

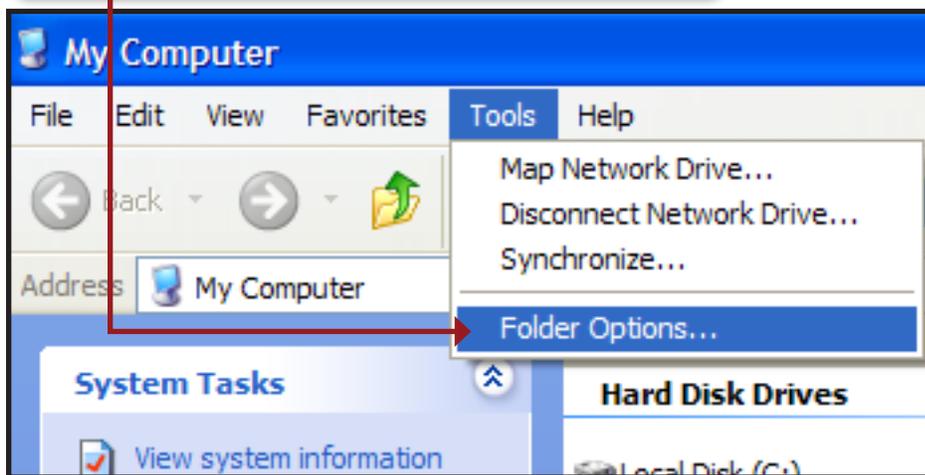
### IN THIS ISSUE

- ✘ Settings to Export and Import Schedules

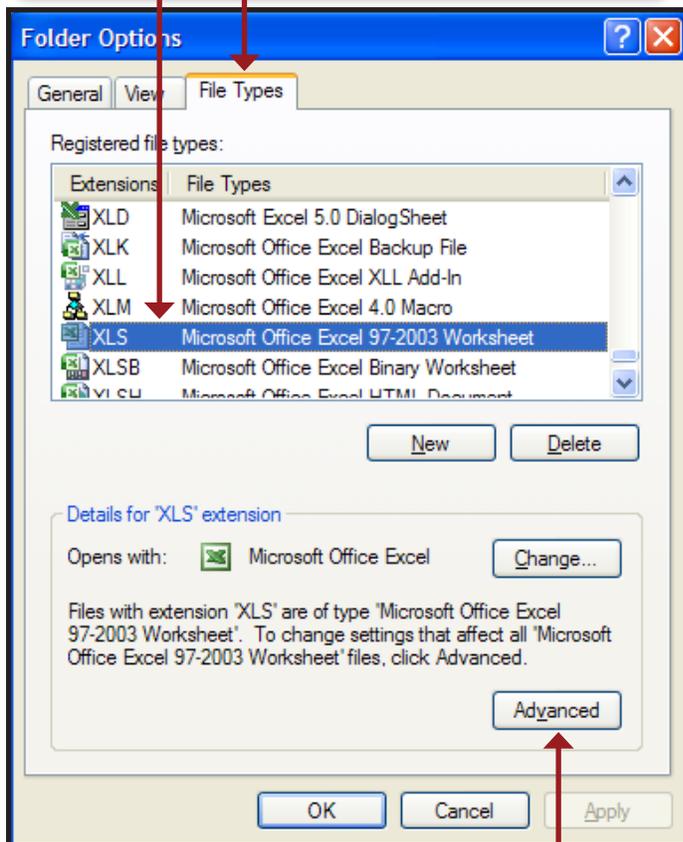
## Settings to Export and Import Schedules

If clicking on the **Export** link in Nexsure, the Microsoft® Excel® spreadsheet opens in the current window and does not provide Microsoft Excel controls, use the following guidelines to adjust settings:

