nexsure®

Tips & Facts
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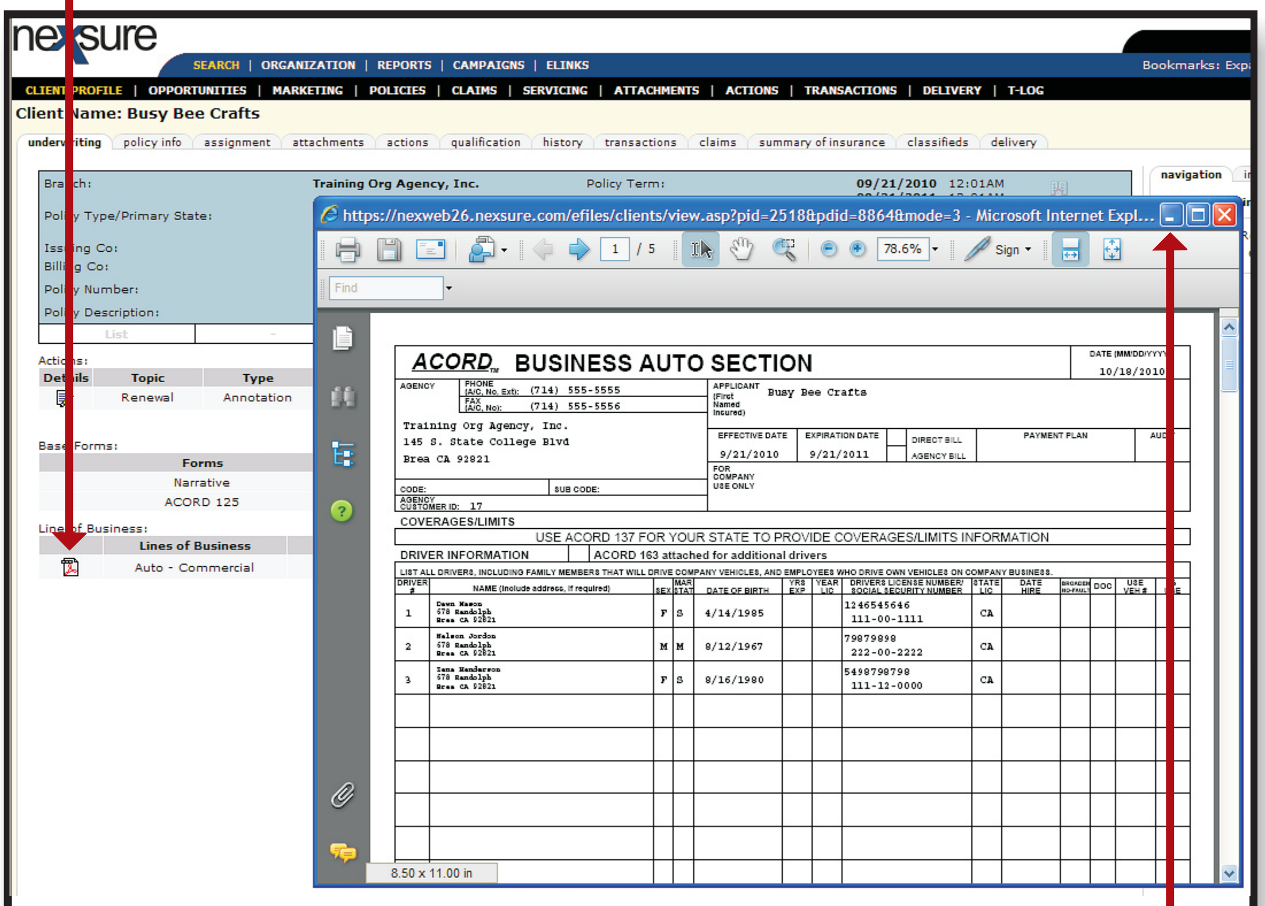
IN THIS ISSUE - Opening Forms to use for Reference

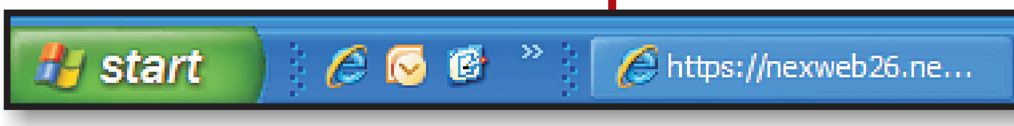
Want to know how to open a Line of Business form in a PDF format to use as a reference while working on other areas of Nexsure for the client? This can be done as follows:

1. From either the **MARKETING** or **POLICY** > **underwriting** tab, click the **PDF** icon beside the line of business.



2. Once the PDF is open, minimize the PDF window and navigate to another area of Nexsure, such as certificates. The PDF window remains available.

3. The **Taskbar** button for the PDF can be selected from the **Taskbar** to bring up the form to use as a reference. Resize the window as necessary once open.



4. To close the PDF document, click **Close** on the window.