

## **IN THIS ISSUE**

Policy Filter Shortcut

## **Policy Filter Shortcut**

After locating the client through **SEARCH** and clicking on the **Details** icon, the client **card file** tab is displayed. To access the policy screens to show all policies with the same line of business, you could click on **POLICIES**, click the **[Show]** link, enter the line of business and click the **Search** button to display all matches (For more information see "HOW to Use the POLICIES Summary Search Filter", in Chapter 6, *CRM Training Manual*). Next time, try this shortcut to cut this process down to one step:



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## nexsure IE | HELP | SETUP | LOG ITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG Client Name: Busy Bee Crafts policies history certifica binders verifications summary of insurance Showing Page 1 of 1 1 🛩 Filters: [Show] Line Of Business Policy Number Policy Description Updated By Updated Date Annualized \$ Billed Premiun Policy **Billing Carrie** Stan Coverage Stage Status Policy Renewed 05/22/2008 05/22/2009 Term 05/22/200 Details Policy Type Mode Issuing Carrier surance G Workers Compensati WC - 789987 Work Co **\$50,000.00 A** \$50,000.00 A 6 New Mary Oberleitn 11/19/2008 Hartfo ord I **P \$**\$\$ cers Compensation 789987 Com Addi record from BOR 6 Work WC -Policy Future Mary Oberleitne 05/22/2008 \$0.00 D 05/22/2009 05/22/2010 05/22/2009 Hartford Insurance G Hartford Insurance G Renew ₽ 20 Process renewal

2. Opening the **Search Filter** shows that the line of business was automatically entered when the line of business link was clicked on the **card file** tab.

All In Force policies with the same line of business are displayed.

nexsure			HOME   HELP   SETUP   LOGOUT
BEARGE   ORGANIZATION   REPORTS   CAMPAIGNS   ELINKS			Bookmarks: Expand   Add   Remove Selected 💞
CLIENT PROFILE   OPPORTUNITIES   MARKETING   POLICIES   CLAIMS   SERVICING   ATTACHMENTS   ACTIONS   TRANSACTIONS   DELIVIRY   T-LOG			
Client Name: Busy Bee Crafts			Commercial Account
policies history certificates binders verifications summary of insurance			~
	Showing Pag	je 1 of 1 ▶ ) 1 💌	Filters: [Hide]
Search Filters			Save Filter Settings Save Reset
Policy Number:	Term Eff. Date (Fr):	Term Eff. Date (To):	Assignment:
Mode: All	Term Exp. Date (Fr):	Term Exp. Date (To):	Responsibility:
Policy Status: All	Cvg. Eff. Date (Fr):	Cvg. Eff. Date (To):	Updated By:
Issuing Carrier:	Cvg. Exp. Date (Fr):	Cvg. Exp. Date (To):	LOB: Workers Compensation
Billing Carrier:	Updated Date (Fr):	Updated Date (To):	Bill Method: All
Retail Agent:	Action Description:	Business Type(s):	
Sort Filters			
Sort Field 1: Exp Date 💌	Sort Order 1: Ascending 💙	Sort Field 2:	Sort Order 2:
Files Per Page: 10 💌			Search Restore Clear

**Note**: For more information see "Using the Card File" > "In Force", in Chapter 3, *CRM Training Manual.* 

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