Chapter 4

Actions Setup

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- ***** Determining and Setting up Action Topics
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Determining and Setting up Action Types

Actions are used as follow up reminders or to document something. Types are a default description clarifying the Action and are associated with Action Topics. The topic might be looked at as a group or category for the Action (reminder or documentation). **Types** are not unique and may be reused with any topic. Make sure when adding Action types not to repeat them since one is all that will be needed regardless of the number of associations.

Once an Action is added to a client, policy or for you personally, it cannot be removed. So, before adding the first Action to Nexsure either manually or automatically through the Policy Servicing page, it is best to determine what types will be important to your Organization. It is important to review the default list provided in your Organization and modify the types to fit your workflow. These types are global and will be used by all personnel at any level of the Organization.

• To access Action Type setup, click the **SETUP** link on the Utility menu. Click **Actions** on the Setup Console. Click the **Types** tab.

nexsure						HOME	HELP S	ETUP LOGOU
SEARCH	ORGANIZ	ATION REPORTS			Bo	okmarks: Expan	d Add R	emove Selecter
Use the navigation below to access Nexsure setup information.								
Setup Console 🛛 🗵	actions	topics types						
Expand Minimize			Showing page 1 of 2	2 Page 1	~	Filt	er: [Show]	[Add New]
Actions Color Schemes	Details	Action Type	Description	Date Created	Status	Updated by	Updated da	te Remove
Integration Downloads Lookup Management	•	Acknowledgement rcv'd from Co?	Used when waiting for an acknowledgement from the company that has special ramifications.	04/02/2002	Active			E
+ Opportunities		Annotation		04/20/2004	Active			E
Print Blank Forms	*	Appointment		03/25/2002	Active			E
Programs		Call Client		03/25/2002	Active			E
Security Administration		Call Underwriter		03/25/2002	Active			B
,		Cancelled By Agent		11/23/2004	Active			B
		Cancelled By Carrier		11/23/2004	Active			B
		Cancelled By Insured		11/22/2004	Active			R_

The Action types added to every Organization on creation can be found in the list below titled **Nexsure Action Type Defaults**. Take a look at these types and compare to your current workflow to determine what should be changed or added.

Nexsure Action Type Defaults

Туре	lcon	Considerations
Acknowledgement rcv'd from Co?	General	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Annotation	Information	Annotation is used when Servicing policy requires that an Action be added. Not recommended for modification.
Appointment	Calendar	Appointment is used when moving Actions to Outlook Calendar to identify scheduled items.
Call Client	Phone	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Call Underwriter	Phone	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Cancelled By Agent	General	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Cancelled by Carrier	General	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Cancelled by Insured	General	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Check Status	Phone	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Create Meeting Agenda	Description	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Information needed	Information	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Legacy System	General	If items were converted from your previous system this type is used to identify them. Not recommended for modification.
Opportunity	Open Folder	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Payment Received?	Question mark	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.

Туре	lcon	Considerations
Policy Received?	Question mark	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Presentation	General	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Received from Carrier?	Question mark	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Received from Client?	Question mark	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
Submit to Carrier?	Information	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.
T-filed	Closed Folder	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.

HOW to Add a New Action Type

Before adding new Action Types make sure to search making certain that one does not already exist.

- Click the [Show] link at the top of the summary page to display the Search filters.
- In the type field enter a few characters of the type to add. In the Status field, click the drop-down arrow to select All to include all active and inactive Action Types in your search results. Click the Search button.
- If there is no match add the new type. If there is a match, click the **Details** icon to modify the Action Type if necessary. See "HOW to Modify an Existing Action Type" in this chapter.

To add a new **Type**, click the **Add New** link on the right at the top of the summary page to display the **Add New Action Type** pop-up window.

Add New Ac	tion Type	nevsure
Type: Status Icon:	Active V General V	
Description:		
		Save Cancel

Enter text in the **Type** field. The text will display in a list for selection of an Action Type. **Status** defaults to Active. Click the **Icon** drop-down box to select an icon to display on the Action summary. The Icon list is not editable.

Note: The type icon also determines how the action interacts with Microsoft Outlook
synchronization. Assigning a type to a Calendar 🔤 or Phone 😁 icon will synchronize the
action with your Outlook Calendar. Assigning any other icon to the type will synchronize
the action with the Outlook Task pad.

