

Chapter 6

Lookup Management

IN THIS CHAPTER

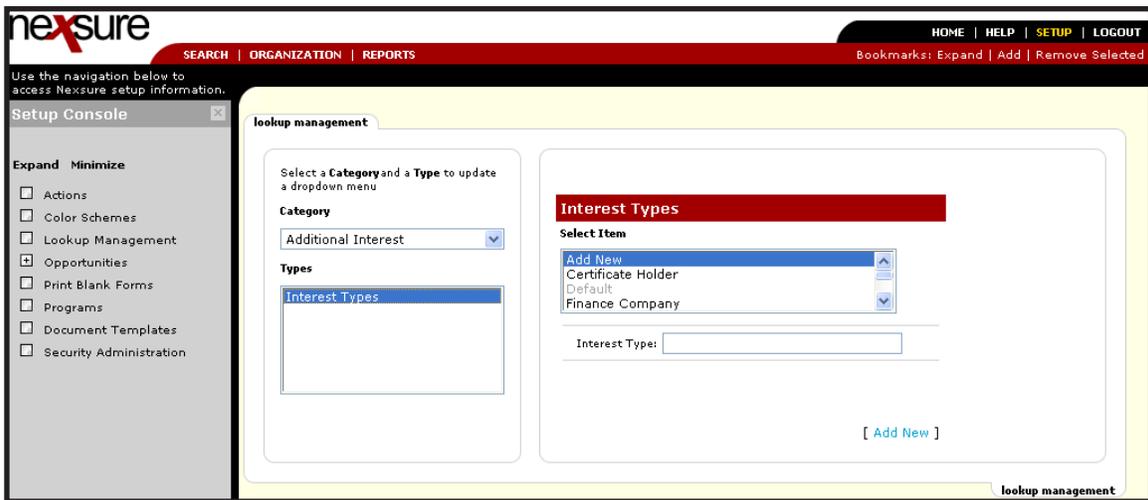
- ✦ Modifying Category types in Lookup Management
- ✦ General Instructions to Add/Modify/Delete Items
- ✦ Category Type Locator Including Modification Exceptions

Modifying Category Types in Lookup Management

Lookup Management contains fields that may be modified by the Organization. Keep in mind when making additions or modifications that these affect everyone in your Organization. Once an item has been used it may not be removed from Nexsure. Instead of being deleted a warning message is displayed advising that the item is in use. The item name may be changed, but it will change on all records that are currently in use.

To access Lookup Management:

Click the **SETUP** link located on the Utility menu. Click the **Lookup Management** link on the Setup console.



General Instructions to Add/Modify/Delete Items

Only the items may be modified as the Categories and Types are required in the different areas of Nexsure and are available for selection in drop-down boxes. These items are used to clarify, identify specific types of data records or set defaults. Use the directions below to add, modify or delete items for all Categories:

Begin by selecting the Category and then the type to add, modify or delete items. To add a new item, at the top of the select items list, click **Add New**.

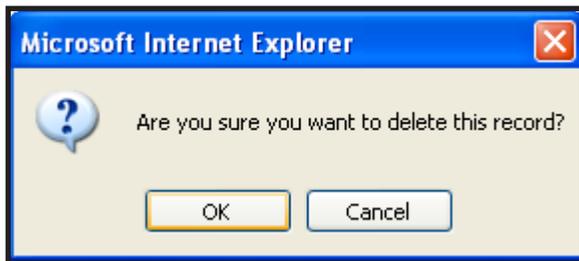
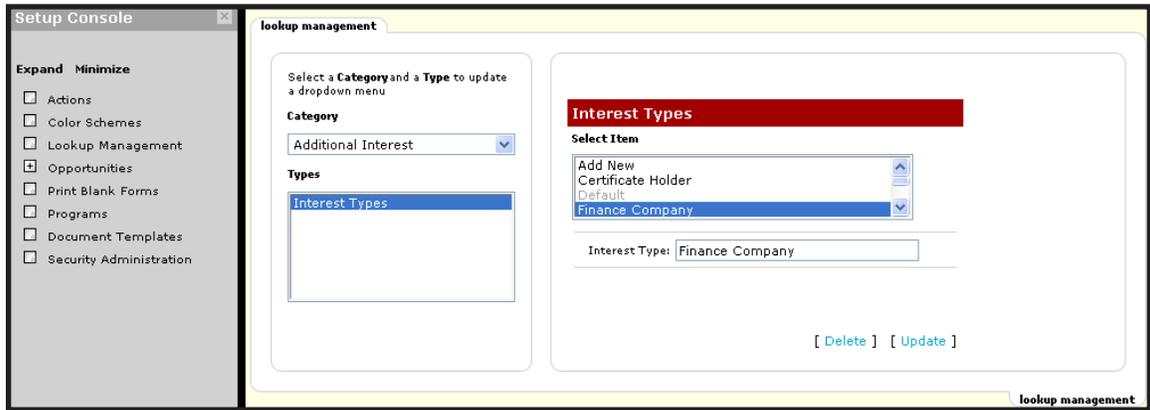
- Below the list is a empty field with a label beside it of the type selected, click in the field and enter the new item.
- Click the [\[Add New\]](#) link below the field to add the item.

