nexsure®

Tips & Facts

Volume 5, Issue 6

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Searching For Clients Globally

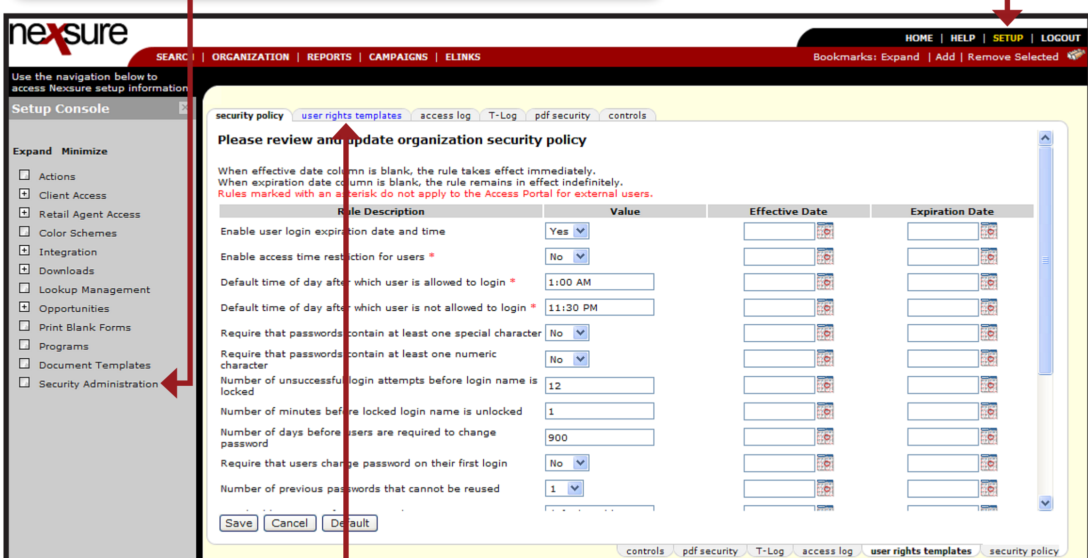
Need to allow the receptionist the ability to locate clients and direct calls to the appropriate assignment in your entire Nexsure Org without giving access to all branches? If so, this can be done by providing security access to one branch along with global search access.

Granting Security Access

Perform the following steps to provide the ability to access Global search:

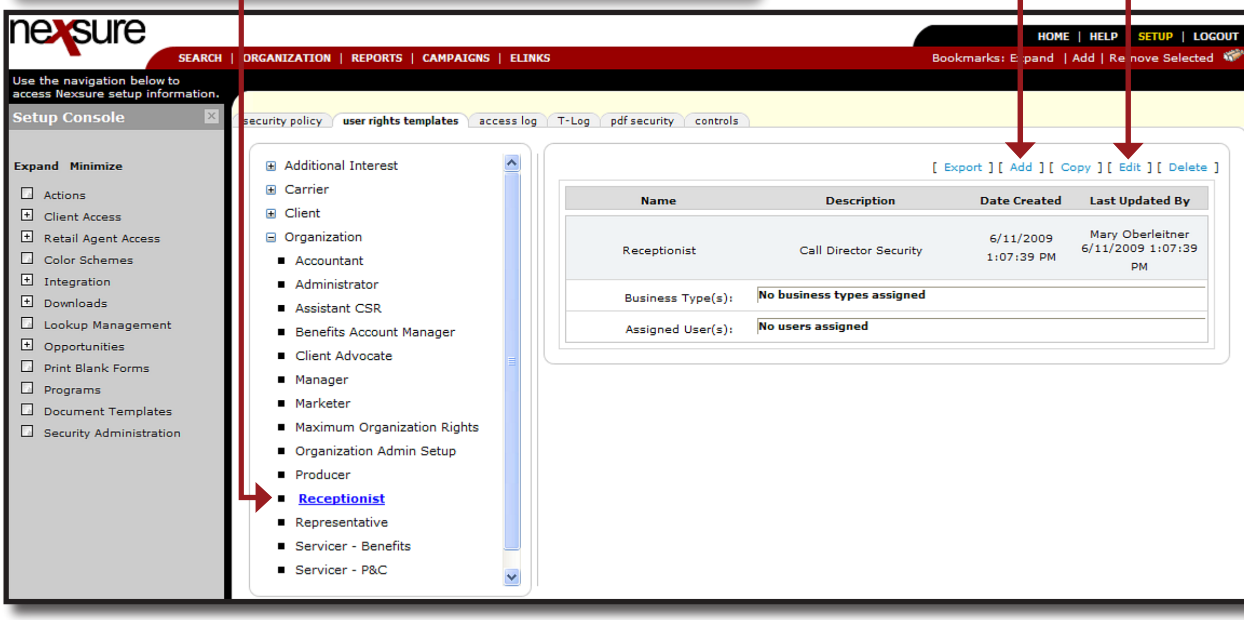
1. On the **Utility** menu, click the **Setup** link.

