

## IN THIS ISSUE

\* Using the HideBegin Option: is not equal to

## Using the HideBegin Option: is not equal to

In this Tips & Facts you will learn another way to use the **HideBegin** option: **is not equal to**. From *Tips & Facts Vol. 2, Issue 13* you learned how to use the **Hide Begin** statement with the **true**, **false**, **none** options.

In case you were wondering why it is important to use **HideBegin** instead of **IF** statements, there are actually a couple of reasons. The first reason is: the **IF** statements are not visible unless **Alt F9** is selected to reveal codes. So that means if a template editor is not aware that **IF** statements were used in the template they can very easily be removed inadvertently when updating the template. The result would be a template that does not work properly. On the other hand, a **HideBegin** is always visible, so there is no mistaking its presence in the document template. The second reason is: after a template has been merged that contains **IF** statements, users cannot change text that is the result of the **IF** statement since the **IF** statement will always return the results.

After accessing the document template (in this example the General Liability template is being used) through **SETUP** > **Document Templates** and clicking the **Details** icon, perform the following:

In these examples, it is desired to have different text for each liability audit code.

To complete the audit section for this document a **HideBegin** statement must be added for each different audit type. The choices found in the **Audit** list on the Commercial General Liability ACORD 126 form are as follows:

- Blank
- A Annual
- S Semi-Annual
- Q Quarterly
- M Monthly
- O Other

Note: When using the **Hide Begin** statement, remember that if the result is true, **Hide Begin**, **Hide End** and any text in-between will be removed when the document is merged. In the examples below, if the fields are not equal to the letter entered, the text will be removed from the document.



To address the Blank audit selection, perform the following steps:

1. Position the cursor in the document where the text will be placed once the condition is met on merging. Click on the BNexsure Fields button and open the General Liability ACORD 126 and click on the Billing group. Click and drag the Audit Code field toward the document.

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| Coverage Ty      | e: «Commercial General Liability            | - Basis»                               | F   | Policy ID                                   |
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| Coverages        |   | Nexsure Frield Properties              | ⊢   | Total Estimated Premium                     |
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|                  |   | - Hide Page                            |     |   |
|                  |   | nice Page                              |     | Effective Date                              |
|                  |   | Drop as Conditional HideBegin field    |     | Representation Date                         |
|                  |   | Add HideEnd field automatically        | ٦.  | Payment Plan                                |
|                  |   | Delete range if the value              | н   | Audit Code                                  |
|                  |   | C is equal to                          | Ш   | Products Premium                            |
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| to delet         | te the text if the field is not e           | gual to <b>Blank</b> .                 |     |   |
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| 3. Notice        | that the Add HideEnd field a                | automatically check box is alread      | y ( | checked. Leaving this                       |
| checked          | d will help assure that the <b>F</b>        | lideBegin has a HideEnd stateme        | ent | t to prevent merging                        |
| problem          | ns When the <b>OK</b> button is di          | cked the following will be display     | 00  | lon the document:                           |
| propier          |   | ckeu, the following will be display    | eu  | i on the document.                          |

<<HideBegin>><<HideEnd>>

4. Click between the **<<HideBegin>><<HideEnd>>** to add content. Type the content that will be hidden or merged into the document if the statement result is true or false such as in the following:

<<HideBegin>>This policy will not be audited.<<HideEnd>>



To address the Annual Audit, perform the following steps immediately after the condition for no audit selection:



 Click between the newly created <<HideBegin>><<HideEnd>> conditions to add content. If the Audit Code is equal to A the hidden entry will be displayed. If the Audit Code contains any other value, the statement will be hidden.

<<pre><<HideBegin>>This policy will be audited at the end of the policy term which is on an Annual basis. Please make sure to keep all records to show evidence of policy exposure for this audit. The premium could increase or decrease if the estimated exposure is greater or less than the actual exposure.<<HideEnd>>



To address the Semi-Annual Audit, perform the following steps immediately after the condition for Annual Audit:

7. Click and drag the Audit Code field toward the document to open the Nexsure Field Properties dialog box. Click the is not equal to option. Type the letter of the audit code (for example the letter "S" for Semi-Annual Audit) in the box beside the Delete range if the value is equal to option and click OK to add the <<HideBegin>><<HideEnd>> conditions.



