

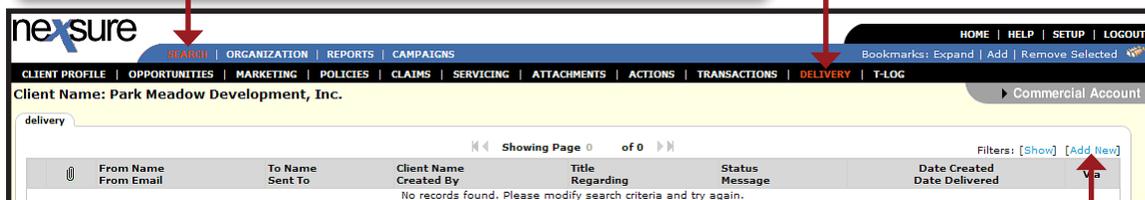
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## Searching for Carrier Contacts in Delivery

When delivery addresses are needed for the Carrier Contact on faxes or emails, use the Nexsure address book to locate contacts entered in the Nexsure Carrier records. Perform the following steps to search for Carrier Contacts in Delivery:

1. Locate and select the appropriate client through **SEARCH** and click the **DELIVERY** link at client, certificate or policy level.



2. Click the **[Add New]** link to add a new delivery record.

3. Click the **Address Book**  icon to display the Nexsure address book.



4. In the **address book** dialog box, select **Contacts** from the the **Entity** list.

**address book**

Entity  
 Contacts [Search] [Clear]

Display Name Client Entity  
 Joan Hartford Insurance Group Carrier

Search Results

<input type="checkbox"/>	Display Name	Client	Send To	Via	Phone Number	Ext.	Entit
<input type="checkbox"/>	Joan Smith	Hartford Insurance Group	7146681555	Fax			Carri
<input type="checkbox"/>	Joan Smith	Hartford Insurance Group	m3ober@gmail.com	eMail			Carri

From To CC BCC [Select] [Close]

5. In the **Display Name** box, type in part of the contact's name.

6. In the **Client** box, type in the carrier's name.

7. In the **Entity** box, type in **Carrier**.

8. Click the **[Search]** link to display all contact matches (In this example, **Hartford Insurance Group** was used).

**Tip:** Since contacts are not added to each carrier name in the **Carrier Record**, typing in the full carrier name instead of part of the name will limit the contact search results for just the carrier name entered. Entering part of the carrier name will return the contact for each carrier found in the search. For example, the Hartford Insurance Group has multiple issuing carriers. So if only **Hartford Insurance Group** is entered as the carrier name, the contact of **Joan** (in the example above) will display in the list one time for each carrier name added under the Hartford Insurance Group.

9. If the contact name is not known, do not enter a **Display Name**. This will return all the contacts for the carrier name entered into the **Client** box.

10. Select a contact by clicking the check box beside the appropriate Display Name and address.

**address book**

Entity  
 [Search] [Clear]

Display Name  Client  Entity

**Search Results**

<input type="checkbox"/>	Display Name	Client	Send To	Via	Phone Number	Ext.	Ent
<input checked="" type="checkbox"/>	Joan Smith	Hartford Insurance Group	7146681555	Fax			Car
<input type="checkbox"/>	Joan Smith	Hartford Insurance Group	m3ober@gmail.com	eMail			Car
<input type="checkbox"/>	Seth Jones	Hartford Insurance Group	7146679000	Fax			Car
<input type="checkbox"/>	Seth Jones	Hartford Insurance Group	john.jones@zzex.com	eMail			Car

From  To  CC  BCC
 [Select] [Close]

11. Select the option of **From**, **To**, **CC** or **BCC** and click the **[Select]** link to populate the delivery fields.

**Fact:** This same method of searching for Carrier Contacts can also be used for Retail Agent Deliveries.