Enter a description in the **Description** field. The description will assist when revisiting the types for future additions. This description is for setup only and will not be displayed on the Action itself.

4	oona oones	
₽	🚩 High	Claim 😪 Call Client
	ined called in c	aim-

Click the **Save** button to complete the addition of the new **Type**. If **Cancel** is selected instead the addition is aborted.

HOW to Modify an Existing Action Type

After reviewing the list of default types, if it is decided that an existing Action Type should be modified to meet workflow needs, click the **Details** icon to display the Action Type. Make any modifications and click the **Save** button to keep the changes. Clicking the **Cancel** button will abort any changes.

actions	topics types							
			K 4	Showing page 3 of 9 ▶ 🕅	Page 3 💙	F	ilter: [Shov	v] [Add New]
Details	Details Action Type							
*	Check Status		Update Exis	sting Action Type		ne sure		B
P	Claim Frequency							
*	Claim Payment							B
P	Claims Review		Type:	Create meeting agenda				B
P	Class of Business		Status	Active 🔽				B
*	Create meeting agenda		Icon:	Description 💌				Ē
*	Declined to quote (to claims		Description:					Ē.
*	Documentation							B
*	Documenting Conversation							Ē
*	Fax from Insured				ſ	Save Cancel		Ē
					(es to	pics actions

Note: Altering Action types will not only affect newly added Actions, but will also alter existing actions including closed items.

An Action Type may also be modified to change its Status to **Inactive** so that it will not be available for selection when adding a new action. An Action Type that is **Inactive** may be modified and changed to an **Active** status. To locate an Inactive Action Type, click the **[Show]** link at the top of the summary page to display the Search filters. In the **Status** drop-down menu, select **Inactive** and click the **Search** button to display Inactive types. Click the **Details** icon of the Inactive type and change its Status to **Active**. Click the **Save** button to save changes or **Cancel** to abort changes.

actions	topics types						
		Showing p	page 8 of 8 ▶ M Page	8 🛩	F	ilter: [Hide]	[Add New]
Search Crit Action Typ	teria Je:	Created Date (Fr):	Created Date (To)	:	Descripti	ion:	
Statu	Inactive 🖌	Updated Date (Fr):	Updated Date (To)		Updated	By:	
	All Active					Search	Clear
Details	A Inactive	Description	Date Created	Status	Updated by	Updated dat	e Remove
*	sign Disclaimer for flood		03/13/2007	Active			E
*	Sold Property		03/20/2007	Active			B
>	Submit to carrier	Transfer report to carrier	03/29/2002	Active			

Note: Any actions that were previously created using that type will remain unchanged. If an action type is **Inactive**, any active action topics with that type will still be displayed on the **actions** tab.



Notes	

Determining and Setting up Action Topics

Topics might be looked at as a group or category for the Action (reminder). When determining what Action Topics should be added, first take a look at your workflow keeping in mind that a lot of what was previously tracked through an Action-like list is now tracked automatically on Nexsure's **Home** menu links. To avoid workflow duplication consider that Nexsure tracks all in-process: Opportunities, **Marketing Submissions**, **Binders**, **Edits**, **Audits**, **Expirations**, **Endorsements**, **Cancellations**, and **Claims**. As each item is moved to the next stage, posted or aborted they are automatically removed from Home page tracking without having to manage a separate Action. Actions are also used to document activity that is not created by Nexsure servicing, such as documenting a phone call.

Below is the list of default Topics added to every new Organization upon creation. Take a look at the list and evaluate its need. Remove those that are not needed and add ones that will be important to your Organization. Once an Action topic has been added only the description may be modified.

Торіс	Considerations			
Activity	<i>If items were converted from your previous system this type is used to identify them. Not recommended for modification.</i>			
Cancellation	Used by Nexsure when adding a Cancellation. Cannot be removed.			
Claim	Used by Nexsure when adding Claims. Cannot be removed.			
Endorsement	Used by Nexsure when adding Endorsements. Cannot be removed.			
General Audit	Used by Nexsure when adding Audits. Cannot be removed.			
Marketing	Used by Nexsure when Marketing existing policies. Cannot be removed.			
Memo	<i>If items were converted from your previous system this type is used to identify them. Not recommended for modification.</i>			
New Business	Used by Interface when adding a new policy. Cannot be removed.			
Non-Renewal	Used by Nexsure when identifying non-renewal policies. Cannot be removed.			
Note	<i>If items were converted from your previous system this type is used to identify them. Not recommended for modification.</i>			
Policy Edit	Used by Nexsure when adding Edits. Cannot be removed.			
Prospecting	May be removed if not needed.			
Renewal	Used by Nexsure when Renewing policies. Cannot be removed.			
Reporting Policies	May be removed if not needed.			

