

IN THIS ISSUE

* Updating Policy Terms on Applications

Updating Policy Terms on Applications

To update the policy term dates on all the applications at once on a marketing or editable policy record, do the following:

1. Access the appropriate client through **SEARCH** on the **Primary** menu and click **MARKETING** on the **Client** menu.

_	_								
ne s	ure	↓						HOME HEL	P SETUP LOGO
	SI	EARCH ORGANIZATION REPORT	IS CAMPAIGNS				Bookm	arks: Expand Add R	emove Selected 🚿
LIENT PROF	ILE OPPORTU	INITIES MARKETING POLICIE	5 CLAIMS SERVICI	NG ATTACHMENTS	ACTIONS TRANSACTIO	NS DELIVERY T-LOG			
ient Nam	history market							100	mmercial Accoun
	instory instruct			Showing Pag	e1of6 ▶ N	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
P	۵	Package CPP-876650-1	Marketing Pending	New	Mary Oberleitner 05/16/2008	\$5,500.00 A	04/28/2006 04/28/2007	Atlantic Mutual Atlantic Mutual	Ŀ
T		General Liability - Commercial				\$2,500.00			
		Property - Commercial				\$3,000.00			
	ø	No Message(s).							
2. C	lick the	Details 🕏 icon.							
3. C	On the u i	nderwriting tab,	click the Pol i	icy Term Ca	alendar 😽 icc	on to change tl	ne date wh	nen necessa	ry.

nexsure								HOME HELP SETUP LOGOUT
SEARCH	Bookmarks: Expand Add Remove Selected 🐗							
CLIENT PROFILE OPPORTUNITIES	MARKETING	POLICIES	CLAIMS S	SERVICING ATTACH	MENTS ACTIONS T	RANSACTIONS DEI	IVERY T-LOG	
Client Name: Busy Bee Craft								Commercial Account
underwriting policy info assignm	nt attachme	nts action	s qualification	history transactio	ns claims summary	of insurance classi	fieds delivery	
Branch: Policy Type/Primary State:	South	ern Insuran	ce Agency	Policy Term: Coverage Ter	m:	05/08/2006 1 05/08/2007 1	2:01AM CST	Inavigation instruction
Issuing Co:	Penn	National		V >>> Stage:		Marketing		Base Requirements General Liability - Commercial
Billing Co:	Penn	National		▼ >> Mode:		New		Umbrella - Commercial Workers Compensation
Policy Number:	06/07	7 Marketing		Status:		Pending	~	instruction navigation
Policy Description:	GL ar	nd PR		Origination D	ate:			
List	Rate	Br	idge	Print	History	In Force	Save Ch	Changes
Actions:								
Details Topic Ty Marketing Appr	pe tation	Status			Memo			
gr			no nessage(s).					

XDimensional[®]

February 27, 2009

© 2009 XDimensional Technologies, Inc. All Rights Reserved. Any unauthorized reproduction of this document is prohibited. XDimensional Technologies, Inc. assumes no liability for any issues resulting from the installation of files detailed in this document. XDimensional Technologies is a registered trademark of XDimensional Technologies, Inc. All trademarks or registered trademarks are the property of their respective companies. This document and the information it contains may constitute a trade secret of XDimensional Technologies, Inc. and may not be reproduced or disclosed to non-authorized users without the prior written permission of XDimensional Technologies, Inc. Permitted reproductions, in whole or in part, shall bear this notice.



4. On the A	Assign Date	and Time dialog	box, click a date in the calendar and click Apply.
Assign Date and Time -	licrosoft Internet Expl	ne sure	
Terms From: 05/1 To: 05/0	/2009 O Annual /2007 Quarterly	uration O Semi-Annual O Other	
Sun Mon T 28 27 3 4 10 11 11 17 18	Wed Thu 28 29 30 5 6 7 12 13 14 19 20 21	▼ 2009 ▼ Fri Sat 1 2 8 9 15 16 22 23 <	
24 25 31 1 Months: Days: Years: 0 0 0	26 27 28 2 3 4	29 30 5 6 Cancel Apply	
Done	😔 Internet	€ 100% × 💥	

5. Click **Save Changes** in the Navigation Toolbar to save the header and update the policy term dates on all applications to the dates entered on the header.

