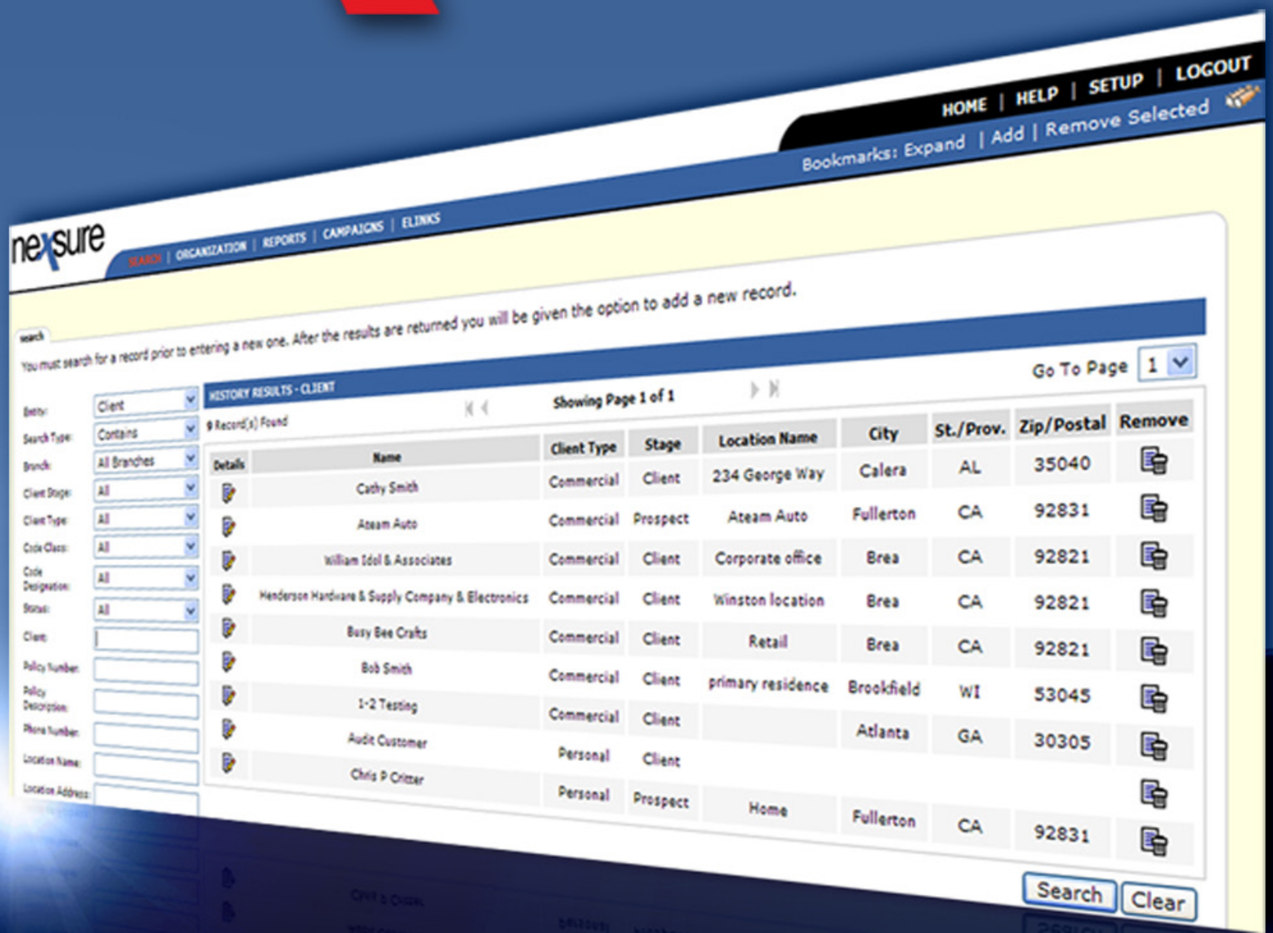
nexsure®



ADMIN Training Manual

Version 2.1.3

XDimensional® Technologies

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X Dimensional® Technologies

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Chapter 1

Organization Maintenance

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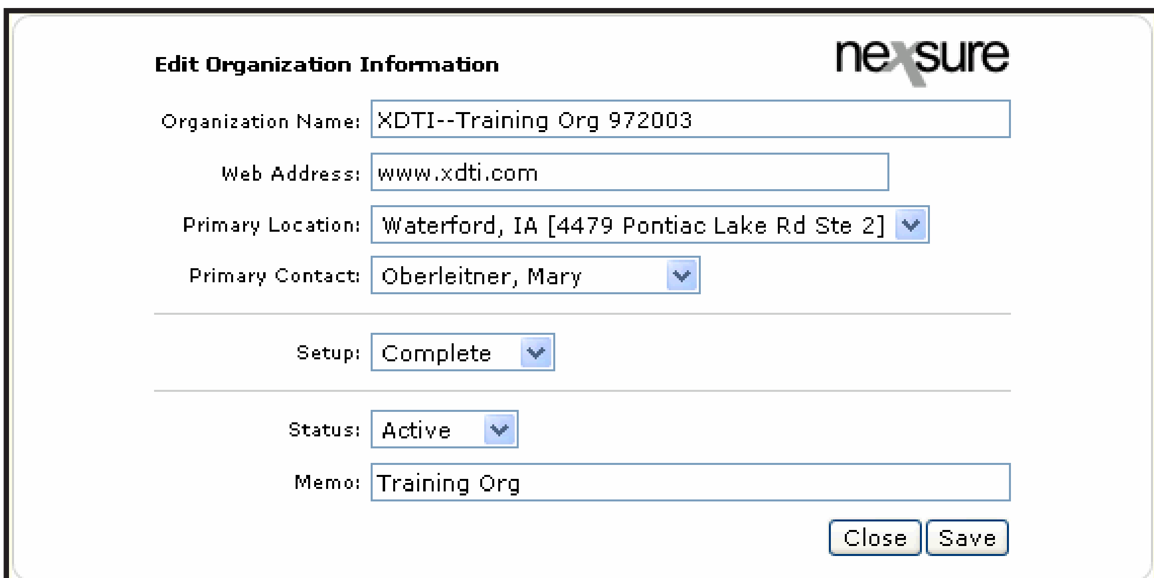
Editing the Organization

Each Nexsure Organization is created using the information provided by you. If the information entered needs to be modified, use the following steps to edit. The organization information is not used for client level activity and is used for accounting and organization information.



1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **Edit** link on the navigation toolbar.

3. The **Edit Organization Information** pop-up window will be displayed. Modify the **Organization Name**, **Web Address**, **Primary Location** and **Primary Contact** as necessary. If the selections are not available, then they must be added before being available in the drop-down boxes. To add or edit the Primary Location address or Contact, see instructions in this chapter.

4. The **Setup** drop-down box is used in the initial setup of Nexsure, indicating when the accounting setup is complete. This locks the organization posting rules and the established accounting periods cannot be deleted. It is important not to change the Org to Incomplete once any type of accounting entries have taken place, including but not limited to invoicing.

5. Use the **Status** drop-down box to indicate if the status of the organization is active or inactive. Setting an organization to an inactive status disables login to the organization.

WARNING: If the organization has been set to inactive, you WILL NOT be able to access Nexsure. For assistance resetting the organization to active, contact Nexsure support at nexsure.support@XDTI.com.

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6. Use the **Memo** field for any notes.

7 . Click **Save** to save the changes or **Close** to abort.

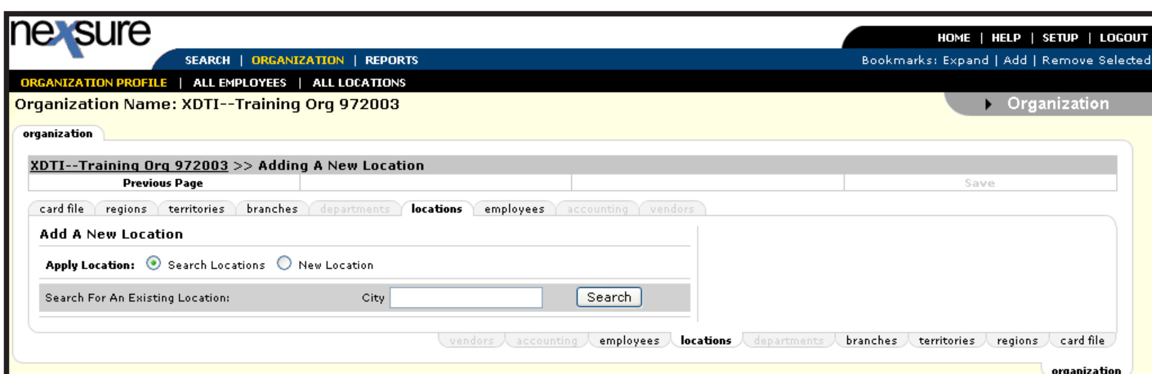
HOW to Add Organization Locations

Since multiple locations may exist for an organization, it is easiest to add all locations at once to the organization and then the regions, territories and branches. To add new locations follow these steps:

1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

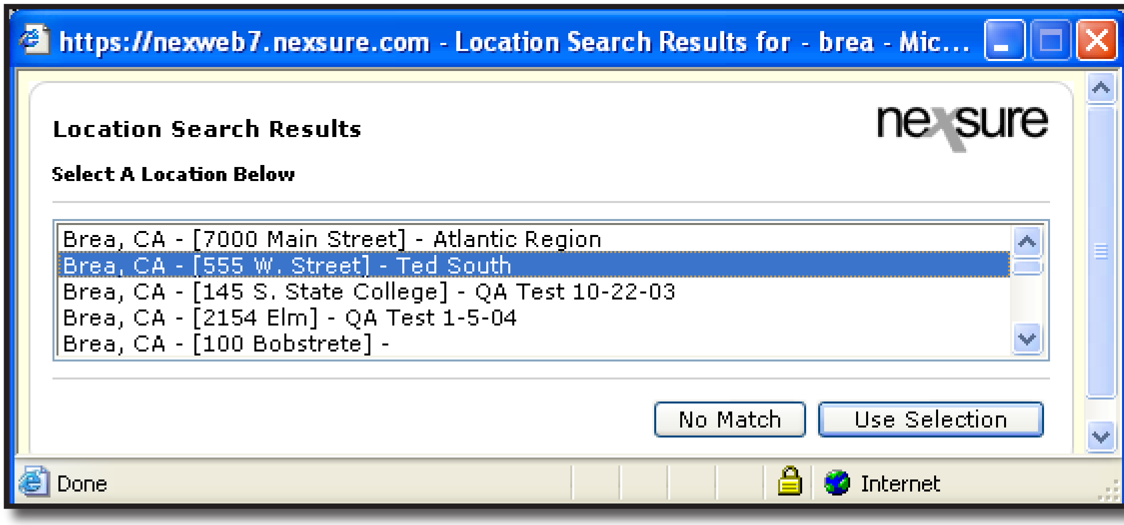
2. Click the **locations** tab to display a summary view of all locations within the organization.

3. Click the **Add New** link on the navigation toolbar to display the Add A New Location screen.



4. Before adding anything in Nexsure, it is important to use the search feature to avoid adding the same information again. Enter the city name in the **City** field and click the **Search** link to locate matches.

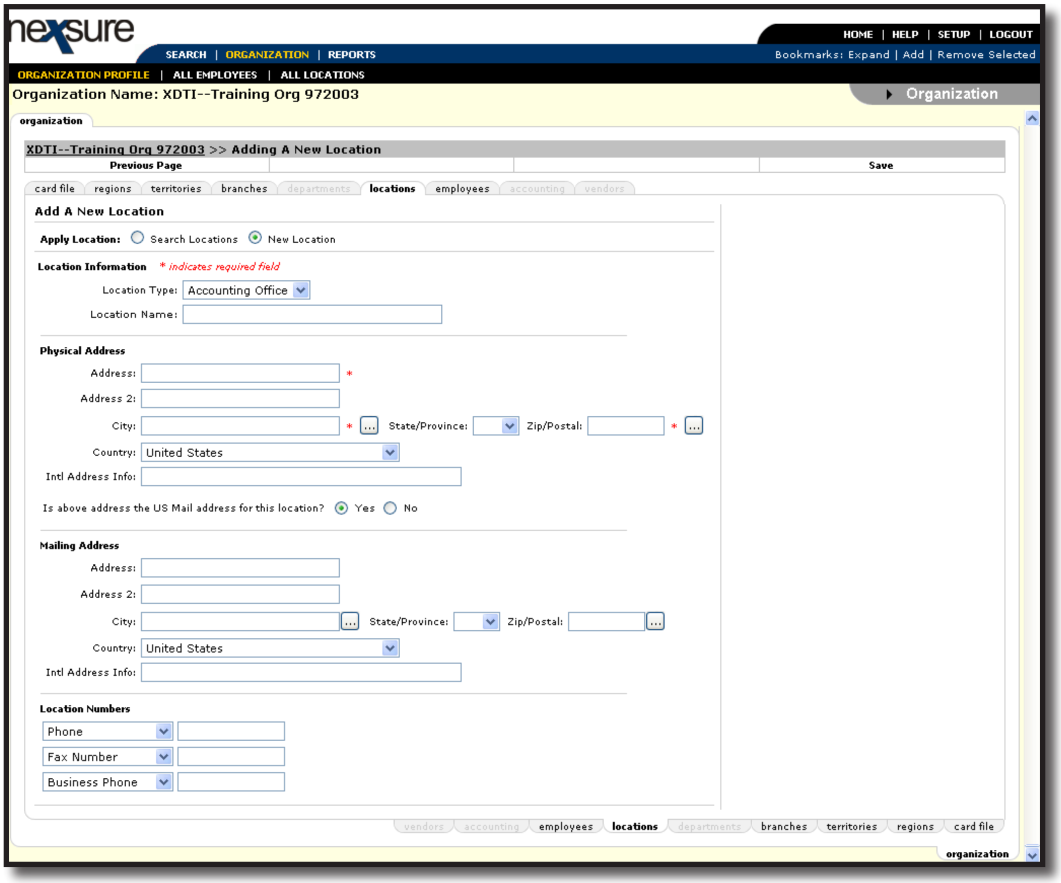
5. If a match exists, either highlight it and select **Use Selection** to use the address or select **No Match** if the location already exists and doesn't need association at this level.



6. If nothing is displayed or No Match is selected, click the **New Location** option on the Add A New Location screen. The fields for entering the location information will be displayed. Use the below as a guide to complete the location details:

Field Label	Description
Location Type	Use the drop-down box that contains items that are entered in SETUP > Lookup Management by you.
Location Name	Enter a unique name to identify the location.
Physical Address	Enter the physical address of the location.
Country	Use the drop-down box to select the country.
Intl Address Info	Enter the international address information, if applicable.
Is above address the US Mail address for this location	If the Yes option is chosen, it is not necessary to fill out the mailing address information.
Mailing Address	Enter the mailing address of the location if it is different than the physical address.
Location Numbers	Enter the phone numbers with no formatting. Formatting will be applied after the location details have been saved. Use the drop-down box to designate the phone number type.

7. After completing the location information, click the **Save** link on the navigation toolbar to store the new location.

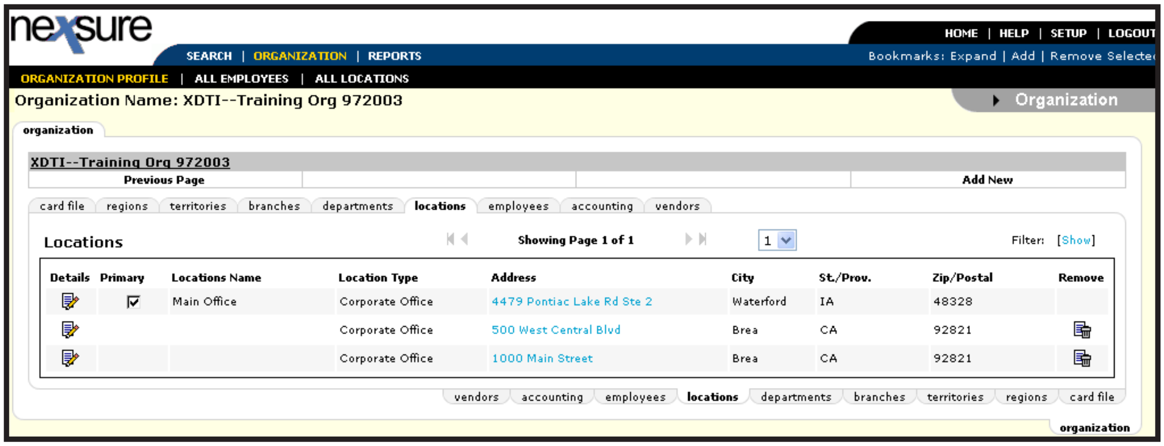


HOW to Edit Organization Locations

1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **locations** tab to display a summary view of all locations within the organization.

Note: Use the **[Show]** link to filter through locations by entering specific criteria. Clicking the **Search** button will return all matching locations.



3. To edit a location, click the **Details** icon on the summary view to display the details.

NOTE: If the location information has been used on other records and is modified, all records will be changed. When an existing location is used elsewhere in Nexsure, an association to the original record is made and not a copy of the existing record.

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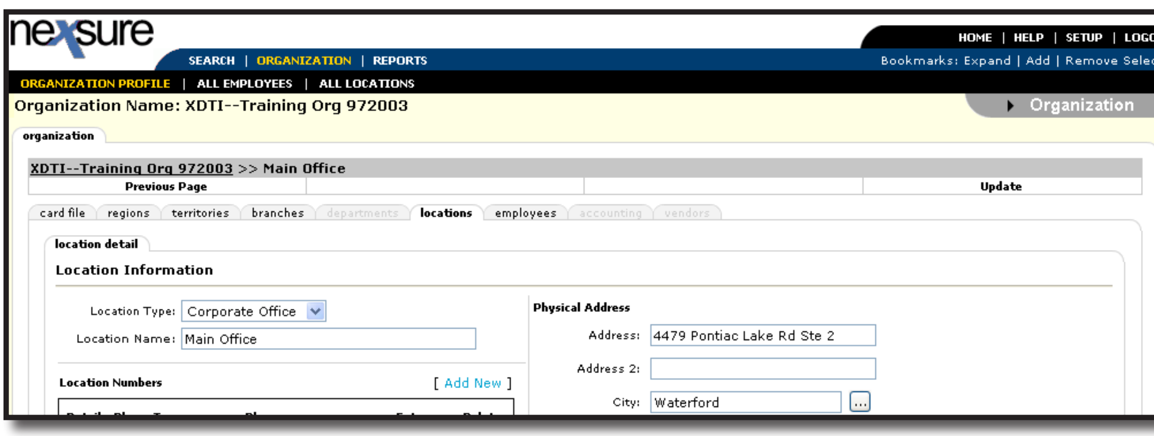
4. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.



HOW to Add Employees for the Organization

Since employees may exist for multiple levels of the organization, it is easiest to add all employees to the Organization level and then using them for all applicable levels; Regions, Territories and Branches. Adding employees to the organization level does not automatically give them security rights to this level. Security rights should only be added to the appropriate level. To add new employees, follow these steps:

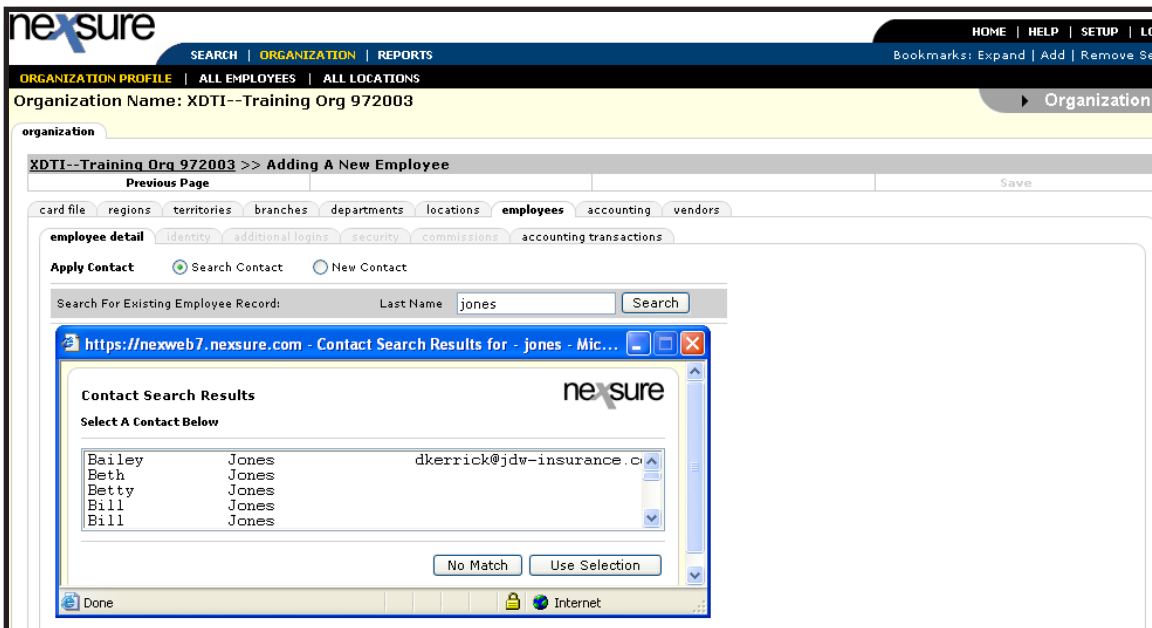
1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **employees** tab to display a summary view of all employees within the organization.

