

Chapter 12

eLink Functionality

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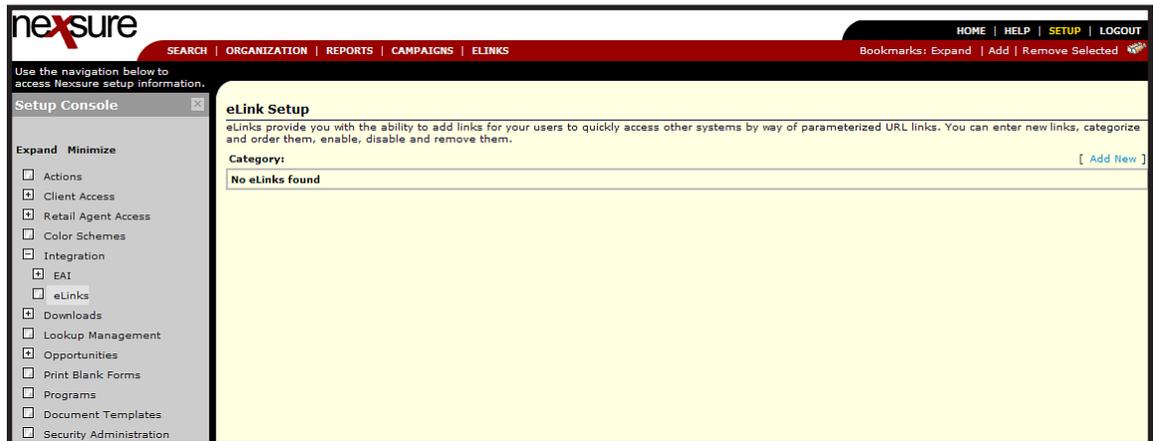
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eLink Functionality

ELinks can provide the ability to populate client or organization data to an integrated website that is equipped to accept the fields. In addition, eLinks are added to grant quick access to websites so the user does not need to leave Nexsure to access a web page.

eLink Functionality Setup

ELinks will need to be setup to be available to the users. Click **ELINKS** on the **Utility** menu and **eLinks** on the **Setup Console** to display the **eLink Setup** screen.



After clicking on the **[Add New]** link for the addition of a new eLink to be added, begin by entering a category. Categories are added easily by typing text into the **Category** box. Once a category is added, it may be used as a way to group the links by selecting the category again for each new site that should be added to the category. If categories are not needed, select default from the drop-down list. This will add the link to the list as a single item for selection.

The screenshot shows the Nexsure Setup Console interface. On the left is a navigation menu with options like Actions, Client Access, Retail Agent Access, Color Schemes, Integration, EAT, eLinks, Downloads, Lookup Management, Opportunities, Print Blank Forms, Programs, Document Templates, and Security Administration. The main area is a form for adding a new eLink. The fields are:

- Category:** A dropdown menu.
- Caption:** A text input field.
- Description:** A text area.
- eLink URL:** A text input field.
- Enabled:** A checked checkbox.
- Parameters:** A section with 'Field:' and 'Value:' input boxes, an 'Optional:' checkbox, and an 'Add' button.

 At the bottom right of the form are 'Test URL' and 'Auto Build' buttons.

In the **Caption** box, enter text that will be used as the link to access the site. The description will only be visible to administrative users in **SETUP**. To make sure the correct URL is entered it may be typed, copied and pasted to the **eLink URL** box. Test the **eLink URL** by clicking **Test URL**.

