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\* Settings to Export and Import Schedules

# Settings to Export and Import Schedules

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





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| 2. Click the <b>File Types</b> tab and select the <b>XLS</b> extension.   |
|---|
|   |
| Folder Options  |
| General View File Types   |
| Registered file types:  |
|   |
|   |
| Microsoft Excel 5.0 DialogSheet   |
| XLK Microsoft Office Excel Backup File  |
| XLL Microsoft Office Excel XLL Add-In   |
| 🙇 XLM 🔶 Microsoft Office Excel 4.0 Macro  |
| XLS Microsoft Office Excel 97-2003 Worksheet  |
| 🔛 XLSB Microsoft Office Excel Binary Worksheet 🥃  |
| 🕬 VI CU Miamaatt Office Event UTMI Decument   |
| <u>N</u> ew <u>D</u> elete  |
| Details for 'XLS' extension   |
| Opens with: Microsoft Office Excel Change   |
| Files with extension 'XLS' are of type 'Microsoft Office Excel<br>97-2003 Worksheet'. To change settings that affect all 'Microsoft<br>Office Excel 97-2003 Worksheet' files, click Advanced. |
| Advanced  |
| OK Cancel Apply   |
| 3. Click the <b>Advanced</b> button.  |



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

| Edit File Type   |                                     | ? 🗙  |
|--|-------------------------------------|--|
| Actions:<br>New<br>Open<br>Print<br>Open as Read-Only<br>Printto | Office Excel Workshe                | et Change <u>I</u> con<br><u>N</u> ew<br><u>E</u> dit<br><u>R</u> emove<br><u>S</u> et Default |
| Confirm open at Always show ex                                   | fter download<br>(tension<br>window | K Cancel   |
| 5. Click OK.   |                                     |  |



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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.

| Edit File Type   |                                      | ? 🔀   |
|--|--------------------------------------|---|
| Actions:<br>New<br>Open<br>Print<br>Open as Read-Only<br>Printto | Office Excel Workshe                 | et <u>Change I</u> con<br><u>N</u> ew<br><u>E</u> dit<br><u>R</u> emove |
| Confirm gpen at<br>Always show ex<br>Browse in same              | fter download<br>(tension<br>window) | Set Default   |
| 7. Click <b>OK</b> .   |                                      | 1   |



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## **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):

| derwriting  | policy in    | fo assignm       | nent a             | ttachmen | ts acti | ons qualifica   | ation history   | transaction                             | s claims               | summary o      | ofinsurance |   |
|-------------|--------------|------------------|--------------------|----------|---------|-----------------|-----------------|---|------------------------|----------------|-------------|---|
| ranch:      |              | 041204           | Branch             |          |         | Policy Te       | :rm:            | 06/24/200<br>06/24/200                  | 4 12:01Al<br>5 12:01Al | M PST<br>M PST | navigation  | instruct<br>ing                                   |
| suing Co:   |              | Acme C<br>Acme C | arriers<br>arriers |          |         | Stage:<br>Mode: | e rem:          | 06/24/200<br>06/24/200<br>Policy<br>New | 4 12:01A<br>5 12:01A   | M PST          |             | nercial /<br>CORD 1                               |
| olicy Nume  | ier:<br>List |                  |                    | Print    | :       | Compa           | re Policy: [On] | In Force<br>[Off]                       | Save C                 | anges          |             | Produc<br>Applica                                 |
| ehicles     |              |                  |                    |          |         |                 |                 |   | Lookup   Iı            | mport   Expo   | ort         | Billing   |
| Sort        |              | -                |                    |          |         |                 |                 | Search                                  | Prev                   | Next           |             | Covera<br>Covera                                  |
| Details     | Vehic        | le Number        | Year               | Make     | Model   | Body Type       | Vehicle Ide     | ntification N                           | umber                  | Remove         |             | Covera  |
| <b>&gt;</b> |              | 1                | 2004               | honda    | civic   |                 |                 |   |                        | E              |             | Endo  |
| <b>P</b>    |              | 2                | 1995               | GMC      |         |                 | 1GDJC:          | 34KOSES472                              | 63                     | E              | ▶           | Vehicle   |
|             |              |                  |                    |          |         |                 |                 |   |                        |                |             | Drivers<br>Genera<br>Additio<br>Attachn<br>Remarl |