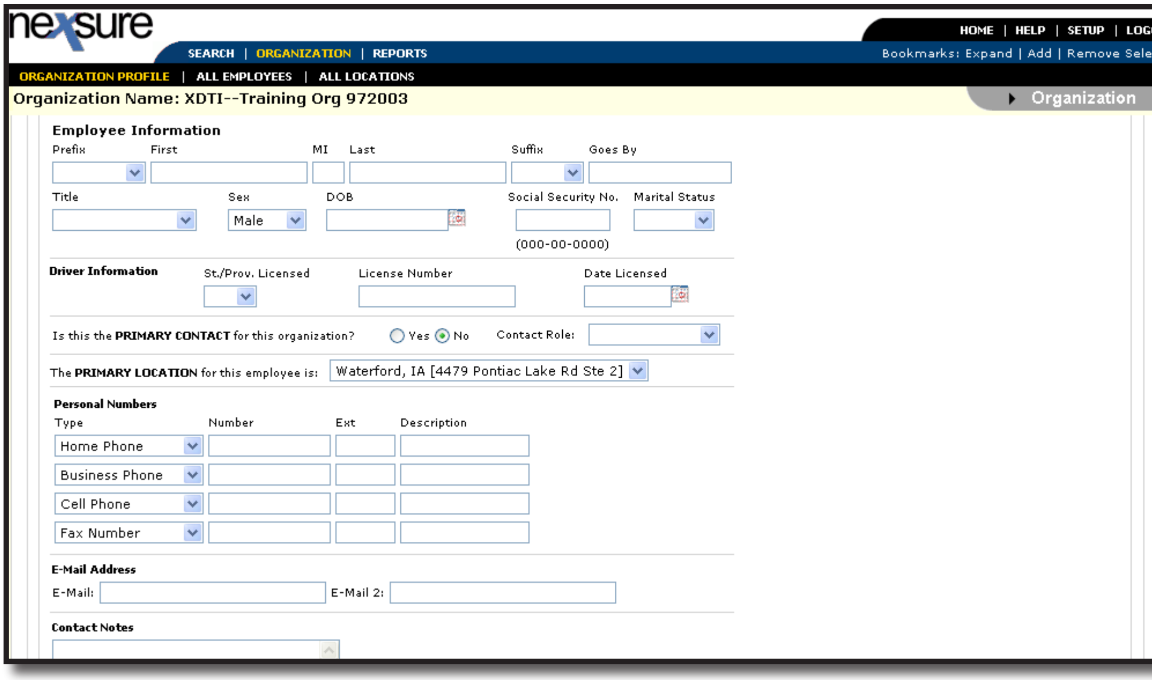
3. Click the **Add New** link on the navigation toolbar to display the Add New Employee screen.

4. Before adding anything in Nexsure, it is important to use the search features to keep from adding the same information again. Enter the last name and click the **Search** link to display all matches.

5. If a match exists, either highlight and select **Use Selection** to use the existing employee or select **No Match** because the employee already exists and does not need to be associated again at this level.



6. If nothing is displayed or **No Match** is selected, click the **New Contact** option.



7. Enter the appropriate information into the employee information fields.

8. Click **Save** to create the new employee and save the employee information to the organization.

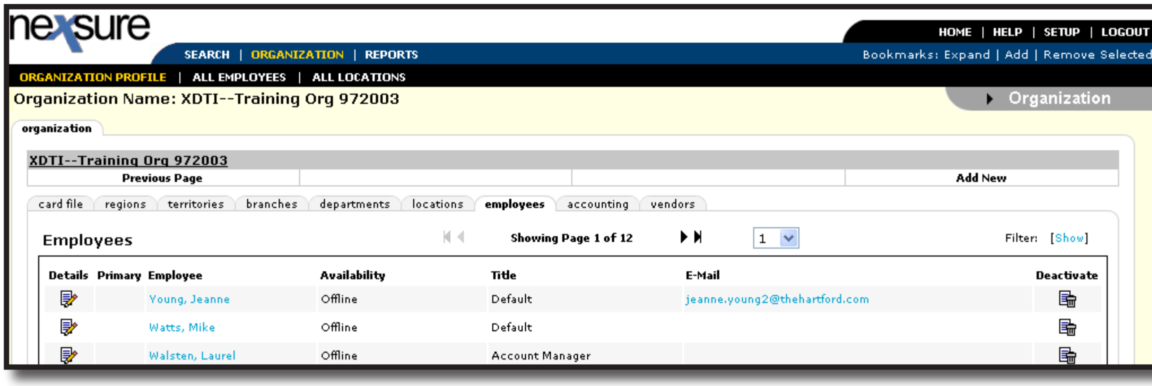
HOW to Edit Employees for the Organization

1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **employees** tab to display a summary view of all employees within the organization.

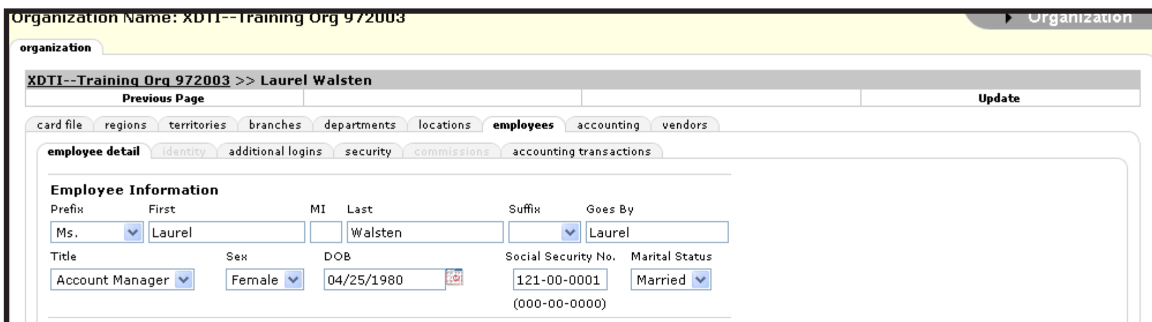
3. To edit employee details, click the **Details**  icon on the summary view to display the details.

NOTE: If the employee has been associated at different levels and is modified, all records will be changed. When an existing employee is used elsewhere in Nexsure, an association to the original record is made not a copy of the existing record.



Note: Use the **[Show]** link to filter through locations by entering specific criteria. Clicking the **Search** button will return all matching employees.

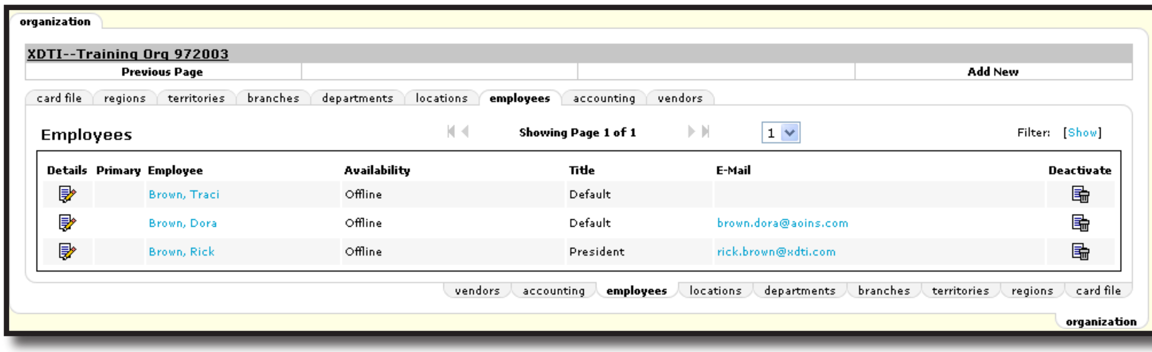
4. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.



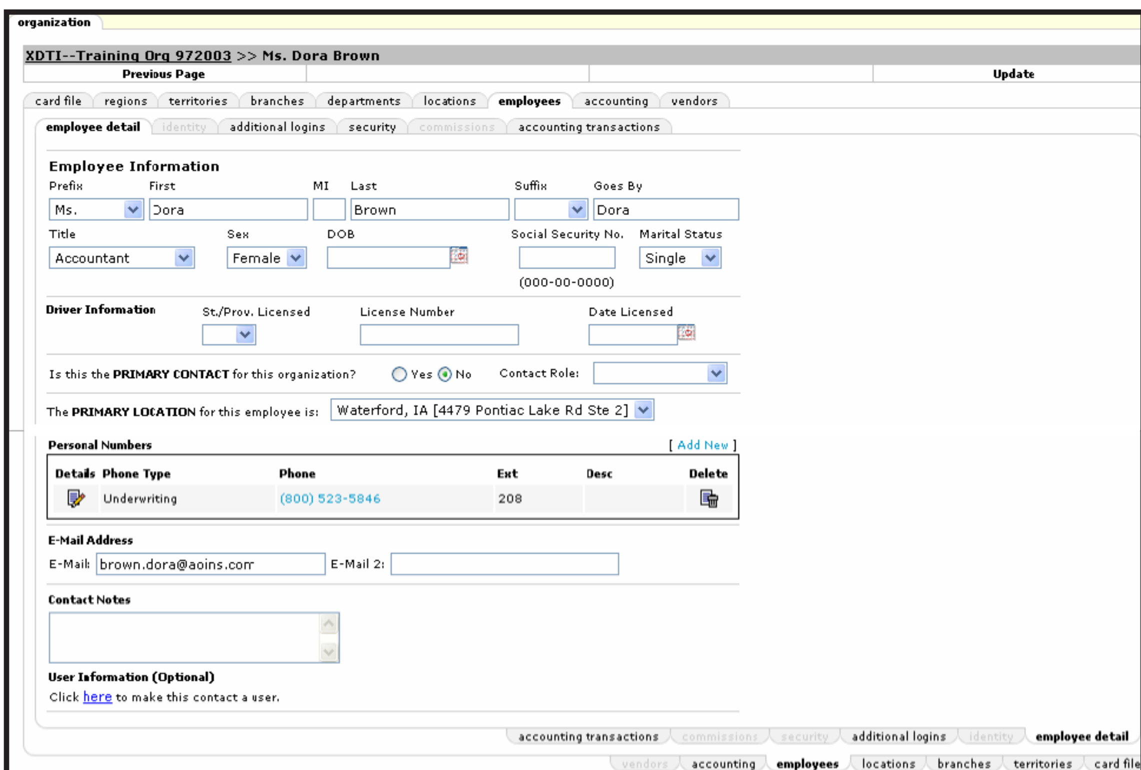
HOW to Assign Employee Security at Organization Level

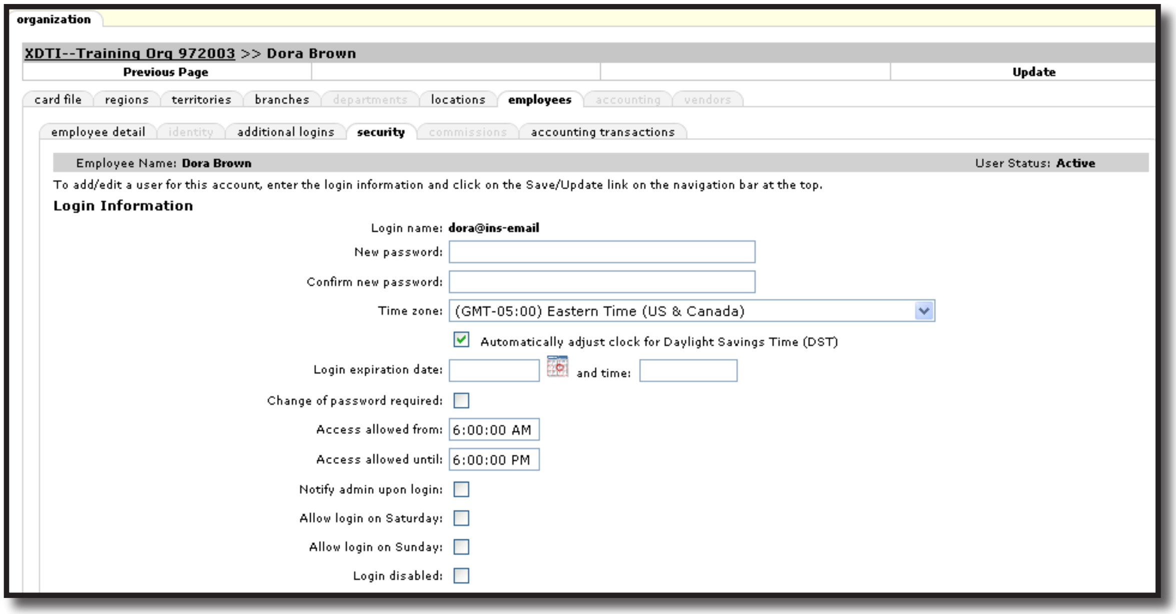
Granting an employee security at this level will not only provide them with security access to the organization level but also the regions, territories and branches that are added to the organization. Only power users and some accounting personnel should be granted access at this level.

1. Click the **Details** icon in the summary view to display the **employee detail** tab.



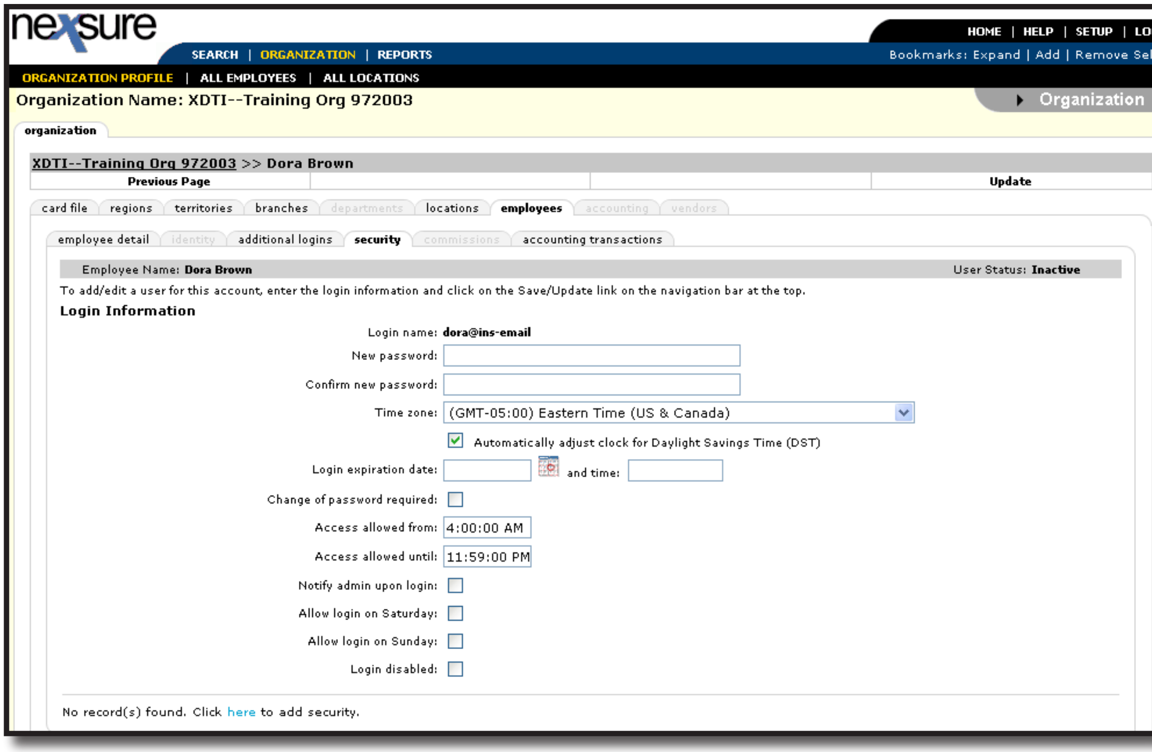
2. At the bottom of the **employee detail** screen there is a link embedded in the following sentence: **Click here to make this contact a user**. This link is only available prior to activating their security. Clicking this link displays the **security** tab.



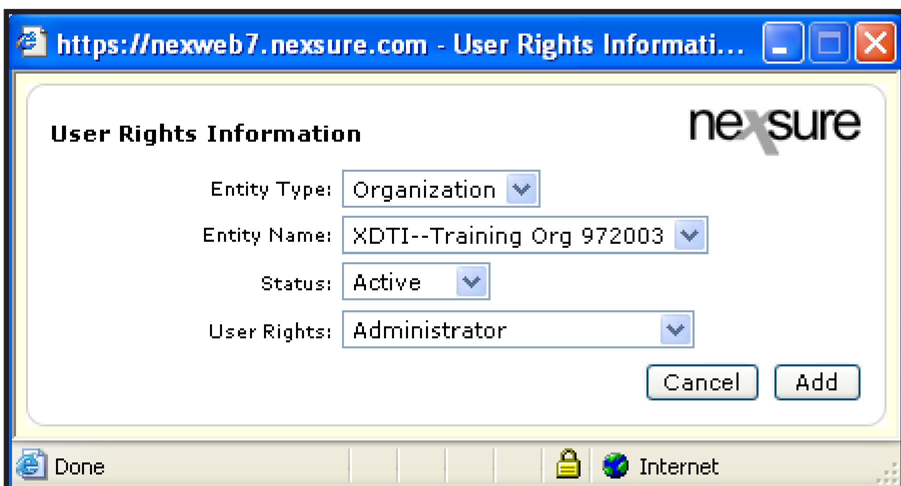


Note: If security has been granted elsewhere the link at the bottom of the page does not display, but the security tab is active instead.

3. Complete the login information on this screen to grant them access to your Nexsure site.
4. After entering all the information, click the **Save** link on the Navigation toolbar and the screen is refreshed now displaying the security link at the bottom of the page.



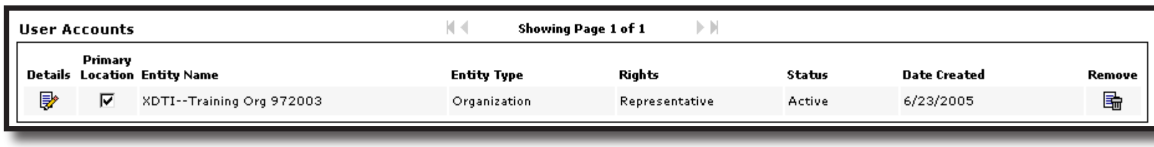
5. Click the link embedded in the sentence: **No record(s) found. Click here to add security**. This displays the **User Rights Information** pop-up window.



6. The **User Rights Information** pop-up window is displayed. The table below shows the options for each field. Modify the editable fields as necessary.

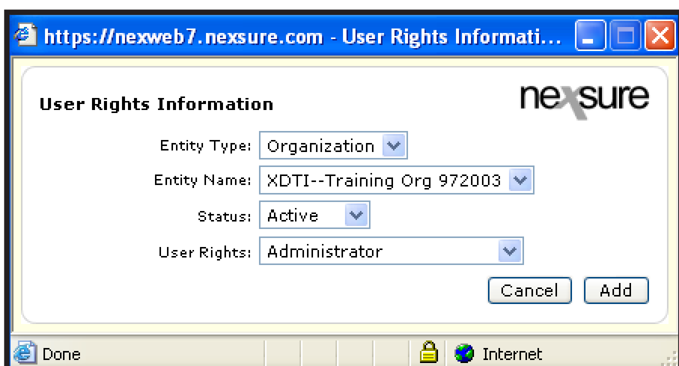
Field	Description
Entity Type	Preset to Organization and can't be modified.
Entity Name	Preset to the name of the Organization and can't be modified.
Status	Defaults to Active but can be modified. Choosing Inactive disables security at this level, which means if they do not have security at any other level then the user will not be able to login.
User Rights	Determines what level of security is assigned to the user. User Rights are added through Security Setup. (See SETUP > User Rights Templates for details)

Clicking **Add** saves changes and Cancel aborts. When **Add** is clicked, the screen refreshes and the security displays at the bottom of the employee file.


User Accounts Showing Page 1 of 1

Details	Primary Location	Entity Name	Entity Type	Rights	Status	Date Created	Remove
	☑	XDTI--Training Org 972003	Organization	Representative	Active	6/23/2005	

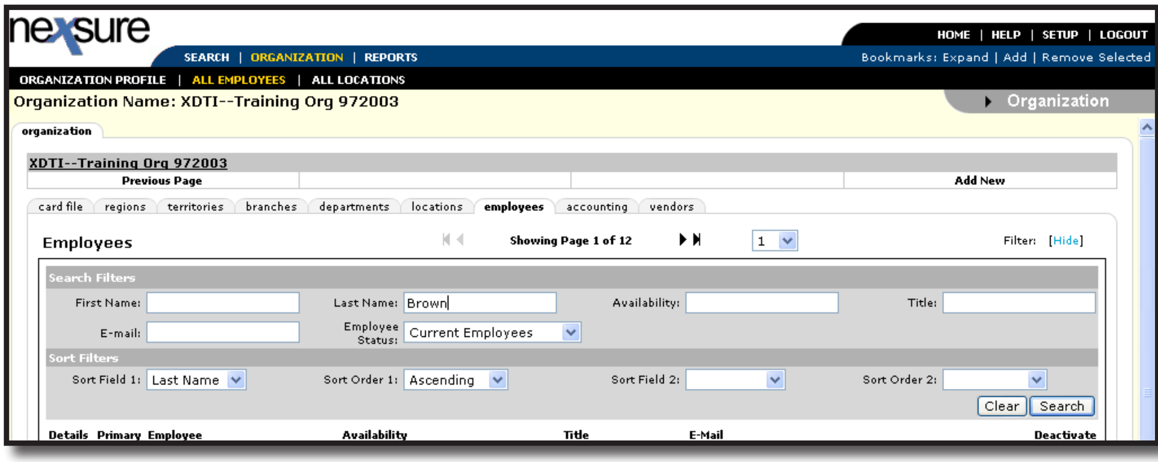
- Security for this employee may be removed by clicking the **Remove** icon.
- Clicking the **Details** icon displays the **User Rights Information** pop-up window, allowing security to be modified as necessary.

