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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.

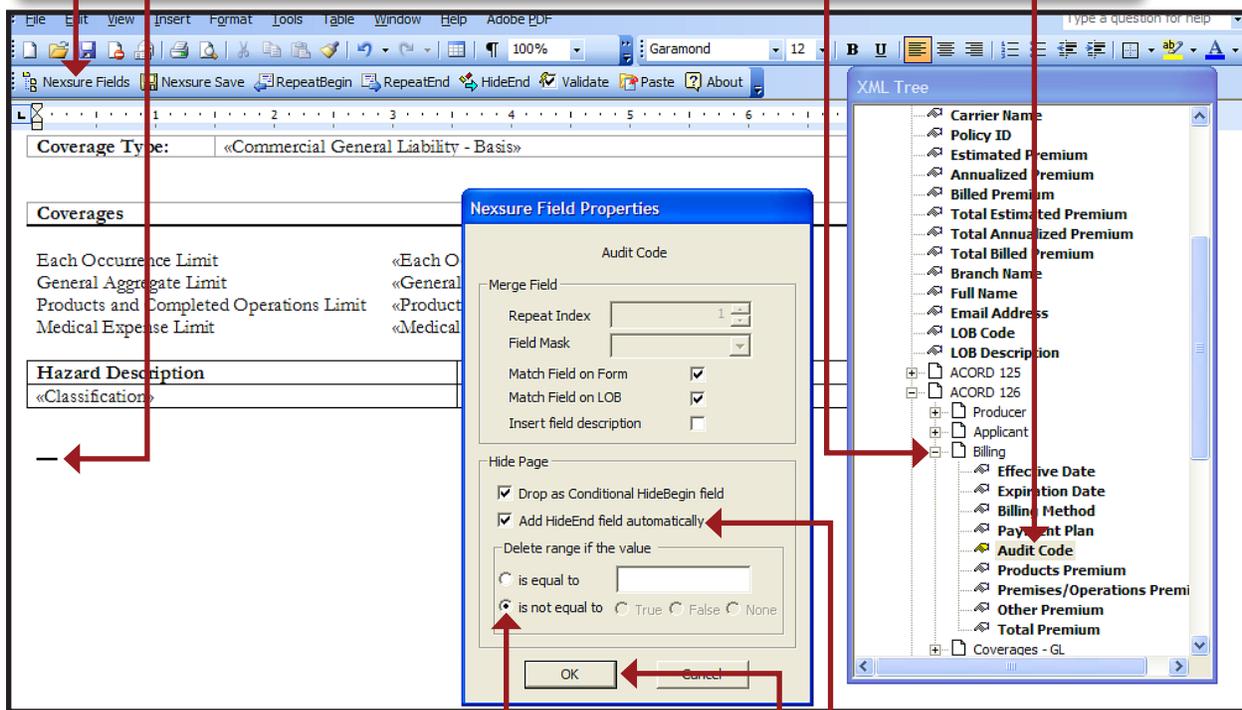
To complete the audit section for this document a **HideBegin** statement must be added for each different audit type. The choices found in the **Audit** list on the Commercial General Liability ACORD 126 form are as follows:

- 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 **Nexsure 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.



2. The **Nexsure Field Properties** dialog box is displayed. Click the **is not equal to** option. This **HideBegin** will address if the policy is not audited, so the **HideBegin** instructs on merging to delete the text if the field is not equal to **Blank**.

3. Notice that the **Add HideEnd field automatically** check box is already checked. Leaving this checked will help assure that the **HideBegin** has a **HideEnd** statement to prevent merging problems. When the **OK** button is clicked, the following will be displayed on the document:

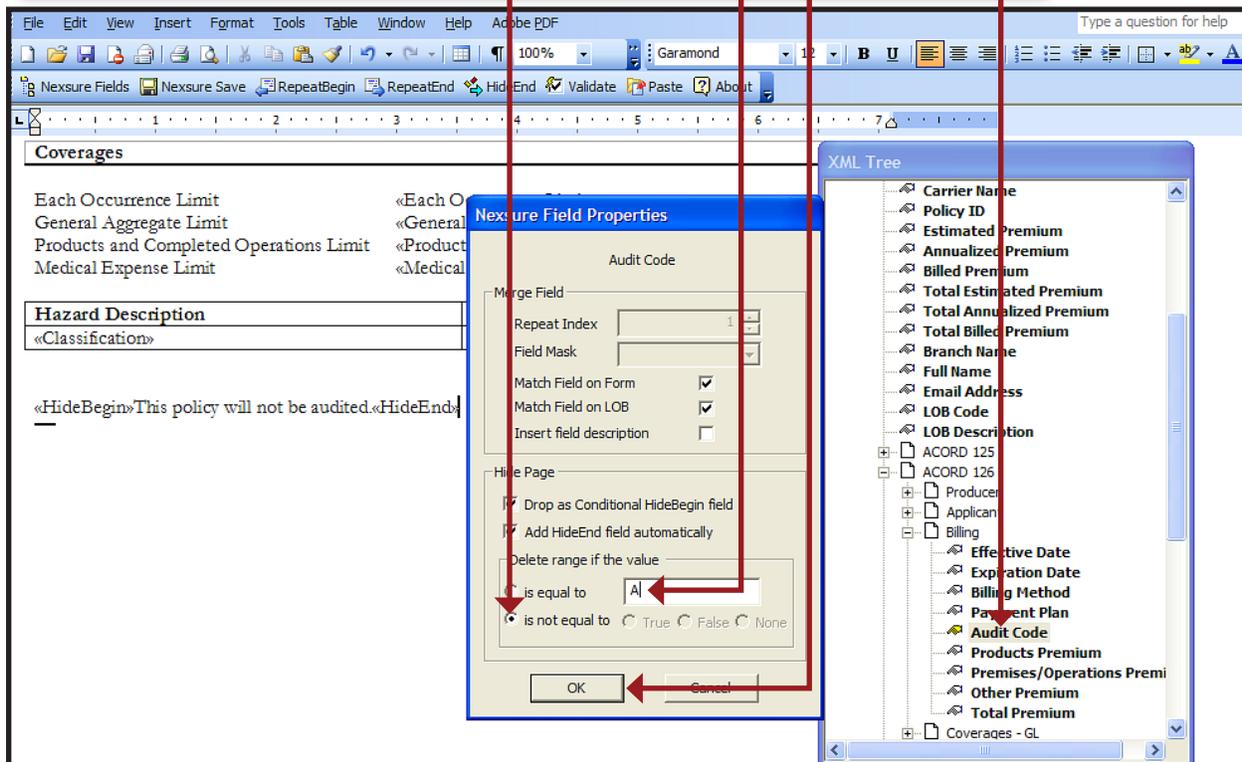
```
<<HideBegin>><<HideEnd>>
```

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:

5. 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 "A" for **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.