Nexsure Action Topic Defaults



HOW to Add Action Topics

To add new Action Topics, click the **SETUP** link on the **Utility** menu. Click the **Actions** link in the **Setup Console**. Click the **topics** tab to display existing topics. Like types it is important to search for existing topics before adding new ones.

actions	topics types						
		Showing	page8of8▶) Pa	ge 8 💙	F	Filter: [Hide] [Add New]
Search Cri Action Typ	teria De:	Created Date (Fr):	Created Date	(To):	Descript	ion:	
State	us: Inactive 🔽	Updated Date (Fr):	Updated Date	(To):	0 Updated	By:	
	All					Search	Clear
Details	Active A Inactive	Description	Date Created	Status	Updated by	Updated date	Remove
	sign Disclaimer for flood		03/13/2007	Active			B
	Sold Property		03/20/2007	Active			B
>	Submit to carrier	Transfer report to carrier	03/29/2002	Active			

Make sure to search making certain that the topic being added does not already exist.

- Click the [Show] link at the top of the summary page to display the Search filters.
- In the topic field enter a few characters of the topic to add. In the Status field, click the dropdown arrow to select All to include all active and inactive Action Topics in your search results. Click the Search button.
- If there is no match add the new topic. If there is a match, click the **Details** icon to modify the Action Topic if necessary. Once a topic is added, only the **Status** and **Description** can be modified.

To add a new **Topic**, click the **Add New** link on the right at the top of the summary page to display the **Add New Action Topic** pop-up window.

Add New Ac	tion Topic	ne sure
Topic:]
Status:	Active 💙	
Description:		
		Save Cancel
_		

Enter the new **Topic** and a description in the **Description** field. The description will assist when revisiting the topics for future additions. This description is for setup only and will not be displayed on the Action itself. The **Status** will default to **Active**.

Click the **Save** button to complete the addition of the new **Topic**. If **Cancel** is selected instead the addition is aborted.

Note: Once a **Topic** is added only the **Description** and **Status** can be modified.

Notes

Associating Type to Topics

In order to use newly added Types and Topics they must be associated to one another in an action. To associate Action Types to Topics, click the **SETUP** link on the Utility menu. Click **Actions** on the **Setup Console**. By default, actions are displayed by topic and the subcategorized by type. First use the Search Filter to look at the types already associated with Topics.

Setup Console 🛛 🗵	actions	opics types pla	ans					
Expand Minimize			Showin	gpage 1 of 15▶	Page 1 💙		Filter: [Hide]	[Add New]
Actions Color Schemes Integration Downloads	Search Crit Actio Alert M	eria n Topic: essage:	^	Action Type: Status: All 🗸	•	Due I Priorit	^{(n:} All ^{ty:} All ♥ Search (Clear
 Lookup Management Opportunities 	Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
Print Blank Forms Programs		······	Legacy System	0 Day(s)	Closed	Normal	Add New	
Document Templates		_			_	plans	人 types 人 topi	cs actions

To search the list of associated Topics and Types:

- Click the [Show] link at the top of the summary page to display the Search filters.
- In the topic field enter a few characters of the topic or type and click the Search button to display the topic and associated types that contain your search criteria. Each search result will display on a separate page by Action Topic with its associated topics. Use the page navigation arrows to view each page.

actions	topics types p	lans					
		Showing	page 2 of 15 ▶ 🕅	Page 2 💙		Filter: [Show]	[Add New]
Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
	Cancellation						
*		Annotation	1 Week(s)	Open	Normal	Service	E
*		Appointment	10 Day(s)	Open	Normal	Add New	

If there is no association found after searching or one needs to be added, click the **Add New** link on the right at the top of the summary page to display the **New Actions** pop-up window.

