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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**.

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**Please review and update organization security policy**

When effective date column is blank, the rule takes effect immediately.  
When expiration date column is blank, the rule remains in effect indefinitely.  
Rules marked with an asterisk do not apply to the Access Portal for external users.

Rule Description	Value	Effective Date	Expiration Date
Enable user login expiration date and time	Yes		
Enable access time restriction for users *	No		
Default time of day after which user is allowed to login *	1:00 AM		
Default time of day after which user is not allowed to login *	11:30 PM		
Require that passwords contain at least one special character	No		
Require that passwords contain at least one numeric character	No		
Number of unsuccessful login attempts before login name is locked	12		
Number of minutes before locked login name is unlocked	1		
Number of days before users are required to change password	900		
Require that users change password on their first login	No		
Number of previous passwords that cannot be reused	1		

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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.

The screenshot shows the Nexsure Setup Console interface. On the left is a navigation tree with 'Organization' expanded. The main content area shows a list of templates under 'user rights templates'. The 'Receptionist' template is selected and highlighted in blue. To the right of the list is a details panel for the selected template, which includes a table with columns for Name, Description, Date Created, and Last Updated By. The table contains one entry for 'Receptionist' with a description of 'Call Director Security'. Below the table are sections for 'Business Type(s)' and 'Assigned User(s)', both showing 'No business types assigned' and 'No users assigned' respectively. Action links for [Export], [Add], [Copy], [Edit], and [Delete] are visible above the table.

Name	Description	Date Created	Last Updated By
Receptionist	Call Director Security	6/11/2009 1:07:39 PM	Mary Oberleitner 6/11/2009 1:07:39 PM

Business Type(s): No business types assigned

Assigned User(s): No users assigned

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

The screenshot shows the Nexsure 'templates' configuration page. The 'Resource Groups' list on the left includes items like 'Client Menu', 'Client Reports', 'Downloads - Commission', 'Financial Entity', 'General Ledger', 'Home Menu', 'Invoice', 'Invoicing Setup', 'Management Reports', 'Marketing Reports', 'Marketing Reports', 'Opportunity Reports', 'Organization', 'Organization Menu', 'Organization Reports', 'Policy', 'Policy Reports', 'Premium Finance Co.', 'Primary Menu', 'Reconciliation', 'Region', 'Reports Menu', 'Retail Agent', 'Servicing', 'Setup', 'Tax Authority', 'Territory', 'Transactions', 'Utility Menu', and 'Vendor'. The 'Primary Menu' item is selected. In the main table, the 'Global Search' row has the 'View' checkbox checked. A red box highlights the 'Save' button in the top right of the table area.

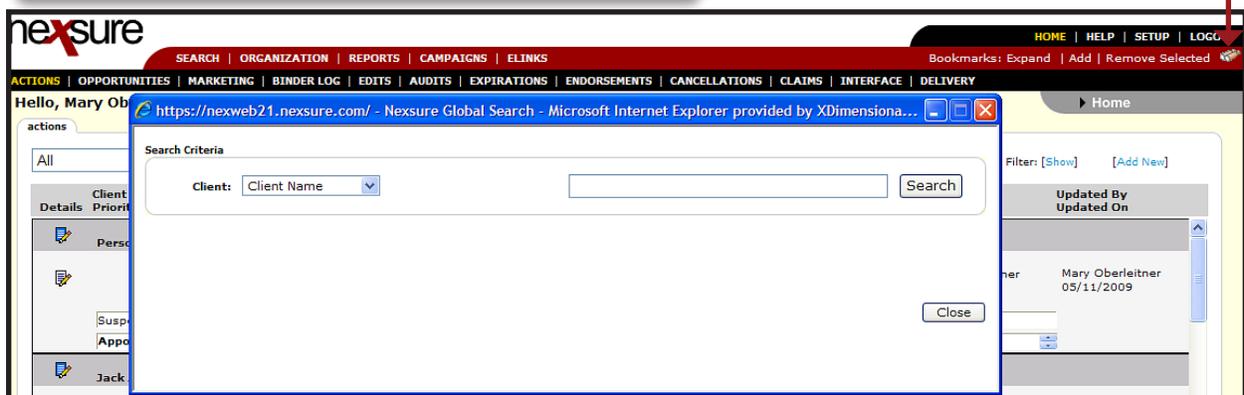
6. Click the **Save** link in the **Navigation Toolbar**.

