

Perform the following after accessing the appropriate client through **SEARCH**, clicking **POLICIES** on the **Client** menu and clicking the **Details**  icon:

1. In the **underwriting > navigation** tab, click the appropriate line of business link.

The screenshot displays the nexsure web application. At the top, there is a navigation bar with links: SEARCH, ORGANIZATION, REPORTS, HOME, HELP, SETUP, LOGOUT. Below this is a sub-navigation bar with links: CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, T-LOG. The main content area shows the client profile for 'Busy Bee Crafts' with various tabs: underwriting, policy info, assignment, attachments, actions, qualification, history, transactions, claims, summary of insurance. The 'underwriting' tab is active, showing a 'navigation' sub-tab. Under 'navigation', there is a list of links: Base Requirements, Commercial Auto, ACORD 127 CA, Producer, Applicant, Billing, Coverages - Auto, Coverages - Tractors, Coverages - Motor Carrier, Endorsements, Vehicles, Drivers, General Info, Additional Interest, Attachments, Remarks. The 'Vehicles' link is highlighted. Below the navigation tab, there is a table of vehicles with columns: Details, Vehicle Number, Year, Make, Model, Body Type, Vehicle Identification Number, and Remove. The table contains 12 rows of vehicle data.

2. Click the ACORD link.

3. Click the appropriate schedule link to open the summary view.



4. To quickly sort the list, click the **Sort** link on the navigation toolbar to open the **Sort Record(s)** dialog box.

Vehicles - Type							Lookup Import Export
Sort	Add Record	Renumber	Search	Prev	Next		
Details	Vehicle Number	Year	Make	Model	Body Type	Vehicle Identification Number	Remove
	1	2000	Ford	Mustang	2D	890890YU879977HJ	
	2	2003	Chevy	Blazer	4D	7989UK798798HJ980	
	3	2004	Volvo	S4	4D	87988KLJ779889HK9	
	4	2002	Ford	Mustang	2D	890890YU345977HJ	

Billing
 Coverages - Auto
 Coverages - Truckers
 Coverages - Motor Carrier
 Endorsements
Vehicles
 Drivers
 General Info
 Additional Interest

5. The sorting choices available reflect the columns that are displayed in the summary view. In the **Sort Record(s)** dialog box, select either **Ascending** or **Descending** for each item in the list.

Sort Record(s)

Year:

Make:

Model:

Body Type:

Vehicle Identification Number:

Cancel

Sort

6. Click the **Sort** button and the summary view will be sorted based on selections.

Vehicles - Type						
Sort	Add Record	Renumber	Search			
Details	Vehicle Number	Year	Make	Model	Body Type	Vehicle
	1	2000	Ford	Mustang	2D	890890YU
	10	2000	Ford	Mustang	2D	890890YU
	11	2000	Ford	Mustang	2D	890890YU
	12	2000	Ford	Mustang	2D	890890YU
	4	2002	Ford	Mustang	2D	890890YU
	2	2003	Chevy	Blazer	4D	7989UK79
	8	2003	Chevy	Blazer	4D	7989UK79
	9	2003	Chevy	Blazer	4D	7989UK79