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Tips for Quick Navigation from the Search Screen for Clients

This document shows how to access some shortcuts found on the client Search screen.

Locate the client from **SEARCH** and instead of clicking the **Details** icon to display the **card file** tab, right-click on the **Details** icon to display available quick links (context tools).

The screenshot shows the Nexsure search interface. On the left, there are search filters for Entity (Client), Search Type (Contains), Client Stage (All), Client Type (All), Code Class (All), Code Designation (All), Status (All), and Client (Flesher Hinton). The main area displays search results for 'Company, Inc.' with details like Phone # (303) 433-8891, Location Name (Music Store), City (Denver), St./Prov. (CO), and Zip/Postal (80212-1245). A context menu is open over the 'Details' icon, listing various actions such as 'Open', 'New Market', 'New Certificate', 'Certificate Summary', 'Policy Summary', 'Verification Summary', 'Actions', 'Attachments', 'Claims', 'Delivery', 'Opportunities', 'Servicing', 'Transactions', and 'Inactivate'.

Each of the active links in the context tools menu (**Open**, **New Market**, **New Certificate**, **Certificate Summary**, **Policy Summary** and **Servicing**) are described below.



If the **card file** tab needs to be accessed, the **Open** link is available so it will not be necessary to go back and click on the **Details** icon. Click **Open** to display the client's **card file** tab.

card file | profiling | contacts | locations | named insureds | related accounts | assignments | classified | campaigns

Flesher Hinton Music Company, Inc. Information
 Website: [Website](#)
Primary Contact
 Name: [Mr. Jason Flesher](#)
 Goes By: Jason
 Title: President
 E-Mail: m3ober@eeocx.com
 Business Phone: (303) 433-8891

Mailing Address
 Location Type: Retail Location
 Address: [PO Box 8900 3936 Tennyson St #39](#)
 City: Denver State/Province: CO
 Zip/Postal: 80212
 Country: United States
 International Info:
 Business Phone: (303) 433-8891

Tracker
 Date Created: 12/5/2008
 Client Since: 12/5/2008
 Related Accounts: 0

Alerts
 Open Actions: 12

Stick-e-Note [Add New]
 No Current Notes

In Force...
 + Auto - Commercial
 + Crime
 + Equipment Floater
 + General Liability - Commercial
 + Property - Commercial
 + Transportation

Assignment Information Retail Agent: [Wyman Insurance Agency, Inc.](#)

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Agency of Colorado - Denver	Commercial Lines	Unassigned	Producer	Carole Houde
<input type="checkbox"/>	Agency of Colorado - Denver	Commercial Lines	Unassigned	Client Advocate	Mary Oberleitner

If a new marketing record needs to be added to an existing record and it is known that the record has not been added, clicking **New Market** streamlines the add new marketing record process by creating the header, adding the Annotation Action and displaying the **New Application Selection** window all with one click instead of four clicks when beginning by just clicking on the client's **Details** icon.

Mode: New

https://nexweb26.nexsure.com/ - New Application - Mi...

New Application Selection

Form Standard: All
 State: Colorado
 Type: Commercial Lines
 Lines of Business: Advertising/Media Liability

Available Applications:
 Advertising/Media Liability

Description: Advertising/Media Liability [UWN, 125, 126]

Nexsure Application Helper

- Basic Pre-fill: Producer and Applicant Information prefilled.
- Pre-fill from other application: Producer, Applicant and other policy detail prefilled.
- Blank Application: Nothing prefilled.

Next Cancel



Need to add a new certificate in a hurry? Clicking **New Certificate** will save four clicks by displaying the **New Certificate of Insurance** screen where the certificate details are completed.

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SEARCH | ORGANIZATION | REPORTS | CAMPAIGNS | ELINKS

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: **Flesher Hinton Music Company, Inc.** [Next]

New Certificate of Insurance

Certificate Selection

To create a Certificate of Insurance complete the information in the fields below. After the information is entered, press [Next].

Select the type of Certificate to create.