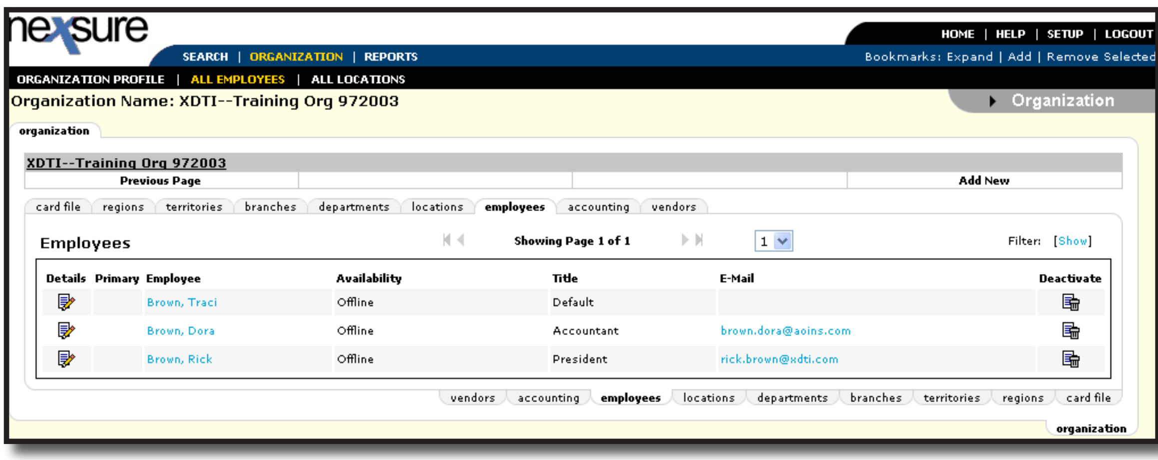


HOW to Designate an Employee as Terminated

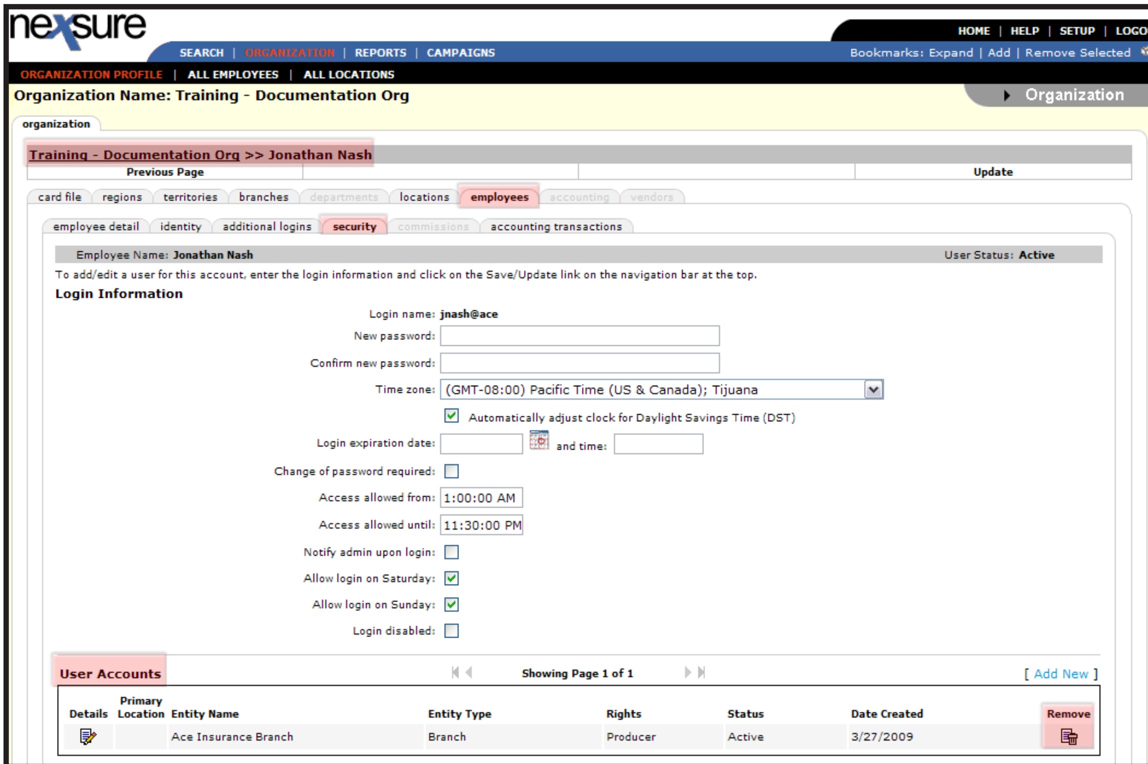
When an employee is no longer employed, they may be removed from the active employee list but not permanently deleted. Prior to deactivating the employee, reassign their policy, client and open Actions assignments to another employee. For instructions to reassign employees, see "Reassigning Clients to Another Employee" in Chapter 2, "Employee Record Maintenance", in this manual. To deactivate or terminate an employee, follow the instructions below:

1. Click **ORGANIZATION**, located on the Primary menu.
2. Click the **employees** tab from the organization level, since all employees are added to this level.
3. Click the **[Show]** link to display the Search criteria fields.
4. Enter the name of the employee in the **First Name** and **Last Name** fields and click the **Search** button to return all matches.

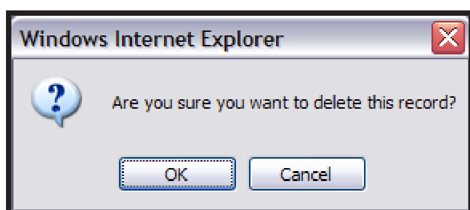




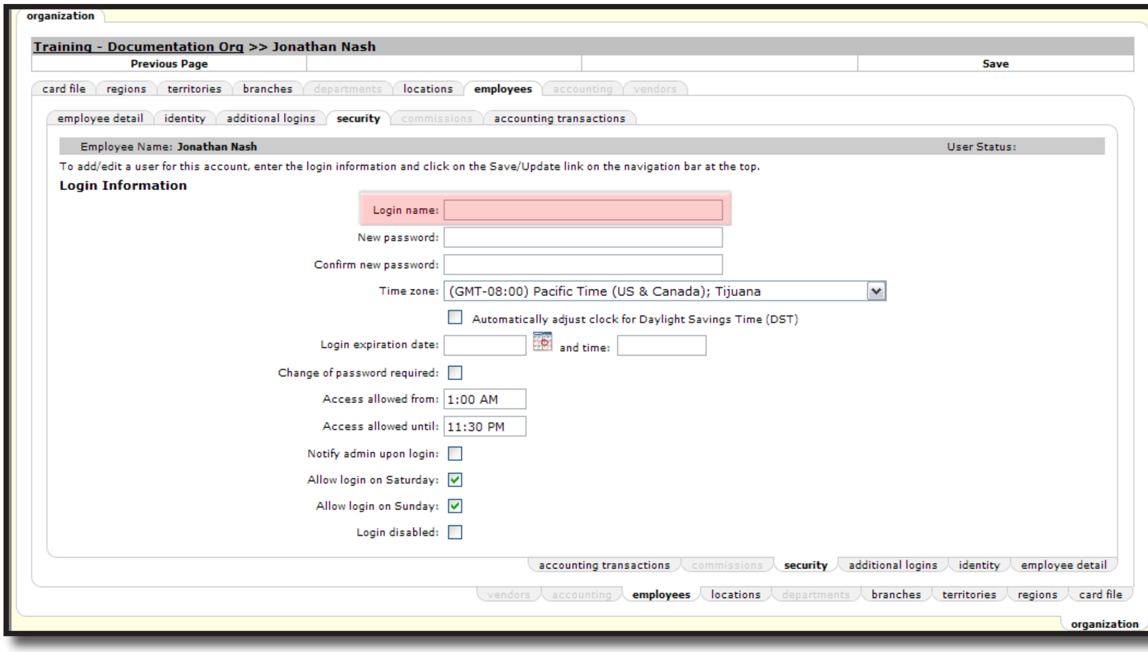
5. Click the **Details** icon of the employee to access their security. Click the security tab.



6. Click the **Remove** icon to remove each **User Account** rights template assigned to the employee. Click **OK** to confirm.



7. When all rights are removed, the **Login Name** field is made active, releasing the login previously assigned to the employee.



Note: If the login name is not released when all User Accounts are removed, contact Nexsure Support. The login name field may be released after adding a different User Rights template and subsequently deleting that rights template.

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8. Click the **employees** tab to return to the Employees summary.

9. Click the **Deactivate** icon to the right of the employee's name.

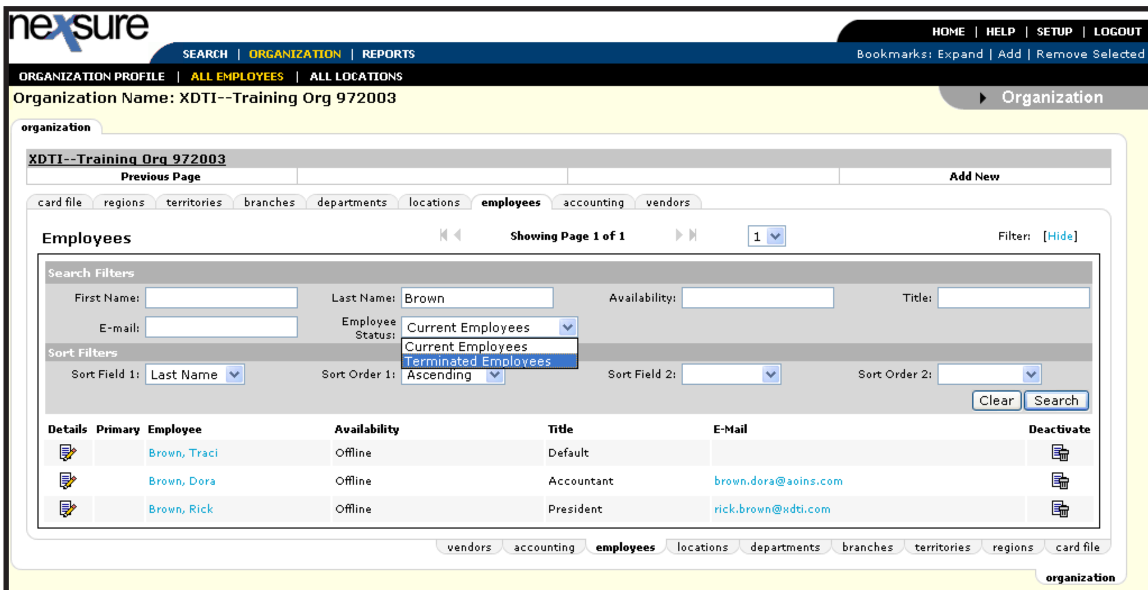
10. Click **OK** to save the information or **Cancel** to abort.

Note: If a terminated employee returns, do not add them to Nexsure again, reactivate them.

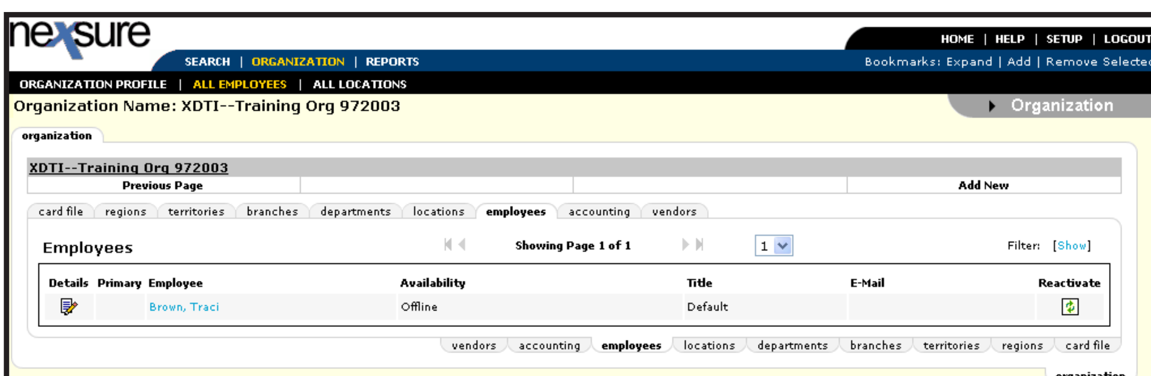
HOW to Reactivate a Terminated Employee

If the employee returns to your employment, do the following to reactivate them:

1. Click **ORGANIZATION**, located on the Primary menu.
2. Click the **employees** tab from the Organization level, since all employees are added to this level.
3. Click the **[Show]** link to display the search criteria fields.
4. Enter the name of the employee in the **First Name** and **Last Name** fields.
5. Select **Terminated Employees** from the **Employee Status** drop-down and click the **Search** button to return all matches.



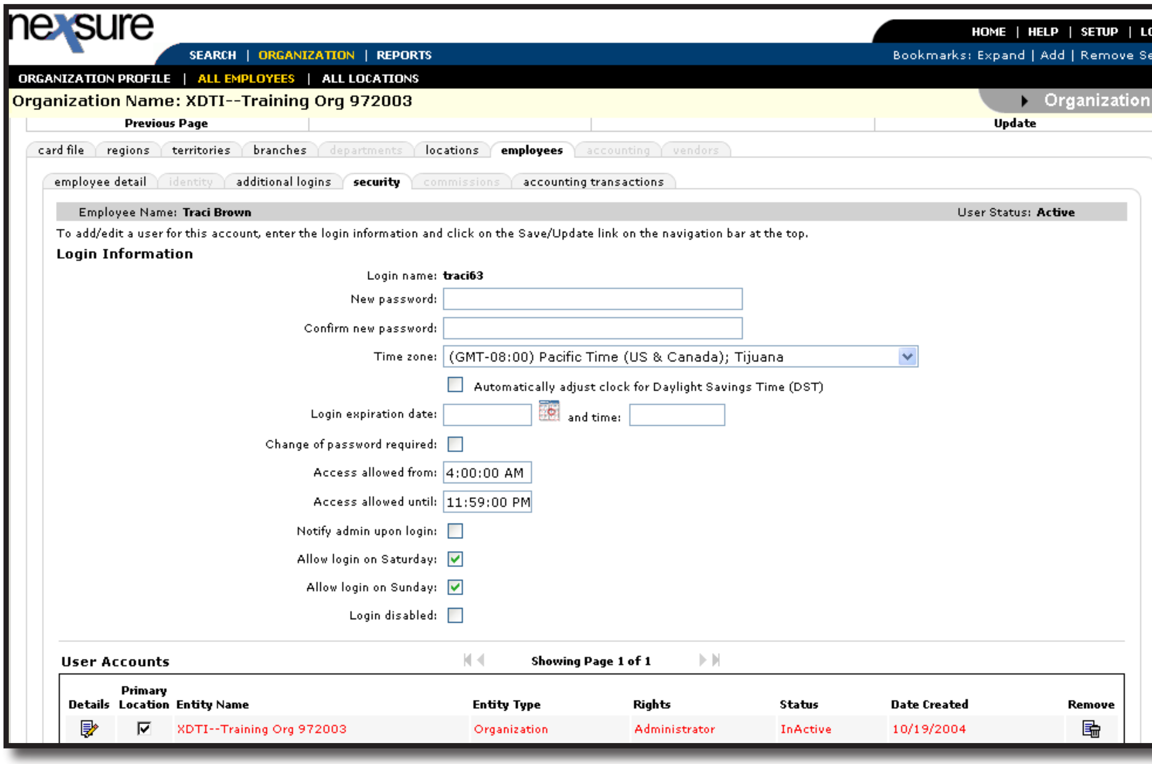
6. Click the **Reactivate** icon to the right of the employee's name.



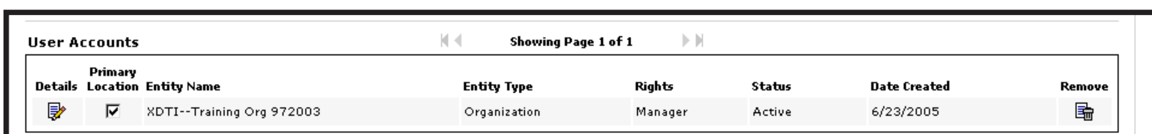
7. Click **OK** to complete the process or Cancel to abort.

8. Activate log-in security:

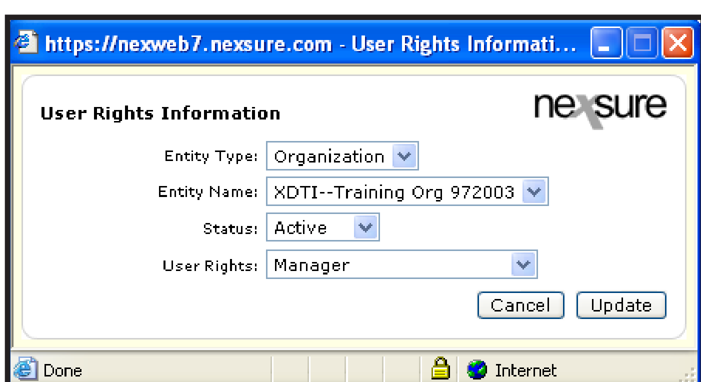
- Click the **Details** icon to the left of the employee name to display their details.
- Click the **security** tab.



- Click the **Details** icon at the bottom of the screen.



- Set the Status to **Active** and click the **Update** button. Once this is complete, the user can log into Nexsure.



Notes

Editing the Region

Each Nexsure Organization is created using the information provided by you. If the information entered needs to be modified, use the following steps to edit. The Region information is not used for Client level activity and is used strictly for Accounting and Organization information.

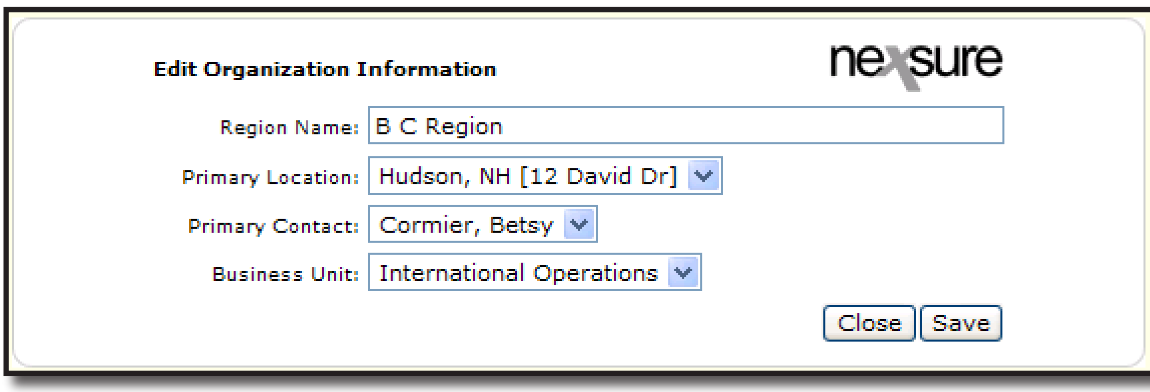
1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **regions** tab to display the Regions in summary view.

3. Use the **[Show]** link to search for a specific region by entering criteria and clicking the **Search** button to display matching regions.

4. Click the **Details** icon of the region to display the region card file.

5. Click the **Edit** link on the navigation toolbar. The table below the screen shot shows the configurable options.



Field	Description
Region Name	The region name can be edited.
Primary Location	*A different selection may be chosen from the drop-down.
Primary Contact	*A different selection may be chosen from the drop-down.
Business Unit	A Business Unit for the region can be added by selecting it from the drop-down list. Selections in this list are added in the SETUP > Lookup Management > Organization module. Business Units provide a tool for virtually grouping regions via reporting.

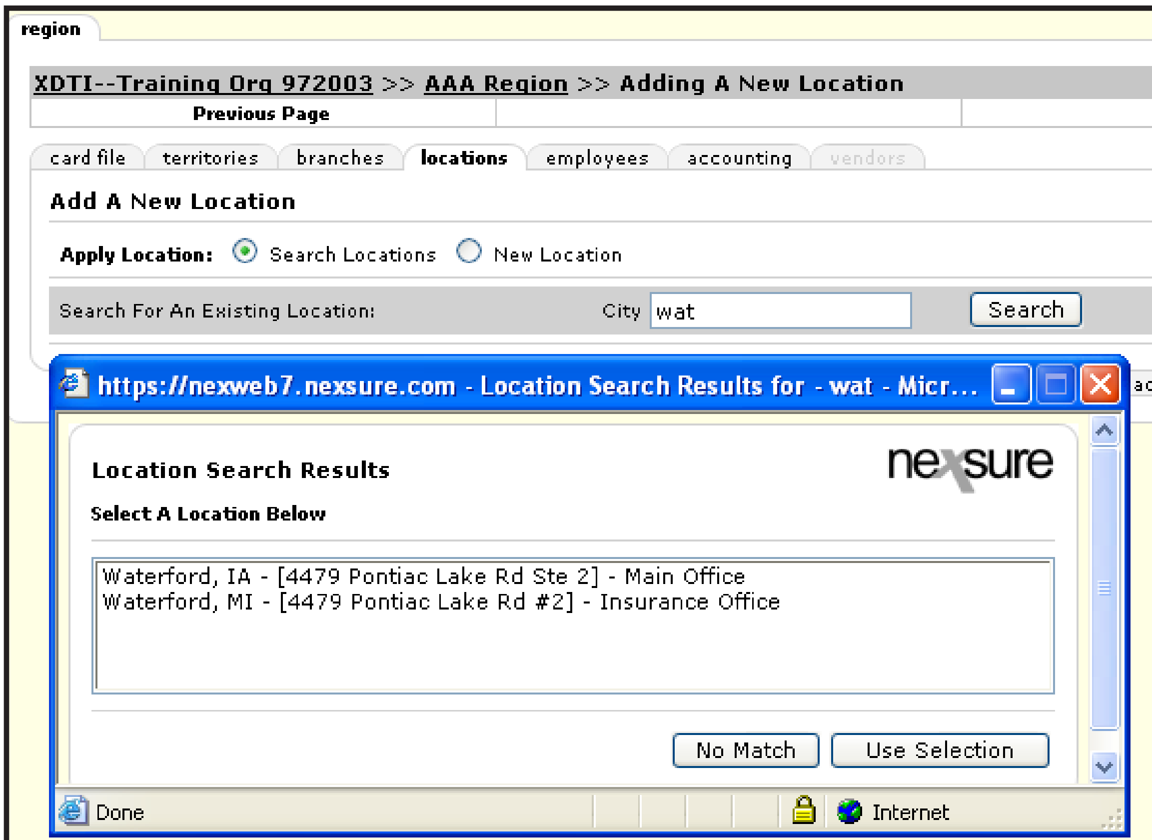
* Providing they have been previously added to the selected region.

6. Click **Save** to store the changes or Close to abort.

HOW to Add Locations to Regions

Since multiple locations may exist for the Organization, it is easiest to add all locations at once to the Organization and then using them for the Regions, Territories and Branches. To associate Organization locations to the Regions, follow these steps:

1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.
2. Click the **regions** tab.
3. Click the **Details** icon for a specific region.
4. Click the **locations** tab to display a summary view of all locations for the selected region.
5. Click the **Add New** link on the navigation toolbar to display the Add New Location screen.
6. Before adding anything in Nexsure it is important to use the search features to keep from adding the same information again. Enter the City and click the **Search** link to display all matches.