 Click between the newly created <<HideBegin>><<HideEnd>> conditions to add content. If the Audit Code is equal to S the hidden entry will be displayed. If the Audit Code contains any other value, the statement will be hidden.

<<pre><<HideBegin>>This policy will be audited Semi-Annually. Please make sure to keep all records to show evidence of policy exposure for this audit. The premium could increase or decrease if the estimated exposure is greater or less than the actual exposure.<<HideEnd>>



To address the Quarterly Audit, perform the following steps immediately after the condition for Semi-Annual Audit:



<<HideBegin>>This policy will be audited Quarterly. Please make sure to keep all records to show evidence of policy exposure for this audit. The premium could increase or decrease if the estimated exposure is greater or less than the actual exposure.<<HideEnd>>



To address the Monthly Audit, perform the following steps immediately after the condition for Quarterly Audit:

| is equal to option and click OK to  | add the < <hidebegin>&gt;&lt;<hideen< th=""><th>d&gt;</th><th><pre>&gt;&gt; conditions.</pre></th><th></th></hideen<></hidebegin>  | d>  | <pre>&gt;&gt; conditions.</pre>  |            |
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| Each Occurrence Limit «Ea<br>General Aggregate Limit «Ge<br>Products and Completed Operations Limit «Pro<br>Medical Expense Limit «Me<br>Hazard Description<br>«Classification»<br>«HideBegin» This policy will be audited at the end<br>make sure to keep all records to show evidence of<br>or decrease if the estimated exposure is greater or I<br>policy will not be audited «HideEnd»«HideBegin»T<br>to keep all records to show evidence of policy exp<br>decrease if the estimated exposure is greater or less<br>policy will be audited quarterly. Please make sure to<br>this audit. The premium could increase or decrease<br>exposure.«HideEnd» | A O<br>eral Nexsure Field Properties<br>fuct<br>Audit Code<br>Merge Field<br>Repeat Index<br>Field Mask<br>Match Field on Form<br>Match Field on Form<br>Match Field on LOB<br>Insert field description<br>Hide Page<br>Fired<br>Hide Page<br>Field<br>Match Field description<br>Hide Page<br>Match Field description<br>Match Field description<br>Hide Page<br>Match Field description<br>Match Field descr | dit | XML Tree         Policy ID         Payment Premium         Payment Premium         Payment Premium         Payment Plan         Produce         Produce         Payment Plan         Product Premium         Product Premium         Product Premium         Payment Plan         Product Premium         Product Premium <t< td=""><td></td></t<> |            |

<<HideBegin>>This policy will be audited Monthly. Please make sure to keep all records to show evidence of policy exposure for this audit. The premium could increase or decrease if the estimated exposure is greater or less than the actual exposure.<<HideEnd>>



To address the Other Audit, perform the following steps immediately after the condition for Monthly Audit:



If the **Audit Code** contains any other value, the statement will be hidden.

<<pre><<HideBegin>>This policy will be audited as specified on your policy. Please make sure to keep all records to show evidence of policy exposure for this audit. The premium could increase or decrease if the estimated exposure is greater or less than the actual exposure.<<HideEnd>>



15. Once all of the audit codes have been addressed, it's time to test the template. Click on the **Ressure Save** button on the toolbar to open the **Save Nexsure Document** dialog box.

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| 16. Click <b>OK</b> to save the docum | ient. |
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**Tip**: If planning to work on a document for an extended period of time, make sure to periodically access **Nexsure Save** and select the **Save and Return to Document** check box. This will save the work completed so far and allows the user to continue working without exiting, preventing loss of changes made to the document.



17. It is easier to test templates using a marketing record where the data can be changed as needed. If a test marketing record does not exist, make sure to add one before proceeding. On the **Primary** menu, click **SEARCH**.

