

IN THIS ISSUE

- ✘ Searching for Clients When Security is Not Granted for all Branches

Searching for Clients When Security is Not Granted for all Branches

The **Global Search** function in Nexsure provides efficiency by allowing an organization-wide search for clients without having to exit the current screen and is also useful for employees who have limited access to quickly identify assignments associated to the client. To take advantage of this search feature perform the following steps:

1. On the **Primary** menu, click the **Global Search**  icon.



The **Search Criteria** dialog box is displayed.

The screenshot shows the 'Search Criteria' dialog box. It has a 'Client:' label followed by a dropdown menu currently set to 'Client Name'. To the right of the dropdown is a text input field and a 'Search' button. At the bottom right of the dialog is a 'Close' button.

2. In the **Client** list, select the criteria for the search.

The screenshot shows the 'Search Criteria' dialog box with the 'Client:' dropdown menu open. The dropdown list contains the following options: Client Name, Contact Name, Enterprise Code, Location Address, Policy Description, and Policy Number. The 'Client Name' option is currently selected. The text input field and 'Search' button are visible to the right.

3. In the text box enter at least two characters. Keep in mind that entering fewer characters will return a broader search result. Entering most of the search criteria will return more specific results.

4. Click **Search**.

5. When the results are returned, security access dictates what functionality is available to the user.

Search Criteria

Client: Client Name

Details Assignment	Client Name	Client City	Client Type	Contact Name	Client Branch
	Block Buster	Quincy	Commercial	Joan Nelson	Southern Insurance Agency
	Busy Bee Crafts	Brea	Commercial	Nancy Blue	Southern Insurance Agency
	EL Camino	El Paso	Commercial	Albertina Hullbrow	JDW Insurance
	Miami Mini Bus	Miami	Commercial	Daniel Fils-Aime	Miami P&C

Tip: To view the client assignment click the  assignment icon.

6. Click the **Details**  icon, the client **card file** tab is displayed, but only if the user has the appropriate branch security. A user with or without security access to the appropriate branch will have access to the **Assignment**  icon which will allow them to see who is assigned to the client.

Client Name: Busy Bee Crafts

Primary Contact
 Name: Ms. Nancy Blue
 Goes By: Nancy
 Title: Owner
 E-Mail: demouser@xdti.com
 Business Phone: (714) 672-5000

Mailing Address
 Location Type: Corporate Headquarters
 Address: PO Box 732 2nd line
 City: Brea State/Province: CA
 Zip/Postal: 92821
 Phone: (714) 255-5600

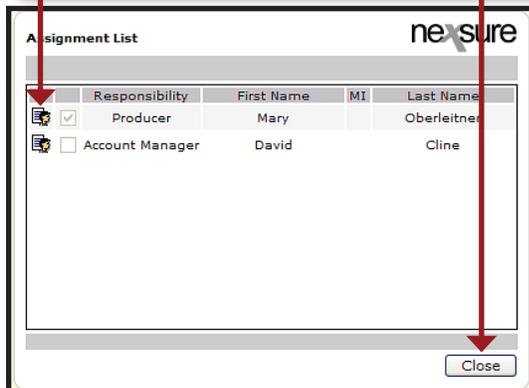
Tracker
 Date Created: 4/27/2006 CST
 Client Since: 4/28/2006 CST
 Website: www.busybee.com
 Related Accounts: 3

Alerts
 Open Actions: 8

Assignment Retail Agent:

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Southern Insurance Agency	Commercial Lines (Acc-Pay on Inv)	Unassigned	Producer	Mary Oberleitner
<input type="checkbox"/>	Southern Insurance Agency	Commercial Lines (Acc-Pay on Inv)	Unassigned	Account Manager	David Cline

7. On the **Assignment List** dialog box, click the **Assignment Details**  icon to see the assignments added to the client, all users will have access to this option. Click **Close** before starting another global search.



Note: To ensure access to the **Global Search**  icon, select the global search **View** rights check box on the security template under the **Primary Menu Resource Group**. For more information on security in Nexsure, see "Security", in Chapter 9, *Admin Training Manual*, located in Nexsure Help under the topic of **Supporting Documents**.