

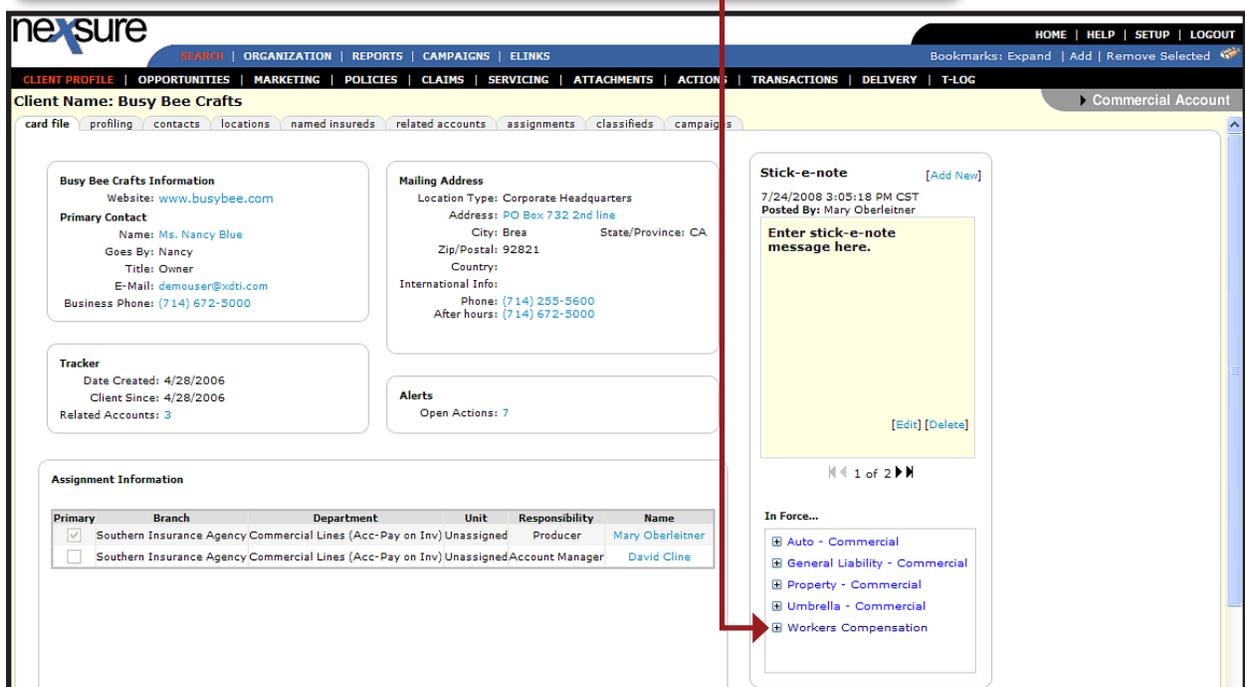
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- ✘ Policy Filter Shortcut

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:

1. On the **card file** tab, in the **In Force** box, locate and click the line of business link.



The screenshot shows the Nexsure interface for a client named 'Busy Bee Crafts'. The 'In Force...' section on the right contains the following list:

- Auto - Commercial
- General Liability - Commercial
- Property - Commercial
- Umbrella - Commercial
- Workers Compensation

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

Client Name: Busy Bee Crafts

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Details	Line Of Business	Policy Number	Policy Description	Policy Type	Stage Status	Mode	Updated By	Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Billing Carrier	Issuing Carrier	Remove
	Workers Compensati	WC - 789987	Work Comp policy		Policy Renewed	New	Mary Oberleitner	11/19/2008	\$50,000.00 A	05/22/2008 05/22/2009	05/22/2008 05/22/2009	Hartford Insurance G	Hartford Insurance G	
	Adding new record from BOR.													
	Workers Compensati	WC - 789987	Work Comp policy		Policy Future	Renew	Mary Oberleitner	05/22/2008	\$0.00 D	05/22/2009 05/22/2010	05/22/2009 05/22/2010	Hartford Insurance G	Hartford Insurance G	
	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.

Client Name: Busy Bee Crafts

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Search Filters

Policy Number: Term Eff. Date (Fr): Term Eff. Date (To):

Mode: Term Exp. Date (Fr): Term Exp. Date (To):

Policy Status: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To):

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To):

Billing Carrier: Updated Date (Fr): Updated Date (To):

Retail Agent: Action Description: Business Type(s):

Sort Filters

Sort Field 1: Sort Order 1: Sort Field 2: Sort Order 2:

Files Per Page:

Save Filter Settings: Save Reset

Assignment:

Responsibility:

Updated By:

LOB: Workers Compensator

Bill Method:

Search Restore Clear

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