

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.


The screenshot displays the Nexsure web application interface. The top navigation bar includes links for SEARCH, ORGANIZATION, REPORTS, CAMPAIGNS, and ELINKS. Below this, a client profile for 'Training Org Agency, Inc.' is shown with various tabs like CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, etc. The 'underwriting' tab is active, showing a list of lines of business. A red arrow points from the 'PDF' icon next to the 'Auto - Commercial' line of business to a second screenshot. The second screenshot shows a PDF window titled 'ACORD BUSINESS AUTO SECTION' open in a Microsoft Internet Explorer browser. The PDF content includes sections for AGENCY, APPLICANT, EFFECTIVE DATE, EXPIRATION DATE, and a table for DRIVER INFORMATION.

DRIVER #	NAME (include address, if required)	SEX	DATE OF BIRTH	EXP	STATE	DRIVER LICENSE NUMBER	STATE	DATE	INSURANCE	DOG	USE
1	Don Mason 570 Randolph Brea CA 92821	F	4/14/1985		CA	1246545646 111-00-1111	CA				
2	Nelson Jordan 570 Randolph Brea CA 92821	M	8/12/1967		CA	79879898 222-00-2222	CA				
3	Jana Henderson 570 Randolph Brea CA 92821	F	8/16/1990		CA	5498798798 111-12-0000	CA				

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.