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21. In the **navigation** tab, open the **General Liability - Commercial > ACORD 126** form to the **Billing** group and make a note of what the **Audit Code** is set to. Now it is time to merge the template.

| essure                    |                |             |          |                          |           |               |              |                  |           | HOME   HELP   SETUP   LOGO                |
|---------------------------|----------------|-------------|----------|--------------------------|-----------|---------------|--------------|------------------|-----------|---|
| -                         | SEARCH   OR    | GANIZATION  | REPORTS  | CAMPAIGNS                |           |               |              |                  |           | Bookmarks: Expand   Add   Remove Selected |
| IENT PROFILE   OPP        | ORTUNITIES   N | ARKETING    | POLICIES | CLAIMS                   | SERVICING | ATTACHM       | ENTS         | ACTIO            | NS   TRAN | SA( TIONS   DELIVERY   T-LOG              |
|                           |                |             |          |                          |           |               |              |                  |           | Commercial Accou                          |
| derwriting policy inf     | o assignment   | attachments | actions  | qualification            | history   | transaction   | s cl         | ims 🕓 s          |           | isurance classifieds delivery             |
|                           |                |             |          |                          |           |               |              |                  |           | navigation instruction                    |
| Branch:                   | Atlantic Bra   | nch         | I        | Policy Term:             |           | 04/28/200     | 6 12<br>7 12 | 01AM C<br>01AM C | ST<br>ST  |   |
| Policy Type:              | Package        |             | (        | Coverage Te              | rm:       |               |              |                  |           | 🗆 Underwriting                            |
|                           |                |             |          |                          |           |               |              |                  |           | ± Base Requirements                       |
| Issuing Co:               | Atlantic Mut   | tual        | 5        | Stage:                   |           | Marketing     |              |                  |           | E General Liability - Commercial          |
| Billing Co:               | Atlantic Mul   | tual        |          | Mode:                    |           | New           |              |                  |           | ACORD 126                                 |
| Policy Number:            | CPP-870050     | -1          |          | otatus:<br>Origination F | hate:     | Pending       |              |                  |           | Producer                                  |
| List                      | Rate           | Bridge      |          | Print                    | Compar    | Policy: [On]  | [Off]        | Save             | Changes   | Applicant                                 |
| List                      | hate           | bridge      |          |                          | company   | er oneyr [on] | fourt        |                  | changes   | ⇒ Billing                                 |
| Billing                   |                |             |          |                          |           |               | _            |                  | Lookup    | Coverages - GL<br>Schedule of Hazards     |
| -                         | Add Record     |             |          |                          |           | -             | Р            | ev               | Next      | Claims Made                               |
| Effective Date:           |                |             |          | 4/28/200                 | 6         |               |              |                  |           | Employee Benefits                         |
| Expiration Date:          |                |             |          | 4/20/200                 | 7 56      |               |              |                  |           | Contractors                               |
|                           |                |             |          | 4/20/200                 | 6881      |               |              |                  |           | Products/Operations                       |
| Billing Method:           |                |             |          | Agency B                 | ill 🔽     |               |              |                  |           | Products Info                             |
| Payment Plan:             |                |             |          |                          |           |               |              |                  |           | Additional Interest                       |
| Audit Code:               |                |             |          | Quantonl                 |           |               |              |                  |           | Bemarks                                   |
| Des durates Des estimates |                |             |          | Quarteri                 | λ [Δ]     |               |              |                  |           | Property - Commercial                     |
| Products Premium:         |                |             | \$       |                          |           |               |              |                  |           |   |
| Premises/Operation        | s Premium:     |             | +        |                          |           |               |              |                  |           | instruction navigation                    |

| 22. Click the <b>attachments</b> ta       | o and click the <b>[Add New]</b> link.                   |  |
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| novsuro                                   |  |  |
|   | IION   REPORTS   CAMPAIGNS                               | HOME   HELP   SETUP   L DGOUT<br>Bookmarks: Expand   Add   Remove Selected 🕷 |
| CLIENT PROFILE   OPPORTUNITIES   MARKET.  | NG   POLICIES   CLAIMS   SERVICING   ATTACHMENTS   ACT   | IONS   TRANSACTIONS   DELIVERY   T-LOG<br>Commercial Actionnt                |
| underwriting policy info assignment attac | ments actions qualifications history transactions claims | summary of insurance classifieds delivery                                    |
| [ Add New ]                               | 🕅 <pre>Showing Page 1 of 1 </pre>                        | [DMS] Filters: [ Show ] [ Hide ] [ Add New ]                                 |



