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- ✕ Drag-and-Drop Text Feature

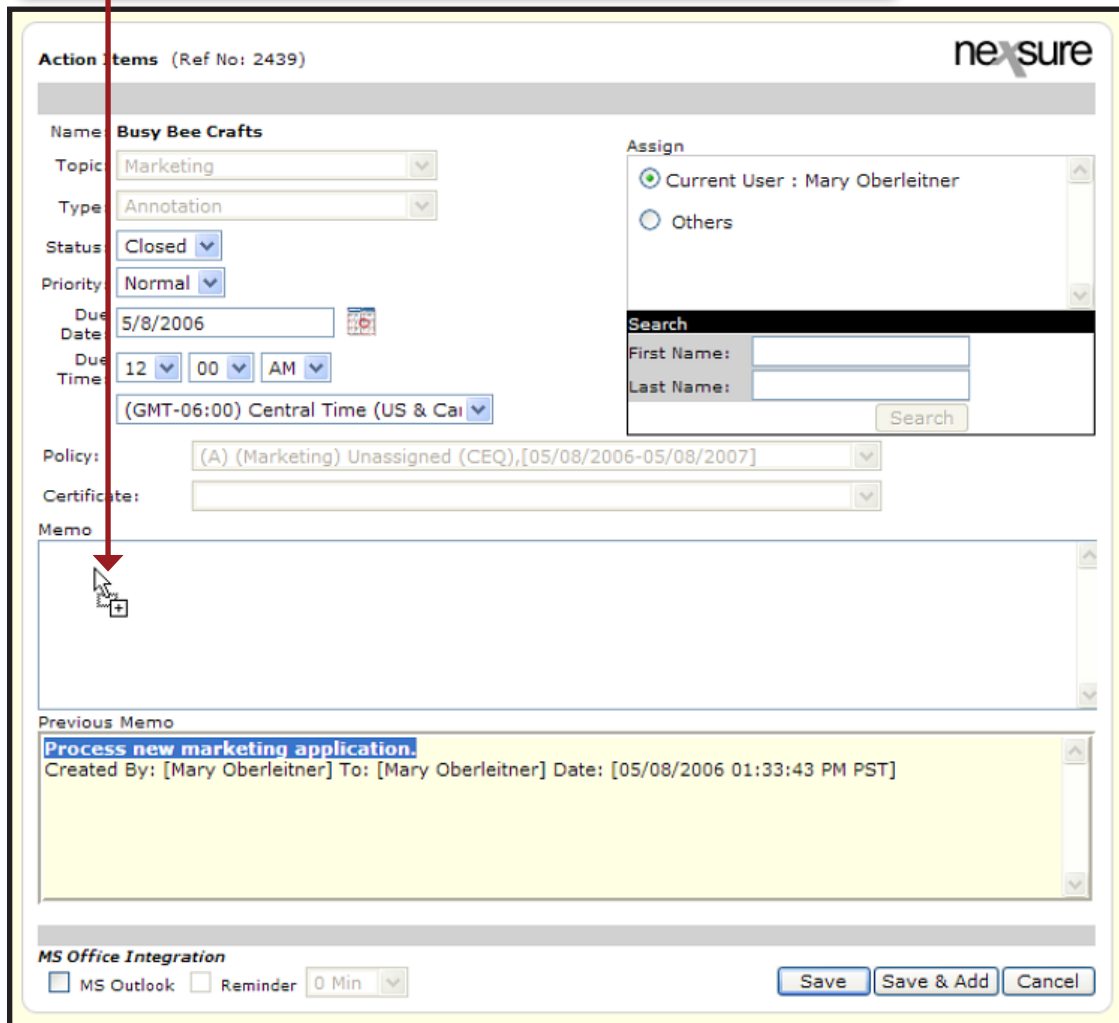
Drag-and-Drop Text Feature

Text can quickly be copied and placed into another text box using a drag-and-drop operation. Follow the steps below:

1. Select the desired text to be copied.

The screenshot displays the 'Action Items' form for 'Busy Bee Crafts' (Ref No: 2439). The form includes fields for Name, Topic (Marketing), Type (Annotation), Status (Closed), Priority (Normal), Due Date (5/8/2006), Due Time (12:00 AM), and Policy. A red arrow points from the first step of the instructions to the 'Previous Memo' section, where the text 'Process new marketing application.' is highlighted in blue, indicating it is selected for copying. The 'Previous Memo' section also shows the creator 'Mary Oberleitner' and the date '05/08/2006 01:33:43 PM PST'. The form also features an 'Assign' section with 'Current User : Mary Oberleitner' and a 'Search' section with 'First Name' and 'Last Name' fields. At the bottom, there is an 'MS Office Integration' section with checkboxes for 'MS Outlook' and 'Reminder', and buttons for 'Save', 'Save & Add', and 'Cancel'.

