

IN THIS ISSUE

- ✘ Document Template Using Client Demographic Data

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**.

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

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.

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.

The screenshot shows the 'Setup Console' with a sidebar on the left containing various setup categories. The main area displays a 'Template' list with columns for Name, S, P, C, Category, Description, Status, Last Updated By, and Last Updated Date. The first row is highlighted, and a red box around the 'Details' icon (a document with a magnifying glass) has a red arrow pointing to it from the instruction box above.

Details	I/E	Name	S	P	C	Category	Description	Status	Last Updated By	Last Updated Date	Remove
	<input type="checkbox"/>	1 A General Liability-MO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	General Liability	Draft	Mary Oberleitner	05/16/2008	
	<input type="checkbox"/>	1.94 Forms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	Forms Test	Draft	Mary Oberleitner	01/12/2008	
	<input type="checkbox"/>	2 A General Liability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	General Liability	Draft	Mary Oberleitner	01/25/2007	
	<input type="checkbox"/>	9 am EST Session	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	Test Document for training session	Draft	Gina Morgan	09/11/2006	
	<input type="checkbox"/>	A Submission Document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Proposal	Marsh	Draft	Mary Oberleitner	07/08/2008	
	<input type="checkbox"/>	additional driver questionnaire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Client Letters	ADQ	Draft	Mary Oberleitner	08/30/2006	
	<input type="checkbox"/>	additional Interest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	Personal Lines Auto	Draft	Mary Oberleitner	04/04/2006	
	<input type="checkbox"/>	Addl prem due - PL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	Personal Lines	Draft	Mary Oberleitner	02/01/2006	
	<input type="checkbox"/>	address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Client Letters	address	Draft	Mary Oberleitner	01/23/2008	
	<input type="checkbox"/>	AgencyTest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Policy Letters	Commercial Proposal	Draft	Mary Oberleitner	09/29/2008	

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.

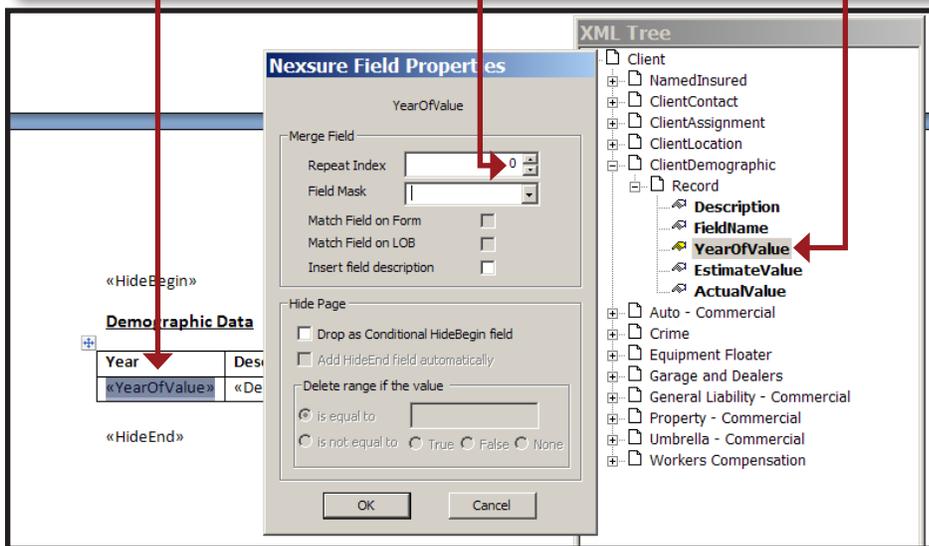
The screenshot shows an 'XML Tree' view in a Microsoft Word document. The tree structure is as follows:

- Client
 - Names Insured
 - ClientContact
 - ClientAssignment
 - ClientLocation
 - ClientDemographic
 - Record
 - Description
 - FieldName
 - YearOfValue
 - EstimateValue
 - ActuaValue
 - Auto - Commercial

A red arrow points from the instruction box above to the 'ClientDemographic' node in the tree.

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>>				

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 screenshot shows the 'Policy Selection' window with the following details:

- Named Insured: Hudson Property Management, Inc. [Primary]
- Contact: Mark Cormier [Primary]
- Location: P O Box 1100, Hudson, NH 03051 [Primary]
- Assignment: Betsy Cormier, Signature Authorized
- Demographic: A list of demographic fields including 2008 Annual Sales, 2008 Employees, 2007 Annual Payroll, 2007 Annual Sales, and 2007 Employees. A red arrow points to the scroll bar on the right of this list.