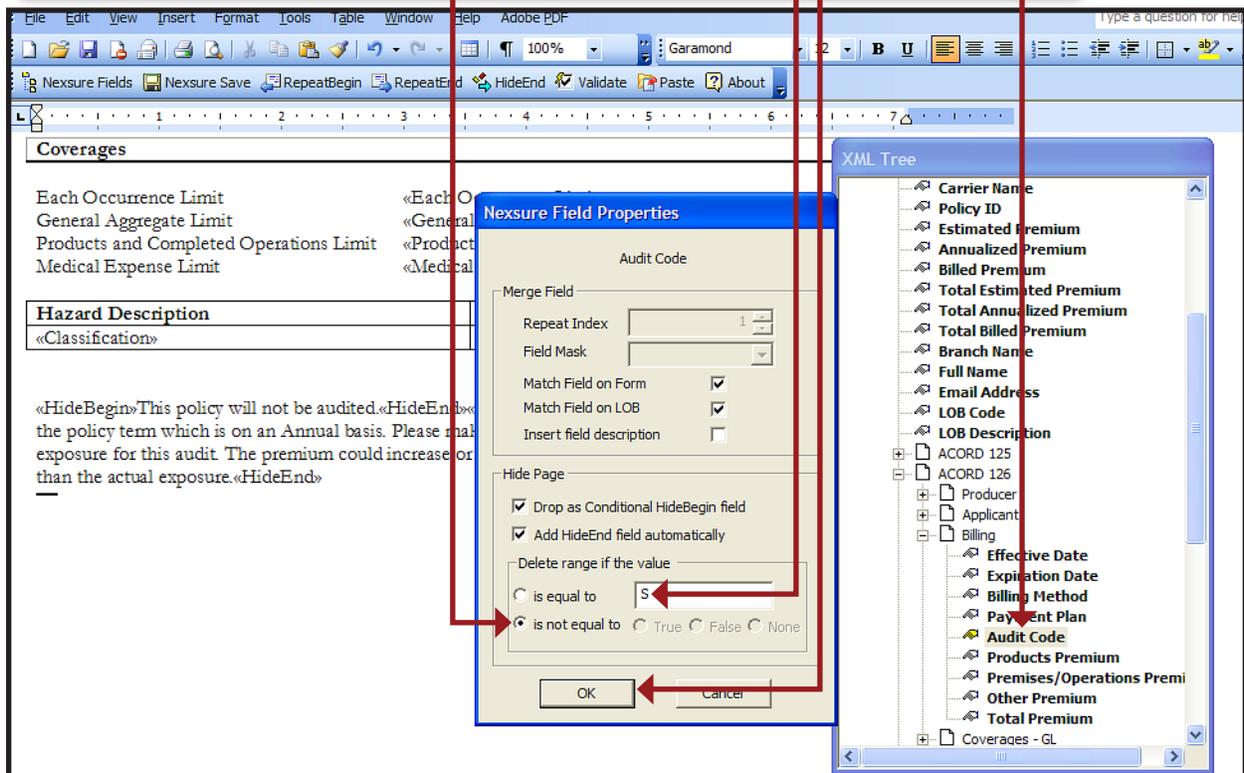


6. Click between the newly created <<HideBegin>><<HideEnd>> conditions to add content. If the **Audit Code** is equal to **A** the hidden entry will be displayed. If the **Audit Code** contains any other value, the statement will be hidden.

<<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:

- 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.

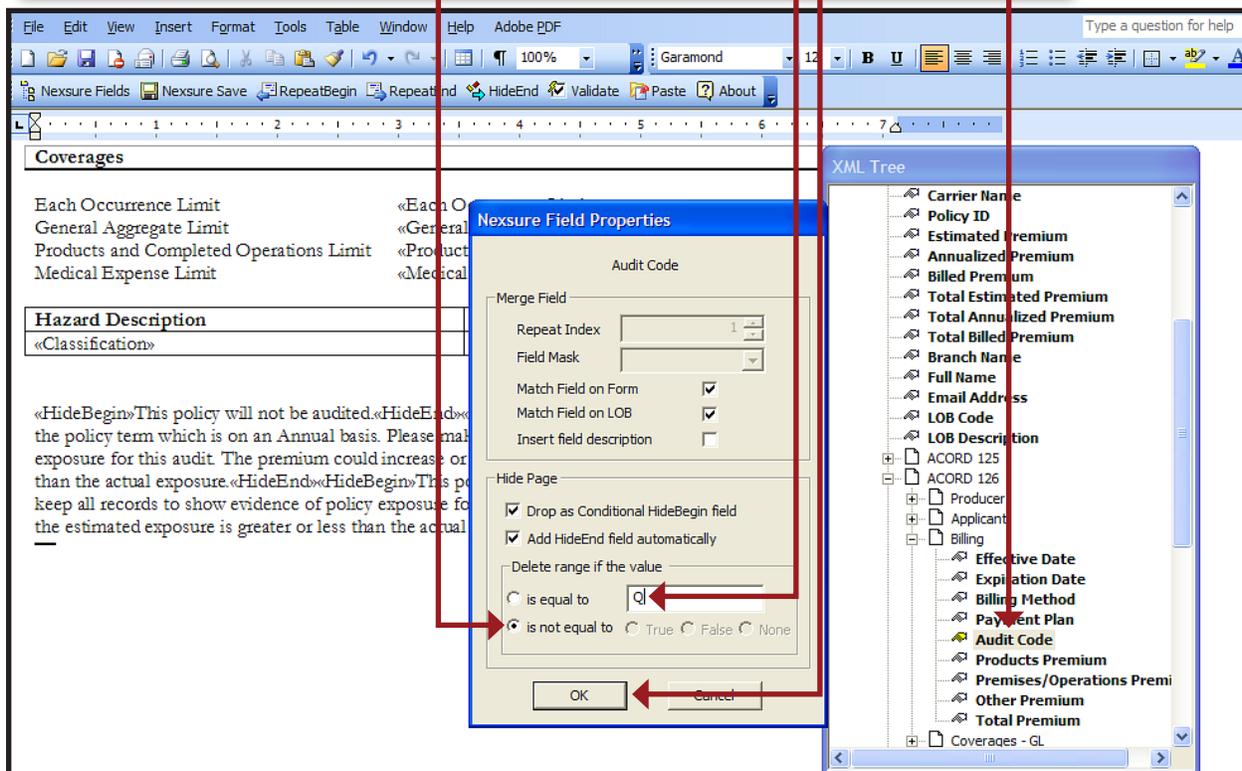


- Click between the newly created <<HideBegin>><<HideEnd>> conditions to add content. If the **Audit Code** is equal to **S** the hidden entry will be displayed. If the **Audit Code** contains any other value, the statement will be hidden.