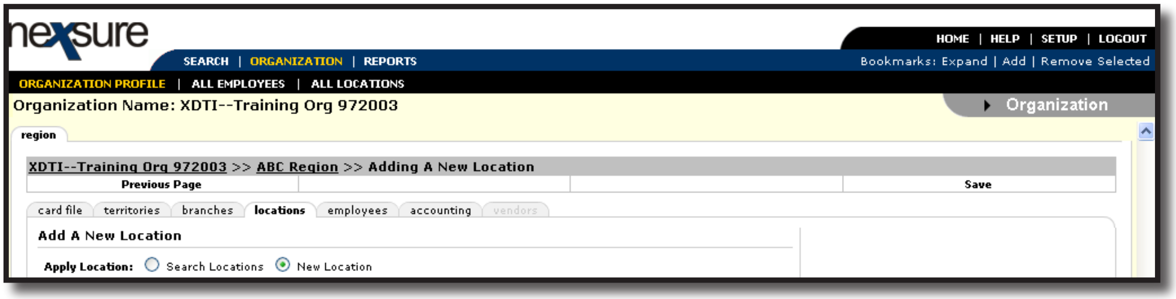


7. If a match exists, highlight and select Use Selection to use the address or select **No Match** because the location does not exist.
8. If nothing is displayed or No Match is selected, it is best to add the location to Organization level and then repeat steps 1-6 above to associate the address to this level. However, a location

may be added to this level by clicking the New Location option to display the fields to enter the location information. Use the below as a guide to complete the location details:

Field Label	Description
Location Type	Use the drop-down box that contains items that are entered in SETUP > Lookup Management by you.
Location Name	Enter a unique name to identify the Location.
Physical Address	Enter the physical address of the Location.
Country	Use the drop-down box to select the Country.
Intl Address Info	Enter the International Address Information if applicable.
Is above address the US Mail address for this location	If the Yes radio button is chosen it is not necessary to fill out the Mailing Address information.
Mailing Address	Enter the mailing address of the Location if it is different than the Physical Address.
Location Numbers	Enter the phone numbers with no formatting. Formatting will be applied after the location's details have been saved. Use the drop-down box to designate the phone number type.

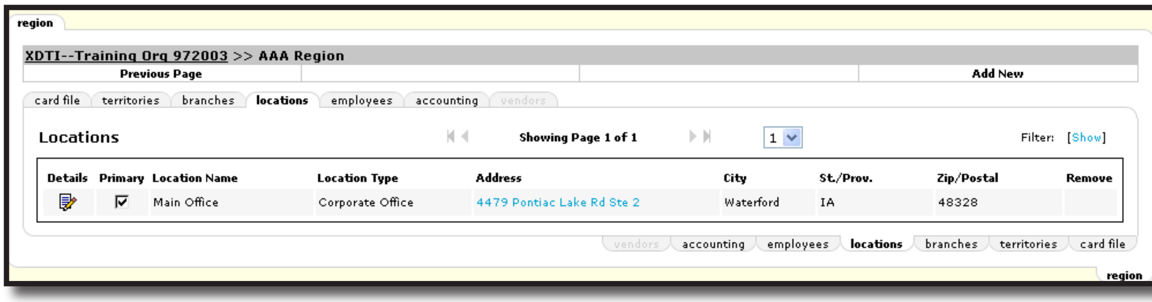
9. After completing the location information, click the **Save** link on the navigation toolbar to store the new location.



HOW to Edit a Location of a Region

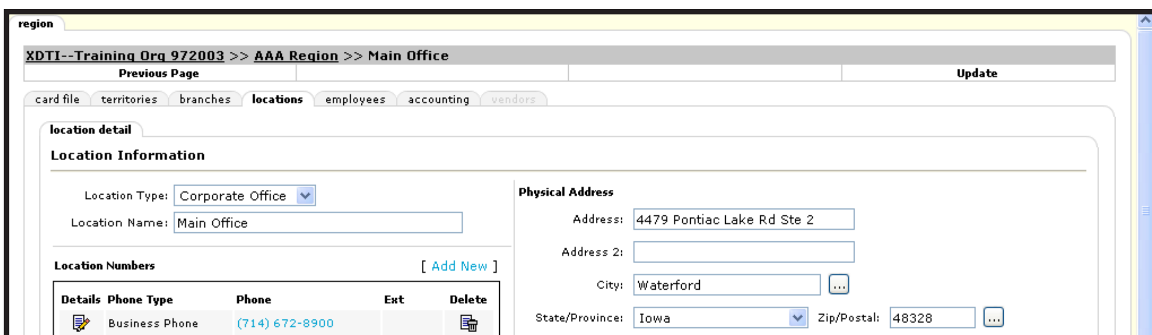
1. To edit a location, click the **Details** icon on the summary view to display the details.

Note: If this location information has been used on other records and is modified, all records will be changed. When an existing location is used elsewhere in Nexsure, an association to the original record is made not a copy of the existing record.



Note: Use the **[Show]** link to filter through locations by entering specific criteria. Clicking the Search button will return all matching locations.

2. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.

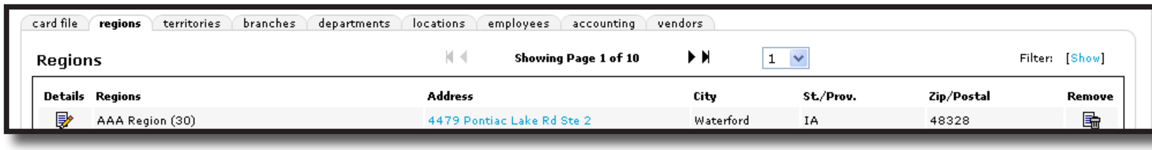


HOW to Add/Edit the Employees for the Region

Since employees may exist within multiple levels of the organization, it is easiest to add all employees to the organization level and then using them for all applicable levels: regions, territories and branches. Adding employees to organization level does not automatically give them security rights to this level. Security rights should only be added to the appropriate level. Add employees to the region level only if they will need access to this level. Since region level will not allow access to the clients, most service personnel will not need access to this level. To associate employees to the region level, follow these steps:

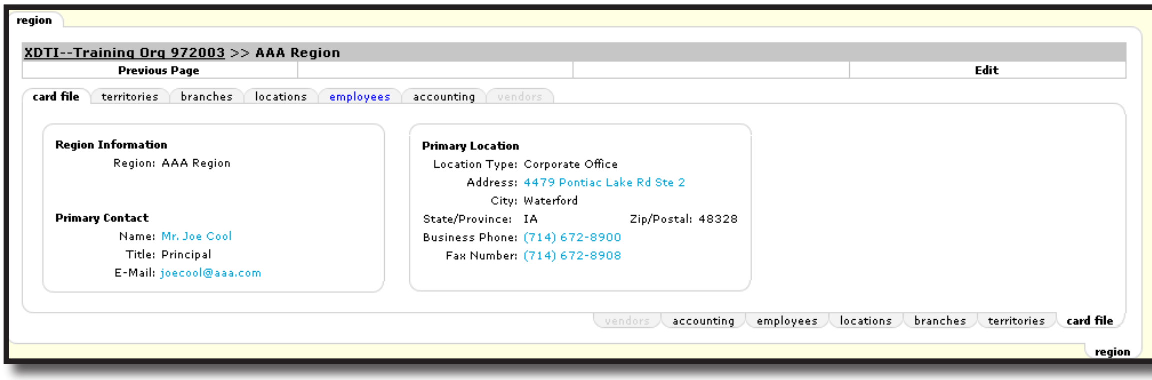
1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **regions** tab to display a summary view of all regions.



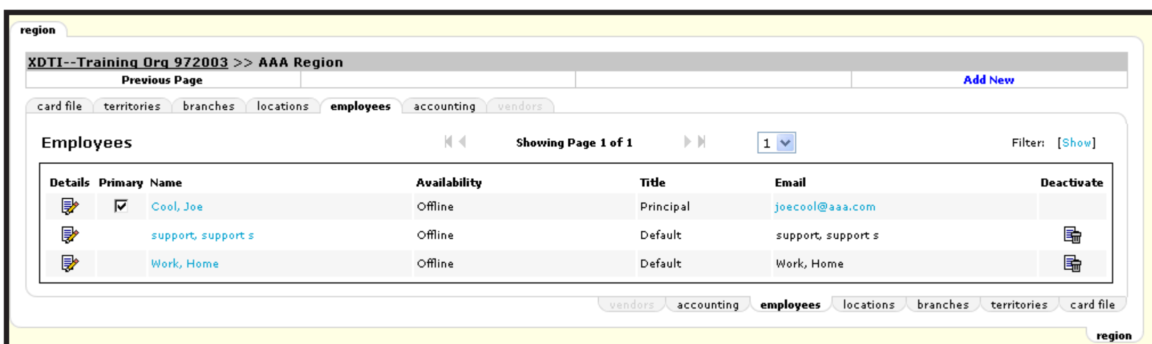
3. Click the **Details** icon beside the region name to associate the employee with.

4. The selected region card file is displayed. Click the **employees** tab to display all employees associated with the selected region.

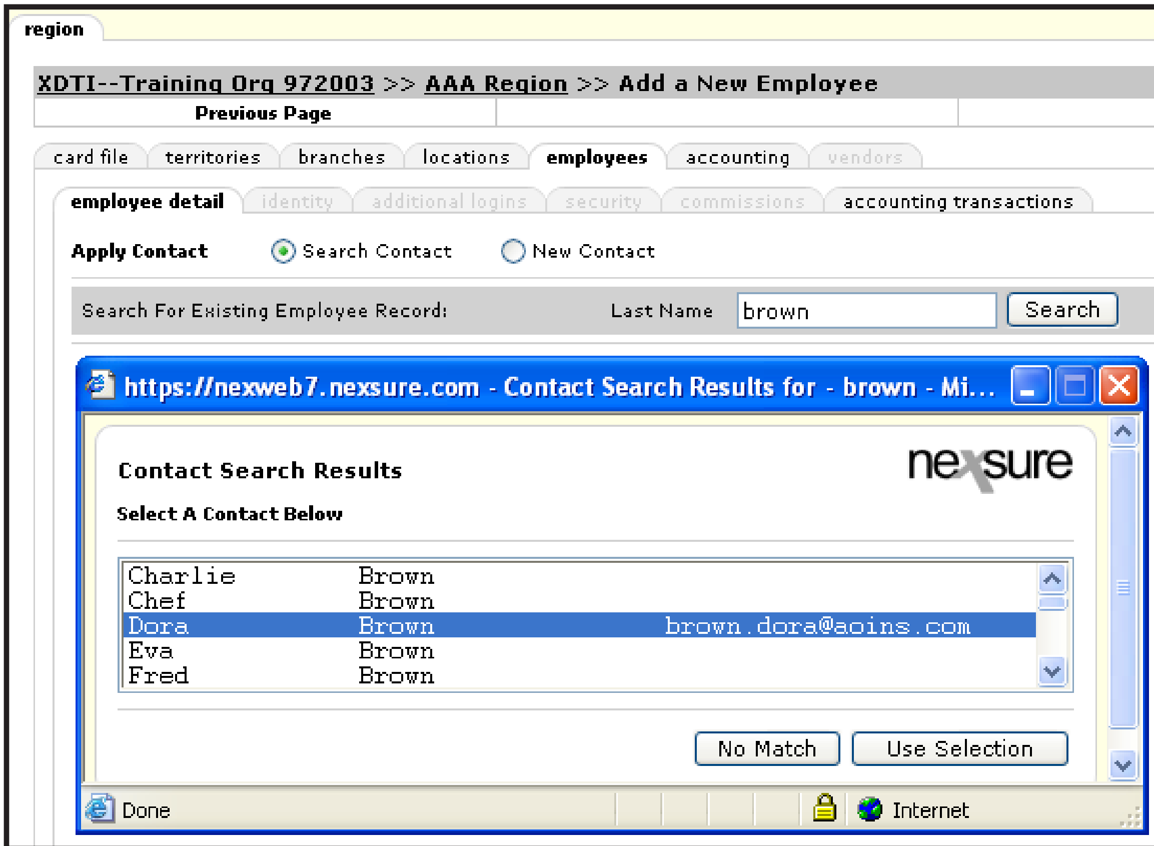


5. Click the **[Add New]** link on the navigation toolbar to display the Add New Employee screen.

6. Before adding anything in Nexsure it is important to use the search features to keep from adding the same information again. Enter the last name and click the **Search** link to display all matches.



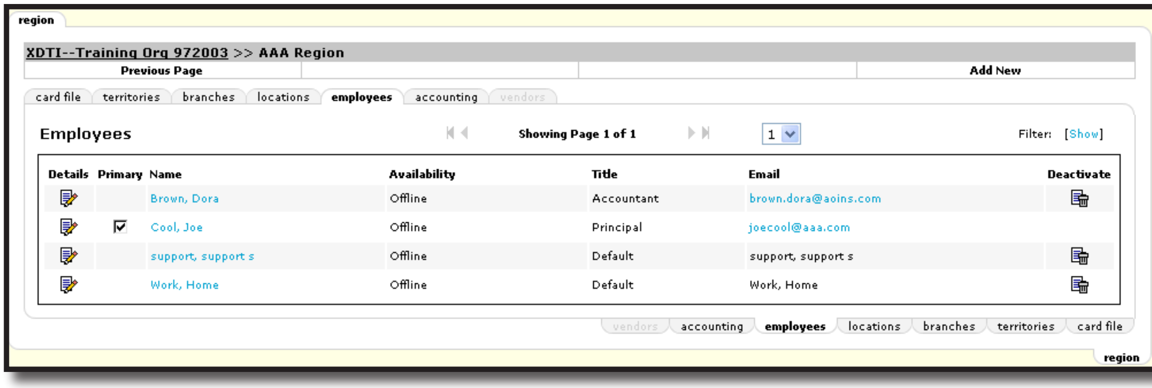
7. If a match exists, highlight and select **Use Selection** to use the existing employee or select **No Match** because the employee does not exist and must be added at Organization level before associating to the Region level.



Note: If nothing is displayed or No Match is selected, go back to **ORGANIZATION** > **employees** and add there first. (See directions for Adding Employees at Organization level). After adding to the organization level, return here to associate the employee at this level.

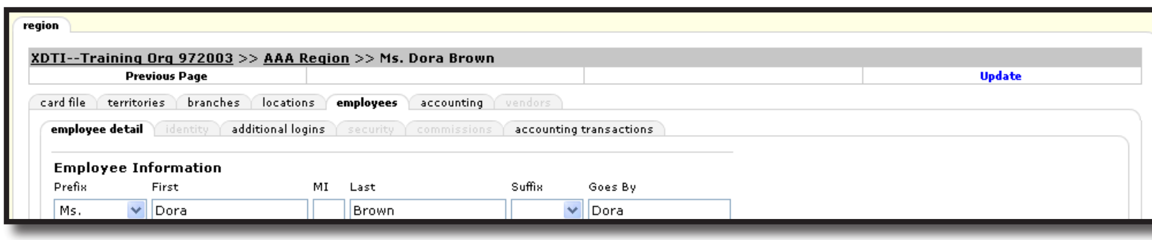
8. To edit employee details, click the **Details** icon on the summary view to display the details.

Note: Keep in mind that modifying this employee record will modify all existing associations as well except for Title, Contact roll and primary default. When an existing employee is used elsewhere in Nexsure, an association to the original record is made, not a copy of the existing record.



Note: Use the **[Show]** link to filter through employees by entering specific criteria. Clicking the Search button will return all matching employees.

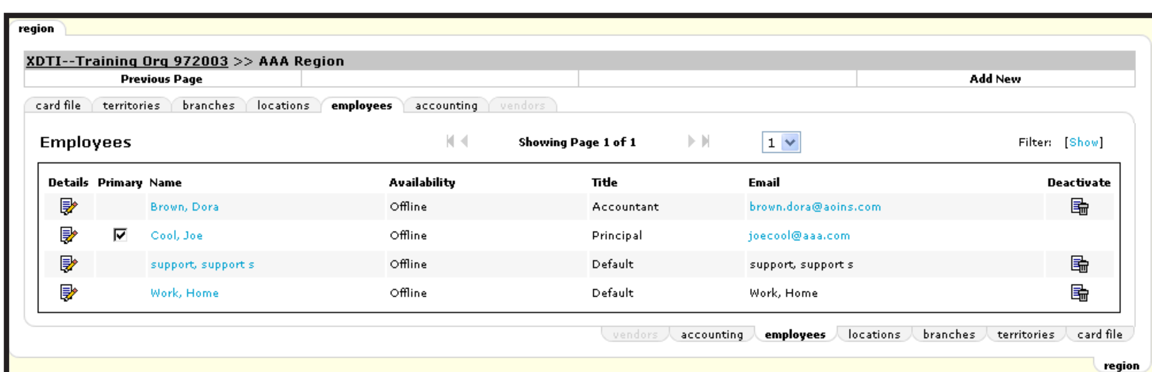
9. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.

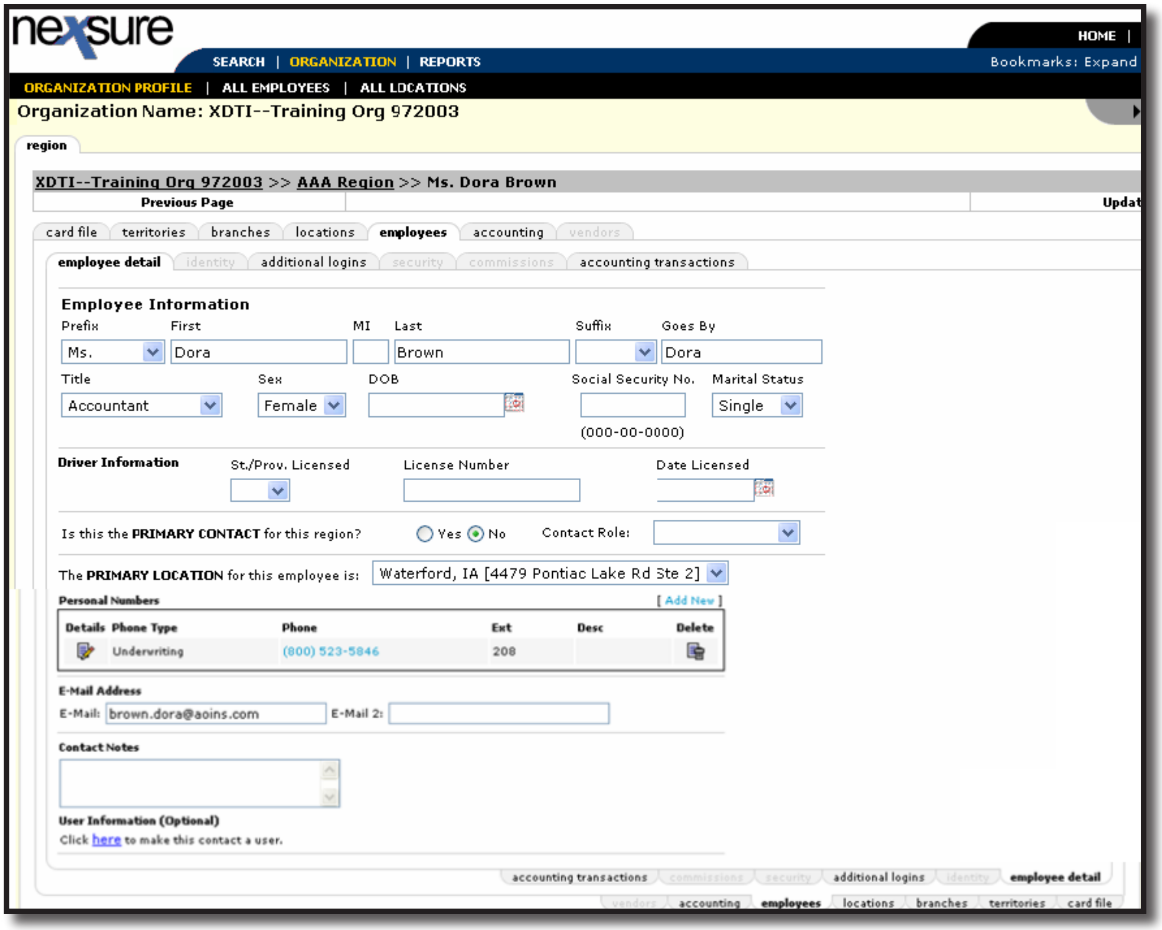


HOW to Assign Employee Security at Region Level

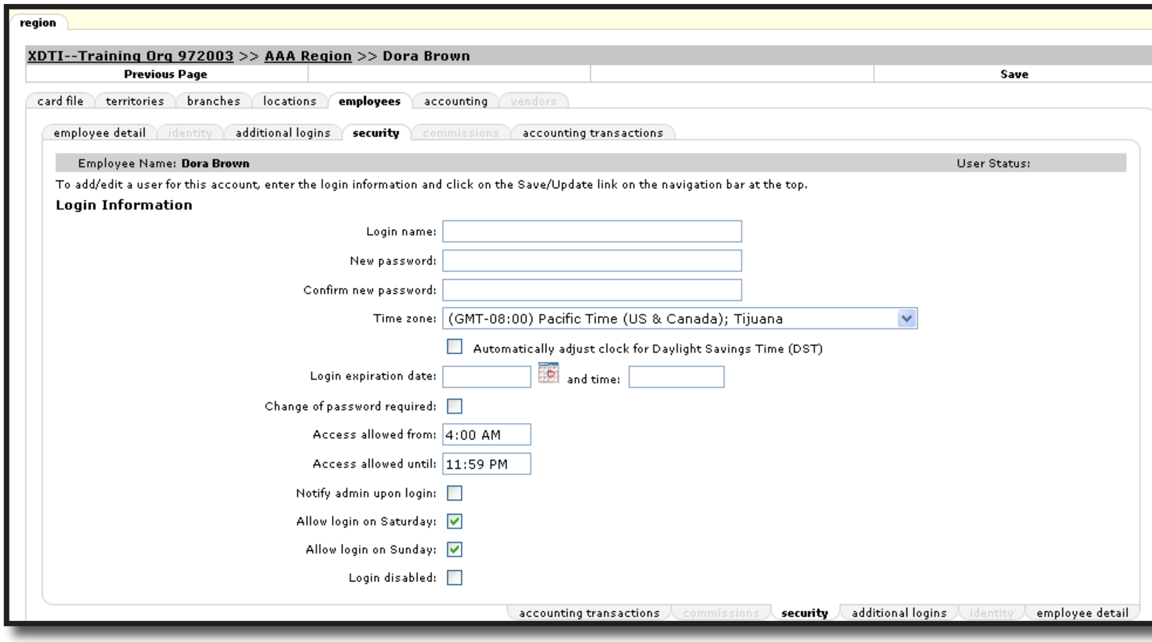
If the employee is not to be given security at region level, then do not add the employee to the region level. Granting an employee security at this level will not only provide them with security access to region level but also the territories and branches that are added to the region.

