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✗ Using Alerts on the Client Card File

Using Alerts on the Client Card File

The card file provides a summary view of information used for servicing the client's account. Below are some explanations for various elements of the client card file:

The client card file displays when accessing a client by:

- Clicking **SEARCH** on the **Primary** menu.
- Clicking CLIENT PROFILE on the Client menu.

Information on the card file is organized in boxes with certain elements displayed as blue hyperlinks. Hyperlinks, when clicked, link to additional details. The **Alerts** box displays the number of **Open Actions** for the client. If the client does not have any **Open Actions**, the digit zero displays next to **Open Actions** in the **Alerts** box.





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If the client has **Open Actions** in the **Alerts** box, the total number of **Open Actions** displays as a hyperlink. Click the card file's **Open Actions** hyperlink.

				_						
SU	lre							HOME HELP LOG		
	SEARCH				Bookmarks: Expand Add Remove Selected					
NT PROFIL		ARKETING SERVICI	NG ATTACHM	NT: ACTIONS	DELIVERY					
nt Name	: Powers Constructio	on Co., Inc.						Commercial Accou		
file	filing contacts location	named insureds	related accounts	Assignments	lassifiede campaigns					
ine pro	ining contacts location.	inamed madreds	Telated accounts	a significantes	campaigns					
Powers C	onstruction Co., Inc. Informat	tion	Mailing Address			Stick-e-note	[Add New]			
1	Website: N/A		Location Typ	e: Corporate Headqu	arters	No Current Notes				
Primary (Contact		Addres	s: 000 Elm Street		No current Notes				
	Name: Mr. John Powers		Cit	y: Manchester	State/Province: NH					
C	Goes By: John		Zip/Post	al: (3108						
	Title: CEO		Country:							
	E-Mail: nexsurecontact@ao	l.com	International In	io:						
Home Phone: (603) 555-1111			Fax Numbe Phor	e: (603) 555-5554 e: (603) 555-5555						
Tracker										
Date	Created: 10/6/2008									
Clie	ent Since: 10/6/2008		Alerts	\mathbf{V}						
Related Accounts: 1 Open Actions: 5			s: 5							
					In Force					
						🗄 Auto - Commerci	ial			
Assignmen	t Information					General Liability	- Commercial			
Deimar	Desarch	Desertment	Unit	Dessessibilit	News	Property - Comm	nercial			
Primary	Aca Insurance Branch	Commercial Lines	Unassigned	Producer	Name Batay Cormian	Workers Compe	nsation			
14	Ace insurance branch	connercial cities	onassigned	Producer	Decsy Connier					
	Ace Insurance Branch	Commercial Lines	Unassigned	Account Manager	Susan McDonough					

The Nexsure Search Filter's default settings for the **Action Status** box is set to **Open** for the client regardless of the **Due Date (To)** or **Assigned To** boxes.

_		
nexsure		HOME HELP LOGOUT
	SEARCH	Bookmarks: Expand Add Remove Selected 🛷
CLIENT PROFILE	PPORTUNITIES MARKETING SERVICING ATTACHMENTS ACTIONS DELIVERY	
Client Name: Pov	vers Construction Co., Inc.	Commercial Account
actions		
	Showing page 1 of 1 🏷 🛛 Page 1 💌	Filter: [Hide] [Add New]
Search Filters		Filter Settings: Save Reset
Action Topic:	Assigned To: Created By:	Updated By:
Action Type:	Due Date (Fr):	Policy No:
Action Status: Op	en 🔽 Memo: Certificate No:	Retail Agent:
Description:		
Sort Filters		
Sort Field 1: Du	e Date Sort Order 1: Ascending Sort Field 2: Line of Business	Sort Order 2: Ascending
Files Per Page: 10		Search Restore Clear

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Clicking the **Open Actions** hyperlink from the client card file instantly displays all **Open Actions** for the client even when the actions are assigned to other users.