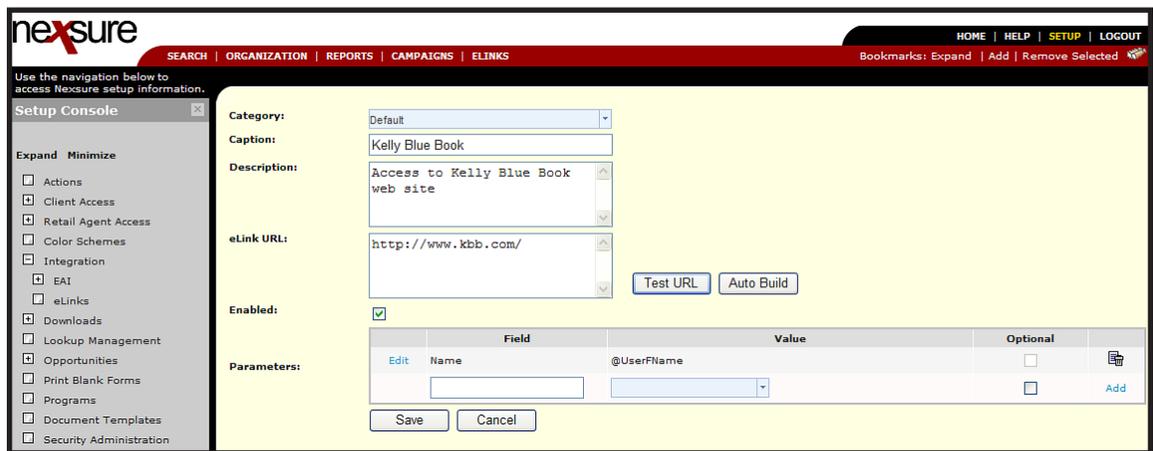
This screenshot shows the same Nexsure Setup Console form as above, but with a browser window overlaid on top. The browser window shows the Kelley Blue Book website at the URL http://www.kbb.com/. The website content includes the KBB logo, navigation tabs for 'Home', 'New Cars', 'Used Cars', 'Research & Explore', and 'News & Reviews', and a 'Welcome to KBB' message. This confirms that the eLink URL entered in the form is correct and accessible.

In order to make the link available to users, the **Enabled** check box must be selected. Clear the **Enabled** check box to remove without deleting.

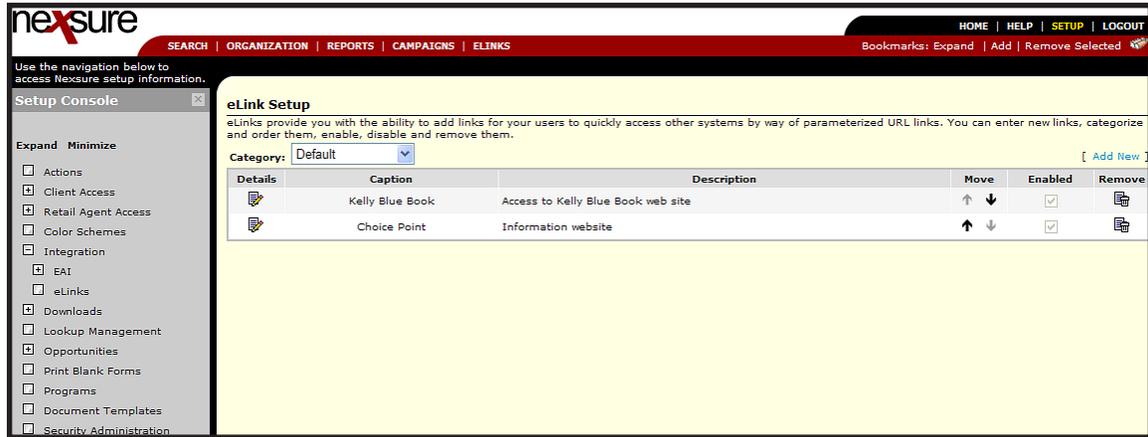
The **Parameter** fields allow passing Nexsure data to a specific entity. These fields currently are:

- Login ID
- Org ID
- User First Name
- User Last Name
- User Email
- Client ID
- Enterprise Code
- Policy ID
- Policy Number

Clicking **Auto Build** is used to automatically identify parameter values within the eLinks URL field. Text values are added to the table and the user is required to replace text values with variables provided as needed. Once parameters are added, the **Edit** link is available on the left. **Edit** links can be clicked to modify parameters as needed. The **Name** field and parameter area will hold a maximum of 25 characters. To add additional parameters, click the **Add** link on the right side of the parameter. The **Optional** check box allows the system to override a non-required parameter in the URL if the value is not available. If parameter is selected as **Optional** and the client level value is not available (user not in a client); the URL string will not contain the field or value. To remove a parameter, click the **Remove**  icon. To save the newly added link, click **Save**. To abort the addition, click **Cancel**.



Once saved, the summary screen is displayed. To reorder the display, click the black **Move** arrows to move the links up or down the list to the desired location. Reordering also changes the view order on the selection display. Use the **Category** list to display all URL's added to a specific category. Click the **Details**  icon to edit and the **Remove**  icon to delete.



Using the Links

To use the newly added links, on the **Primary** menu, click **ELINKS** and move the pointer to the **Category** (as in the example below: **Agency Partners**) to see the **Captions** (as in the example below: **AM Best**) or directly on the links without a category. The user will click the **Caption** to display the website in a new window. Accessing a link does not affect the Nexsure session and opens the web page in a new window.



