

IN THIS ISSUE

- ✘ Add Record Link in Application Schedules

Add Record Link in Application Schedules

When entering items in an application that are contained in a schedule, use the **Add Record** link on the **Navigation Toolbar** to save the current record and add a new item without having to click **Save Changes** first. Perform the following steps after locating the client through **SEARCH** and clicking on the **Details** icon:

1. Click the policy **Details** icon (in this example, the **marketing** tab is being used) to access the application that needs to be updated on the **underwriting** tab.

The screenshot shows the Nexsure application interface. At the top, there is a navigation bar with 'SEARCH | ORGANIZATION | REPORTS | CAMPAIGNS | ELINKS'. Below that, a client profile for 'Nunnally's Glass & Framing Inc.' is displayed. A table lists application records with columns: Details, Assign, Line of Business, Policy Number, Policy Description, Policy Type, Stage Status, Mode, Updated By, Updated Date, Estimated Premium, Policy Term, Billing Carrier, Issuing Carrier, and Remove. A red arrow points from the 'Details' icon in the first row to the 'underwriting' tab in the next screenshot.

2. On the **underwriting** tab, navigate to the scheduled section of the application where the new records need to be added (in this example, **Vehicles - Type** is selected).

The screenshot shows the Nexsure application interface on the 'underwriting' tab. A navigation toolbar at the top includes 'navigation | instruction'. A sidebar on the right shows a tree view with 'Underwriting' expanded, and 'Vehicles' selected. The main content area shows a form for 'Vehicles - Type' with fields for Vehicle Number (321), Year (2009), Make (Ford), Model (Mustang), Body Type (2D), Vehicle Identification Number (89890098HJ678JI87), and Vehicle Type (FP). A red arrow points from the 'Add Record' link in the 'Vehicles - Type' section to the 'Add Record' link in the next screenshot.

3. After you have entered all information for the record and are ready to add the next record, click the **Add Record** link on the **Navigation Toolbar** to save the current record and open the entry screen for the next record. Once all records on the schedule have been added, click **Save Changes** on the **Navigation Toolbar**.