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

| _              | -   |         |       |           | •                 | . , ,                |            | F    |          |  |  |  |  |  |  |
|----------------|---|---------|-------|-----------|-------------------|----------------------|------------|------|----------|--|--|--|--|--|--|
| Clie<br>The fi | Client Name: Nigel Tufnel - DBA Guitar Player >> Vehicles<br>The following data is for display only. To edit click export button and use the File -> Save As menu to save a local |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
|                | A1 🔻 🎓 PolicyDetailsID  |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
|                | A   |         | В     | С         | D                 | E                    | F          |      | <b></b>  |  |  |  |  |  |  |
| 1              | PolicyDet   | ailsID  | VehID | Veh_Order | Vehicle_ModelYear | Vehicle_Manufacturer | Vehicle_Mo | del  | Vehicle_ |  |  |  |  |  |  |
| 2              |   | 18274   | 3743  | 1         | 2004              | honda                | civic      |      |          |  |  |  |  |  |  |
| 3              |   | 18274   | 3744  | 2         | 1995              | GMC                  |            |      |          |  |  |  |  |  |  |
| 4              |   |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
| 5              |   |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
| 6              |   |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
| 7              |   |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
| 8              |   |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
| 9              |   |         |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
| 10             |   |         |       |           |                   |                      |            | _    |          |  |  |  |  |  |  |
| 11             |   |         |       |           |                   |                      |            | _    |          |  |  |  |  |  |  |
| 12             |   |         |       |           |                   |                      |            | _    |          |  |  |  |  |  |  |
| 14 4           | 🕨 🕨 🗸 Veh   | icles / |       |           |                   |                      |            |      |          |  |  |  |  |  |  |
|                |   |         |       |           |                   | De                   | eliver Exp | port | Cancel   |  |  |  |  |  |  |

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| 4.        | Microso   | ft Excel o                       | opens wi                                 | th the     | sche         | dule ent                                    | ered on the spreads  | sheet. In <b>Fi</b> l | e menu se                        | elect Save As. |
|-----------|---|----------------------------------|--|------------|--------------|---|----------------------|-----------------------|----------------------------------|----------------|
| 8         | Aicrosoft Ex  | cel                              |  | _          |              |   |                      |                       |                                  |                |
|           | Edit     Vje       New     Open       Qlose     Save       Save     Save       Save as We     File Search | eb Page                          | F <u>o</u> rmat                          |            | <u>D</u> ata | <u>Window</u><br>Ctrl+N<br>Ctrl+O<br>Ctrl+S | Help Adobe PDF       | X↓   Lu 40<br>        | 100% -<br>F<br>Vehicle_<br>civic |                |
| 5.<br>Sav | Type a n  | ame in t                         | he <b>File n</b>                         | ame k      | oox, s       | elect the                                   | file's destination a | nd click <b>Sav</b>   | /e.                              |                |
| 50        | Save <u>i</u> n:  | 🕑 Desk                           | top                                      |            |              | ~   | - 🖻   😋 🗙 💕 🖩        | 🔢 🔻 Too <u>l</u> s 🕶  |                                  |                |
| M         | My Recent<br>Documents  | My Do<br>My Co<br>My Ne<br>Downk | cuments<br>mputer<br>twork Place<br>bads | s          |              |   |                      |                       |                                  |                |
| M         | ly Computer   |                                  |  |            |              |   |                      |                       |                                  |                |
|           | Network   | File <u>n</u> ame:               | Vehicl                                   | es.xls     |              |   | 2                    |                       | ave                              |                |
|           | Places  | Save as ty                       | pe: Micros                               | soft Offic | ce Exce      | Workbook                                    | *.xls)               |                       | ancel                            |                |