<<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:

- 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 **“Q”** for **Quarterly Audit**) in the box beside the **Delete range if the value is equal to** option and click **OK** to add the **<<HideBegin>><<HideEnd>>** conditions.

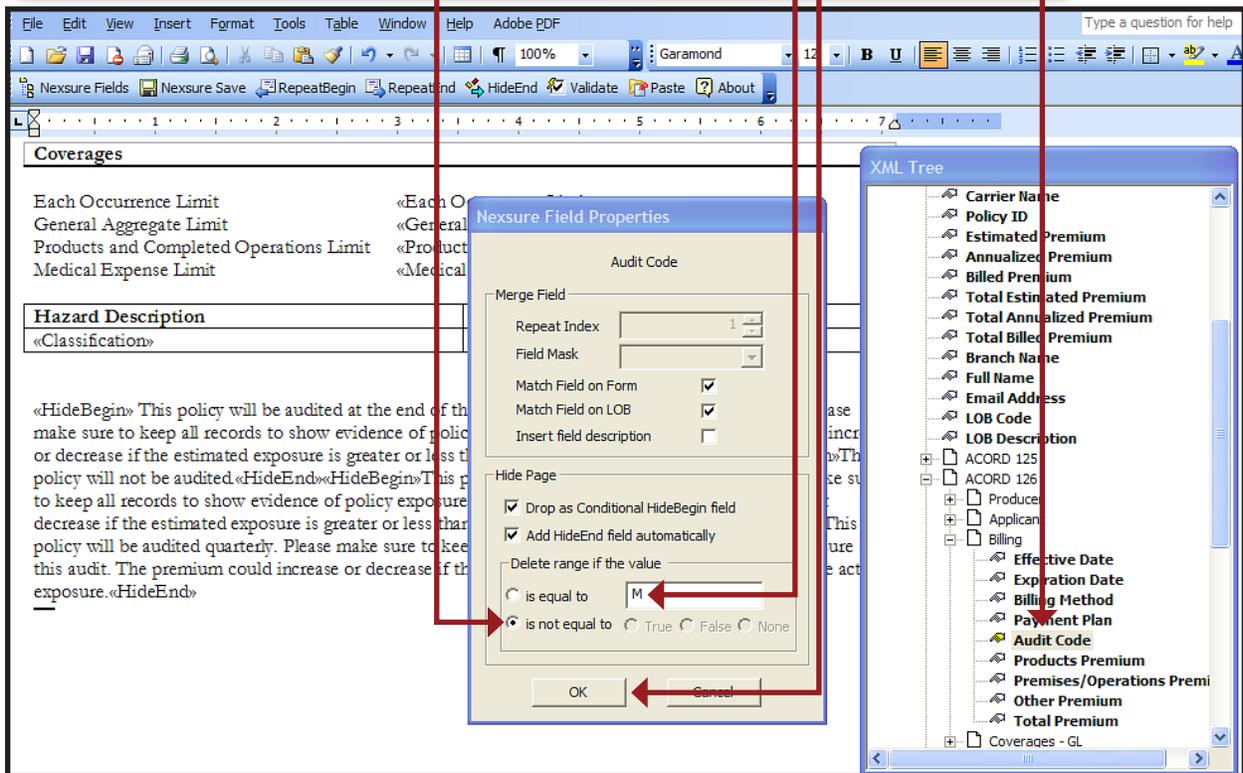


- Click between the newly created **<<HideBegin>><<HideEnd>>** conditions to add content. If the **Audit Code** is equal to **Q** the hidden entry will be displayed. If the **Audit Code** contains any other value, the statement will be hidden.

<<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:

- 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 **"M"** for **Monthly Audit**) in the box beside the **Delete range if the value is equal to** option and click **OK** to add the <<HideBegin>><<HideEnd>> conditions.