2. In the **Setup Console**, click **Security Administration**.

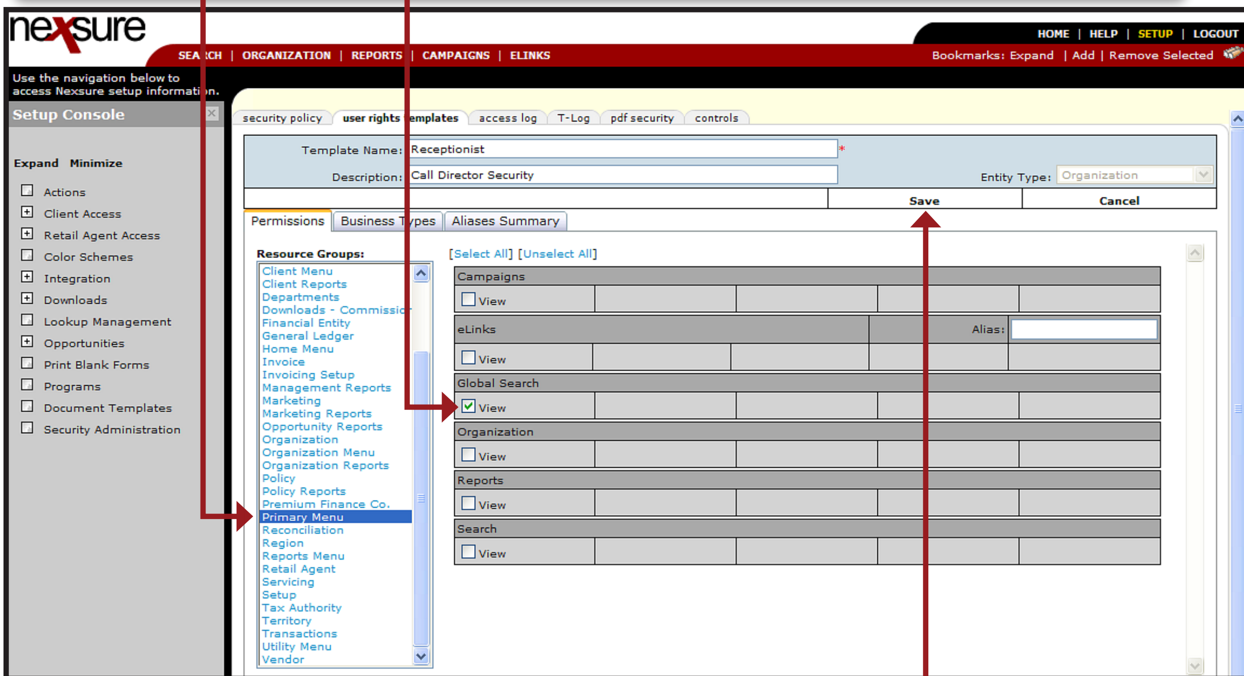


3. Click the **user rights templates** tab.

4. Select a template under **Organization** and click the **[Edit]** link. A new template may also be added by clicking the **[Add]** link.



5. In the **Resource Groups** list, click on **Primary Menu** and select the **View** check box for **Global Search**.



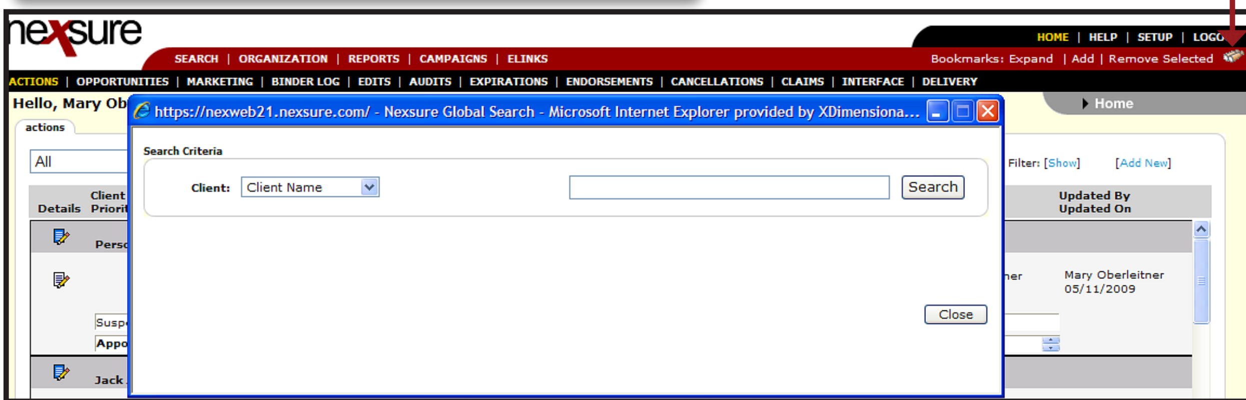
6. Click the **Save** link in the **Navigation Toolbar**.