1. On the desktop, double-click the **My Computer**  icon. In Windows® Explorer®, click **Tools** > **Folder Options**.

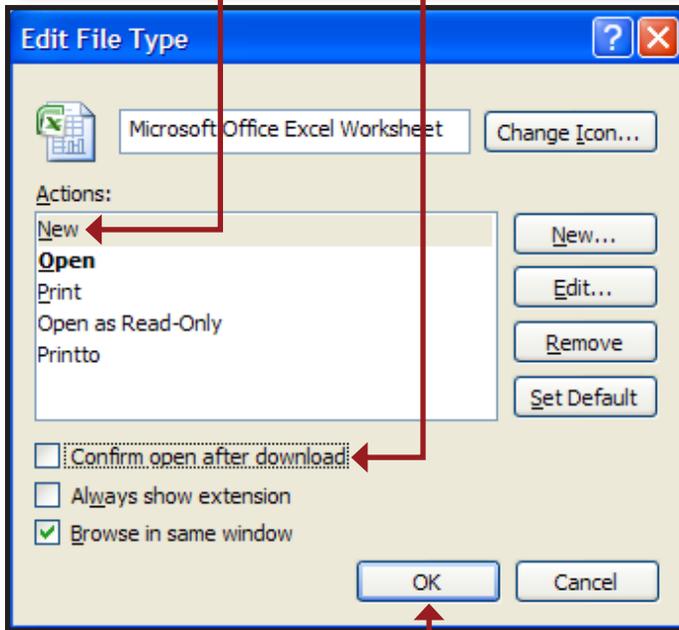


2. Click the **File Types** tab and select the **XLS** extension.



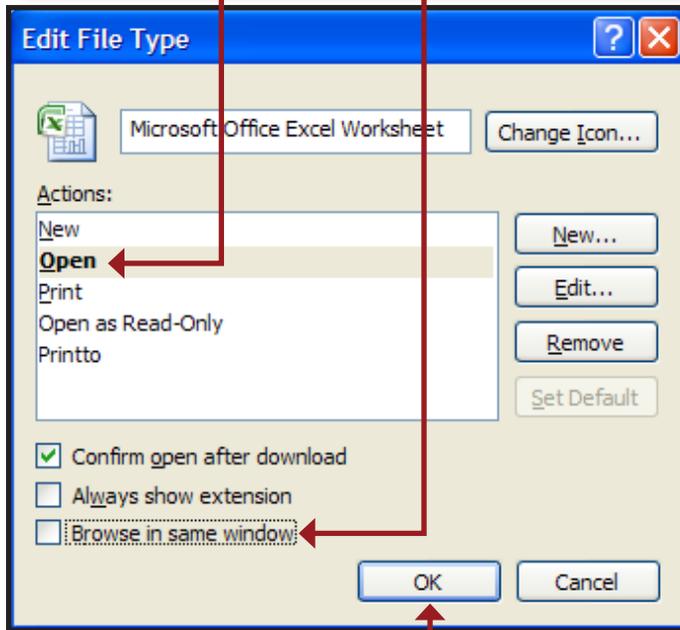
3. Click the **Advanced** button.

4. In the **Edit File Type** dialog box, select **New** in the **Actions** box and clear the **Confirm open after download** check box.



5. Click **OK**.

6. If Microsoft Excel is opening in the Nexsure window, in the **Edit File Type** dialog box, select **Open** in the **Actions** box and clear the **Browse in same window** check box.



7. Click **OK**.

### Exporting a Schedule

Any type of schedule can be exported. Perform the following steps to export a schedule (a vehicle schedule is being used for this example):

1. Click on an active **Commercial Auto** policy for a client and click the **Vehicles** link.

Client Name: Nigel Tufnel - DBA Guitar Player

underwriting | policy info | assignment | attachments | actions | qualification | history | transactions | claims | summary of insurance

Branch: 041204 Branch | Policy Term: 06/24/2004 12:01AM PST  
 Policy Type: Monoline | Coverage Term: 06/24/2004 12:01AM PST  
 Issuing Co: Acme Carriers | Stage: Policy  
 Billing Co: Acme Carriers | Mode: New  
 Policy Number: NY VIN | Status: In Force

List | Print | Compare Policy: [On] [Off] | Save Changes

**Vehicles** | Lookup | Import | **Export**

Sort	Vehicle Number	Year	Make	Model	Body Type	Vehicle Identification Number	Remove
	1	2004	honda	civic			
	2	1995	GMC			1GDJC34KOSES47263	

navigation | instruction

- Underwriting
  - Base Requirements
  - Commercial Auto
    - ACORD 127 C
    - Producer
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    - Coverages
    - Coverages
    - Endorsement
    - Vehicles**
      - Drivers
      - General Info
      - Additional Info
      - Attachments
      - Remarks

2. Click on the **Export** link.

3. Once the vehicles to be exported are displayed, click the **Export** button.

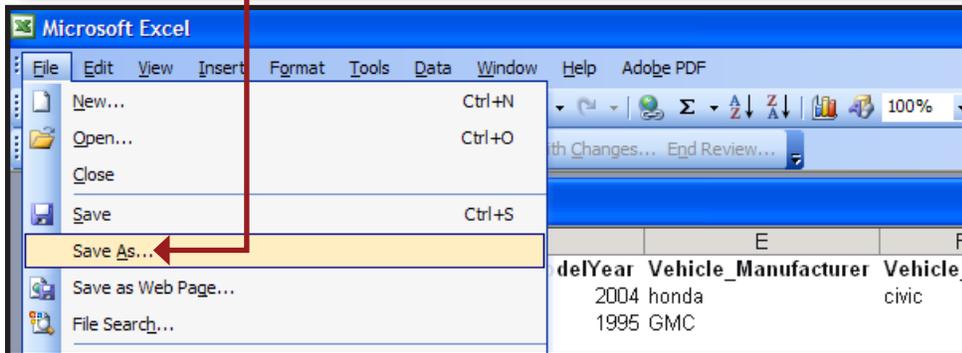
Client Name: Nigel Tufnel - DBA Guitar Player >> Vehicles

The following data is for display only. To edit click export button and use the File -> Save As... menu to save a local copy.