**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.

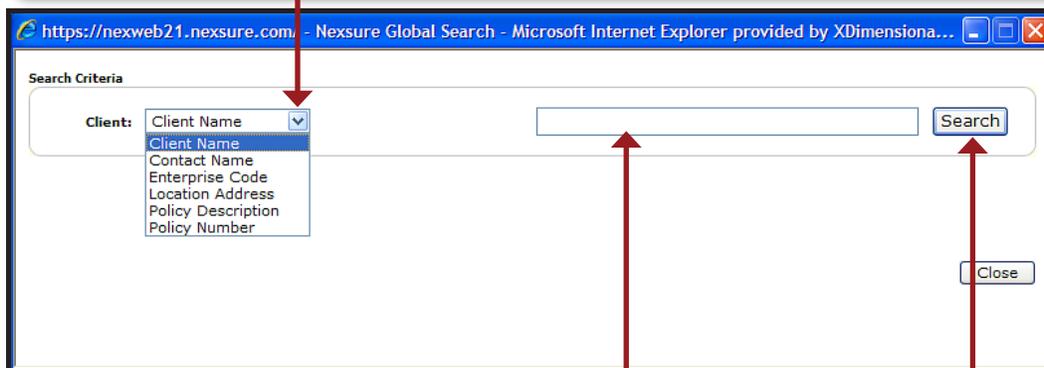
### Client Global Search

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 Search** 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.



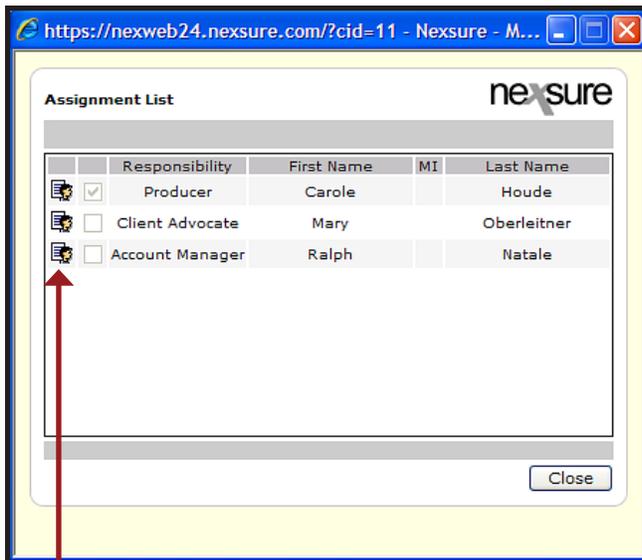
3. Type in a minimum of 3 characters and click the **Search** button to return results. Search will find consecutive data contained within the field.

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.

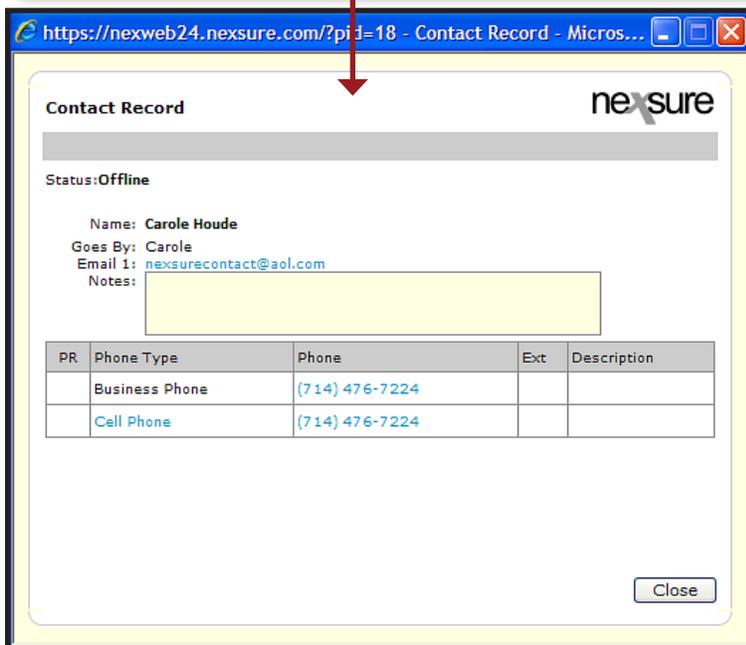
Details Assignment	Client Name	Client City	Client Type	Contact Name	Client Branch
	Mason Crenshaw	Brea	Personal	Mason Crenshaw	Ace Insurance Branch
	Thomas and Marie Barnes	Littleton	Personal	Marie Barnes	Agency of Colorado - Denver

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.

Responsibility	First Name	MI	Last Name
<input checked="" type="checkbox"/> Producer	Carole		Houde
<input type="checkbox"/> Client Advocate	Mary		Oberleitner
<input type="checkbox"/> Account Manager	Ralph		Natale



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
<input checked="" type="checkbox"/>	Ace Insurance Branch	Personal Lines	Unassigned	Producer	Mary Oberleitner

[Close](#)