Note: If the employee was logged in at the time the security template was altered, have them log out and log in to see the security addition activated.

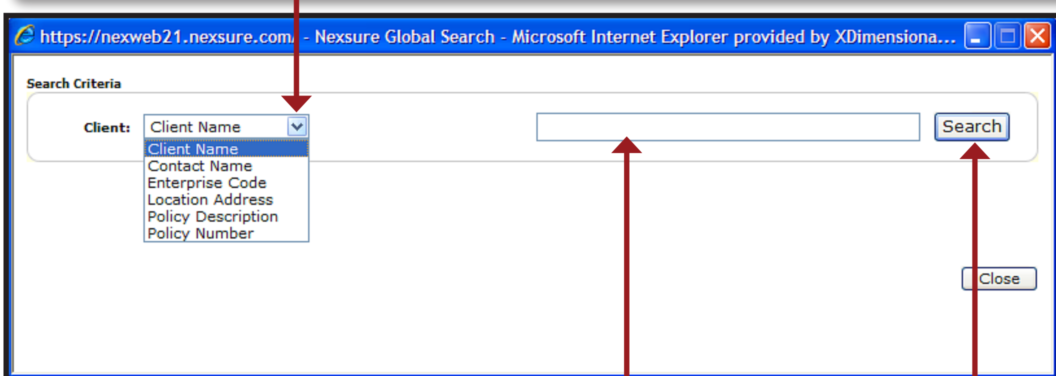
Client Global Search

Now that security has been granted to gain access to the Global Search feature, use the following to search for clients:

1. Click the **Global Seach** icon on the right side of the **Primary** menu to display the **Search Criteria** dialog box.

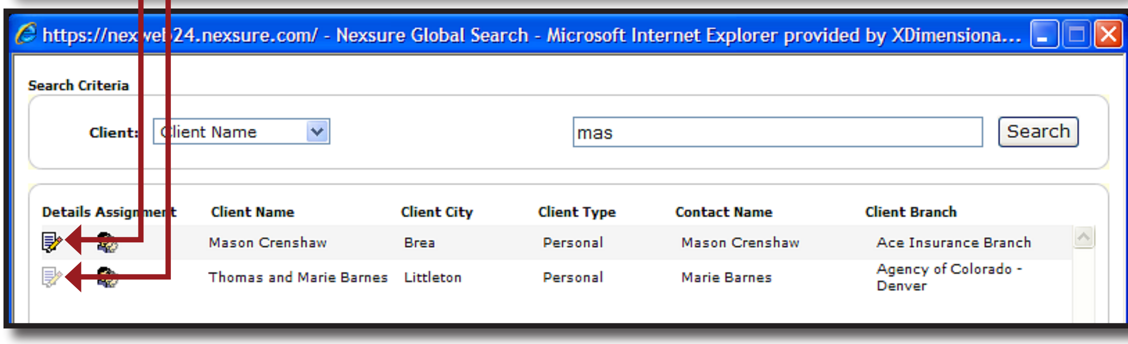


2. To search a field other than **Client Name**, click the **Client** list and choose **Contact Name**, **Enterprise Code**, **Location Address**, **Policy Description** or **Policy Number** depending on the information provided.