1. Click the **Details** icon in the summary view to display the **employee detail** tab.



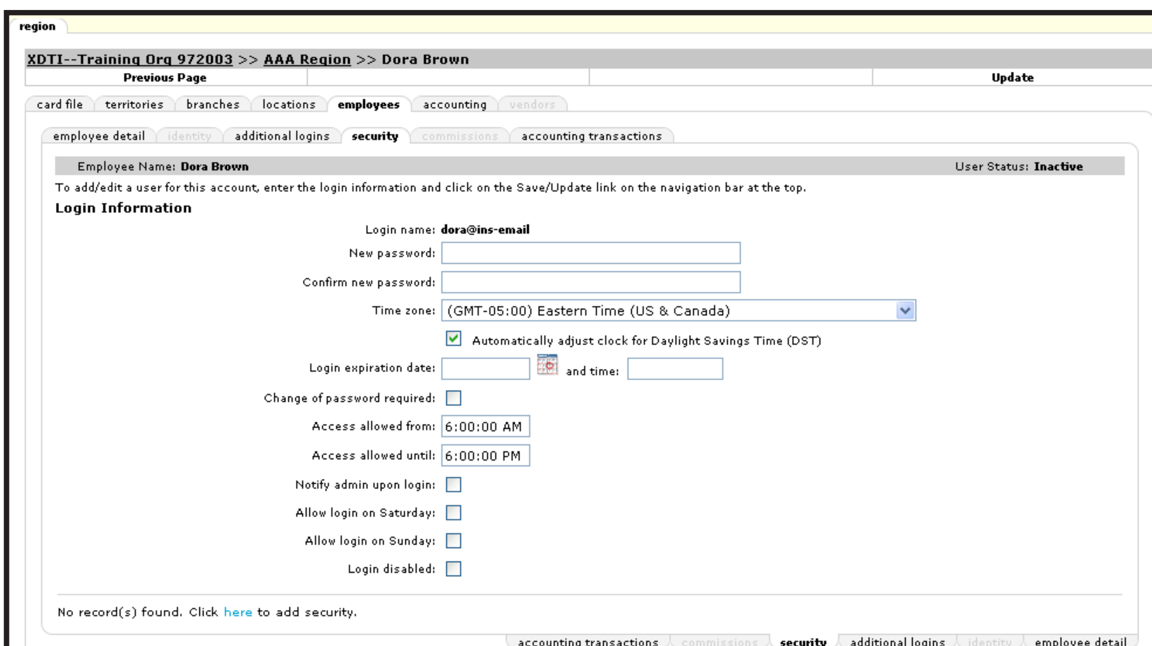


2. At the bottom of the **employee detail** screen there is a link embedded in the following sentence: **Click here to make this contact a user**. This link is only available prior to activating their security. Clicking this link displays the Employees Security page.

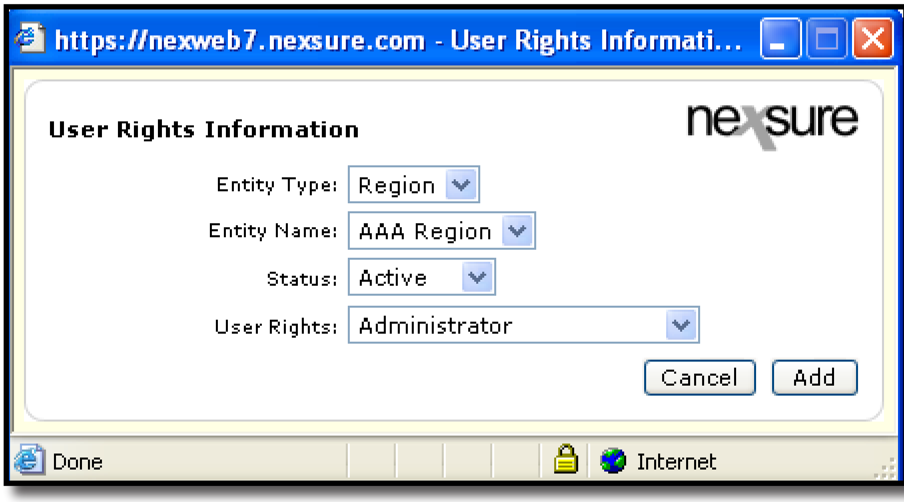


3. Complete the login information on this screen to grant them access to your Nexsure site at this level.

4. After entering all the information, click the **Save** link on the Navigation toolbar and the screen is refreshed now displaying the security link at the bottom of the page.



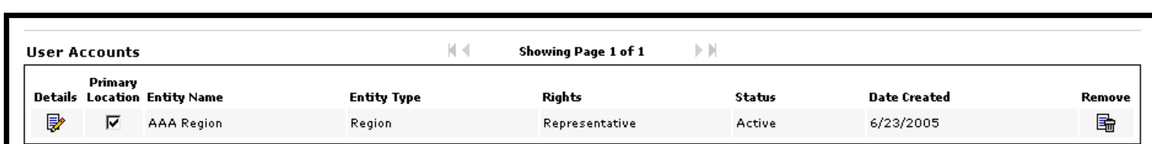
5. Click the link embedded in the sentence: **No record(s) found. Click here to add security**.



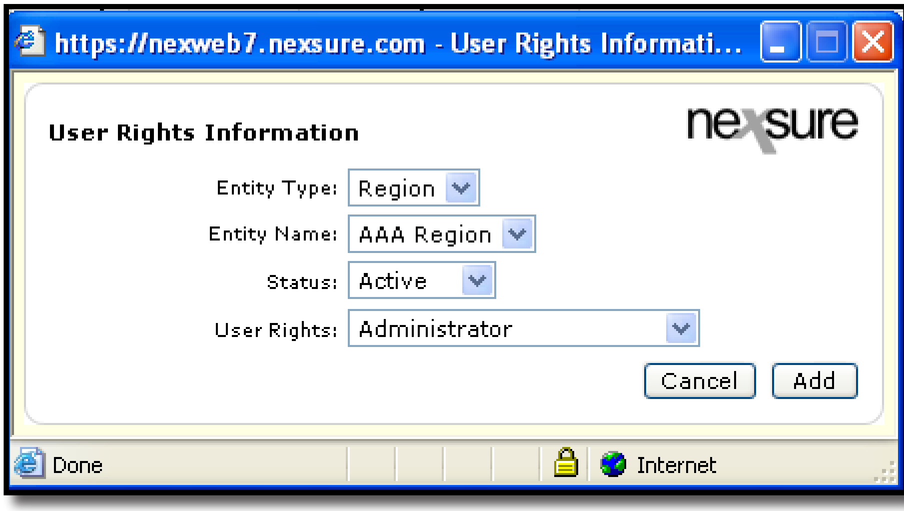
6. The **User Rights Information** pop-up window is displayed. The table below shows the options for each field. Modify the editable fields as necessary.

Field	Description
Entity Type	Preset to Region and can't be modified.
Entity Name	Preset to the name of the Region the employee has been added to and can't be modified.
Status	Defaults to Active but can be modified. Choosing Inactive disables security at this level, which means if they do not have security at any other level then the user will not be able to login.
User Rights	Determines what level of security is assigned to the user. User Rights are added through Security Setup. (See SETUP > User Rights Templates for details)

7. Click **Add** to save changes, Cancel will abort. When the Add button has been clicked, the screen refreshes and the security is displayed at the bottom of the employee file. The process is complete.



- Security for this employee may be removed by clicking the **Remove** icon.
- Clicking the **Details** icon displays the **User Rights Information** pop-up window, allowing security to be modified as necessary.


https://nexweb7.nexsure.com - User Rights Informati...
User Rights Information
nexsure
Entity Type: Region
Entity Name: AAA Region
Status: Active
User Rights: Administrator
Cancel
Add
Done
Internet

Notes

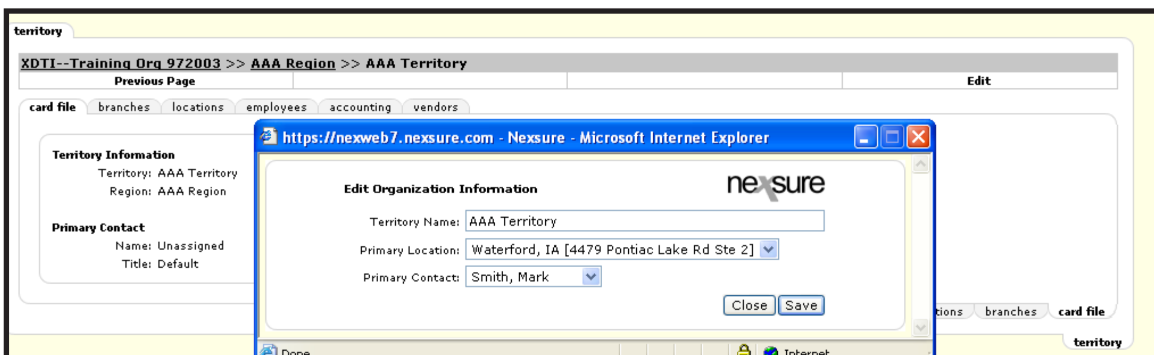
Editing the Territory

Each Nexsure organization is created using the information provided by you. If the information entered needs to be modified, use the following steps to edit. The territory information is used for accounting and organization information.

1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.
2. Click the **territories** tab to display the territories in summary view.
3. Use the **[Show]** link to search for a specific territory by entering criteria and clicking the **Search** button to display matching territories.
4. Click the **Details** icon of the territory to display the **territory > card file** tab.
5. Click the **Edit** link on the navigation toolbar.
6. The **Edit Organization Information** pop-up window is displayed. The table below shows the options for each field. Modify the editable fields as necessary.

Field	Description
Region Name	The territory name can be edited.
Primary Location	*A different selection may be chosen from the drop-down.
Primary Contact	*A different selection may be chosen from the drop-down.

*** Providing they have been previously added to the selected region.**



7. Click **Save** to store the changes or Close to abort.

HOW to Add/Edit the Locations for the Territories

Since multiple locations may exist for the Organization, it is easiest to add all locations at once to the organization and then using them for the territories, regions and branches. To associate organization locations to territories, follow these steps:

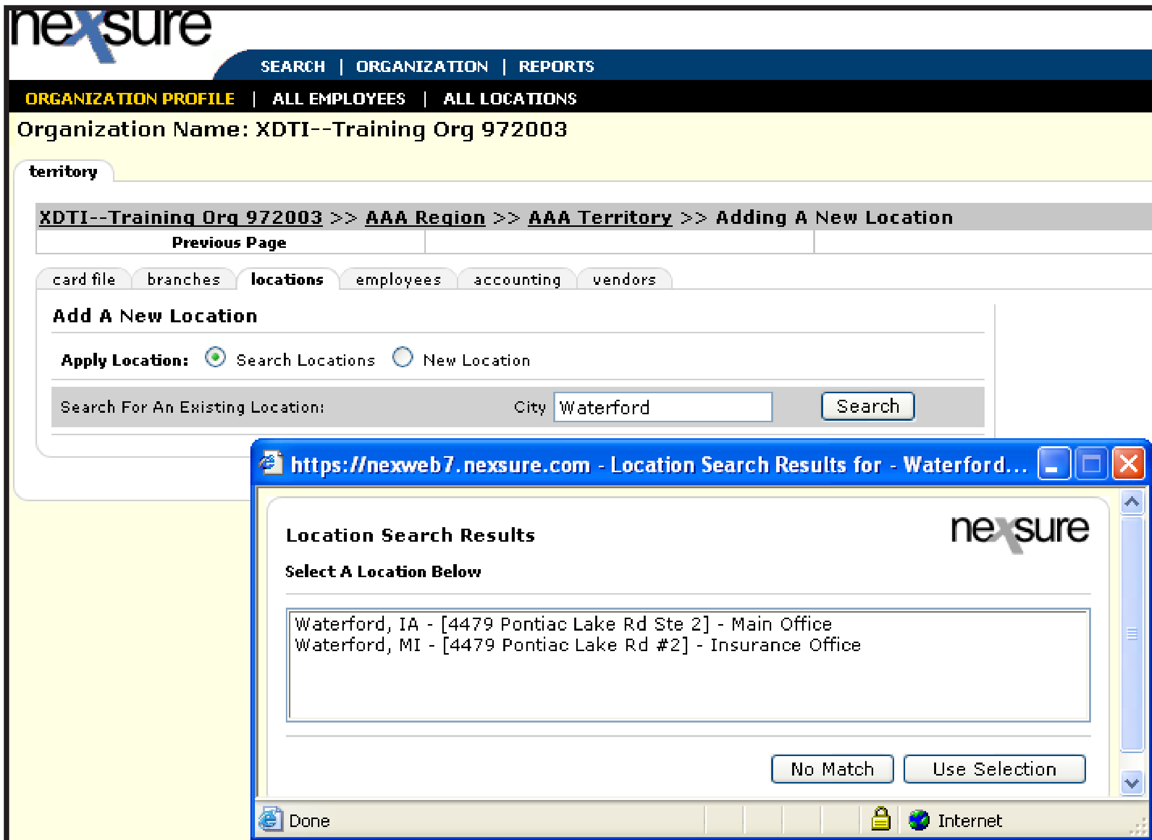
1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **territories** tab.

3. Click the **Details** icon for a specific territory and then the **locations** tab to display a summary view of all locations for the selected territory.

4. Click the **Add New** link on the navigation toolbar to display the Add New Location screen.

5. Before adding anything in Nexsure, it is important to use the search features to keep from adding the same information again. Enter the city and click the **Search** link to display all matches.

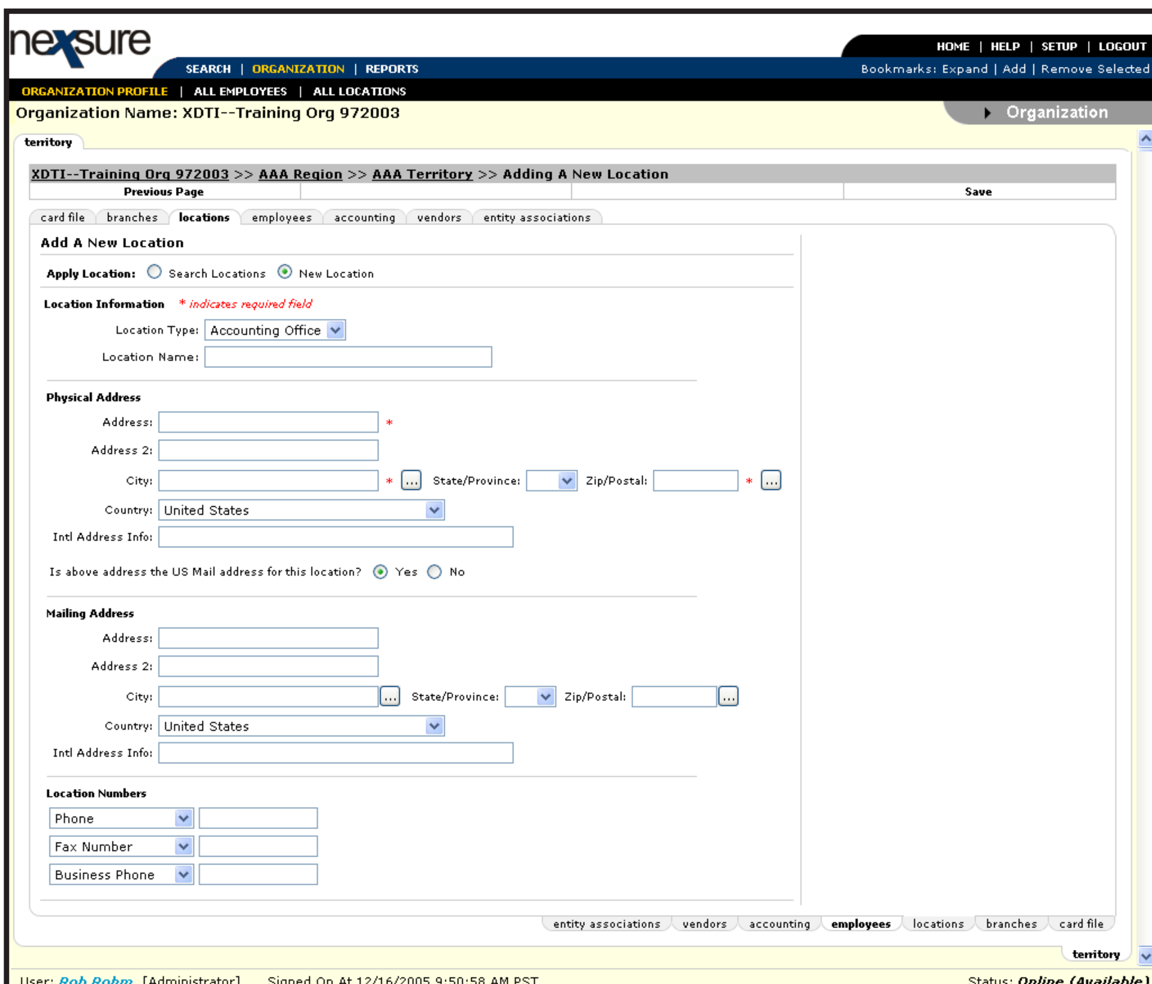


6. If a match exists, highlight and select **Use Selection** to use the address or select **No Match** because the location does not exist.

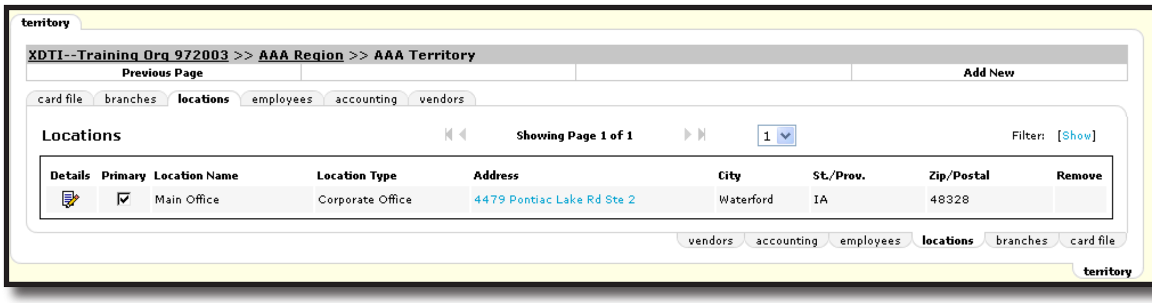
7. If nothing is displayed or No Match is selected, it is best to add the location to Organization level and then repeat steps 1-5 above to associate the address to this level. However, a location may be added to this level by clicking the New Location option to display the fields to enter the location information. Use the below as a guide to complete the location details:

Field Label	Description
Location Type	Use the drop-down that contains items that are entered in SETUP > Lookup Management by you.
Location Name	Enter a unique name to identify the location.
Physical Address	Enter the physical address of the location.
Country	Use the drop-down to select the Country.
Intl Address Info	Enter the international address information, if applicable.
Is above address the US Mail address for this location?	If the Yes radio button is chosen it is not necessary to fill out the mailing address information.
Mailing Address	Enter the mailing address of the location, if different from the physical address.
Location Numbers	Enter the phone numbers without formatting. Formatting will be applied after the location details have been saved. Use the drop-down to designate the phone number type.

8. After completing the location information, click the **Save** link on the navigation toolbar to store the new location.

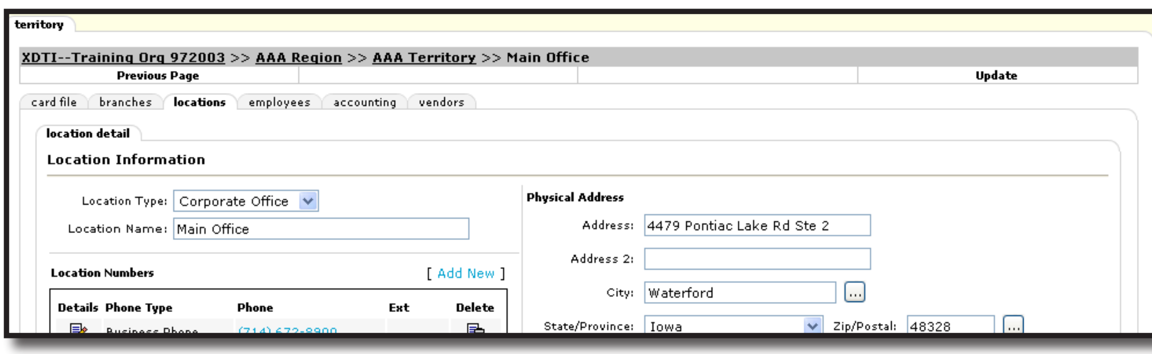


9. To edit a location, click the **Details** icon on the summary view to display the details. Keep in mind that if this location information has been used on other records and is modified, all records will be changed. When an existing location is used elsewhere in Nexsure, an association to the original record is made not a copy of the existing record.



Note: Use the **[Show]** link to filter through locations by entering specific criteria. Clicking the Search button will return all matching locations.

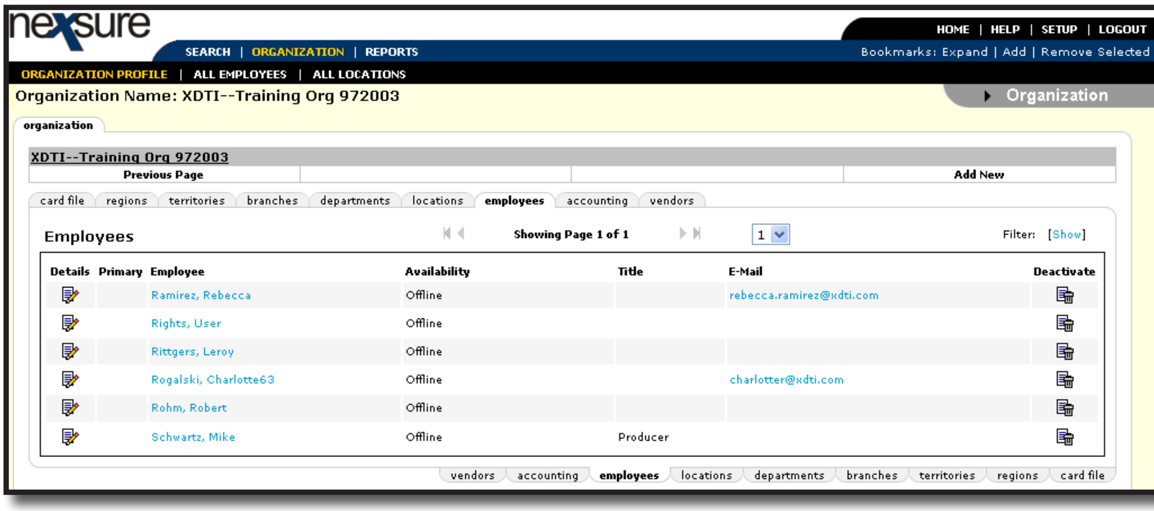
10. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.