New Action	ne sure
Trigger:	Add New 💙 Allow cancel/modify 🗹
Topic:	×
Type:	×
Due In:	2 week(s)
Priority:	Normal
Status:	Open 💌
Description:	
	v
Alert?:	
Link	
action?:	
	Save Save & Add Cancel

The **Trigger** selection default for a new action is **Add New**. Triggers create an action to be displayed when a policy is **In Forced** from a **Bound**, **Future**, **Expired** or **Marketing** stage. Action **Triggers** are optional. If this action is not to be used for a **Trigger**, do not change the **Add New** default. For information about setup of Action **Triggers**, see "Determining and Setting Up Action Triggers" later in this chapter.

Click the **Topic** drop-down box and choose the **Topic** the **Type** is to be associated with. If the **Topic** is inactive, the topic will not be available for selection when adding a new action.

New Actions	, ne sure
Trigger:	Add New 💙 Allow cancel/modify 🗹
Topic:	V
Type:	Activity
Due In:	Binder Cancellation
Priority:	Certificates Claim
Status:	Endorsement
Description:	Marketing Memo New business Non-renewal
Alert?:	Personal
Link	Policy Edit Prospecting
action?:	Renewal
	Verifications
	[Save] Save & Add Cancel

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Click the Type drop-down box and select the type to be associated with the topic. If the **Type** is **Inactive**, the **Type** will not be available for selection when adding a new action.

New Actions	5	ne sure
Trigger:	Add New 👻	Allow cancel/modify 🗹
Topic:	Claim	*
Type:		~
Due In:	A descende descenario activitationer Co.2	
Priority:	Appointment	
Status:	Bind and Order Call Client	
Description:	Call Underwriter Cancelled By Agent Cancelled By Carrier Cancelled By Insured Check Status	
Alert?:	Create meeting agenda Exposure Checklist	
Link	Information Needed	
action?:	Legacy System Marketing Strategy Meeting Payment received? Policy Received? Presentation Received from Carrier? Received from client? Submit to carrier Tufiled	

Click the **Due In** drop-down box to select the number of days the open action will generally be due in. Use the vertical scroll bar to select a number of days that may be out of view. The user will have the option to change the number of days on their action.

The **Priority** drop-down box has 2 choices – Normal and High. Selecting **High** will show the Action with a red flag ***** indicating its importance. A normal priority has no icon.

>	Sonia Jones				
>	🚩 High	Claim 😪 Call Client		Open	12/21/2003 12:01 AM IDLW
	insd called in claim-				
_					
	Auto Check				
>		Reporting Policies 密 Call Client	AUTO123456; AUTC -12/15/2004)	Open	12/24/2003 12:01 AM MST
	Sent Agent of Reco	ord Letter To Insured, See	e If It Has Been Retur	ned.	

Set the status to **Open** if the Action requires a follow up or **Closed** if documentation only.

New Action	s ne sure
Trigger:	Add New 🛛 Allow cancel/modify 🗹
Topic:	Claim
Type:	Information Needed
Due In:	2 week(s)
Priority:	Normal
Status:	Open 💌
Description:	
Alert?:	
Link	
action?:	
	Save Save & Add Cancel

The Description field is only for this association to identify why it was added for future reference. It does not display on Actions added.

The setup of an action allows for an alert message to display when the action is being closed. Select the **Alert** check box to display an **Alert Message** box.

New Action	₅ ne su	re
Trigger:	Add New	~
Topic:	Claim	~
Type:	Information Needed	*
Due In:	2 week(s)	*
Priority:	Normal	~
Status:	Open	~
Description:		~
Alert?:		
Alert message:	Notify Claims Manager if estimate is over \$50,000 or there is any evidence of Personal Injury.	~
Link action?:		
	Save Save & Add Can	cel

Enter a message up to 200 characters long to display when a staff member is closing the action. Once the alert is added to the action, an Alert icon is displayed next to the affected action when it is saved. From the **actions** tab, hold the mouse pointer over the **Alert** 1 icon to display the message.