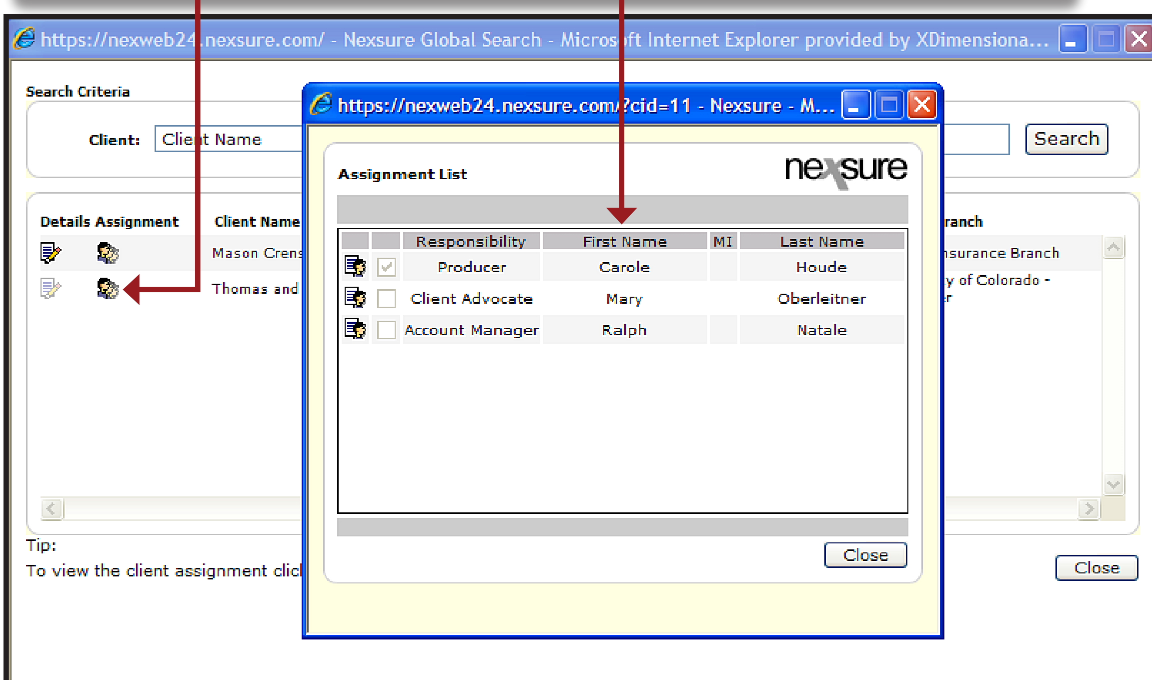


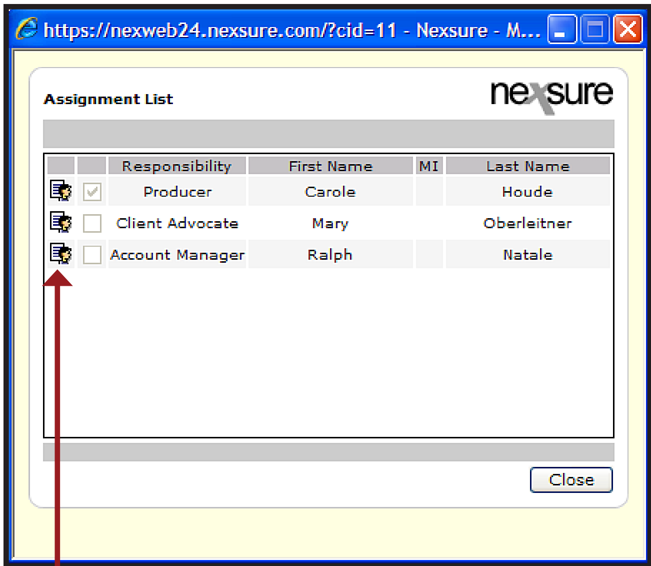
3. Type in a minimum of 3 characters and click the **Search** button to return results. Search will find consecutive data contained within the field.

4. The grayed-out **Details** icon indicates that the user does not have access to the branch the client is assigned to. The white **Details** icon means the user does have access to the branch.