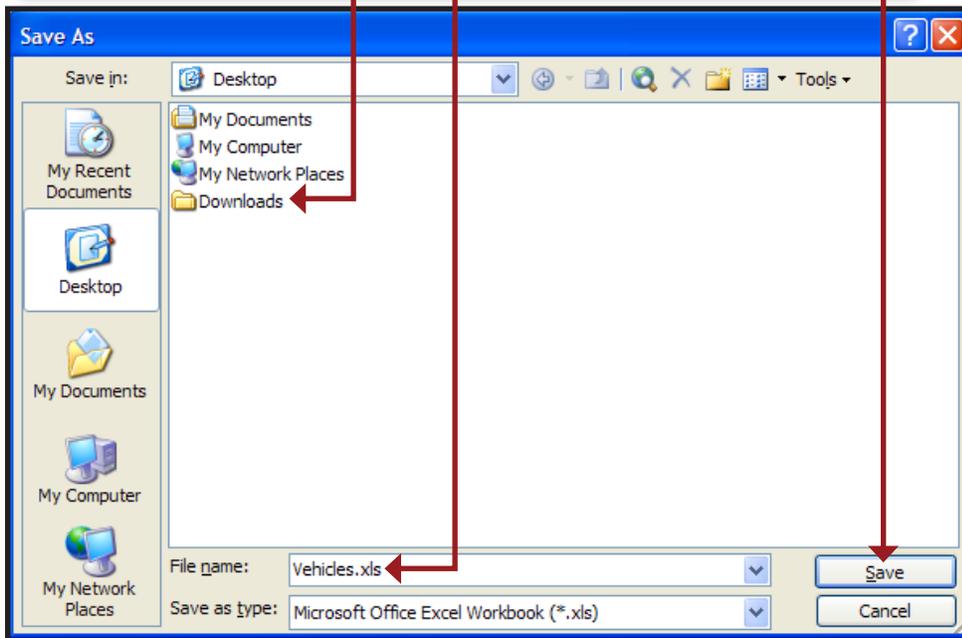
A1	A	B	C	D	E	F	
PolicyDetailsID	VehID	Veh_Order	Vehicle_ModelYear	Vehicle_Manufacturer	Vehicle_Model	Vehicle	
18274	3743	1	2004	honda	civic		
18274	3744	2	1995	GMC			

Deliver | **Export** | Cancel

4. Microsoft Excel opens with the schedule entered on the spreadsheet. In **File** menu select **Save As**.



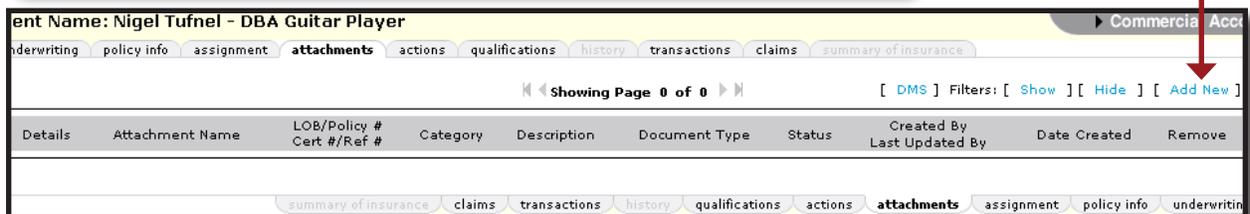
5. Type a name in the **File name** box, select the file's destination and click **Save**.