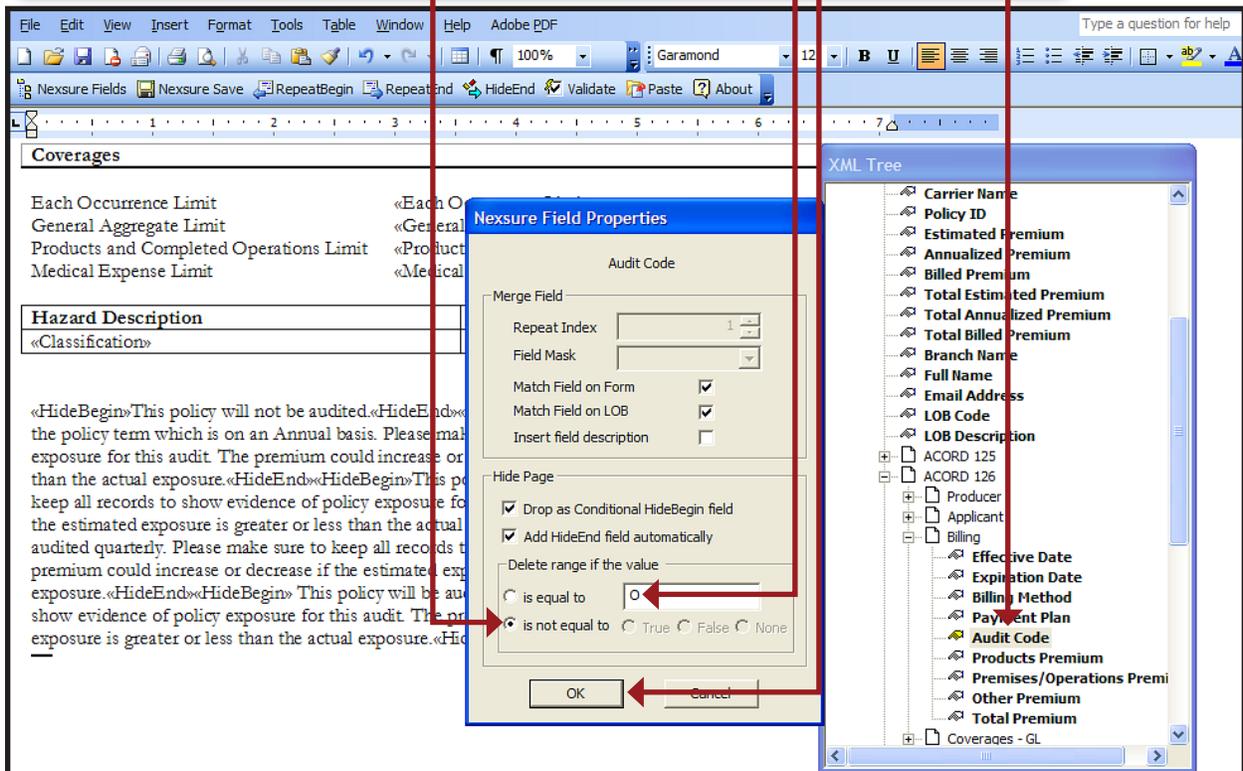


- Click between the newly created <<HideBegin>><<HideEnd>> conditions to add content. If the **Audit Code** is equal to **M** the hidden entry will be displayed. If the **Audit Code** contains any other value, the statement will be hidden.

<<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:

- 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 **"O"** for **Other Audit**) in the box beside the **Delete range if the value is equal to** option and click **OK** to add the <<HideBegin>><<HideEnd>> conditions.



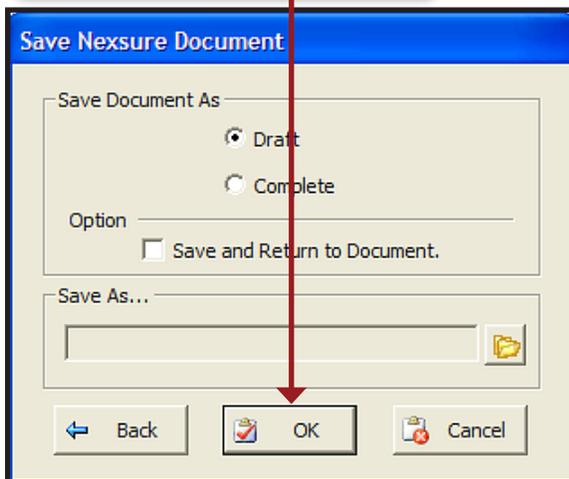
- Click between the newly created <<HideBegin>><<HideEnd>> conditions to add content. If the **Audit Code** is equal to **O** the hidden entry will be displayed. If the **Audit Code** contains any other value, the statement will be hidden.