2. Press / hold the left mouse button and drag the selected text into the desired text box until the pointer becomes a  and release the mouse.



The screenshot shows the 'Action Items' form for 'Busy Bee Crafts' (Ref No: 2439). A red arrow points from the instruction above to a mouse cursor with a plus sign, which is positioned over the 'Memo' field. The form includes fields for Name, Topic, Type, Status, Priority, Due Date, Due Time, Policy, Certificate, and Memo. The 'Assign' section shows 'Current User : Mary Oberleitner'. The 'Search' section has fields for First Name and Last Name. The 'Previous Memo' section shows a previous entry: 'Process new marketing application. Created By: [Mary Oberleitner] To: [Mary Oberleitner] Date: [05/08/2006 01:33:43 PM PST]'. The 'MS Office Integration' section has checkboxes for 'MS Outlook' and 'Reminder' with a dropdown for '0 Min'. At the bottom are 'Save', 'Save & Add', and 'Cancel' buttons.

3. The text is now dropped into the desired text box. Click within the text box to add more text.

Action Items (Ref No: 2439) nexsure

Name: Busy Bee Crafts

Topic: Marketing

Type: Annotation

Status: Closed

Priority: Normal

Due Date: 5/8/2006

Due Time: 12:00 AM

Time Zone: (GMT-06:00) Central Time (US & Cai)

Policy: (A) (Marketing) Unassigned (CEQ),[05/08/2006-05/08/2007]

Certificate:

Memo:

Process new marketing application.

Previous Memo:

Process new marketing application.
Created By: [Mary Oberleitner] To: [Mary Oberleitner] Date: [05/08/2006 01:33:43 PM PST]

MS Office Integration

☐ MS Outlook ☐ Reminder 0 Min


Buttons: Save Save & Add Cancel

Drag-and-Drop Text from an Editable Text Box

If text needs to be moved from a text box that can be edited, the text is actually moved to the new location instead of being copied. Follow the steps below:

1. Select the desired text to be copied.

The screenshot shows the nexsure web application interface. The top navigation bar includes links for SEARCH, ORGANIZATION, and REPORTS. Below this is a sub-navigation bar with links for CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, and DELIVERY. The main content area displays the 'Client Name: Busy Bee Crafts' and various tabs for underwriting, policy info, assignment, attachments, actions, qualification, history, transactions, and claims. The 'Applicant' section is highlighted, showing fields for Application Date (5/8/2006), Applicant - (First Named Insured): (Busy Bee Crafts1574), and Agency Customer ID. A red arrow points from the first step of the instructions to the text 'Busy Bee Crafts1574' in the Applicant field.

2. Press / hold the left mouse button and drag the selected text into the desired text box until the pointer becomes a  and release the mouse.

3. The text is now moved into the desired text box. Click within the text box to add more text.

The screenshot displays the nexsure web application interface. The top navigation bar includes links for SEARCH, ORGANIZATION, and REPORTS. Below this, a secondary navigation bar lists various modules: CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, and DELIVERY. The main content area shows the 'Client Name: Busy Bee Crafts' and a tabbed interface with options like underwriting, policy info, assignment, attachments, actions, qualification, history, transactions, claims, and summary of insurance. The 'underwriting' tab is active, displaying a table with columns for Branch, Policy Type, Issuing Co, Billing Co, Policy Numbers, List, Rate, Bridge, Print, and Compare Policy. The 'Applicant' section is expanded, showing fields for Application Date (5/8/2006), Applicant - (First Named Insured) (Busy Bee Crafts), and Agency Customer ID (1574). A red box highlights the 'Agency Customer ID' field, and a red arrow points to it from the text box in the previous step.