actions	topics types pla	ns					
		Showing pa	age 3 of 15▶₩	Page 3 💌		Filter: [Show]	[Add New]
Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
	Claim						
		Acknowledgement rcv'd from Co?	3 Day(s)	Open	Normal	Add New	B
		Annotation	0 Day(s)	Closed	Normal	Service	
1		Call Client	4 Day(s)	Open	High	Add New	B
🔛 🍐	<u>•</u> ee	Information Needed	2 Week(s)	Open	Normal	Add New	E
P	Notify Claims M	lanager if estimate is ov	/er \$50,000 or	Closed	Normal	Add New	E
	there is any evi	dence of Personal Injur	y.		plans	types topic	s actions

Actions may also be setup to open a subsequent action when the current action is closed. Select the **Link Action** check box to link the current action to a following predetermined action. Once the **Link Action** check box is selected, options display to identify the linked action that will follow the current action. Any action that was previously linked to the new action will display in the **Preceding link** box and cannot be modified at this point.

Link action?:	
Preceding link:	-
Following link:	
Topic:	*
Type:	~
Default memo:	A. W
Allow cancel/modify?:	

Nexsure.

In the **Following link** area, the **Topic** and **Type** lists are available to select the topic and type for the action that is to follow the current action when it is closed. Once a **Topic** is selected, action types already associated

250 characters long to default in the resulting action memo section.

 Note:
 Annotation
 Added
 by

with that topic are then available to select in the **Type** list. In the **Default memo** box, enter a memo up to

Select the **Allow cancel/modify** ? check box to enable the **Cancel**, **Topic** and **Type** options in the following action. When the linked action is displayed, the staff member must save the action. If the **Allow cancel/modify** ? check box is not selected, the staff member will not be able to modify or cancel the following action.

Click **Save** to finish and add just this one association, or **Save & Add** to save this association and display a new **Add New** screen for another association. Click **Cancel** to abort the association.



The new associated **Action Type** and **Topic** are displayed on the **actions** tab. A **Link** icon will display if the **Action Type** and **Topic** is linked to a following action. An **Alert** 1 icon will display if an alert was added to the **Action Type** and **Topic**.

actions	topics types pla	ns					
		Showing p	age 3 of 15 ▶ 🕅	Page 3 💌		Filter: [Show]	[Add New]
Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
	Claim						
P		Acknowledgement rcv'd from Co?	3 Day(s)	Open	Normal	Add New	B
		Annotation	0 Day(s)	Closed	Normal	Service	
P		Call Client	4 Day(s)	Open	High	Add New	B
🐶 🔥	69	Information Needed	2 Week(s)	Open	Normal	Add New	
P		T-filed	0 Day(s)	Closed	Normal	Add New	B

HOW to Modify an Action Type and Topic

To modify an **Action Type** and **Topic**, click the **SETUP** link on the **Utility** menu. Click **Actions** on the **Setup Console**. By default, actions are displayed by topic and then subcategorized by type. Click the **Details** icon of the **Action Type** and **Topic** you want to modify. The **Update Actions** screen displays.

Update Actions	ne sure
Trigger:	Add New 🛛 Allow cancel/modify 🗹
Topic:	Claim
Type:	Information Needed
Due In:	2 week(s)
Priority:	Normal 💌
Status:	Open 💙
Description:	<u>^</u>
	V
Alert?:	
Alert message:	Notify Claims Manager if estimate is over \$50,000 or there is any evidence of Personal Injury.
Link action?:	
Preceding link:	
Following link:	
Topic:	Claim 🗸
Type:	Acknowledgement rcv'd from Co?
Default memo:	Claim number and reserve information received
Allow cancel/modify?:	
	Save Cancel

The Action Type and Topic cannot be changed. An alert message may be changed by editing the text in the Alert message box. An alert message may be removed by clearing the Alert? check box. To remove a link between actions, clear the Link action? check box. The following action Topic, Type and Default memo may be changed. Click the Save button to save any changes or click Cancel to abort changes to the Action Type and Topic.

Notes

Determining and Setting Up Action Triggers

Action Triggers create an action when a policy is In Forced from a Bound, Future, Expired or Marketing stage. Action Triggers are optional. When a new action is created in SETUP by clicking [Add New] on the

actions tab or an existing action is modified by clicking its **Details** icon from the actions summary, the **Trigger** selection is displayed. For information on setting up new actions see "Associating Type to Topics" earlier in this chapter. For information on modifying an existing action see "HOW to Modify an Action Type and Topic" earlier in this chapter.

