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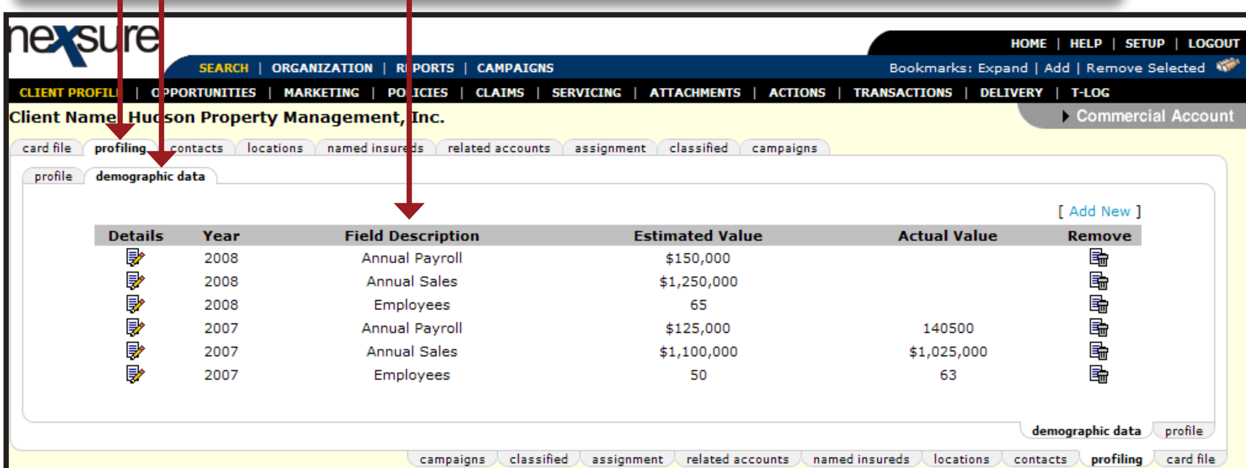
Document Template Using Client Demographic Data

Client demographic data is used to document values that change from year to year to facilitate benchmarking. Demographic data can also track estimated values versus actual values within those years. Demographic values are customized by each agency in **SETUP** > **Lookup Management** > **Client** > **Demographic Data**. Demographic values documented at the Client level can be merged into document templates for use in proposals or other sales presentations.

Demographic Data at the Client Level

Demographic data is maintained on the **CLIENT PROFILE > profiling** tab > **demographic data** tab**.** The illustration below has values for 2007 and 2008 for **Annual Payroll**, **Annual Sales** and **Employees**.



Note: Demographic values can be different than dollar values, such as number of locations, vehicles or employees. Document templates use a field mask to convert numbers into a monetary format. Be sure to format demographic dollar values when entering them at the Client level to avoid using a field mask for your document template. A field mask should not be used to convert the number of employees into a dollar value.