<<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  **Nexsure Save** button on the toolbar to open the **Save Nexsure Document** dialog box.



16. Click **OK** to save the document.



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**.

search

You must search for a record prior to entering a new one. After the results are returned you will be given the option to add a new record.

Entity: Client
 Search Type: Contains
 Branch: All Branches
 Client Stage: All
 Client Type: All
 Code Class: All
 Code Designation: All
 Status: All
 Client:

HISTORY RESULTS - CLIENT
 50 Record(s) Found
 Showing Page 1 of 5
 Go To Page 1

Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
	Busy Bee Crafts	Commercial	Client	Retail	Brea	CA	92821	
	Bob's Bakery	Commercial	Client	Bakery	Brea	CA	92823	
	Adam Signs	Commercial	Client	Office	Brea	CA	92821	
	Gabbie Gardea	Personal	Client	Primary residence	El Paso	TX	79936	
	Planters Nuts	Commercial	Client	Main	Brea	CA	92821	

18. Click the appropriate client's **Details** icon.

19. On the **Utility** menu, click **MARKETING**.

CLIENT PROFILE | OPPORTUNITIES | **MARKETING** | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

marketing history market analysis

Showing Page 1 of 1
 Filters: [Show]

Details	Assign	Line of Business Policy Number Policy Description Policy Type	Stage Status	Mode	Updated By Updated Date	Estimated Premium	Policy Term	Billing Carrier Issuing Carrier	Remove
		Package CPP-876650-1	Marketing Pending	New	Mary Oberleitner 05/15/2008	\$5,500.00 A	04/28/2006 04/28/2007	Atlantic Mutual Atlantic Mutual	
		General Liability - Commercial				\$2,500.00			
		Property - Commercial				\$3,000.00			
		No Message(s).							

market analysis history marketing

20. Click the **Details** icon of the marketing record to display the **underwriting** tab.

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.

The screenshot shows the Nexsure web application interface. The navigation menu on the right is expanded to show the 'Billing' group under 'General Liability - Commercial > ACORD 126'. The 'Billing' group is highlighted with a red arrow. Below the navigation menu, the 'Billing' section is visible, showing the 'Audit Code' set to 'Quarterly [Q]'. A red arrow points to the 'Audit Code' dropdown menu.

22. Click the **attachments** tab and click the **[Add New]** link.

The screenshot shows the Nexsure web application interface with the 'attachments' tab selected. The 'Client Name: Busy Bee Crafts' is displayed. The 'Add New' link is highlighted with a red arrow. The page shows 'Showing Page 1 of 1' and '[DMS] Filters: [Show] [Hide] [Add New]'.

23. In the **Add New Attachment** dialog box, click the **Create Document with Template** option.

Nexsure Office Integration

Add New Attachment

Add Attachment
 Create Document with Template
 Create Document without Template
 Attach Outlook Messages
 Add External Attachment

Attachment Name:

Document Description:

24. Enter both an **Attachment Name** and **Document Description** and click **Next**.

25. Enter part of the **Template Name** and click **Search** to return the search results.

Nexsure Office Integration

New Document

Template Name:

Template Description:

Document Type: ▼

Category: ▼

Business Type: ▼

Available Templates:

- 1 A General Liability-MO

26. The results are displayed in the **Available Templates** box. Click the desired template and click **Next**.

27. On the **Policy Selection** screen, click **OK** to begin the merge process.

Policy Selection
Select criteria to default into the document.

Named Insured:

Contact:

Location:

Assignment:

Demographic:

Line of Bus.	Policy Number	Stage	Issuing Carrier	Cvg Eff	Cvg Exp	Pol Eff	Pol Exp	Change	Desc
General Liability - Commercial	..876650-1	Marketing	Atlantic..	04/28/06	04/28/07	04/28/06	04/28/07	--	

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.

The screenshot shows a PDF document with the following content:

Named Insured:	Busy Bee Crafts
Carrier:	Atlantic Mutual
Policy Term:	04/28/2006 - 04/28/2007
Coverage Type:	Occurrence

Coverages

Each Occurrence Limit	1000000
General Aggregate Limit	\$2,000,000
Products and Completed Operations Limit	\$2,000,000
Medical Expense Limit	\$25,000

Hazard Description	Exposure
Retail Sales	3000000
Clerical	45000
Distributor	65000

Audit Information:

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.

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.