HOW to Add an Action Trigger

From a new or existing action, click the **Trigger** drop-down box. The default selection is **Add New** indicating the action is not currently used as a **Trigger**. Action **annotations** used by Nexsure servicing cannot be used for trigger events. Select the desired **Trigger** option from the list. Each In Force **Trigger** option may be used only once in an Organization. If the option is already in use, the option will be highlighted in gray and may not be selected.

Update Acti	ons	ne sure
Trigger:	Add New	Allow cancel/modify
Topic:	Add New In Force Bound In Force Expired	· · · · · · · · · · · · · · · · · · ·
Type:	In Force Future In Force Marketing	dd
Due In:	1 day(s)	~
Priority:	Normal	~
Status:	Open	*
Description:		~
Alert?:	✓	~
Alert message:	Issue Binder only if within agency auth or written confirmation from carrier if c authority.	ority. Request Binder Automotive States of binding
Link action?:		
		Save Cancel

The **Allow cancel/modify** check box to the right of the **Trigger** selection controls whether the user may cancel or modify the **Topic/Type** of the action triggered when they click the **In Force** link. If the box is not checked when the action is setup, the **Cancel** button will be inactive and the **Topic** and **Type** boxes will be grayed out on the triggered action. If the **Allow cancel/modify** box is checked, the user will be able to cancel the triggered action and/or select a different **Topic** or **Type** on the triggered action.



Each Action **Topic/Type** combination may only be used for one **Trigger** event. Action **Triggers** are identified on the **action** tab summary under the **Trigger** column.

actions	topics types	plans					
		🛚 🖣 Showing pa	ge 14 of 15▶▶	Page 14 💙		Filter: [Show]	[Add New]
Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
	Renewal						
🛛 🔛 🧕	2	Annotation	0 Day(s)	Closed	Normal	Service	E
*		Appointment	10 Day(s)	Open	Normal	Add New	E
*		Check Status	3 Day(s)	Open	Normal	Add New	B
>		Exposure Collection	2 Week(s)	Open	Normal	Add New	E
*		Policy Checked	2 Week(s)	Open	Normal	In Force Future	B
🦻	69	Send Thank you Letter	10 Day(s)	Open	High	Add New	
>		T-filed	0 Day(s)	Closed	Normal	Add New	B

HOW to Remove or Change an Action Trigger

To assign a trigger event to a different action, the trigger must first be removed from the existing action. To remove an action **Trigger**, locate the trigger event on the action tab summary. The trigger event is shown on

the **Trigger** column. Click the **Details** icon of the action with the trigger event to be removed. From the **Trigger** drop-down list, select **Add New** to remove the trigger from the action. **Save** the action to remove the **Trigger** or **Cancel** to keep the **Trigger** event on this action.

Update Act	tions	nevsure
Trigger		
nggen.	In Force Future	Allow cancel/modify 🕑
Topic:	In Force Bound	
Type:	In Force Expired In Force Future	
Due In:	In Force Marketing	~
Priority:	Normal	*
Status:	Open	~
Description	:	~
		<u> </u>
Alert?:		
Link		
action?:		
		Save Cancel

When the **Trigger** event, **In Force**, **Bound**, **Expired**, **Future** or **Marketing**, is removed from an action it is available to select as the **Trigger** on another action. Actions that already have a **Trigger** event selected may not be used for a second **Trigger** event. For help adding the **Trigger** to a new action, see "HOW to Add an Action Trigger" earlier in this chapter.

Notes



Determining and Setting Up Action Plans

Action Plans are used to automate workflow and help document repetitious tasks by defining a series of actions with a plan. An organization may have multiple Action Plans. Prior to setting up a new Action Plan, all actions that will be used in the plan must exist. Actions from several different topics may be associated under one plan.

HOW to Add an Action Plan

Click **SETUP** on the **Utility** menu. Click **Actions** on the **Setup Console**. Click the **plans** tab. Any existing **Action Plans** display in a summary view.