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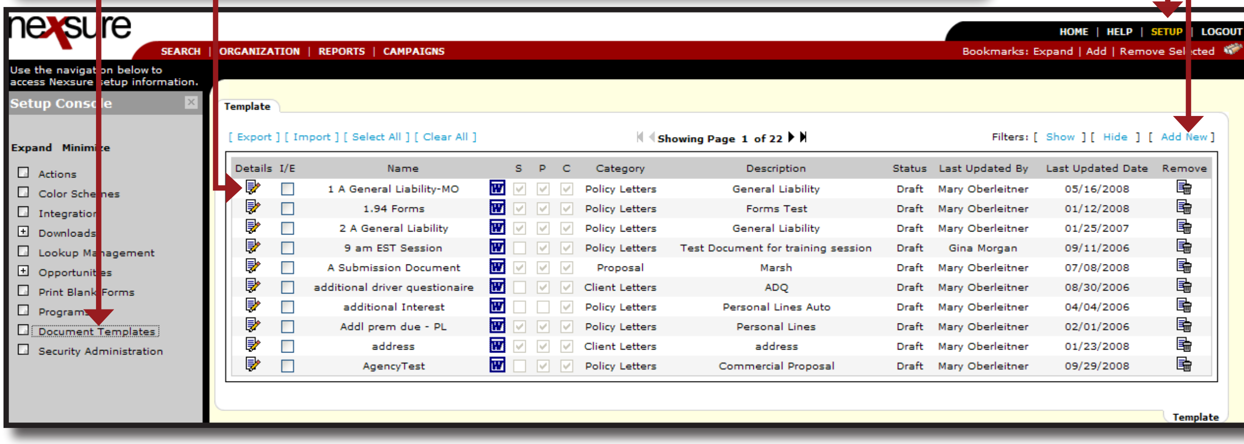
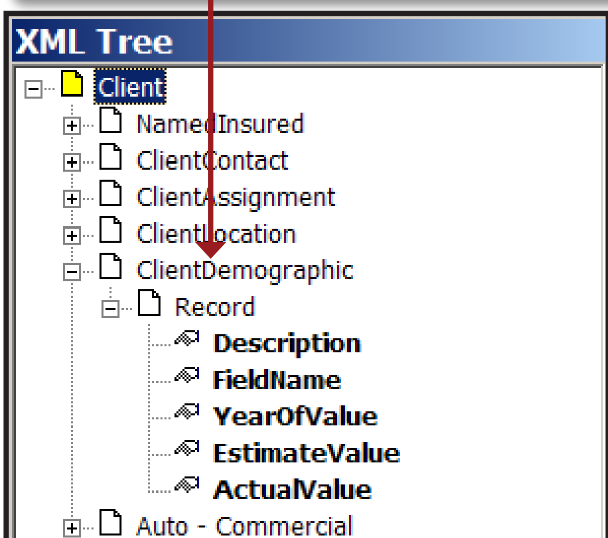
The Document Template

1. Access the document template through **SETUP** > **Document Templates**. Click the **Details** icon of an existing template or **[Add New]** to create a new template.

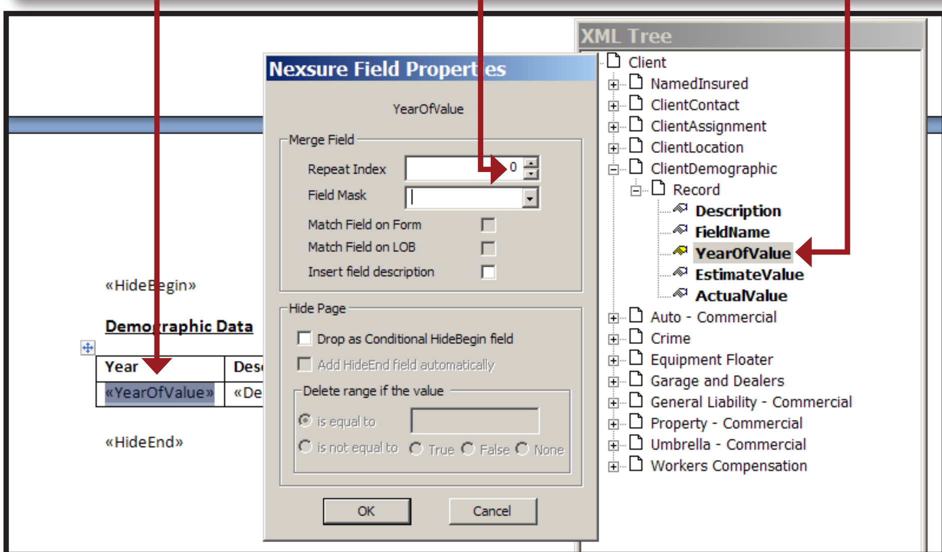


2. In the Microsoft® Word template, click on the **Nexsure Fields** button to display the **XML Tree**. Merge fields for **Client Demographic** are in a schedule record format.



3. Add a table to your document to hold the merge fields. Place the pointer in the table cell that will hold the merged data; select and drag the field value from the XML Tree into the table cell. In this illustration, the **YearOfValue** merge field is being placed in the first cell of the second and last row of the table. To be certain all demographic values selected at the client level will merge to the document, set the **Nexsure Field Properties Merge Field Repeat Index** to zero.

   Note: Do not add another table row touching the bottom row of the table that holds the scheduled item merge fields. The **Field Mask** option is not used to format dollar values because Demographic Values may be other than monetary.