_						_	_		
nexsl	lre							HOME HELI	P LOGOUT
	SEARCH					в	ookmarks: Expand	Add Remove Se	elected 🖤
CLIENT PROFIL	E OPPORTUNITIES MA	RKETING SERVICI	IG ATTACHMEN	TS ACTIONS DE	LIVERY				
Client Nan e	: Powers Constructio	n Co., Inc.						Commercia	I Account
actions									
			Showing	page 1 of 1 ▷ 🕅	Page 1		Filter: [Sh	ow] [A	dd New]
Details	ActionTopic Action Type	Policy Info Priority	Status	Due Date Due Time	Days Left (Overdue by)	Assigned To	Created By Created On	Updated By Updated On	
	Renewal								
	😽 Marketing Strategy Meeting		Open	12/14/2008 12:01 AM PST	5	Betsy Cormier	Betsy Cormier 10/06/2008	Betsy Cormier 12/09/2008	
	2008 Renewal Marketing								
	2008 Renewal Marketing	- Renewal marketin	ig strategy meeti	ng					
	Renewal								
	Appointment		Open	12/16/2008 12:01 AM PST	7	Betsy Cormier	Betsy Cormier 10/06/2008	Betsy Cormier 12/09/2008	
	2008 Renewal Marketing								
	2008 Renewal Marketing	- make appointmen	it to obtain renew	al information from	client		<u> </u>		
*	Claim	BA987456321; Auto	- Commercial (CAUTO); [10/01/200	8 - 10/01/2009]				
	Annotation		Open	12/16/2008 12:01 AM PST	7	Jonathan Nash	Betsy Cormier 12/09/2008	Betsy Cormier 12/09/2008	
	DOL 12/1/2008 OV rear	ended IV. Insured D	river John Powers.	OV owner Gretchen	Smith.		- Common		
	Pend for insured's estim	ate to forward to Gr	etchen Smith's ag	jent.			-		
2	Renewal			40/04/0000			Datas Carrier	Datas Carrier	
	Information Needed		Open	12/21/2008 12:01 AM PST	12	Susan McDonoug	h Betsy Cormier 10/06/2008	12/09/2008	
	2008 Renewal Marketing								-
				•					actions
—									
User: Jack Po	orter [Representative]	Signed On At 12/	9/2008 8:06:42 A	M PST				Status: Online (Available)



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Compare Client Menu ACTIONS to Client Card File Alerts Open Actions

The Nexsure default Search Filter settings for **Client** menu > **ACTIONS** limits the actions displayed to **Open** actions assigned to the logged on user with a **Due Date (To)** up to the current date. In this illustration, the user does not have any assigned **Open Actions**.

nessure							HOME H	IELP LOGOUT
	SEARCH					Bookmarks: Expand Ade	d Remove	e Selected 🛷
CLIENT PROFILE OP	PORTUNITIES MARKETING	SERVICING ATT	ACHMENTS ACTI	ONS DELIVERY				
Client Name: Pove	ers Construction Co., I	nc.					Commer	cial Account
actions								
		K 🗠	Showing page 0 o	f 0 🕨 Page 🔽		Filter: [Hide]		[Add New]
Search Filters		•				Filter Settings:	Save	Reset
Action Topic:	Ass	igned To: Jack Porte	er	Created By:		Updated By:		
Action Type:	, Due	Date (Fr):		Due Date (To): 12/9	2008	Policy No:		
Action Status: Oper	ı 💌	Memo:		Certificate No:		Retail Agent:		
Description:								
Sort Filters								
Sort Field 1: Due	Date 🗾 Sor	t Order 1: Ascending	· ·	Sort Field 2: Line	of Business	Sort Order 2:	Ascending	
Files Per Page: 10	▼					Search	Restore	Clear
		Filter result fo	und no record(s).	Please modify search and t	try again.			
								actions

To display all **Open Actions** for the client from **Client** menu > **ACTIONS**, the user must clear the **Search Filter**; select the **Action Status** of **Open**; and click **Search**.

nessu	re								LOCOUT
	SEARCH						Bookmarks: Expand L	Add I Remove Sele	ted 🧭
CLIENT PROFILE			ATTACHMENTS	ACTIONS	DELIVERY				
Client Name:	Powers Construction	n Co., Inc.						Commercial	ccount
actions		,							
			Showing p	age 1 of 1))	Page 1		Filter: [Hide] [Add	New]
Search Filters							Filter Settings:	Save Re	et
Action Topic		Assigned To:			Created By:		Updated B	y:	
Action Type		Due Date (Fr):		2	Due Date (To):		Policy N	D:	
Action Status	Open 💌	Memo:			Certificate No:		Retail Agen	t:	
Description									
Sort Filters									
Sort Field 1	Due Date	Sort Order 1: ASC	ending 💌		Sort Field 2: Line of	f Business 💌	Sort Order	2: Ascending	2
Files Per Page	10 V	Delicy Info		Due Date	David Left		Search	Restore Cle	ar
Details	Action Type	Priority	Status	Due Time	(Overdue by) Assigned To	Created Dy Created On	Updated On	
	Renewal								
	Marketing Strategy Meeting		Open	12/14/2008 12:01 AM PST	5	Betsy Cormier	Betsy Cormier 10/06/2008	Betsy Cormier 12/09/2008	
	2008 Renewal Marketing								
	2008 Renewal Marketing	 Renewal marketing st 	trategy meeting						
	Renewal								
	B Appointment		Open 1	12/16/2008 12:01 AM PST	7	Betsy Cormier	Betsy Cormier 10/06/2008	Betsy Cormier 12/09/2008	
	2008 Renewal Marketing								
	2008 Renewal Marketing	 make appointment to 	obtain renewal i	information fr	om client				