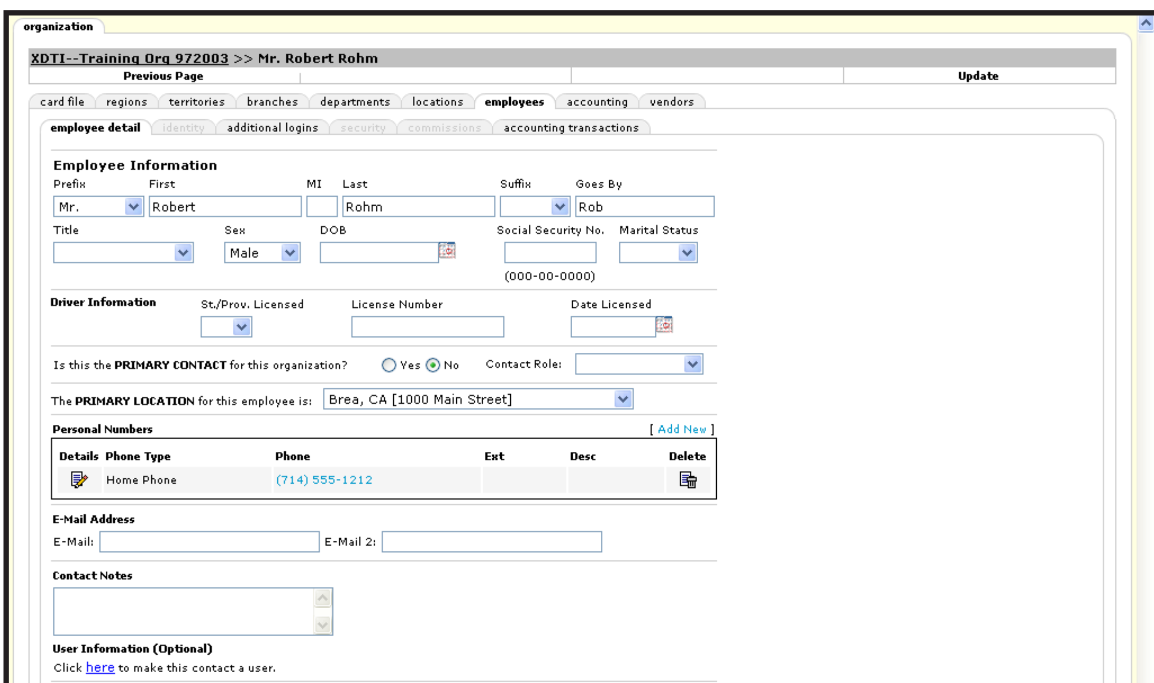


HOW to Assign Employee Security

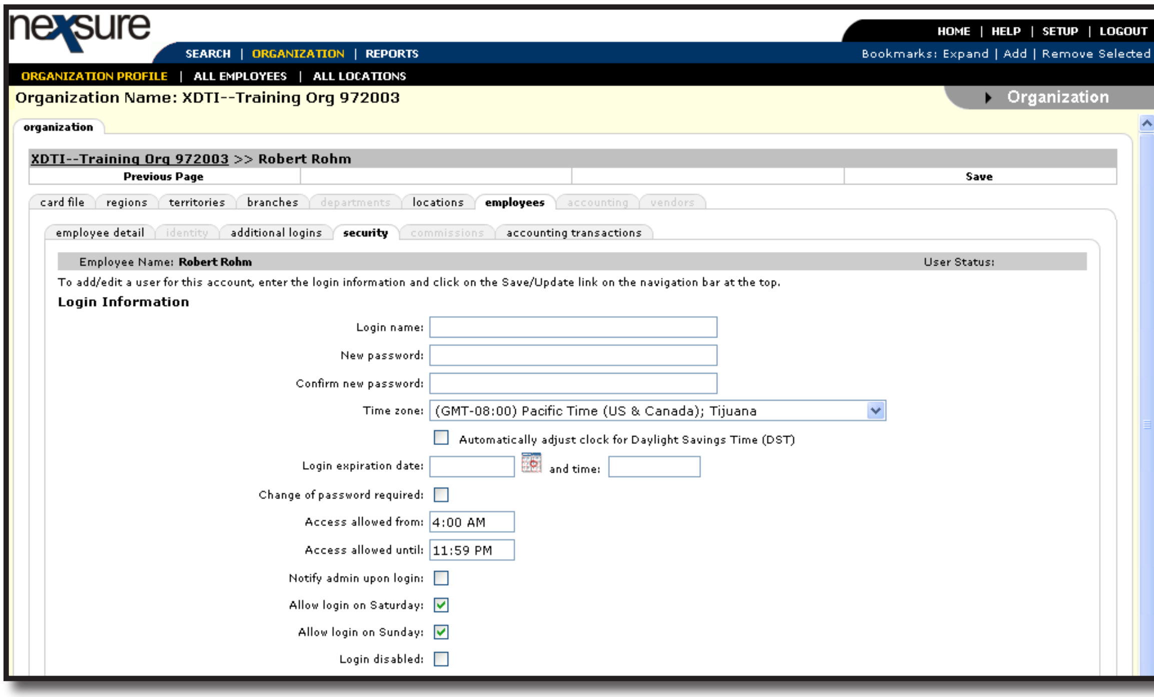
If an employee should not be given security at the territory level, then do not add the employee to territory level unless this employee is one that will receive commission. An employee being paid commission must be associated at both territory and branch levels, whether they will have security access or not. They are added at branch level so they may be assigned to the policy and given commission on the invoices. They are added at the territory level as well so that checks may be issued to them. Make sure not to add an entirely new employee but to search and use the employee added at organization level. Granting an employee security at this level will not only provide them with security access to territory level but also the branches that are added to the territory.

1. Click the **Details** icon in the summary view to display the **employee detail** tab.



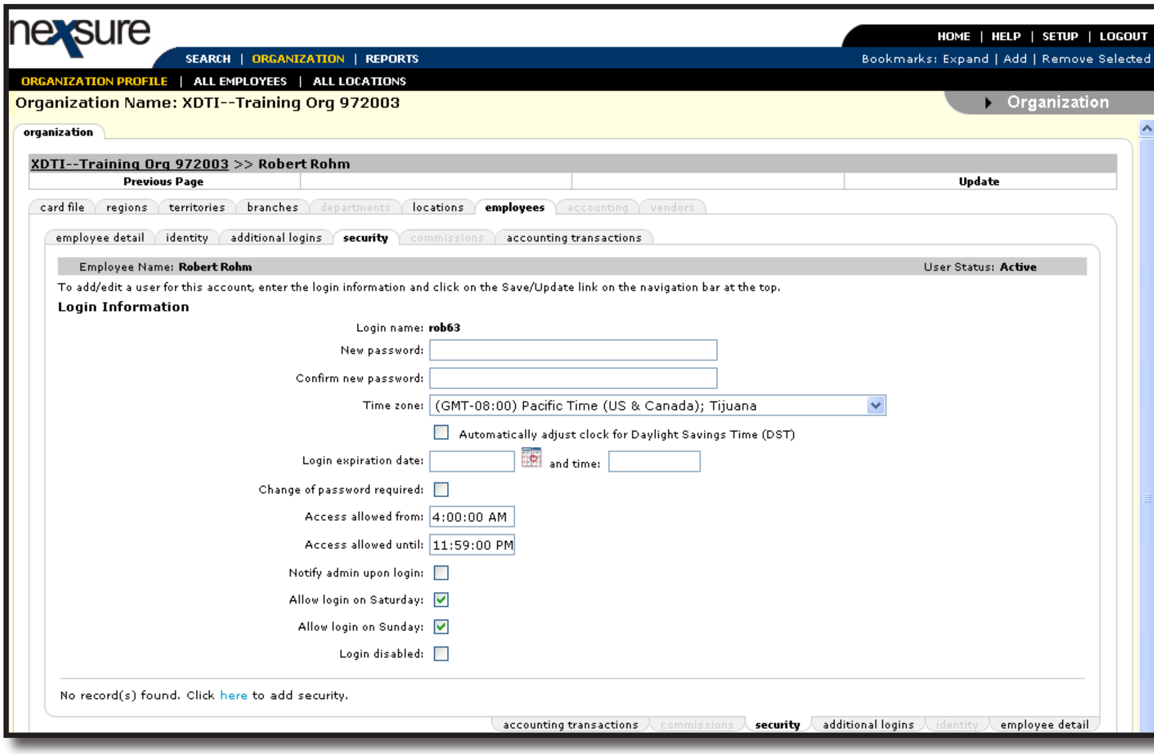


2. At the bottom of the **employee detail** screen there is a link embedded in the following sentence: **Click here to make this contact a user**. This link is only available prior to activating their security. Clicking this link displays the Employees Security page.

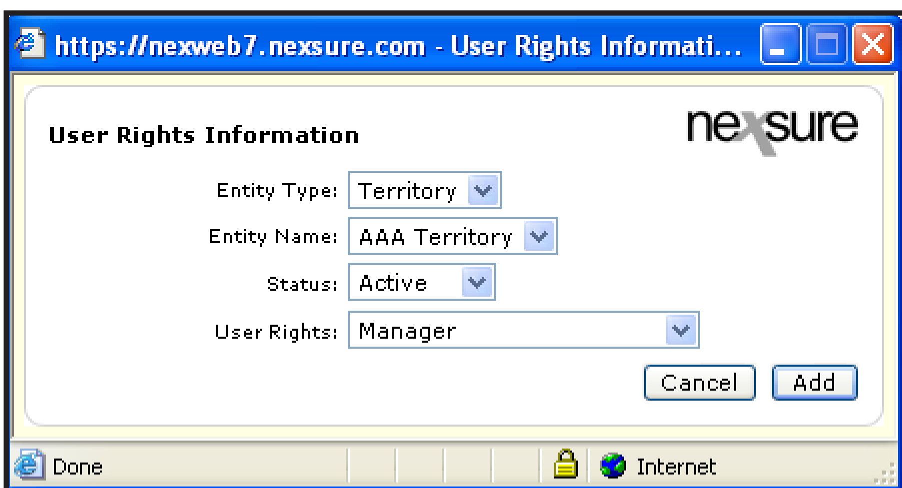


3. Complete the login information on this screen to grant them access to your Nexsure site at this level.

4. After entering all the information, click the **Save** link on the Navigation toolbar and the screen is refreshed now displaying the security link at the bottom of the page.



5. Click the link embedded in the sentence: **No record(s) found. Click here to add security**.

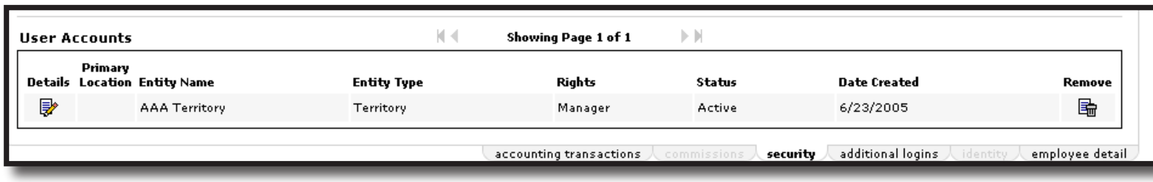


6. The **User Rights Information** pop-up window is displayed. The table below shows the options for each field. Modify the editable fields as necessary.

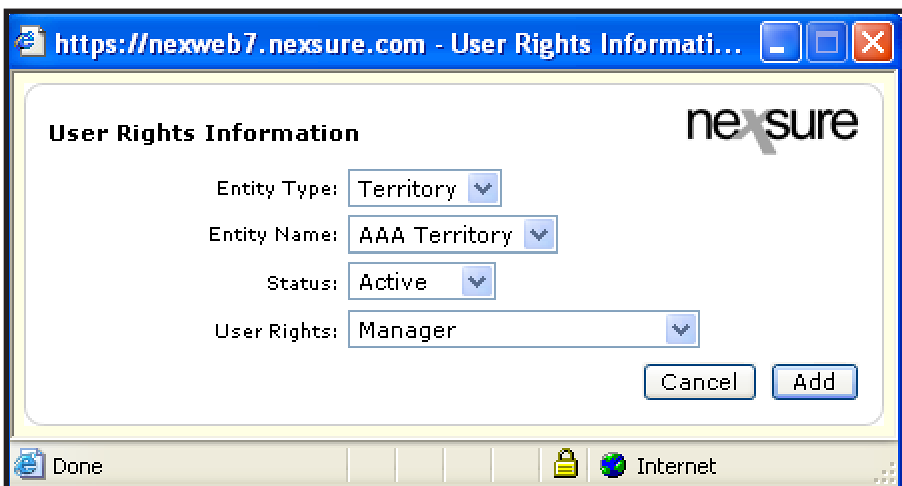
Field	Description
Entity Type	**Preset to Territory and can't be modified.**
Entity Name	**Preset to the name of the Territory the employee has been added to and can't be modified.**

Field	Description
Status	Defaults to Active but can be modified. Choosing Inactive disables security at this level, which means if they do not have security at any other level then the user will not be able to login.
User Rights	Determines what level of security is assigned to the user. User Rights are added through Security Setup. (See SETUP > User Rights Templates for details)

7. Click **Add** to save changes, Cancel will abort. When the Add button has been clicked, the screen refreshes and the security is displayed at the bottom of the employee file.



- Security for this employee may be removed by clicking the **Remove** icon.
- Clicking the **Details** icon displays the **User Rights Information** pop-up window, allowing security to be modified as necessary.



Notes

Editing the Branch

Each Nexsure Organization is created using the information provided by you. If the information entered needs to be modified, use the following steps to edit. The Branch information is used for Client level activity and also for Accounting and Organization information.

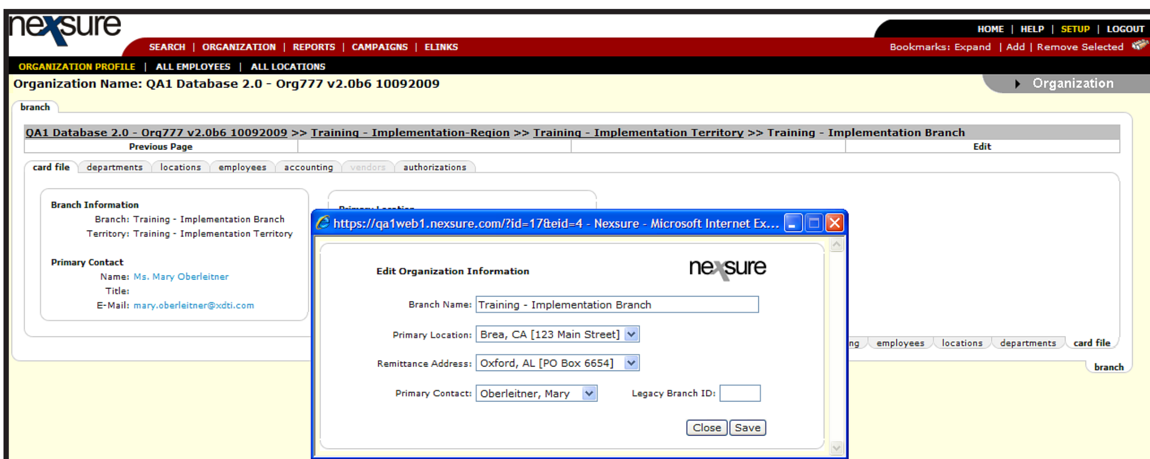
1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.

2. Click the **branches** tab to display the Branches in summary view.

3. Use the **[Show]** link to search for a specific Branch by entering criteria and clicking the **Search** button to display matching Branches.

4. Click the **Details**  icon of the Branch to display the branch card file.

5. Click the **Edit** link on the navigation toolbar. The Branch Name may be edited and a different selection for the Primary Location and Contact may be selected providing they have been previously added to the selected Branch. The Legacy Branch ID is used in the Data Conversion Process, so updating this field is only necessary if requested by our Conversion Department. The **Remittance Address** will print on invoices and client statements as the remittance address. The **Primary Location** will default but may be changed by selecting a location address from the drop-down box.

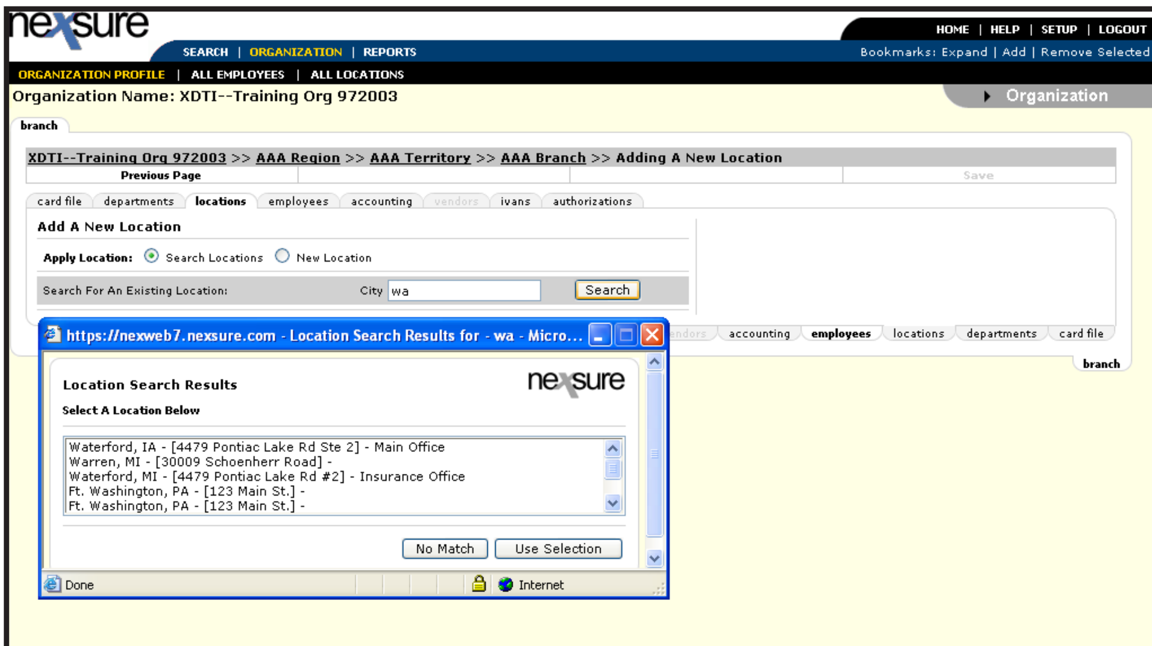


6. Click **Save** to store the changes or Close to abort.

HOW to Add/Edit the Locations for the Branches

Since multiple locations may exist for the organization, it is easiest to add all locations at once to the organization and then use them for the branches, regions and territories. To associate organization locations to the branches, follow these steps:

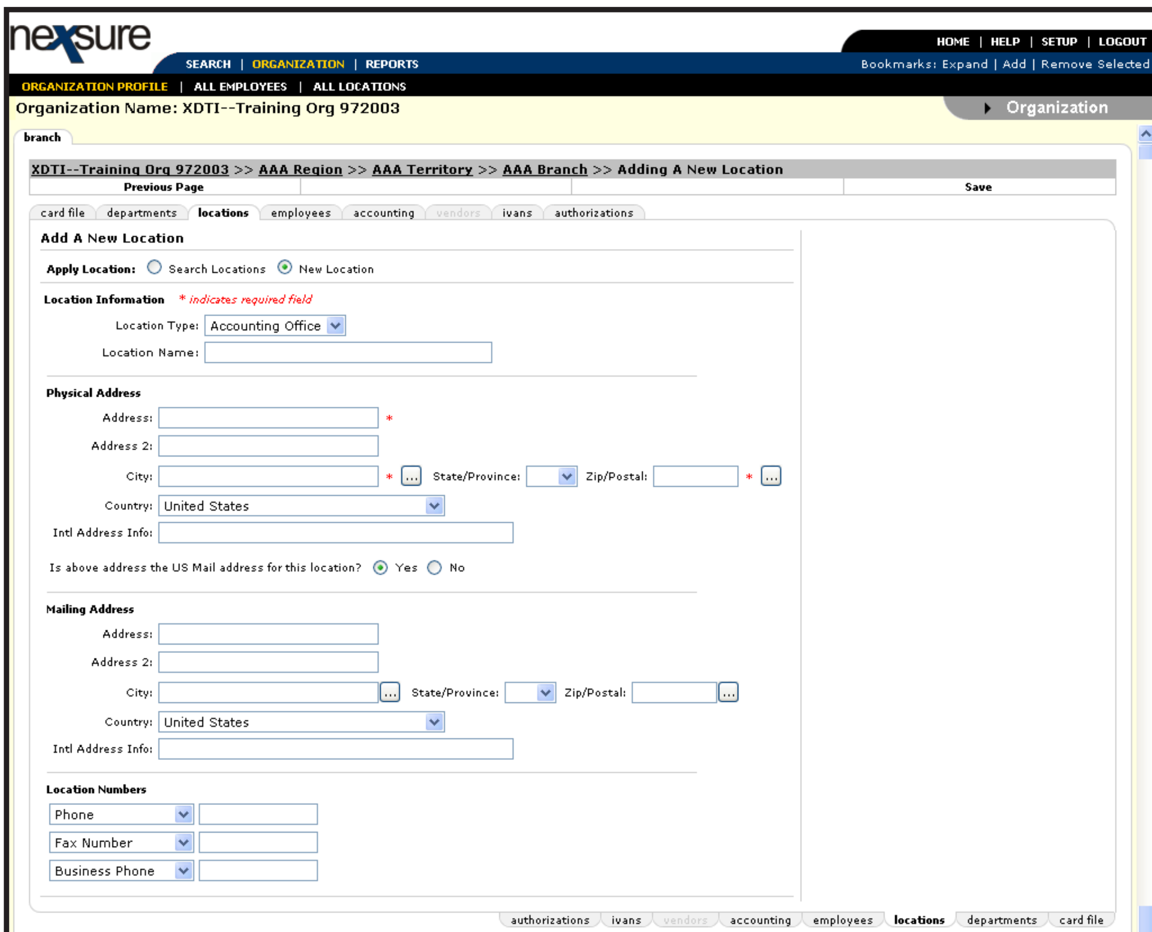
1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.
2. Click the **branches** tab.
3. Click the **Details**  icon of a specific branch.
4. Click the **locations** tab to display a summary view of all locations for the selected branch.
5. Click the **Add New** link on the navigation toolbar to display the Add New Location screen.
6. Before adding anything in Nexsure it is important to use the search features to keep from adding the same information again. Enter the City and click the **Search** link to display all matches.