Setup Console	actions	topics types	plans					
Expand Minimize				Showing page 1 of 1	e 1 💙		Filter: [Show]	[Add New]
Actions	Details	Action Plan	Action Topic	Action Type	Action S	tatusDue In	Priority	Remove
Color Schemes	*	Renewal Marketing	9					
± Downloads			Renewal	Appointment	Open	10 Day(s)	Normal	
Lookup Management			Renewal	Information Needed	Open	5 Day(s)	Normal	
± Opportunities			Renewal	Marketing Strategy Meeting	g Open	2 Week(s)	Normal	
Print Blank Forms			Renewal	Call Underwriter	Open	2 Day(s)	Normal	~
Programs	_					plans	types topi	ics actions

Click the [Add New] link to display the Add New Action Plan dialog box. Enter the Plan Name and a Description for the plan. The Name may be up to 20 characters long. The Description is limited to 50 characters.

Add New Acti	on Plan	nevsure
Plan Name:	Producer New Bus	
Plan Description:	Use for all Producer driven new	business
		*
		Next Cancel

Click **Next** to select the actions that will make up the plan. In the **Select or Modify Action Plan** dialog box select the **Action Topic**. The associated **Action Types** are listed. Select each **Action Type** for the **Action Topic** that will be used in the plan. Use the vertical scroll bar to view all possible selections.

Select or Mod	ify Action Plan	ne sure
Action Topic:	New business	
Action Types:	Payment received?	<u> </u>
	Policy Received?	
	Presentation	
	Submit to carrier	~
Select Save & Ac	ld to add or remove actions from anoth once all selections have been ma	er action topic. Select Next de.
	Next	Save & Add Back

If the Action Plan will consist of actions under only the one Action Topic, click Next. If the Action Plan will include actions from another Action Topic, click Save & Add to save the selections from the first topic and continue to select the next Action Topic and all Action Types under that topic. When no further Action Topic selections need to be made, click Next.

The **Action Plan Sequence** dialog box displays. In the **Seq#** list, change the sequence of the actions if necessary. The sequence determines the default due date of open actions when the plan is added by the user. To change the sequence, highlight the action to move and use the up/down arrows to move the action. Click **Finish** when the sequence is correct.



The new action plan is added to the **plans** tab.

actions	topics types	plans					
		Showing p	page 1 of 1	1 🗸		Filter: [Show]	[Add New]
Details	Action Plan	Action Topic	Action Type	Action Status	Due In	Priority	Remove
	Producer New Bus						
		New business	Appointment	Open	1 Day(s)	Normal	
		New business	Exposure Checklist	Open	5 Day(s)	Normal	
		New business	Marketing Strategy Meeting	Open	2 Week(s)	Normal	
		New business	Submit to carrier	Open	2 Week(s)	Normal	
		New business	Presentation	Open	1 Week(s)	Normal	
		New business	Bind and Order	Open	0 Day(s)	Normal	
>	Renewal Marketing						B
		Renewal	Appointment	Open	10 Day(s)	Normal	
		Renewal	Information Needed	Open	5 Day(s)	Normal	
		Renewal	Marketing Strategy Meeting	Open	2 Week(s)	Normal	
		Renewal	Call Underwriter	Open	2 Day(s)	Normal	\sim

HOW to Modify an Action Plan

Click the **Details** icon of the plan to change the name or associated actions. Changes to the plan will apply to plans added by users after the modification is saved. Existing plans are not changed.

Changes to the Action Topics and Types themselves automatically propagate to the plan.

HOW to Remove Action Topics and Types

To remove an Action Type and Topic, click the SETUP link on the Utility menu. Click Actions on the Setup Console. By default, actions are displayed by topic and then subcategorized by type. Use the navigation link at the top of the page to view other pages. Click the Remove icon to delete the association of the Action Topic and Type. Action Topics used for annotations will not have an active Remove icon.



