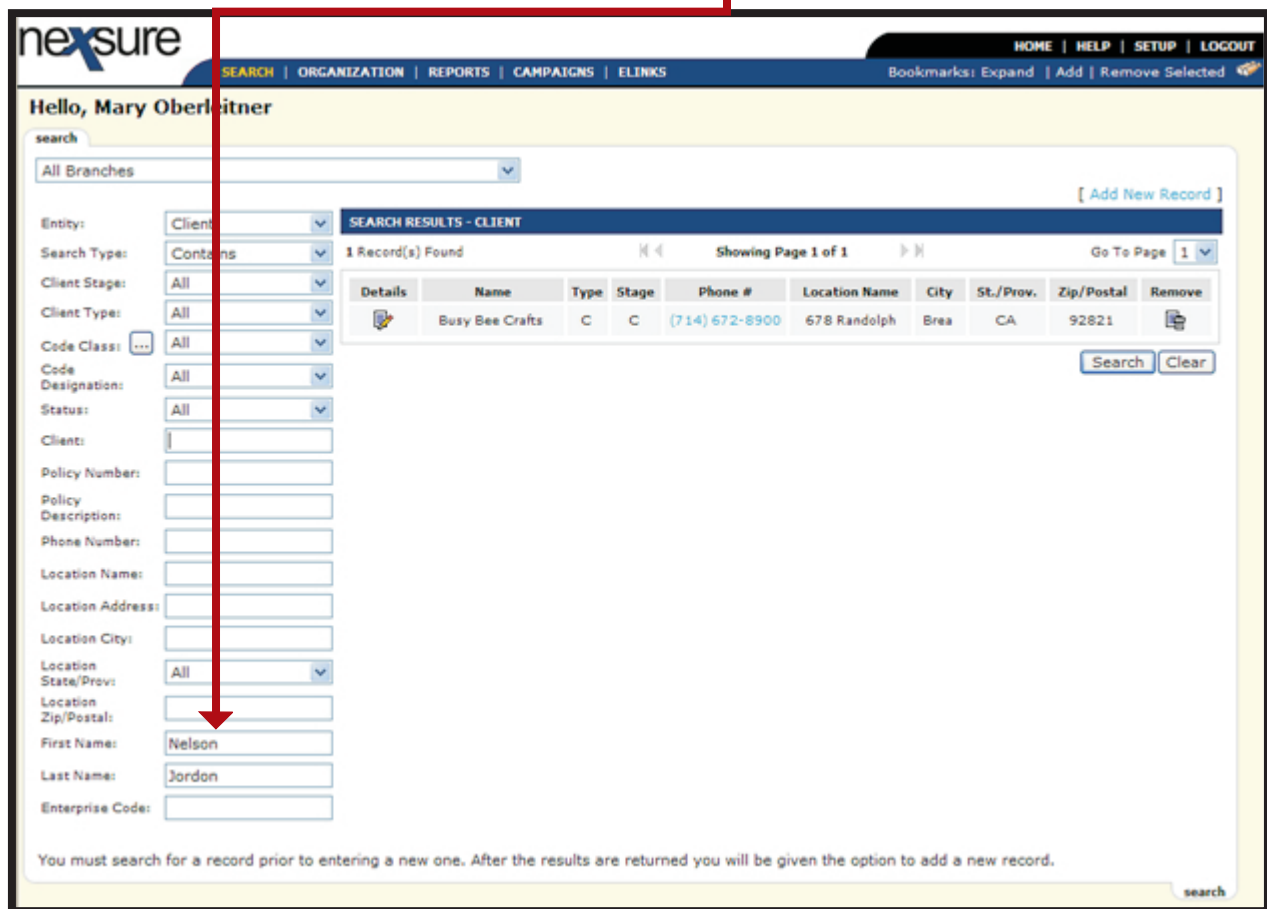


IN THIS ISSUE - Search Clients by Contact Name

Many times clients call and only provide their name when asking for assistance. To quickly locate the record in Nexsure by the **Contact** name, do the following:

1. On the **search** tab, enter the contact name in the **First Name** and **Last Name** fields and click **Search**.



search

Entity: Client

Search Type: Contains

Client Stage: All

Client Type: All

Code Class: All

Code Designation: All

Status: All

Policy Number:

Policy Description:

Phone Number:

Location Name:

Location Address:

Location City:

Location State/Prov: All

Location Zip/Postal:



First Name: Nelson

Last Name: Jordan

Enterprise Code:

SEARCH RESULTS - CLIENT

1 Record(s) Found Showing Page 1 of 1 Go To Page 1

Details	Name	Type	Stage	Phone #	Location Name	City	St./Prov.	Zip/Postal	Remove
	Busy Bee Crafts	C	C	(714) 672-8900	678 Randolph	Brea	CA	92821	

Search Clear

You must search for a record prior to entering a new one. After the results are returned you will be given the option to add a new record.

search

Tip: Remember to select the **Contact** check box on the **people** tab in Nexsure so that the record can be located from the **search** tab.