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Changing the Card File Alerts Open Actions Default Search Filter

Individual users may change the Nexsure default **Search Filter** settings on the card file **Open Actions** summary by clicking the filter settings **Save** button to save their personal **Search Filter** criteria. Saving **Search Filter** criteria for the action filter accessed through the card file **Open Actions** link does not affect any other action **Search Filter** settings in Nexsure. In this illustration, the user saved personal **Search Filter** settings to view only the user's assigned **Open Actions** whenever the client card file **Open Actions** hyperlink is clicked.

_				
nexsure				H)ME HELP LOGOUT
	SEARCH		Bookmarks: Expand	Add Remove Selected 🖤
CLIENT PROFILE	PPORTUNITIES MARKETING SERVICING	ATTACHMENTS ACTIONS DELIVERY		
Client Name: Po	vers Construction Co., Inc.			Commercial Account
actions				
		Showing page 0 of 0	je 🔽 Filter: [Hid	e] [Add New]
Search Filters			Filter Settings:	Save Reset
Action Topic:	Assigned To: Jack	Porter Created	By: Updated B	iy:
Action Type:	Due Date (Fr):	Due Date (T	o): Policy N	0:
Action Status: Op	en 💌 Memo:	Certificate	No: Retail Ager	nt:
Description:				
Sort Filters				
Sort Field 1: Du	e Date 🗾 Sort Order 1: Asc	ending 🔄 Sort Field	2: Line of Business Sort Order	2: Ascending
Files Per Page: 10	▼		Search	Restore Clear
	Filter re	sult found no record(s). Please modify sea	rch and try again.	
				actions



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The client card file **Open Actions** hyperlink will always reflect the total number of **Open Actions** as a servicing alert for the client. The user's saved **Search Filter** settings will control the displayed results when clicking the card file **Open Actions** hyperlink.

In this illustration, there are no assigned **Open Actions** to the user for this client. The **Alerts** box displays five (5) **Open Actions** for the client. When the user clicks the client card file **Open Actions** hyperlink, no records are found based on the user's previously saved personal **Search Filter** settings.

su								HOME HELP LOG
	SEARCH					Bookma	rks: Expand Ac	ld Remove Selected
NT PROFILE	OPPORTUNITIES M/	RKETING SERVICI	NG ATTACHMEN	T. ACTIONS	DELIVERY			
t Name:	Powers Construction	n Co., Inc.						Commercial According to the second
file prof	iling contacts location:	named insureds	related accounts	assignments	classifieds campaigns			
Powers Co	onstruction Co., Inc. Informat	tion	Mailing Address			Stick-e-note	[Add New]	
v	Website: N/A		Location Type:	Corporate Headqu	arters	No Current Notes		
Primary C	ontact		Address	000 Elm Street		no carrent notes		
	Name: Mr. John Powers		City	lanchester	State/Province: NH			
G	Goes By: John		Zip/Postal:	3108				
	Title: CEO		Country:					
	E-Mail: nexsurecontact@ao	l.com	International Info:					
Home	e Phone: (603) 555-1111		Fax Number: 603) 555-5554 Phone: 603) 555-5555					
Tracker Date	Created: 10/6/2008		Alerta					
Clie Related A	int Since: 10/6/2008		Open Actions:	5				
Keistes A	counts. 1							
						In Force		
Assignment	t Information							
Caraguinein	C Information					General Liability -	Commercial	
Primary	Branch	Department	Unit	Responsibility	Name	Property - Comme	rcial	
V	Ace Insurance Branch	Commercial Lines	Unassigned	Producer	Betsy Cormier	Workers Compens	ation	
	Ace Insurance Branch	Commercial Lines	Unassigned	Account Manager	Susan McDonough			

To return to the Nexsure default Search Filter settings for the client card file, click the filter's **Reset** button. The next time the user accesses **Open Actions** from the card file **Alerts** box, all **Open Actions** for all users will display by default.



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