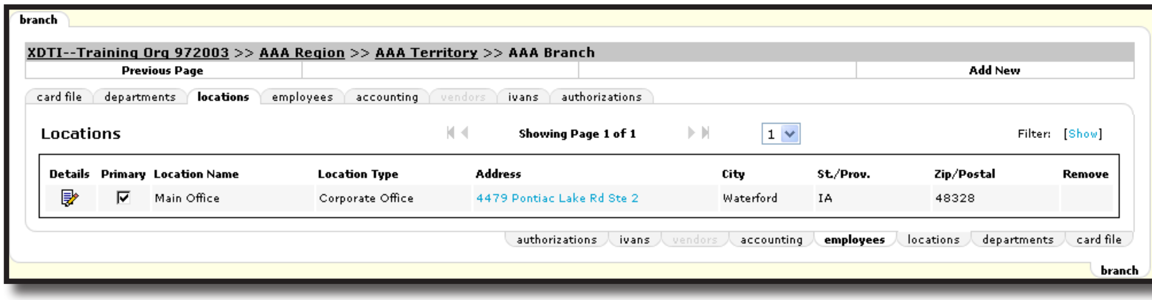
7. If a match exists, highlight and select **Use Selection** to use the address or select No Match because the location does not exist.
8. If nothing is displayed or No Match is selected, it is best to add the location to Organization level and then repeat steps 1-6 above to associate the address to this level. However, a location may be added to this level by clicking the New Location option to display the fields to enter the location information. Use the below as a guide to complete the location details:

Field Label	Description
Location Type	Use the drop-down box that contains items that are entered in SETUP > Lookup Management by you.
Location Name	Enter a unique name to identify the Location.
Physical Address	Enter the physical address of the Location.
Country	Use the drop-down box to select the Country.
Intl Address Info	Enter the International Address Information if applicable.
Is above address the US Mail address for this location	If the Yes option is chosen, it is not necessary to fill out the Mailing Address information.
Mailing Address	Enter the mailing address of the location if it is different than the one entered in the Physical Address field.
Location Numbers	Enter the phone numbers with no formatting. Formatting will be applied after Location details have been saved. Use the drop-down box to designate the phone number type.

9. After completing the location information, click the **Save** link on the navigation toolbar to store the new location.

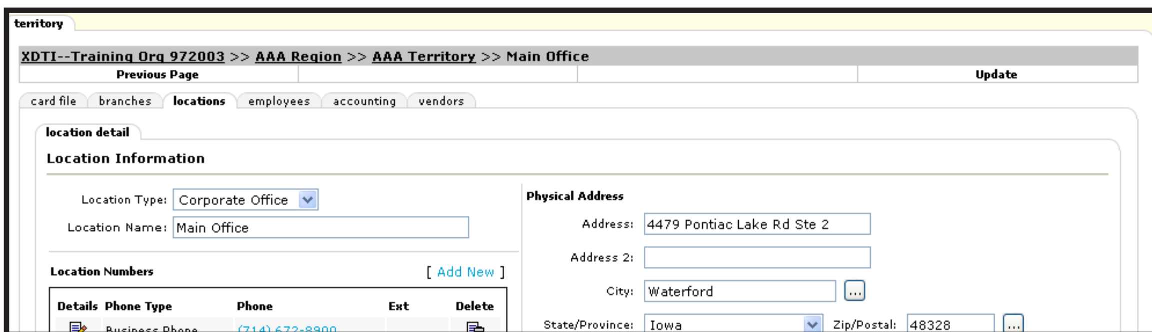


10. To edit a location, click the **Details** icon on the summary view to display the details. Keep in mind that if this location information has been used on other records and is modified, all records will be changed. When an existing location is used elsewhere in Nexsure, an association to the original record is made not a copy of the existing record.



Note: Use the **[Show]** link to filter through locations by entering specific criteria. Clicking the Search button will return all matching locations.

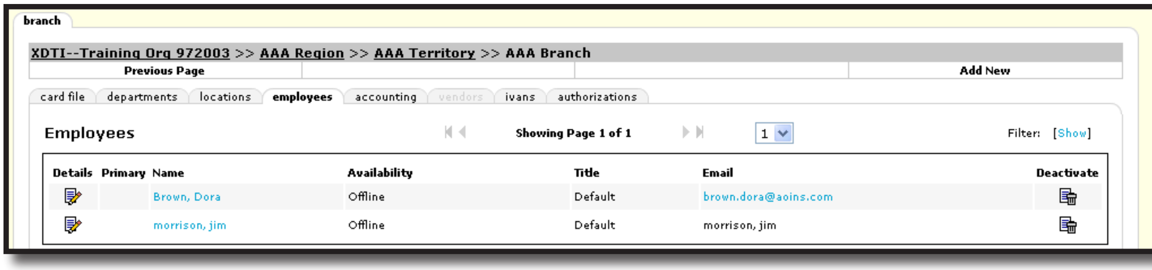
11. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.

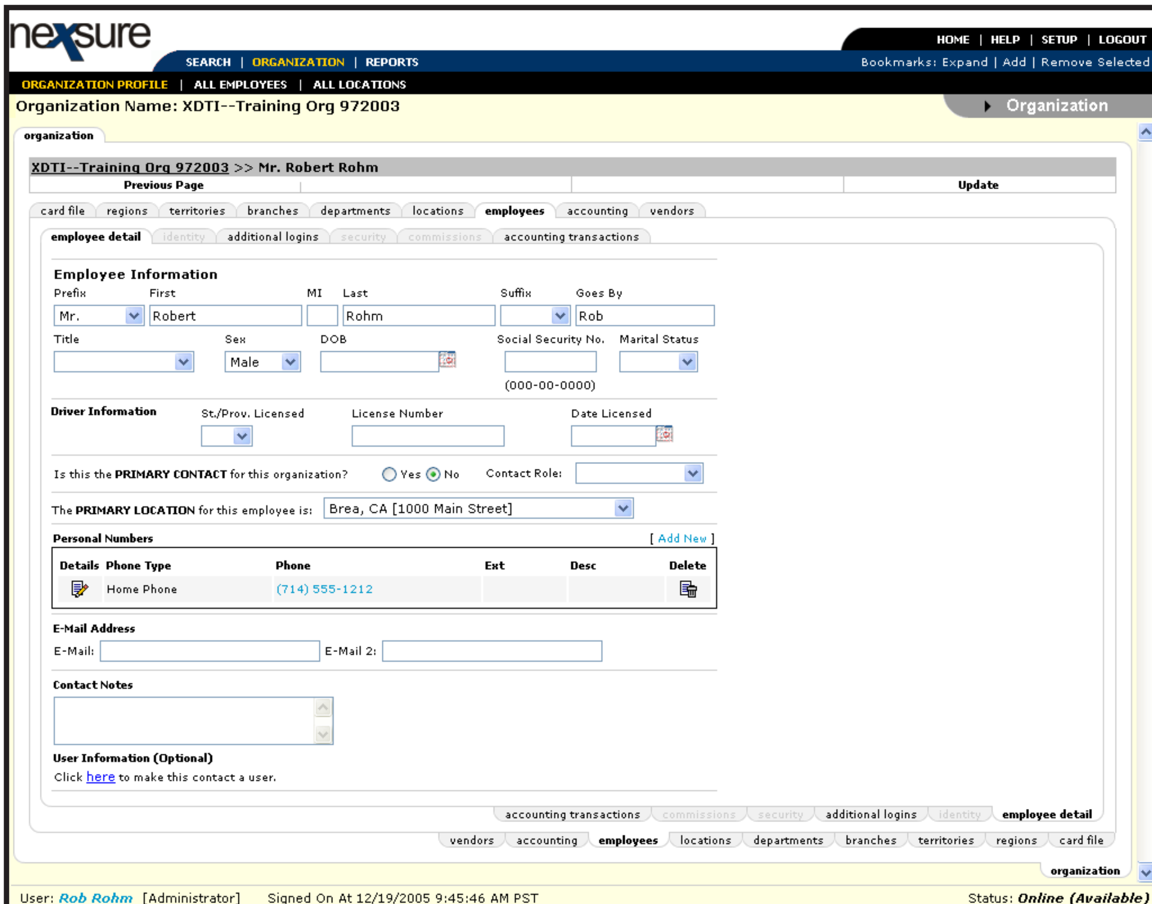


HOW to Assign Employee Security at Branch Level

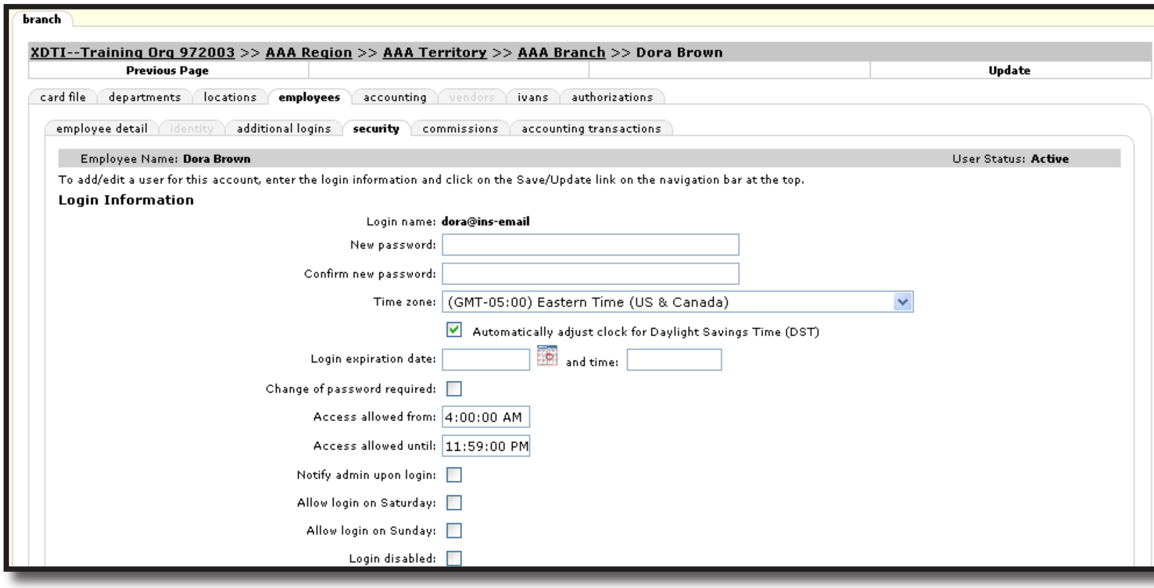
If the employee is not to be given security at the branch level, then do not add the employee to branch level unless this employee is one that will receive commission or added as an assignment to either client or policy. An employee being paid commission must be associated at both the territory and branch levels, whether they will have security access or not. They are added at the branch level so they may be assigned to the policy and given commission on the invoices. They are added at the territory level as well so that checks may be issued to them. Make sure not to add an entirely new employee but to search and use the employee added at the organization level. Granting an employee security at this level will only provide them with security access to this branch.

1. Click the **Details** icon on the summary view to display the **employee detail** tab.



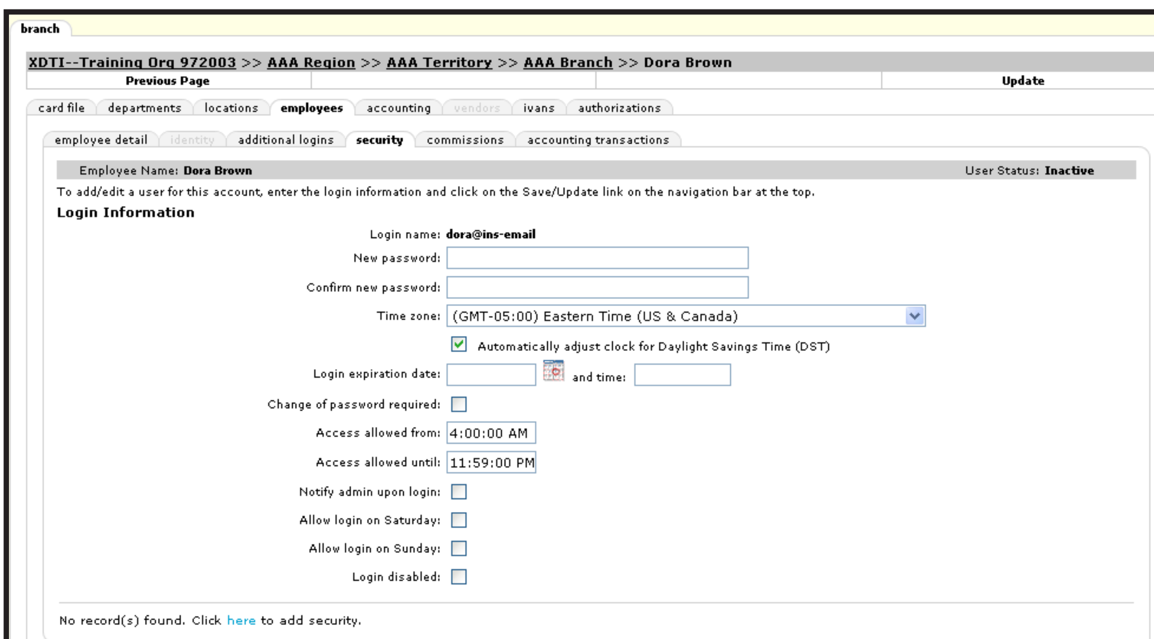


2. At the bottom of the **employee detail** screen there is a link embedded in the following sentence: **Click here to make this contact a user**. This link is only available prior to activating their security. Clicking this link displays the Employees Security page.

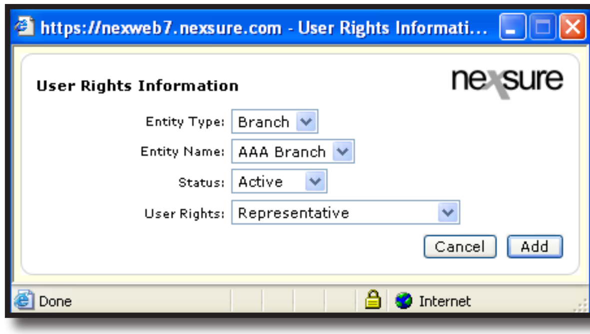


3. Complete the login information on this screen to grant them Access to your Nexsure site at this level.

4. After entering all the information, click the **Save** link on the Navigation toolbar and the screen is refreshed now displaying the security link at the bottom of the page.



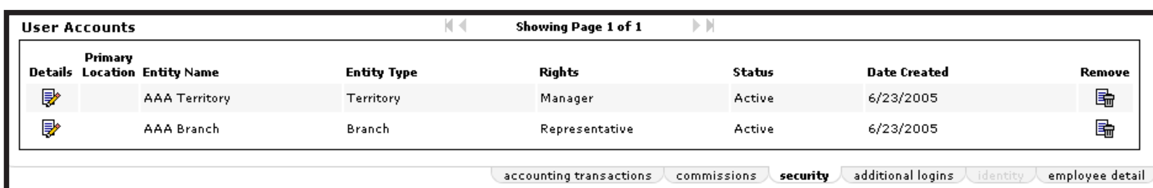
5. Click the link embedded in the sentence: **No record(s) found. Click here to add security**.



6. The **User Rights Information** pop-up window is displayed. The table below shows the options for each field. Modify the editable fields as necessary.

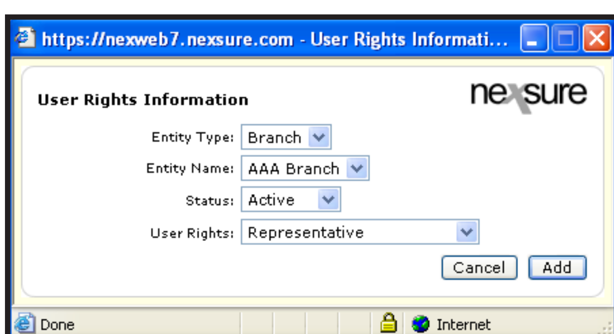
Field	Description
Entity Type	Preset to Branch and can't be modified.
Entity Name	Preset to the name of the Branch the employee has been added to and can't be modified.
Status	Defaults to Active but can be modified. Choosing Inactive disables security at this level, which means if they do not have security at any other level then the user will not be able to login.
User Rights	Determines what level of security is assigned to the user. User Rights are added through Security Setup. (See SETUP > User Rights Templates for details)

7. Click **Add** to save changes, Cancel will abort. When the Add button has been clicked, the screen refreshes and the security is displayed at the bottom of the employee file. The process is complete.



Note: If other security has been granted all levels display at the bottom of the employees security tab as shown above.

- Security for this employee may be removed by clicking the **Remove** icon.
- Clicking the **Details** icon displays the **User Rights Information** pop-up window, allowing security to be modified as necessary.



Notes

Adding and Editing Departments at Branch Level

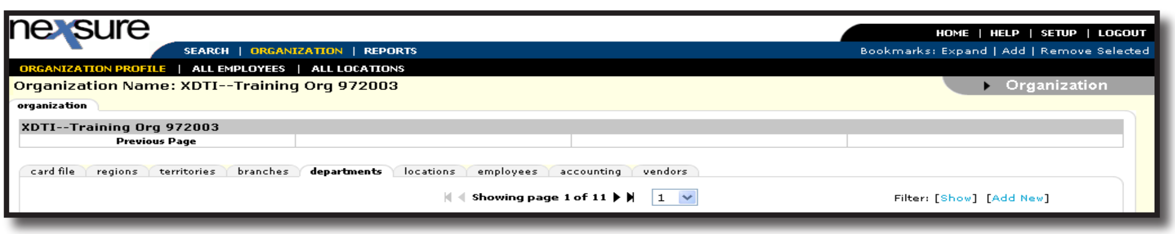
Departments hold the posting rules for the branches, so a minimum of one must be added at each branch level. This provides an organization with the flexibility to have different posting rules by department if needed.

Adding departments is like adding employees and must be added at the Organization level. The newly added department is automatically added to each created branch as well as adding the General Ledger income and expense accounts. Departments may be removed from the branches but remember one department must exist for each branch.

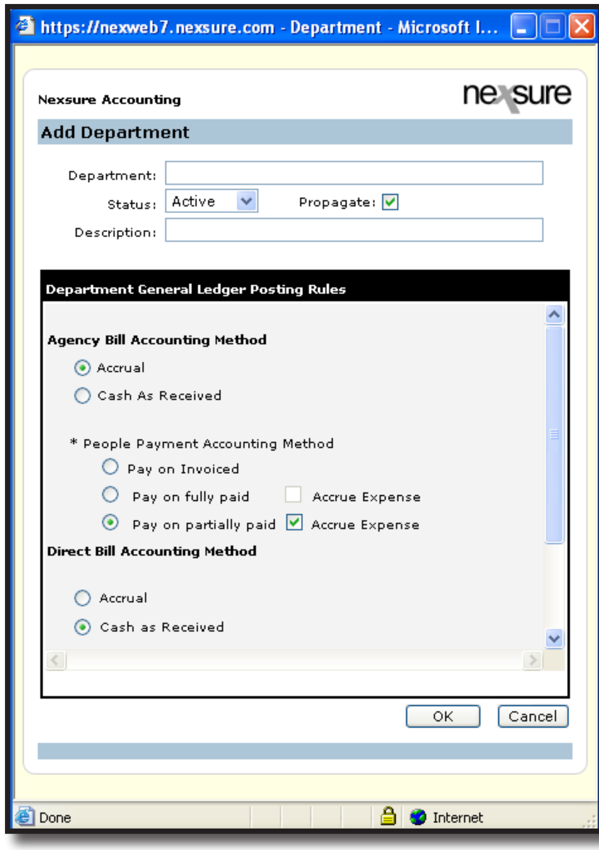
Note: Posting Rules define how an agency recognizes their income and pays their producers. Example: Commercial Lines Department recognizes Agency Bill Income on an Accrual Basis and Direct Bill on a Cash Basis. Once posting rules are saved when adding the Department, they may not be modified.

Once a department has been created at Organization level, it can be viewed at the Branch level. Any editing of the Department name or description is done at the Organization level. If the department status is changed to inactive at Organization level all branch associations are inactive as well. If the Department Status is changed to inactive at Branch level, it is only this Department that is inactive. A department may not be removed if it has been used at client, policy assignments or transaction levels. To create a department at Organization level, use the following steps:

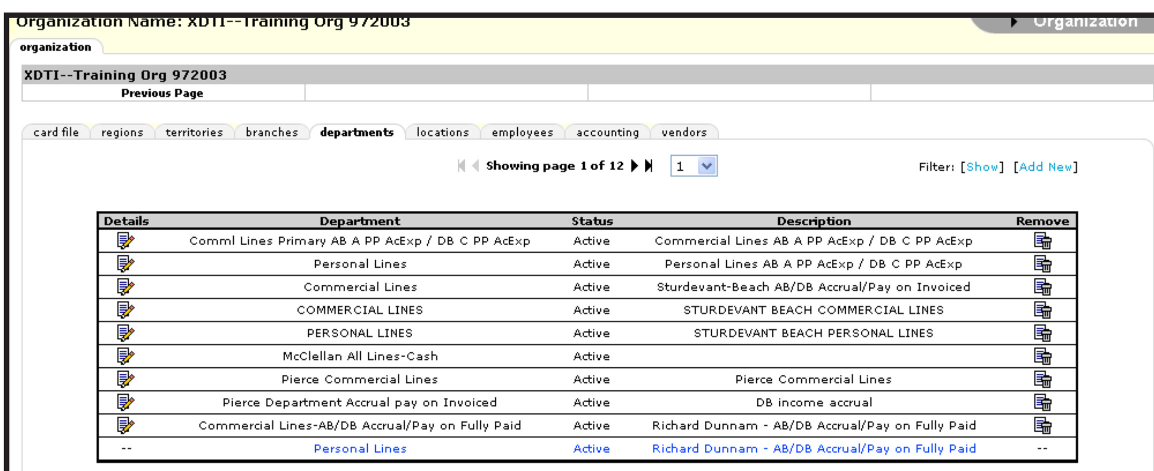
1. On the Primary menu, click the **ORGANIZATION** link.
2. Click the **departments** tab.