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### 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 <b>attachements</b> tab, click the [Add  | New] link        | to add a new               | attachm            | ent.                          |                               |              |
|--|------------------|----------------------------|--------------------|-------------------------------|-------------------------------|--------------|
| ent Name: Nigel Tufnel - DBA Guitar Player<br>nderwriting policy info assignment attachments actions quali | fications histo  | ry transactions c          | :laims summ        | nary of insurance             | Comn                          | nercia Acc   |
|  | Showing          | Page 0 of 0 🕨 🕅            |                    | [ DMS ] Filters: [            | Show ][ Hide ]                | [ Add New ]  |
| Details Attachment Name LOB/Policy # Category  | Description      | Document Type              | Status             | Created By<br>Last Updated By | Date Created                  | Remove       |
| summary of insurance L claims  | ↓ transactions ↓ | history <b>qualificati</b> | ons <u>actions</u> | attachments ass               | ignment $\lambda$ policy info | Lunderwritir |
| 2. Select Add Attachment and click Next.   | -                | 1                          |                    |                               |                               |              |
| Nexsure Office Integration   | ne               | sure                       | 1                  |                               |                               |              |
| Add New Attachment   |                  |                            |                    |                               |                               |              |
| C Add Attachment   |                  |                            |                    |                               |                               |              |
| C Create Document with Temp  | late             |                            |                    |                               |                               |              |
| C Create Document without Te   | mplate           |                            |                    |                               |                               |              |
| C Attach Outlook Messages  |                  |                            |                    |                               |                               |              |
| O Add External Attachment  |                  |                            |                    |                               |                               |              |
| Can  | cel Ne           | xt >>                      |                    |                               |                               |              |

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

| nderwriting | policy    | nfo as:  | signment | attachments action            | s qualificati | ons history trans | actions claims s | summary o | finsurance                     |               |          |
|-------------|-----------|----------|----------|-------------------------------|---------------|-------------------|------------------|-----------|--------------------------------|---------------|----------|
|             |           |          |          |                               | М             | Showing Page 1 o  | of 1 🕨 🕅         | Ľ         | DMS ] Filters: [ Sh            | ow ][ Hide ][ | Add New  |
| Details     | Attach    | nent Nan | ne       | LOB/Policy #<br>Cert #/Ref #  | Category      | Description       | Document Type    | Status    | Created By<br>Last Updated By  | Date Created  | Remove   |
| <b>P</b>    | Vehide \$ | Schedule | X        | Commercial Auto<br>Unassigned |               | Vehicle Schedule  | Microsoft Excel  |           | John Suardini<br>John Suardini | 09/28/2004    | <b>B</b> |

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| erwriting policy          | info assignn | nent a | ttachment  | ts act   | tions  | qualific         | ation history   | transaction   | IS  | claims    |      | nmary of |    | e            |
|---------------------------|--------------|--------|------------|----------|--------|------------------|-----------------|---------------|-----|-----------|------|----------|----|--------------|
| ranch:                    | 041204       | Branch |            |          | F      | Policy Te        | erm :           | 05/27/20      | 04  | 12:01AM   | PST  |          | na | vigation ins |
| olicy Type:               | Monolin      | e      |            |          | (      | Coverag          | e Term:         | 03/27/200     | 00  | 12:01AM   | PSI  |          |    | Underwriting |
| cuipe Cou                 | Acmo (       |        |            |          |        | +                |                 | Maukating     |     |           |      |          |    | 🗄 Base Red   |
| isuing Co:<br>Illing Co:  | Acme C       | amers  |            |          |        | otage:<br>Mode:  |                 | Now           |     |           |      |          |    | 🖯 Commer     |
| ning Co:<br>blicu Number: | Upaccio      | amers  |            |          |        | node:<br>Status: |                 | Pending       |     |           |      |          |    | E ACOF       |
| List                      | UIIII        | jiieu  | Print      |          |        | Compa            | re Policy: [On] | [Off]         |     | Save Cha  | ange | 5        |    | Pro          |
| hicles                    |              |        |            |          |        |                  |                 |               | Loc | okup   Im | port | Expor    | t  | Bill         |
| -                         | Add Reco     | -d     |            |          |        |                  |                 | -             | Т   | Prev      | Ť    | Next     | 7  | Co           |
| Details Veh               | icle Number  | Year   | Make       | Model    | Body   | / Type           | Vehicle Ide     | ntification N | lum | ber       | Ren  | nove     |    | Co           |
|                           |              | P      | lease clic | k 'Add F | Record | ' to inse        | rt new data.    |               |     |           | Г    |          |    | Erm          |
|                           |              |        |            |          |        |                  |                 |               |     |           |      |          |    | De Vel       |
|                           |              |        |            |          |        |                  |                 |               |     |           |      |          |    | Dri          |