The table below includes all fields available for Client Demographics to demonstrate the results for each field in a merged document. The table header row contains the field name as seen from the demographic data record at the Client level. `<<Description>>` merges the **Year** and **Field Description** values as one item:

<<Hide Begin>>

Demographic Data

Year	Year / Field Description	Field Description	Estimated Value	Actual Value
<<YearOfValue>>	<<Description>>	<<FieldName>>	<<EstimateValue>>	<<ActualValue>>

<<Hide End>>

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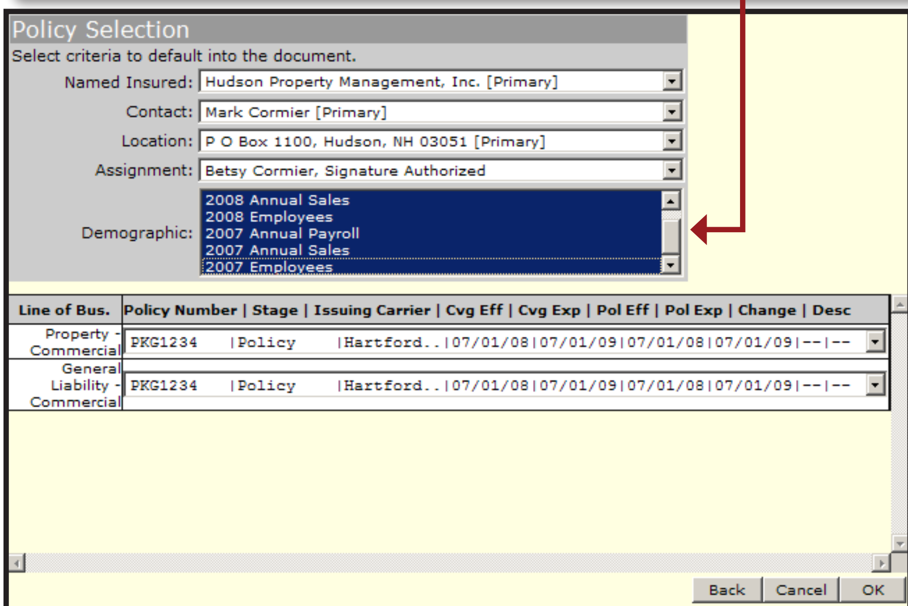
Creating the Document for the Client

1. Create a new document using the template that contains the demographic merge fields. The new document may be added at **attachments,** at policy level or **ATTACHMENTS** at client level. On the **Policy Selection** screen, select one or more demographics to default into the document. In the **Demographic** box, press and hold the **Shift** key and select a range of demographics, or press and hold the **Ctrl** key to select various demographics. Use the scroll bar to the right of the demographic selection list to view the complete list. In this example all demographic data is selected to default into the document.

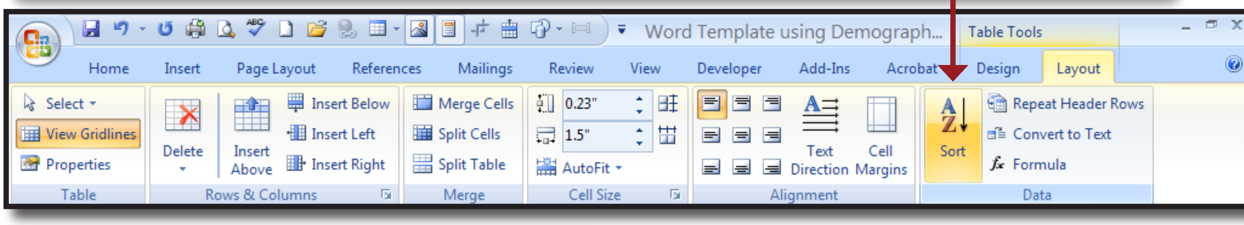


The merged results for the selected demographic data and the schedule built into the document template are shown below. Note how <<Description>> populates the merged document with the **Year** and **Field Description** combined into one item. The **Actual Value** for 2007 Annual Payroll was entered at the Client level without formatting. The document template was intentionally created not to format the **Estimated Value** and **Actual Value**. If the field mask was used to format dollar values, the values for number of Employees would also be converted to dollar values.

