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***** Searching for Carrier Contacts in Delivery

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 s click the DEL	elect the appr IVERY link at c	opriate client t lient, certificate	hrough SEARC e or policy leve	H and	7	
	ORGANIZATION REPOR	RTS CAMPAIGNS			HO Bookmarks: Expand	ME HELP SETUP LOCOUT Add Remove Selected 🌾
Client Name: Park Meadow	Development, Inc.	ES CLAIMS SERVICING	ATTACHMENTS ACTIONS	TRANSACTIONS	DELIVERY	Commercial Account
U From Name From Email	To Name Sent To	Client Name Created By No records found. Plea	wing Page 0 of 0) Title Regarding ase modify search criteria a	Status Message nd try again.	Date Crea Date Delive	Filters: [Show] [Add New] ted ered Va
2. Click the [Ad	d New] link to	add a new deli	very record.	-		
3. Click the Add	lress Book 🏨	icon to display [.]	the Nexsure a	ddress book		
nexsure	SEARCH OF	RGANIZATION REP	ORTS CAMPAIG	IS		
CLIENT PROFILE OF Client Name: Park delivery	PORTUNITIES Meadow Dev	MARKETING POLI elopment, Inc.	CIES CLAIMS	SI RVICING	ATTACHMENTS AC	TIONS TRANSACTI(
email fax			E-Mail Informatio	n	[Send] [Save Dr	aft] [Print] [Close]
	Title:					

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4. In the address b	ook dialog k	oox, select C	C ontacts fr	om th	e th	e Entity list.			
address book									
Entity Contacts	~	[Search]	[Clear]					L	
Display Name Joan	CI H	ient artford Insi	urance Gro	auc	Entit Cari	y rier		L .	
		Search	Results		1			L .	
Display Name	Client	Send To		Via	Ph	one Number	Ext. Entit		
] Joan Smith	Hartford Insurance Group	71466815	5	Fax			Carrie		
Joan Smith	Hartford Insurance Group	m3ober@g	mail.com	eMail		[Selec	Carri t] [Close]		
				_	-		_	4	
5. In the Display N in part of the co	ame box, tr ntact's name	ype e.							
6. In the Client box	, type in the	e carrier's na	ame.						
7. In the Entity box	, type in Ca	rrier.							
8. Click the [Search] link to dis	play all cont	act match	es (In	this	example, Ha i	rtford Insura	ince Grou	p 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.

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

address book Entity Contacts Display Name Client Entity Carrier
Entity Contacts Client Client Entity Carrier
Hantford Insurance Group
Search Results
Display Name Client Send To Via Phone Number Ext. Ent
Joan Smith Hartford Insurance 7146681555 Fax Car Group
Hartford Joan Smith Insurance m3ober@gmail.com eMail Car Group
Seth Jones Hartford Insurance 7146679000 Fax Car Group
Hartford Seth Jones Insurance john.jones@zzex.com eMail Car Group
○ 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 fit

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

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