Below the demographic list is a table with columns: Line of Bus., Policy Number, Stage, Issuing Carrier, Cvg Eff, Cvg Exp, Pol Eff, Pol Exp, Change, Desc.

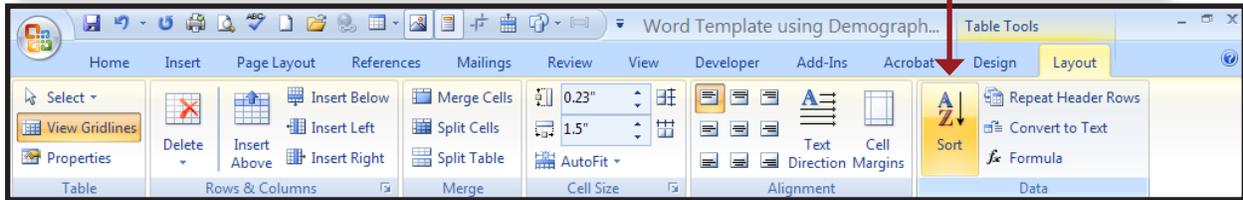
Line of Bus.	Policy Number	Stage	Issuing Carrier	Cvg Eff	Cvg Exp	Pol Eff	Pol Exp	Change	Desc
Property Commercial	PKG1234	Policy	Hartford..	07/01/08	07/01/09	07/01/08	07/01/09	-- --	
General Liability Commercial	PKG1234	Policy	Hartford..	07/01/08	07/01/09	07/01/08	07/01/09	-- --	

Buttons: Back, Cancel, OK

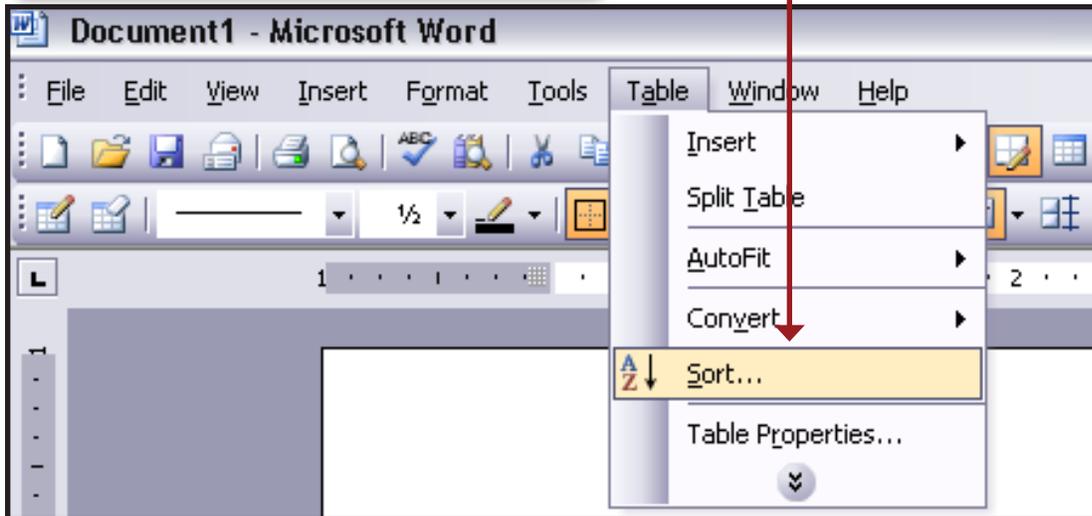
The merged results for the selected demographic data and the schedule built into the document template are shown below. Note how <<Description>> populates the merged document with the **Year** and **Field Description** combined into one item. The **Actual Value** for 2007 Annual Payroll was entered at 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

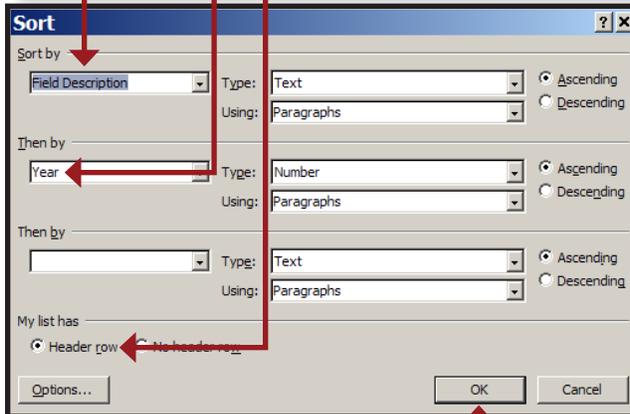
2. To sort the table to display values for 2007 and 2008 for each demographic together, select the table then click **Sort** (In Word 2007, **Sort** is available under **Table Tools** > **Layout** tab).



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



- 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.



- 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.

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	