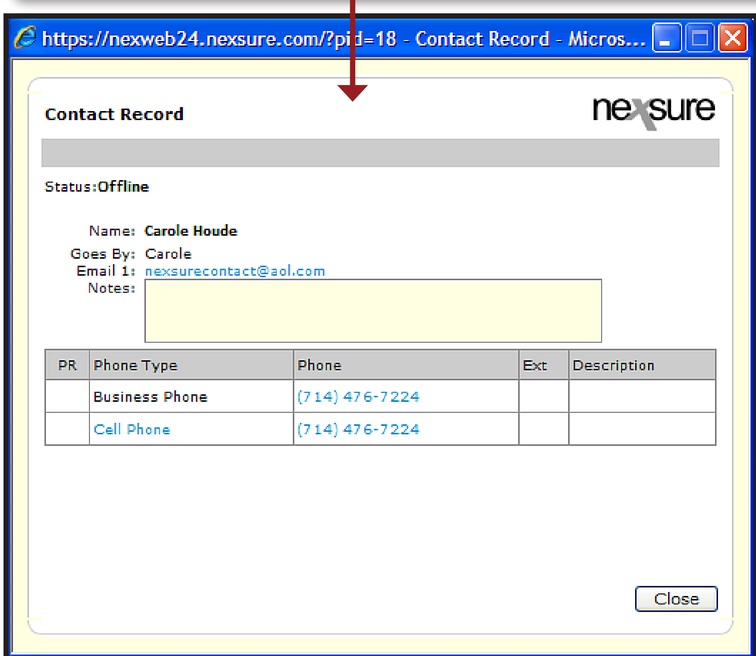


5. The user will not be able to click any grayed-out **Details** icons but can click the **Assignment** icon to display the **Assignment List** screen. The **Assignment List** screen displays the assignments on the account so the user will know who to contact for this account.

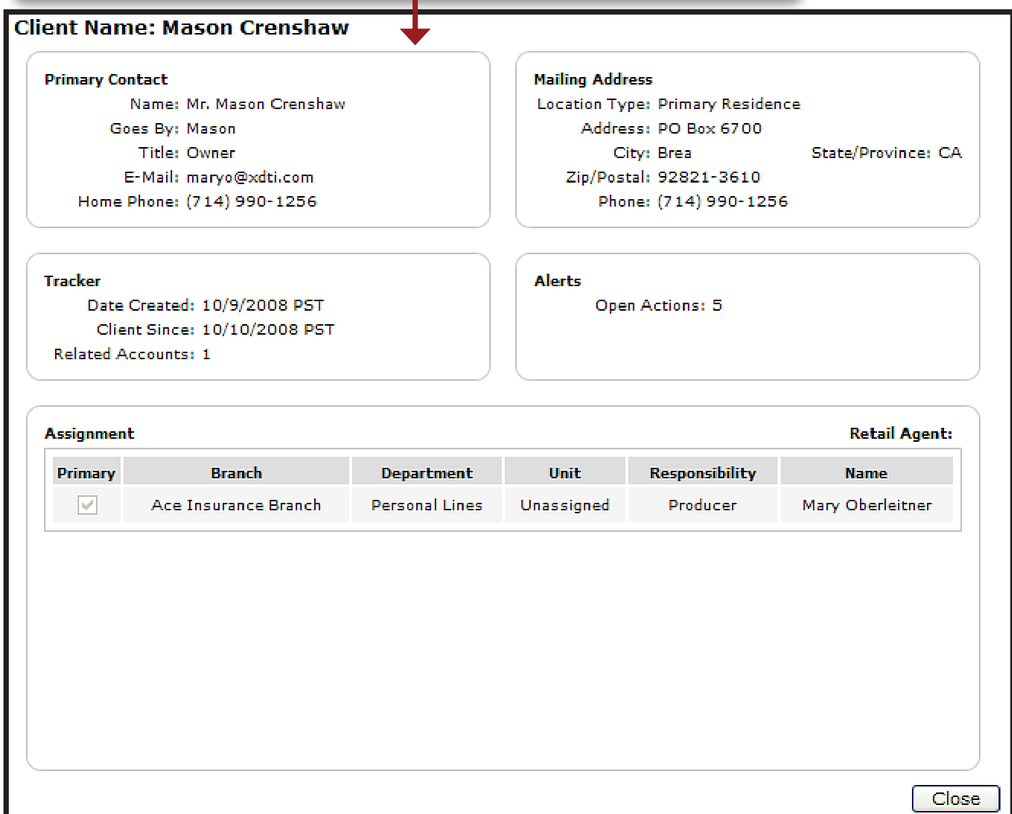




6. If the user needs the contact's phone number or email address, clicking on the **Assignment Details** icon next to their name will display the **Contact Record** dialog box.



7. Clicking the white **Details** icon will display the client's card file.


Client Name: Mason Crenshaw

Primary Contact
Name: Mr. Mason Crenshaw
Goes By: Mason
Title: Owner
E-Mail: maryo@xdti.com
Home Phone: (714) 990-1256

Mailing Address
Location Type: Primary Residence
Address: PO Box 6700
City: Brea State/Province: CA
Zip/Postal: 92821-3610
Phone: (714) 990-1256

Tracker
Date Created: 10/9/2008 PST
Client Since: 10/10/2008 PST
Related Accounts: 1

Alerts
Open Actions: 5

Assignment **Retail Agent:**

Primary	Branch	Department	Unit	Responsibility	Name
✓	Ace Insurance Branch	Personal Lines	Unassigned	Producer	Mary Oberleitner

Close