ACORD 24 Certificate of Property Insurance 24 1-95

Insured Name

Select the Insured Name that is to appear on the certificate.

Flesher Hinton Music Company, Inc.

Authorized Representative Signature

Select the Authorized Representative Signature that is to appear on the certificate.

Carole Houde

Description (optional)

Need to look for a certificate already created? Click **Certificate Summary** to display the **Certificate Summary** screen. This will save two clicks using the normal path of beginning by clicking on the client **Details** icon.

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SEARCH | ORGANIZATION | REPORTS | CAMPAIGNS | ELINKS

HOME | HELP | SETUP | LOGOUT

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: **Flesher Hinton Music Company, Inc.** Commercial Account

policies | history | **certificates** | binders | verifications | summary of insurance

Current View: Certificates

Showing page 1 of 1 Page 1 Filters: [Show]

Details	Cert No	Named Insured	Form	Description	# Holders	Date Posted	Cert Status Posted	Original Certificate	Remove
	40	Flesher Hinton Music Company, Inc.	Certificate of Liability Insurance with Disclaimer 25		6	3/11/2009	Active	<input checked="" type="checkbox"/>	



Quickly access the **Policy Summary** screen by clicking **Policy Summary**.

Client Name: Flesher Hinton Music Company, Inc. Commercial Account

Show/Hide	Policy Number Policy Description	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier
	PR-989898 Commercial Property	Monoline Property - Commercial	07/01/2009 07/01/2010	In Force Renew	\$270.77 A \$0.00 A	Hartford Insurance Group Hartford Casualty Insurance
	TR-900000 Transportation	Monoline Transportation	08/04/2009 08/04/2010	In Force New	\$2,530.00 A \$2,500.00 A	ACE USA ACE Insurance Company of the Midwest
	T-8990890 Transportation	Monoline Transportation	08/04/2009 08/04/2010	In Force New	\$0.00 A \$0.00 A	Chubb Group of Insurance Companies Chubb Indemnity Insurance Company
	EQ-98000 Equipment Floater	Monoline Equipment Floater	11/17/2009 11/17/2010	In Force New	\$0.00 A \$500.00 A	Chubb Group of Insurance Companies Chubb Indemnity Insurance Company
	CPP876000-1 2008 Pckg Policy	Package	12/22/2009 12/22/2010	In Force Renew	\$7,000.00 A \$7,000.00 A	Hartford Insurance Group Hartford Casualty Insurance
Package Includes: General Liability - Commercial, Property - Commercial						
	AU-900000 Sales Vehicles	Monoline Auto - Commercial	03/03/2010 03/03/2011	In Force Renew	\$0.00 A \$0.00 A	Hartford Insurance Group Hartford Casualty Insurance
	CRIME-9890890 Crime	Monoline Crime	05/25/2010 05/25/2011	Rewritten New	\$5,000.00 A \$5,000.00 A	Chubb Group of Insurance Companies Chubb Indemnity Insurance Company

To service the policy quickly, click **Servicing** to access the **servicing** tab.

Client Name: Flesher Hinton Music Company, Inc. Commercial Account

Services

- Marketing
- Market Analysis
- Binders
- Edit
- Endorsement
- Renewal
- Cancellation
- Claim
- Audit
- New Certificate(s)
- Renewal Certificate(s)
- Verification(s)

This option is used to create new or remarket submissions.

Enter the desired effective date of the new policy: 04/13/2010

Enter a brief description of the marketing records: Process new marketing application.
Note: This information will populate the action description field.

Enter additional notes to populate the action memo section: Process new marketing application.

Market: New line of business Existing line of business

Form Standard: ACORD

State: Colorado

Type: Commercial Lines

Available Applications:

- Aircraft - Commercial
- Aircraft - Glider
- Aircraft - Industrial Aid
- Aircraft - Non-Owned
- Aircraft - Pleasure & Business
- Airport and FBO
- Apartments

Applications Selected:

Note: To be added later are **Binder Summary, Verification Summary, Actions, Attachments, Claims, Delivery, Opportunities, Transactions** and the ability to inactivate a client.