Default Action Association List

Торіс	Туре	Days Due	Status	Priority
Activity	Legacy System	0	Closed	Normal
Cancellation	Annotation	7	Open	Normal
	Appointment	10	Open	Normal
	Cancelled By Agent	0	Closed	Normal
	Cancelled by Carrier	0	Closed	Normal
	Cancelled by Insured	0	Closed	Normal
	Check Status	15	Open	Normal
	Payment Received?	4	Open	High
	Received from Carrier?	27	Open	Normal
	T-filed	0	Closed	Normal
			· · ·	
Claim	Acknowledgement rcv'	d 3	Open	Normal
	from Co?	0	Closed	Normal
	Coll Client	0	Onon	High
		4	Open	nign Normal
	I-med	0	Closed	Normai
Endorsoment	Annotation	20	Onen	Normal
Endorsement	Annotation Check Status	20	Open	Normal
		25	Open	Normal
	Information needed	10	Open	Normal
		30	Open	Normai
	Т-піед	0	Closed	Normai
Concerci Audit	Annotation	0	Closed	Normal
General Audit	Annotation	0	Closed	Normal
		4	Open	Normal
		3	Open	Normal
	Information Needed	4	Open	Normal
	Payment received?	5	Open	Normal
		120	Open	Normai
	Т-піед	U	Closed	Normai
has doubles	A		Classed	Nervel
Iviarketing	Annotation	0	Closed	Normal
		30	Closed	Normai
	Opportunity	0	Closed	Normai
Momo	Logacy System	0	Closed	Normal
Wento	Legacy System		ciosed	Normai
New Business	Annotation	0	Closed	Normal
The W Dusiness	Annointment	1	Onen	Normal
	Call Client	3	Open	Normal
	Call Underwriter	3	Open	Normal
	Check Status	5	Open	Normal
	CHECK Status		Open	NUTHAI

Торіс	Туре	Days Due	Status	Priority
	Information needed	3	Open	Normal
	Payment received?	3	Open	Normal
	Policy received?	27	Open	Normal
	T-filed	0	Closed	Normal
Non-Renewal	Annotation	0	Closed	High
	Appointment	0	Closed	Normal
Note	Legacy System	0	Closed	Normal
Personal	Appointment	0	Open	Normal
Policy Edit	Annotation	0	Closed	Normal
Prospecting	Call Client	0	Open	Normal
	Presentation	0	Open	Normal
Renewal	Annotation	0	Closed	Normal
	Appointment	10	Open	Normal
	Call Client	3	Open	Normal
	Call Underwriter	2	Open	Normal
	Check Status	3	Open	Normal
	Information needed	5	Open	Normal
	Payment received?	5	Open	Normal
	Policy received?	27	Open	Normal
	T-filed	0	Closed	Normal
			-	
Reporting Policies	Call Client	7	Open	Normal
	Call Underwriter	4	Open	Normal
	Information needed	4	Closed	High
	Payment received?	7	Open	Normal
	Received from client?	6	Closed	Normal
	T-filed	0	Closed	Normal

Notes

Actions Types and Topics Worksheets

After reviewing your Organizations workflow and comparing to the Actions defaulting in Nexsure, create a list of Actions by using the worksheets provided in this section. After compiling the list it will be easy to quickly enter them in Nexsure following the instructions in this chapter.

New Action Type Screen

Add New Ac	tion Type	ne sure
Type: Status Icon:	Active V General V	
Description:		
		Save Cancel

Note: The Type icon also determines how the action interacts with Microsoft Outlook. Assigning a type to an appointment or phone call icon will synchronize the action with your Outlook Calendar. Assigning any other icon to the type will synchronize the action with the Outlook Task pad.

Icon Choices:

Information Calendar General Questionmark Description View Feedback Open Folder Closed Folder

Phone

Worksheet for Action Types

Image: state in the state in	Туре	lcon	Status	Description
Interfact				
Image: set of the				
Image: set of the				
Image: set of the				
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Image: set of the				
Image: set of the				
Image: set of the				
Image: state s				
Image: second				
Image: second				
Image: second				
Image: state in the state in				
Image: second				
Image: second				
Image: second				
Image: Sector of the sector				
Image: second				
Image: Constraint of the second sec				
Image: second				

New Action Topic Screen

Add New Ac	tion Topic	ne sure
Topic:]
Status:	Active 🗸	
Description:		
		Save Cancel

Worksheet for Action Topics

Торіс	Status	Description

New Actions Screen

New Actions	ne sure
Trigger:	Add New 🛛 Allow cancel/modify 🗹
Topic:	×
Type:	×
Due In:	2 week(s)
Priority:	Normal
Status:	Open 🗸
Description:	~
Alert?:	
Link action?:	
	Save Save & Add Cancel

Worksheet for Action Topic/Type Associations

Торіс	Туре	Due In	Open / Closed	Alert Message	Linked Action	Default Memo



Notes