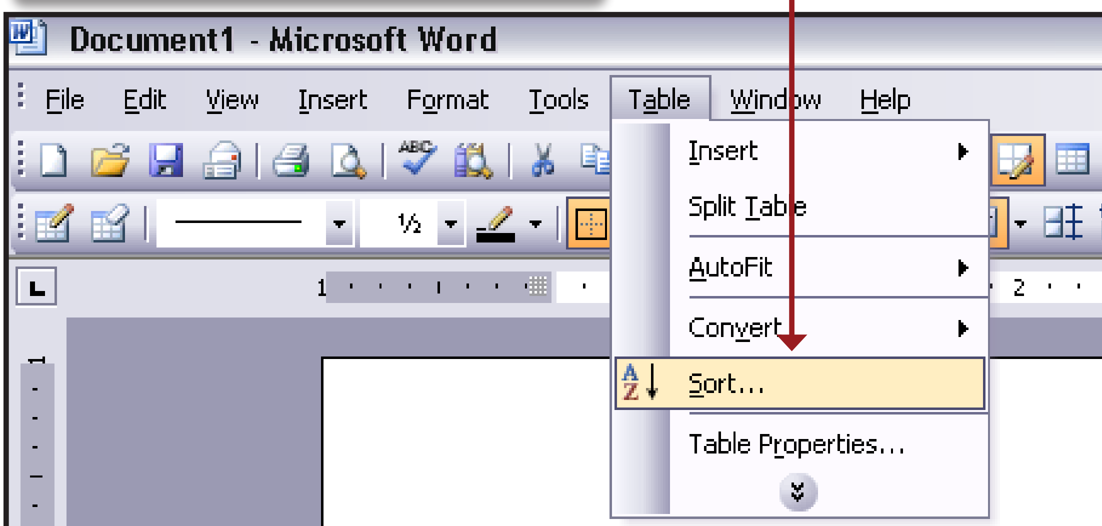
Demographic Data

Year	Year / Field Description	Field Description	Estimated Value	Actual Value
2008	2008 Annual Payroll	Annual Payroll	$150,000	
2008	2008 Annual Sales	Annual Sales	$1, 250,000	
2008	2008 Employees	Employees	65	
2007	2007 Annual Payroll	Annual Payroll	$125,000	140500
2007	2007 Annual Sales	Annual Sales	$1,100,000	$1,025,000
2007	2007 Employees	Employees	50	63

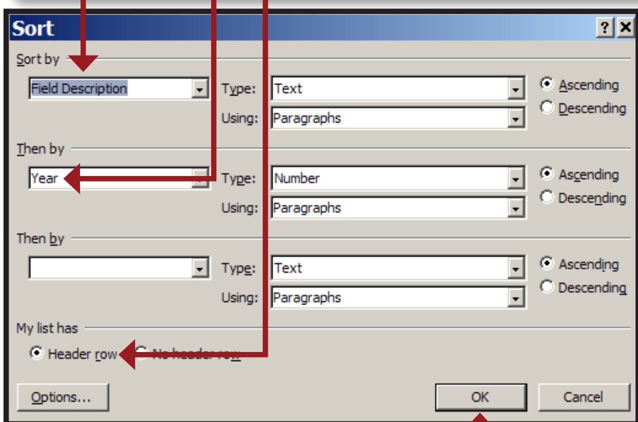
2. To sort the table to display values for 2007 and 2008 for each demographic together, select the table then click **Sort** (In Word 2007, **Sort** is available under **Table Tools** > **Layout** tab).



In Word 2003, **Sort** is available in the Table menu.



3. The **Sort** dialog box is completed to sort the **Field Description** as the primary sort and **Year** as the secondary sort. Selecting the **Header row** option keeps the header row out of the sort and also identifies the column headings by name.



4. Click **OK** to sort the table.

The table now displays all demographic types together and in order by year (ascending). The merged table sorts all values by the year in the first column. To sort the table so that each demographic of a similar value is grouped together for comparison, the separate **Year** and **Field Description** columns are used instead of the combined **Year/ Field Description** column. The **Year/Field Description** has been deleted.

Demographic Data

Year	Field Description	Estimated Value	Actual Value
2007	Annual Payroll	$125,000	$140,500
2008	Annual Payroll	$150,000	
2007	Annual Sales	$1,100,000	$1,025,000
2008	Annual Sales	$1,250,000	
2007	Employees	50	63
2008	Employees	65	