3. Click the **[Add New]** link located on the right side of the Departments page to display the Add Department pop-up window.
4. In the Department field, enter a name for the Department so that it may be easily identified at Client level. In the Status field, selecting Active will make the Department available to be used in a branch. Enter a description of the Department (optional).



As departments are added in Nexsure posting rules default to the Organization's posting rules. Each department may be individually altered as needed. While the department is processing, it will be displayed in a light blue color without a **Details** or **Remove** icon available. When processing is complete, the icons are visible and the text is displayed in black.



Details	Department	Status	Description	Remove
	Comml Lines Primary AB A PP AcExp / DB C PP AcExp	Active	Commercial Lines AB A PP AcExp / DB C PP AcExp	
	Personal Lines	Active	Personal Lines AB A PP AcExp / DB C PP AcExp	
	Commercial Lines	Active	Sturdevant-Beach AB/DB Accrual/Pay on Invoiced	
	COMMERCIAL LINES	Active	STURDEVANT BEACH COMMERCIAL LINES	
	PERSONAL LINES	Active	STURDEVANT BEACH PERSONAL LINES	
	McClellan All Lines-Cash	Active		
	Pierce Commercial Lines	Active	Pierce Commercial Lines	
	Pierce Department Accrual pay on Invoiced	Active	DB income accrual	
	Commercial Lines-AB/DB Accrual/Pay on Fully Paid	Active	Richard Dunnam - AB/DB Accrual/Pay on Fully Paid	
--	Personal Lines	Active	Richard Dunnam - AB/DB Accrual/Pay on Fully Paid	--

Departments are added to client and policy assignments and used based on the primary assignment when invoicing. When invoices are posted the system applies the posting rules for that department and posts to the income and expense accounts accordingly.

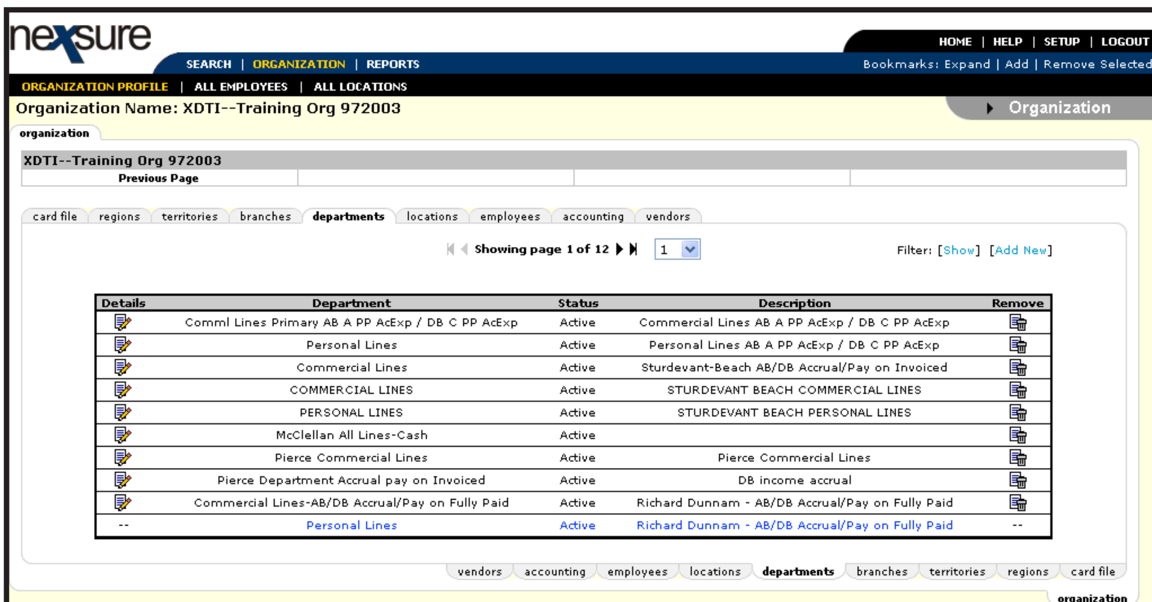
> **Note:** When units have been added to a department, the income and expenses created by the invoices are routed to the Unit GL Accounts via the department.

Use information provided in the Accounting Training Manual Chapter 2 to determine Department Posting rules.

5. To complete the process, click **Update** to save the changes or click the Cancel button to abort. Once the department is saved, the posting rules cannot be altered. If a mistake was made, remove the department and add it again. This must be done prior to adding to branches.

HOW To Access the Department Posting Rules

1. After logging into Nexsure the **Home** menu is displayed.
2. From the **Home** menu, click on the **ORGANIZATION** link on the **Primary** menu.
3. Click on the **departments** tab.
4. Click on the **Details** icon on the far left of the desired department.



If the agency has just added a new branch to the organization, add the departments to the branch by using the following steps:

1. Click the **ORGANIZATION** link on the Primary menu.

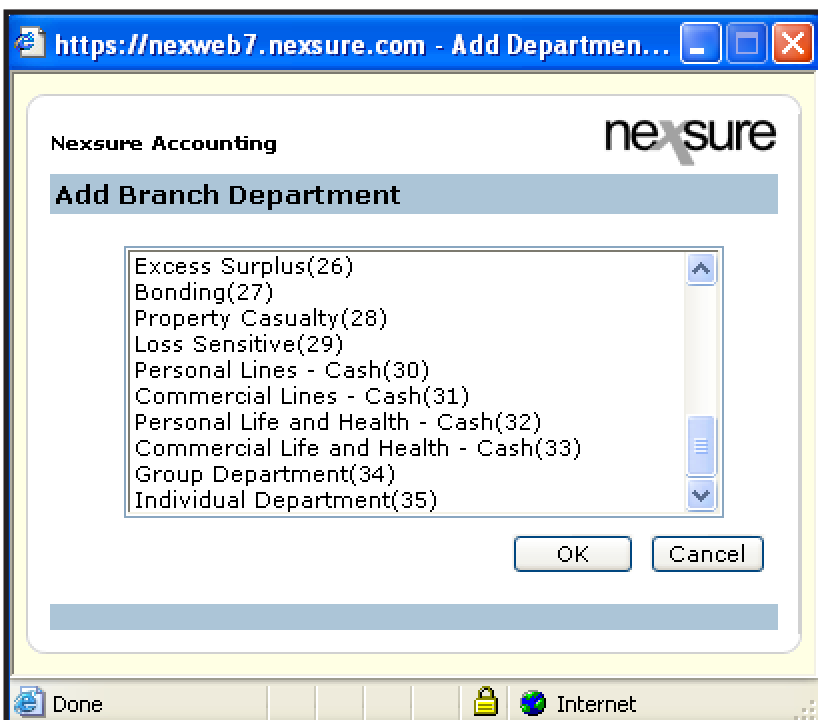
2. Click the **branches** tab.

3. Click the **Details** icon beside the branch the department should be added to.

4. Click the **departments** tab to display the Department screen.

Note: To double confirm you will be adding the department at branch level, use the navigation toolbar located just under the **organization** tab by making sure the branch name is the last one displayed.

2. Click the **[Add New]** link on the right to display the departments added previously at organization level.

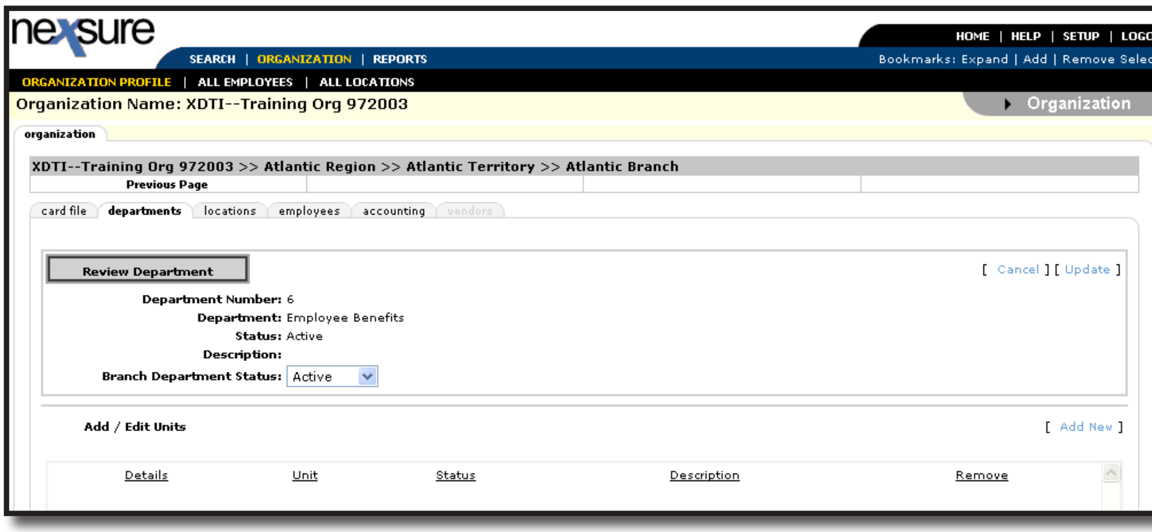


3. Click the department to add.

4. Click the **OK** button or clicking Cancel to abort the process.

5. After the department has been added, clicking on the **Details** icon displays the department details. Notice that the only thing that can be modified is the Status at this level. The Department may be changed to Inactive if it is no longer necessary, but it cannot be removed if it has been added to any Assignment or any invoice activity.

6. After changing the status, make sure to click the **Update** link in the right corner of the details screen to save changes.



HOW to Add Units

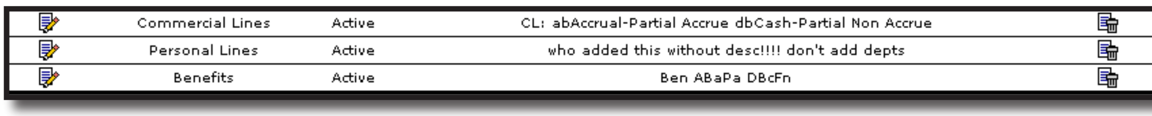
Units are profit centers used to track income and expenses separately for teams within a department. For example, you may want to know the profitability within commercial lines department and have teams to service Large, Medium and Small accounts. Adding units will automatically add income and expense account numbers to the General Ledger. Units may only be removed if no transactions exist or the units have been added to assignment screens at client or policy level. Units may be set to an inactive status to prohibit further use.

- Units are not required (optional*) and multiple units may be added to each department as necessary.
- Each Unit created will automatically have income and expense accounts added to the General Ledger.
- Each Unit has its own Income statement.
- Units are assigned to clients, policies and invoices.
- Income and Expenses from invoicing are posted at this level automatically based on the associated Departments posting rules.

Note: Units are optional in Nexsure, but once added to a department, they are required for each assignment and invoice for that department.

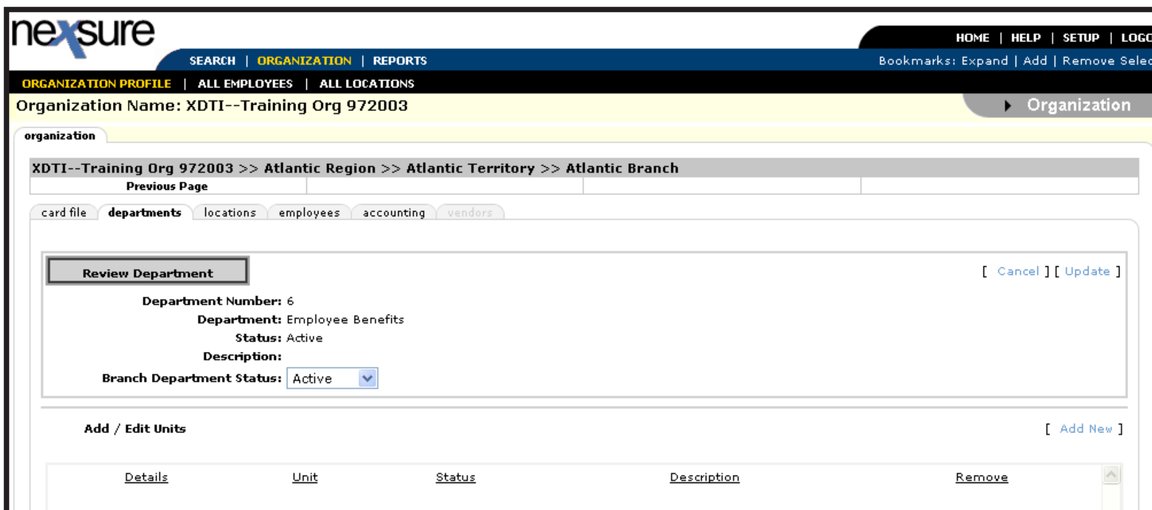
Use the following instructions to add Units to existing Department at Branch Level only:

1. Click the **ORGANIZATION** link on the Primary menu
2. Click on the **branches** tab.
3. Click the **Details** icon beside the branch the department is to be added to
4. Click the **departments** tab to display the department screen.
5. Click the **Details** icon beside the department to display the department details.



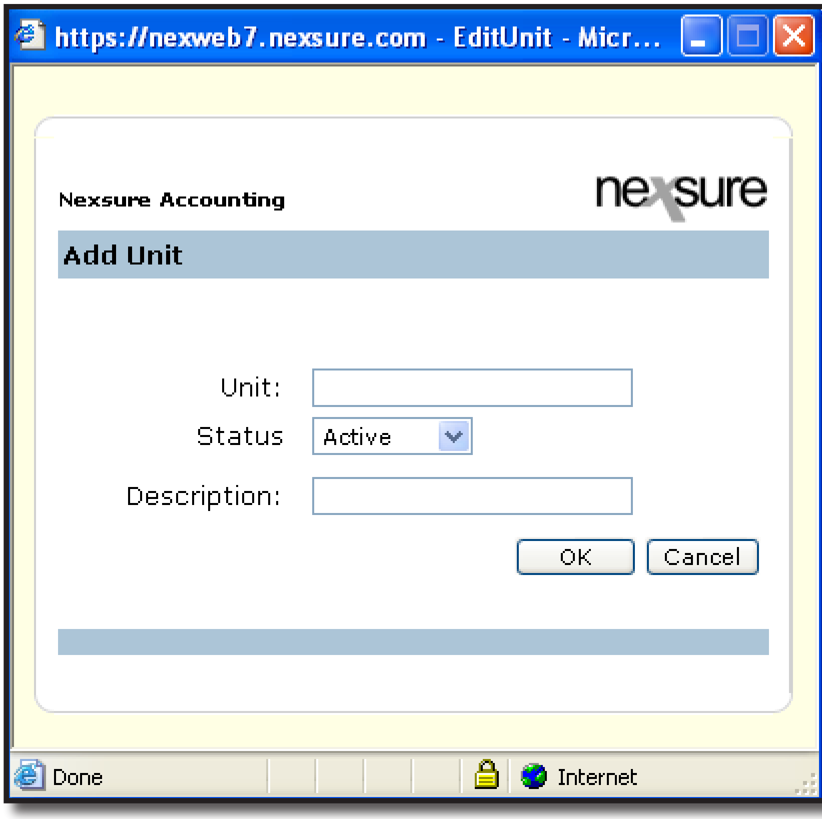
Commercial Lines	Active	CL: abAccrual-Partial Accrue dbCash-Partial Non Accrue	
Personal Lines	Active	who added this without desc!!!! don't add depts	
Benefits	Active	Ben ABaPa DBcFn	

6. Click the **Add New** link to display the **[Add New]** link on the Detail screen to add the Unit.



7. The **Add Unit** pop-up window is displayed. The table below shows the options for each field. Modify the editable fields as necessary.

Field	Description
Unit	Enter the unit name.
Status	Should remain as Active upon adding but may be changed to Inactive should it need to be unavailable later.
Description	Enter a brief description of the unit being added in the field provided



8. Click **OK** to save changes, Cancel will abort. After saving the unit, the new unit displays on the Department page.

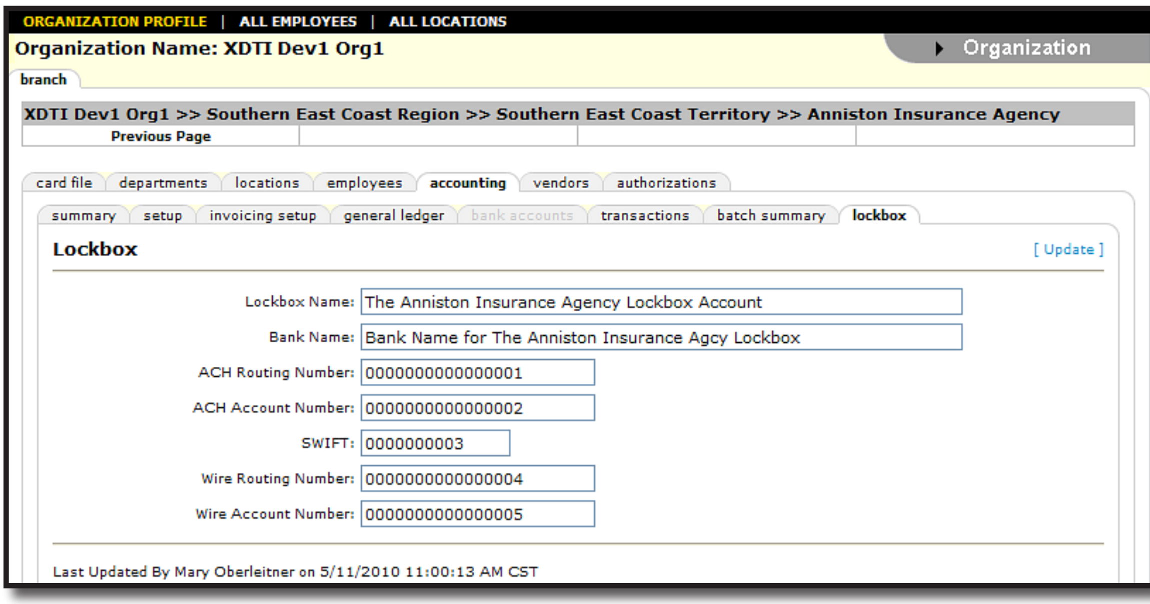
- To Unit may only be removed if not added to any assignments or transactions.
- The status of the Unit may be changed to Inactive to prevent further use if no longer needed by clicking the **Details** icon of the unit. Make sure to click OK to store changes when inactivating the Unit.

Notes

Adding Lockbox Detail

Lockbox detail is used with the existence of a client custom invoice. Client custom invoices can be added to your Nexsure site for an additional fee. Setting up the **Lockbox** is done at branch level. Navigation is as follows: **ORGANIZATION** > **branches** Tab > branch's **Details** icon > **accounting** tab > **lockbox** tab.

Enter the lockbox detail as needed. To save the record, the **Lockbox Name** box must be populated. Make sure to enter any other information that will be printed on the client custom invoice.



Note: Security access to the **lockbox** tab must be activated (For detail on setting up security see "Chapter 9" of this manual).

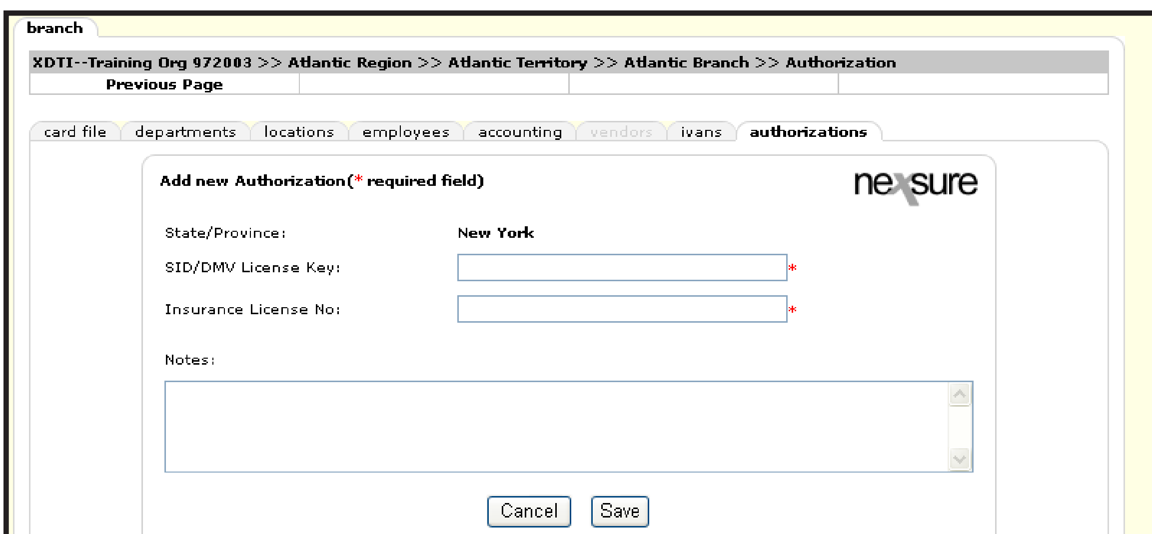
Notes

Adding Authorizations

In New York to issue Auto ID cards the New York DMV requires a license key and Insurance license number. This information must be entered into Nexsure for each Branch issuing New York Auto ID cards from Nexsure. To setup go through the following steps:

1. Click the **ORGANIZATION** link on the Primary menu.
2. Go to the **branches** tab.
3. Click the **Details** icon beside the Branch name.
4. Click the **authorizations** tab.
5. To add authorizations, click the **Add New** link located on the navigation toolbar to display the Add New Authorization screen.

6. Enter the DMV provided License Key and Insurance Number and any notes if desired. Click the **Save** button to store data or Cancel to abort.



7. After the correct information is saved, New York Auto ID cards can be issued from Client Servicing and selecting the **Verification** option. (See Auto ID cards for processing details).

Notes