6. Click the **Import** link.

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

| F | attachn           | nents                             |                  |                    |                 |               | _     |
|---|-------------------|-----------------------------------|------------------|--------------------|-----------------|---------------|-------|
|   | Please<br>informa | select attac<br>ition from.       | nment th         | at you would       | like to import  | schedule      |       |
| [ |                   | Attachmen                         | t Name           | Document           |                 |               |       |
| L | Select            | Descrip                           | ion              | Туре               | Date Created    | Created By    |       |
|   | ۲                 | <b>Vehicle Sch</b><br>Vehicle Sch | nedule<br>nedule | Microsoft<br>Excel | :<br>09/28/2004 | John Suardini |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 |               |       |
|   |                   |                                   |                  |                    |                 | -             |       |
|   |                   |                                   | C                | lose Ir            | nport           |               |       |
| 6 |                   |                                   |                  |                    | 1               | attachmen     | nts 📕 |
| - |                   |                                   |                  |                    |                 |               |       |
| 8 | . Clic            | k Import.                         |                  |                    |                 |               |       |
|   |                   | 1                                 |                  |                    |                 |               |       |

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

| _                    |                     |              |                   |            |          |
|----------------------|---------------------|--------------|-------------------|------------|----------|
| attachm              | ents                |              |                   |            |          |
|                      | 0                   | ·····        |                   |            |          |
|                      | Successt            | ully importe | d schedule list   |            |          |
| Please s<br>informat | elect attachment th | at you woul  | ld like to import | schedule   |          |
| 1                    | Attachment Name     | Document     | :                 |            |          |
| Select               | Description         | Туре         | Date Created      | Created B  |          |
| 0                    | Vehicle Schedule    | Microso      | ft                |            | <b>A</b> |
| ۲                    | Vehicle Schedule    | Excel        | 09/28/2004        | John Suard | ni       |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            |          |
|                      |                     |              |                   |            | -        |
|                      | C                   |              | Import            |            | _        |
|                      |                     | 1030         | un port           |            |          |
|                      |                     |              |                   | attach     | ments    |

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

| IN | derwriting p   | licy info 🔰 assig                              | nment a | attachmen | ts acti | ons qualifica                                    | ation history     | transactions             | claims           | summary of i   | nsurance                                      |
|----|--|--|---------|-----------|---------|--|-------------------|--------------------------|------------------|----------------|---|
|    | Branch:<br>Policy Type:  | Branch: 041204 Branch<br>Policy Type: Monoline |         |           |         | Policy Te  | rm:<br>e Term:    | 05/27/2004<br>05/27/2005 | 12:01A<br>12:01A | M PST<br>M PST | navigation instruction                        |
|    | Issuing Co: Acme Carriers<br>Billing Co: Acme Carriers<br>Policy Number Unassigned |  |         |           |         | Stage: Marketing<br>Mode: New<br>Status: Pending |                   |                          | Course of        |                | Base Requiren Commercial Au ACORD 12 Producer |
|    |  | st   |         | Print     |         | Compa  | re Policy: [Un] [ | Uff]                     | Save U           | hanges         | Applican<br>Billing                           |
|    | Vehicles   |  |         |           |         |  |                   | L                        | .ookup   I       | mport   Export | Couerag                                       |
|    | Sort   | Add Rec  | ord     |           |         |  |                   | Search                   | Prev             | Next           | Coverag                                       |
|    | Details  | Vehicle Numbe                                  | r Year  | Make      | Model   | Body Type  | Vehicle Iden      | itification Nu           | ımber            | Remove         | Coverag                                       |
|    |  | 1  | 2004    | honda     | civic   |  |                   |                          |                  |                | Endorser                                      |
|    | <b></b>  | 2  | 1995    | GMC       |         |  | 1GDJC3            | 4KOSES4726               | 33               | <b>B</b>       | Vehicles                                      |
|    |  |  |         |           |         |  |                   |                          |                  |                | Drivers                                       |

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