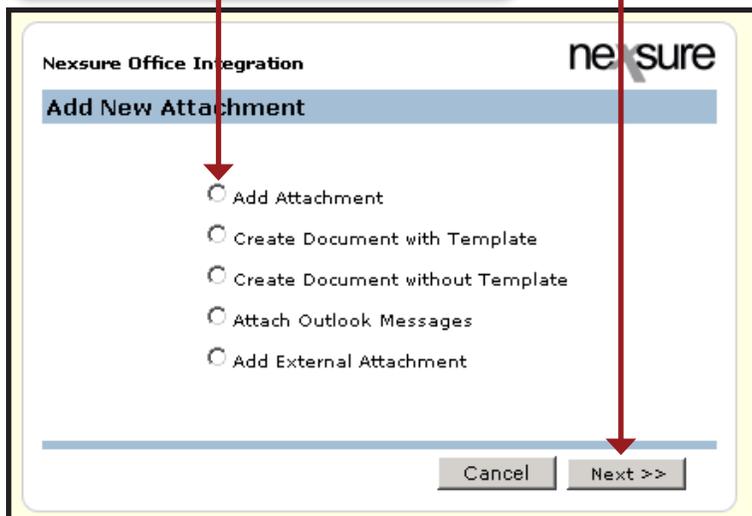
### Importing a Schedule

Any type of schedule can be imported. Perform the following steps to import a schedule (a new marketing commercial auto policy is being used for this example):

1. On the **attachements** tab, click the **[Add New]** link to add a new attachment.



2. Select **Add Attachment** and click **Next**.



3. Click **Browse** to locate the attachment.

**Nexsure Office Integration** nexsure

**Add New Attachment**

Add Attachment  
 Create Document with Template  
 Create Document without Template  
 Attach Outlook Messages  
 Add External Attachment

Add File: C:\Documents and Settings\Suardini\Desktop\Vehicles.xls

Policy: Unassigned/Acme Carriers/Monoline  
 Note: Policy Number / billing Company / Policy Type

Certificate: None  
 Note: Cert # / Ref #

Attachment Name:

Attachment Description:

Date: 09/28/2004

4. Type in the **Attachment Name** and **Attachment Description** and click **Next**. The schedule is now added to the **attachments** tab.

underwriting | policy info | assignment | **attachments** | actions | qualifications | history | transactions | claims | summary of insurance

Showing Page 1 of 1 [ DMS ] Filters: [ Show ] [ Hide ] [ Add New ]

Details	Attachment Name	LOB/Policy # Cert #/Ref #	Category	Description	Document Type	Status	Created By Last Updated By	Date Created	Remove
	Vehicle Schedule	Commercial Auto Unassigned		Vehicle Schedule	Microsoft Excel		John Suardini John Suardini	09/28/2004	

5. Open the marketing policy and click the **Vehicles** link on the **Navigation** menu.

The screenshot shows a policy overview page with the following details:

Branch:	041204 Branch	Policy Term:	05/27/2004 12:01AM PST
Policy Type:	Monoline	Coverage Term:	05/27/2005 12:01AM PST
Issuing Co:	Acme Carriers	Stage:	Marketing
Billing Co:	Acme Carriers	Mode:	New
Policy Number:	Unassigned	Status:	Pending

Navigation menu items include: Underwriting, Base Requirement, Commercial Auto, ACORD 12, Producer, Applicant, Billing, Coverage, Coverage, Coverage, Enter, **Vehicles**, Drivers.

6. Click the **Import** link.

7. In the **attachments** dialog box, click the attachment to import.

The attachments dialog box contains the following table:

Select	Attachment Name	Description	Document Type	Date Created	Created By
<input checked="" type="radio"/>	Vehicle Schedule	Vehicle Schedule	Microsoft Excel	09/28/2004	John Suardini

Buttons: Close, Import

8. Click **Import**.

9. Once the schedule has been imported a **Successfully imported schedule list** message will display. Click **Close**.

**attachments**

Successfully imported schedule list

Please select attachment that you would like to import schedule information from.

Select	Attachment Name	Description	Document Type	Date Created	Created By
<input checked="" type="radio"/>	Vehicle Schedule	Vehicle Schedule	Microsoft Excel	09/28/2004	John Suardini

**attachments**

The vehicles are now imported into the **Vehicles** list.

**underwriting** | policy info | assignment | attachments | actions | qualification | history | transactions | claims | summary of insurance

Branch: **041204 Branch** | Policy Term: **05/27/2004 12:01AM PST**  
 Policy Type: **Monoline** | Coverage Term: **05/27/2005 12:01AM PST**  
 Issuing Co: **Acme Carriers** | Stage: **Marketing**  
 Billing Co: **Acme Carriers** | Mode: **New**  
 Policy Number: **Unassigned** | Status: **Pending**

List | Print | Compare Policy: [On] [Off] | Save Changes

**Vehicles** | Lookup | Import | Export

Sort	Add Record	Search	Prev	Next			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Details	Vehicle Number	Year	Make	Model	Body Type	Vehicle Identification Number	Remove
	1	2004	honda	civic			
	2	1995	GMC			1GDJC34KOSES47263	

**navigation** | instructions

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