| 23. In the Add New Attachment dialog box, click the Create              | e Document with Template option. |
|---|----------------------------------|
| Nexsure Office Integration  |                                  |
| Add New Attachment  |                                  |
| O Add Attachment  |                                  |
| Create Document with Template   |                                  |
| Create Document without Template  |                                  |
| O Attach Outlook Messages   |                                  |
| O Add External Attachment   |                                  |
| Attachment Name: Quarterly Audit Test                                   |                                  |
| Document Description: General Liability Test Document                   |                                  |
|   |                                  |
| Cancel Next >>  |                                  |
|   |                                  |
| 24. Enter both an Attachment Name and Document Descri                   | iption and click Next.           |
|   | ·                                |
| 25 Enter part of the <b>Template Name</b> and click <b>Search</b> to re | turn the search results          |
| 23. Enter part of the remplate Maine and the Search to re               | itum the search results.         |
| Nexaura Office Integration  |                                  |
| New Document  |                                  |
|   |                                  |
| Template Name: 1 A General Liability                                    |                                  |
| Template Description:   |                                  |
| Document Type: MS Word  |                                  |
|   |                                  |
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| Available Templates: 1 A General Liability-MO                           |                                  |
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| Cancel Next >>  |                                  |
| Cancel Next >>  |                                  |



| 27. On the Policy Sele     | ction screen, click OK to begin the merge process.                |                       |        |
|----------------------------|---|-----------------------|--------|
| Policy Selection           |   |                       |        |
| Select criteria to default | into the document.  |                       |        |
| Named Insured:             | Busy Bee Crafts [Primary]   |                       |        |
| Contact:                   | Clair Jones 🛛 👻   |                       |        |
| Location:                  | 1250 Boardwalk Dr., Brea, CA 92821 [Primary]                      |                       |        |
| Assignment:                | Mary Oberleitner, Signature Authorized 🗸 🗸                        |                       |        |
|                            |   |                       |        |
| Demographic:               |   |                       |        |
|                            |   |                       |        |
|                            |   | 1                     |        |
| Line of Bus. Policy Nun    | nber   Stage   Issuing Carrier   Cvg Eff   Cvg Exp   Pol Eff   Po | l Exp   Change   Desc |        |
| General                    | -1/Marketing []]+]aptig104/28/06104/28/07104/28/                  | 06104/28/0711         |        |
| Commercial                 | -1 Marketing   Atlantic.   04/28/08/04/28/07/04/28/               | 06104/28/0711         |        |
|                            |   |                       |        |
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|                            |   | Back Cancel Of        |        |



28. Once the document has merged, only the quarterly text should be found on the document since (in this example) **Quarterly** was the audit type.

| File Edit | t View Insert Format Tools Table Window | w Help Adobe PDF Type a question for help 🗸  |
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| D Neveure |   |  |
| E Nexaure |   |  |
|           | θ                                       |  |
|           |   |  |
|           | Named Insured:                          | Busy Bee Crafts  |
| ·         | Carrier:                                | Atlantic Mutual  |
|           | Policy Term:                            | 04/28/2006 - 04/28/200/  |
|           | Coverage Type:                          | Occurrence   |
| -         |   |  |
| :         |   |  |
|           | Coverages                               |  |
|           |   |  |
|           | Each Occurrence Limit                   | 1000000  |
| <u>.</u>  | General Aggregate Limit                 | t \$2,000,000  |
|           | Products and Completed                  | d Operations Limit \$2,000,000   |
| :         | Medical Expense Limit                   | \$25,000   |
| 4         | Hazard Description                      | Exposure   |
|           | Retail Sales                            | 3000000  |
| -         | Clerical                                | 45000  |
| :         | Distributor                             | 65000  |
|           |   |  |
|           | Audit Information:                      |  |
|           | This policy will be audite              | ed quarterly. Please make sure to keep all records to show evidence of policy exposure |
|           | for this audit. The premi               | ium could increase or decrease if the estimated exposure is greater or less than the   |
| ·         | actual exposure                         | and could increase of decrease if the estimated exposure is greater of less than the   |
| ·         | actual exposure.                        |  |

**Tip**: When testing templates make sure to test all possible selections before using the template. In the audit example above, each audit type should be saved on the **General Liability** form and the template run to make sure they all work as expected.

**Note: HideBegin** cannot be used to hide fields in the schedule tables. Examples of schedules are vehicles, drivers, locations, etc. The reason they will not work is that the **HideBegin** is processed and cleared prior to adding schedules to the document; therefore, the results of using a **HideBegin** in a schedule table would return only the first scheduled item.