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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.

The screenshot displays the Nexsure Client Card File for a prospect named John Powers. The interface includes a navigation bar with options like CLIENT PROFILE, OPPORTUNITIES, MARKETING, SERVICING, ATTACHMENTS, ACTIONS, and DELIVERY. The main content area is divided into several sections:

- John Powers Information:** Primary Contact details including Name (Mr. John Powers), Goes By (John), Title, E-Mail (nexsurecontact@aol.com), and Home Phone (603) 555-1111.
- Mailing Address:** Location Type (Corporate Headquarters), Address (4 Mason Ave), City (Hudson), State/Province (NH), Zip/Postal (3051), Country, and International Info (Phone: 603) 555-1111).
- Alerts:** Open Actions: 0.
- Tracker:** Date Created (10/9/2008), Client Since (10/9/2008), and Related Accounts (1).
- Assignment Information:** A table showing the primary contact's details.

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Ace Insurance Branch	Personal Lines	Unassigned	Producer	Betsy Cormier

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.

The screenshot shows the client profile for Powers Construction Co., Inc. The Alerts section displays 'Open Actions: 5' as a blue hyperlink. A red arrow points from the text above to this link.

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Ace Insurance Branch	Commercial Lines	Unassigned	Producer	Betsy Cormier
<input type="checkbox"/>	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.

The screenshot shows the Search Filter interface. The 'Action Status' dropdown menu is set to 'Open'. A red arrow points from the text above to this dropdown.

Search Filters:

- Action Topic: []
- Action Type: []
- Action Status: **Open**
- Description: []

Sort Filters:

- Sort Field 1: Due Date
- Sort Order 1: Ascending
- Sort Field 2: Line of Business
- Sort Order 2: Ascending

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.

The screenshot displays the Nexsure web interface for a client named Powers Construction Co., Inc. The 'actions' section shows a table of open actions. A red box highlights the 'Open Actions' link in the client card, with red arrows pointing to the 'Open Actions' link in the table and to the 'Open' status column.

Details	Action Topic	Policy Info	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 marketing strategy meeting										
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 appointment to obtain renewal information from client										
Claim	BA987456321; Auto - Commercial (CAUTO); [10/01/2008 - 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 Driver John Powers. OV owner Gretchen Smith. Pend for insured's estimate to forward to Gretchen Smith's agent.										
Renewal	Information Needed		Open	12/21/2008	12:01 AM PST	12	Susan McDonough	Betsy Cormier	10/06/2008	Betsy Cormier	12/09/2008
	2008 Renewal Marketing										

User: **Jack Porter** [Representative] Signed On At 12/9/2008 8:06:42 AM PST Status: **Online (Available)**

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**.

Client Name: Powers Construction Co., Inc. Commercial Account

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Filter: [Hide] [Add New]

Filter Settings: Save Reset

Search Filters

Action Topic: Assigned To: Jack Porter Created By: Updated By:

Action Type: Due Date (Fr): Due Date (To): 12/9/2008 Policy No:

Action Status: Open Memo: Certificate No: Retail Agent:

Description:

Sort Filters

Sort Field 1: Due Date Sort Order 1: Ascending Sort Field 2: Line of Business Sort Order 2: Ascending

Files Per Page: 10 Search Restore Clear

Filter result found no record(s). Please modify search and try again.

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**.

Client Name: Powers Construction Co., Inc. Commercial Account

Showing page 1 of 1 Page 1

Filter: [Hide] [Add New]

Filter Settings: Save Reset

Search Filters

Action Topic: Assigned To: Created By: Updated By:

Action Type: Due Date (Fr): Due Date (To): Policy No:

Action Status: Open Memo: Certificate No: Retail Agent:

Description:

Sort Filters

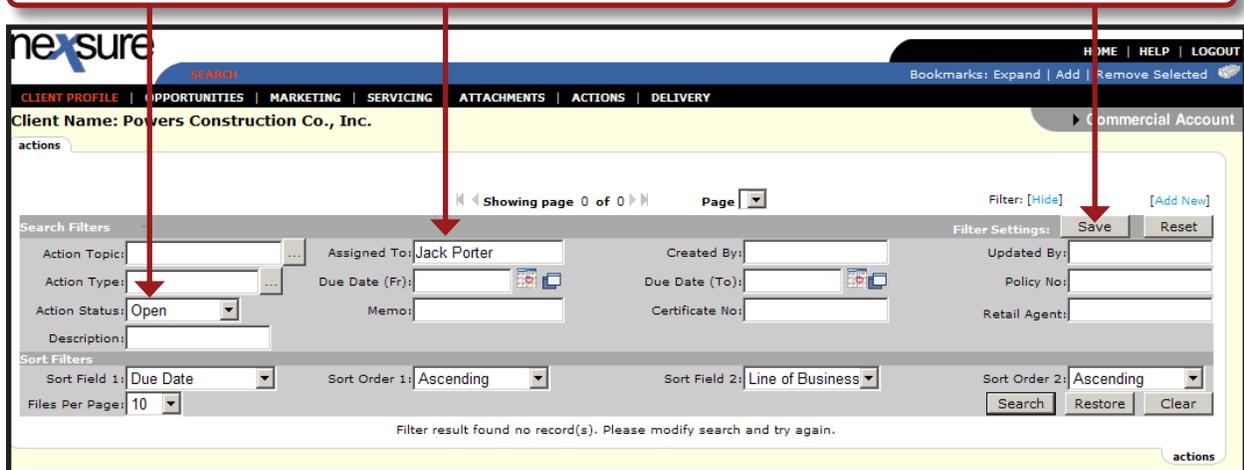
Sort Field 1: Due Date Sort Order 1: Ascending Sort Field 2: Line of Business Sort Order 2: Ascending

Files Per Page: 10 Search Restore Clear

Details	Action Topic	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 marketing strategy meeting												
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 appointment to obtain renewal information from client												

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.



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.

Alerts
Open Actions: 5

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Ace Insurance Branch	Commercial Lines	Unassigned	Producer	Betsy Cormier
<input type="checkbox"/>	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.

Filter Settings: Save **Reset**