nevsure	SEARCH ORGAN	HOME HELP SETUP LOGOUT Bookmarks: Expand Add Remove Selected 🌾					
CLIENT PROFILE	OPPORTUNITIES MARK sy Bee Crafts ty info assignment att	ETING POLICIES CLAI	IMS SERVICING ATTACH	MENTS ACTIONS T	ransactions Deliver	delivery	Commercial Account
Branch: Policy Type/Prim	ary State:	Southern Insurance Agen Package CA 💌	cy Policy Term: Coverage Ter	m:	05/08/2006 12:01/ 05/08/2007 12:01/	AM CST R	Instruction Underwriting Base Requirements
Issuing Co: Billing Co: Policy Number: Policy Description:		Penn National Penn National 06/07 Marketing GL and PR	✓ >>> Stage: ✓ >>> Mode: Status: Origination D	 Stage: Mode: Status: Origination Date: 			General Liability - Commercial Dumbrella - Commercial Workers Compensation instruction navigation
List	Rate	Bridge	Print	History	In Force	Save Changes	
Details Top	pic Type eting Annotation	Status Closed No Mess	age(s).	Memo			
Base Forms:	Forms		c	[Template] [Impo	ort] [ACORD XML] [Suppler	nents] [Add Application]	
	Narrative ACORD 125		Under Commere	writing Narrative cial Application 125			



© 2009 XDimensional Technologies, Inc. All Rights Reserved. Any unauthorized reproduction of this document is prohibited. XDimensional Technologies, Inc. assumes no liability for any issues resulting from the installation of files detailed in this document. XDimensional Technologies is a registered trademark of XDimensional Technologies, Inc. All trademarks or registered trademarks are the property of their respective companies. This document and the information it contains may constitute a trade servet of XDimensional Technologies, Inc. and may not be reproduced or disclosed to non-authorized users without the prior written permission of XDimensional Technologies, Inc. Permitted reproductions, in whole or in part, shall bear this notice.

February 27, 2009



6. After clicking **Save Changes**, the policy term dates on all forms are updated as shown in this example.

		REPORTS CAMPAICNS				HOME HELP SETUP LO			
				HMENTS			T-LOG		okinaiks, Expand Add Keniove Selected
nt Name: Busy Bee Cra	fts								Commercial Acco
			Lister V			-1	deliver		
erwriting poncymio assig	nment attachments	actions quantication	Instory transac	ions cia	ms summary of msurance	classifieds	derivery		
ranch:	Southern Insura	nce Agency	Policy Ter	n:	05/19/2009	12:01AM CST			navigation instruction
olicy Type/PrimaryState:	Package / CA		Coverage	Term:	05/19/2010	12:01AM CS1			Underwriting
	· · · · · · · · · · · · · · · · · · ·								Base Requirements
suing Co:	Unassigned		Stage:		Marketing				Narrative
lling Co:	Unassigned		Mode:		Renew				E ACORD 125
alicy Number:	Unassigned		Originatio	Date:	05/19/2009				Producer
List	Rate	Bridge	Print		Compare Policy: [On]	[Off]	Save Changes		Applicant
					1 7 5 7				Other Named Insureds
lling - Policy		1					Loc	okup	➡ Billing
-	Add Record				-	Prev	Next		Policy
tatus of Transaction:				~				^	Payments
overage Bound Date:				6					Nature Of Business
overage Bound Time:			40.04	take!					Attachments
overage bound miller			12:01						Premises Into General Jafe
M/PM:			AM 🗸						Prior Carrier - GL
roposed Effective Date:			5/19/200	19				-	Prior Carrier - Auto
arrier/Company Name:			Using N	4 d an a 1	Tuannan Cuana				Prior Carrier - Prop
			UCICA No	(CIUNAI	Insurance Group				Prior Carrier - Other
IAIC Code:			458925						Loss/Incident History
Inderwriter:			John Wr:	ght					Enarks General Liability - Commercial
Underwriter Office:			Orlando						Property - Commercial
Delin: Number			orrando					_	instruction preinties
Policy Number:			Unassign	led				~	instruction inavigation
-	-				-	Prev	Next		

Note: If **Market Existing** is selected on the SERVICING screen to copy the application and the policy term in the header does not need to be changed, only the applications need to be updated with the new policy term date. Click the **Save Changes** link on the Navigation Toolbar to update the policy term dates on all applications on the record.

XDimensional Technologies

© 2009 XDimensional Technologies, Inc. All Rights Reserved. Any unauthorized reproduction of this document is prohibited. XDimensional Technologies, Inc. assumes no liability for any issues resulting from the installation of files detailed in this document. XDimensional Technologies is a registered trademark of XDimensional Technologies, Inc. All trademarks or registered trademarks are the property of their respective companies. This document and the information it contains may constitute a trade secret of XDimensional Technologies, Inc. and may not be reproduced or disclosed to non-authorized users without the prior written permission of XDimensional Technologies, Inc. Permitted reproductions, in whole or in part, shall bear this notice.