To modify an item, find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the [\[Update\]](#) link to save the changes.

To delete an item, find the item in the list and click to highlight.

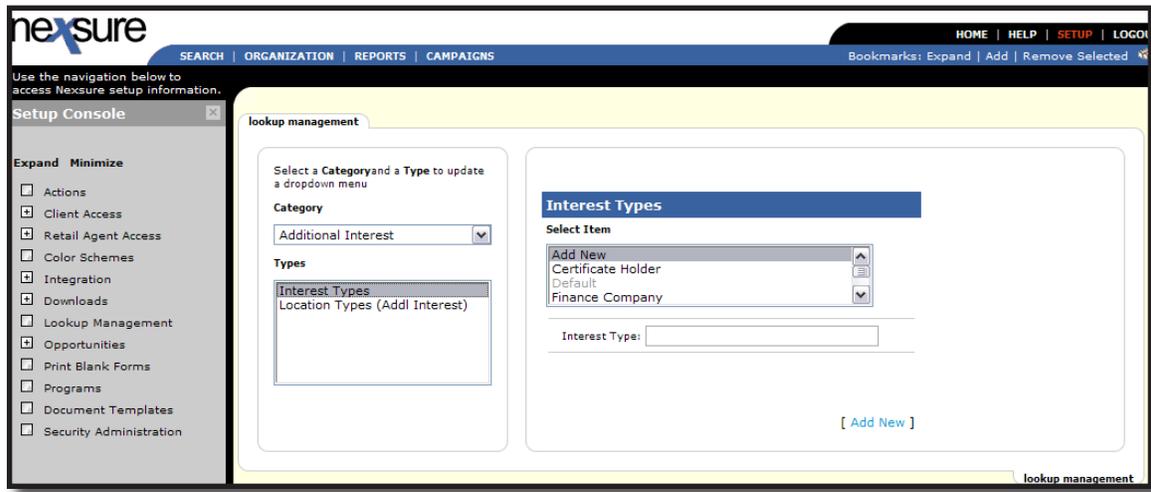
- The name now displays in the field below the list beside the type label.
- Click the [\[Delete\]](#) link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.



Category Type Locator Including Modification Exceptions

Additional Interest Category

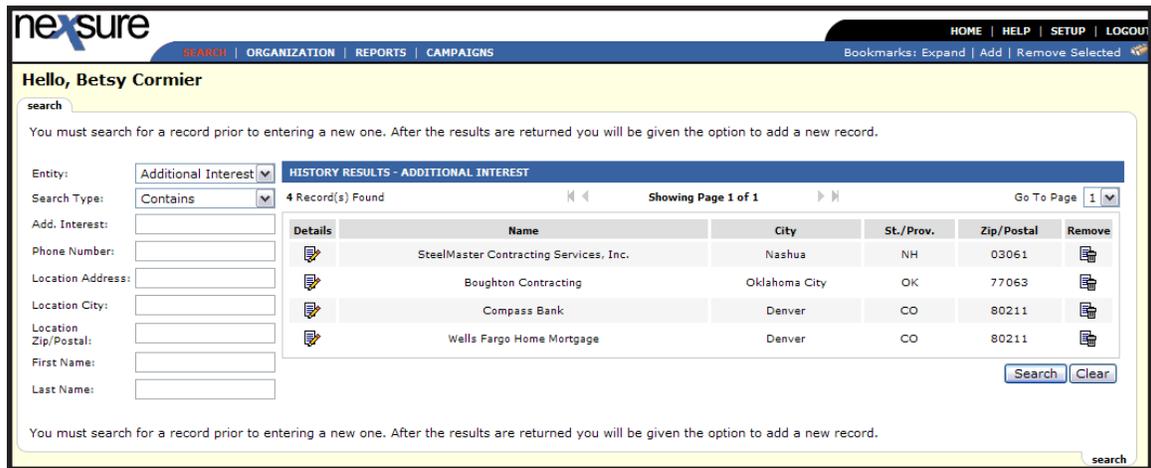
The Additional Interest is the first Category in the list and only has one type, Interest Types. The category of Additional Interest refers to Additional Interest found on the Additional Interest Name page. The Interest Type identifies the particular interest type to identify their interest. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.

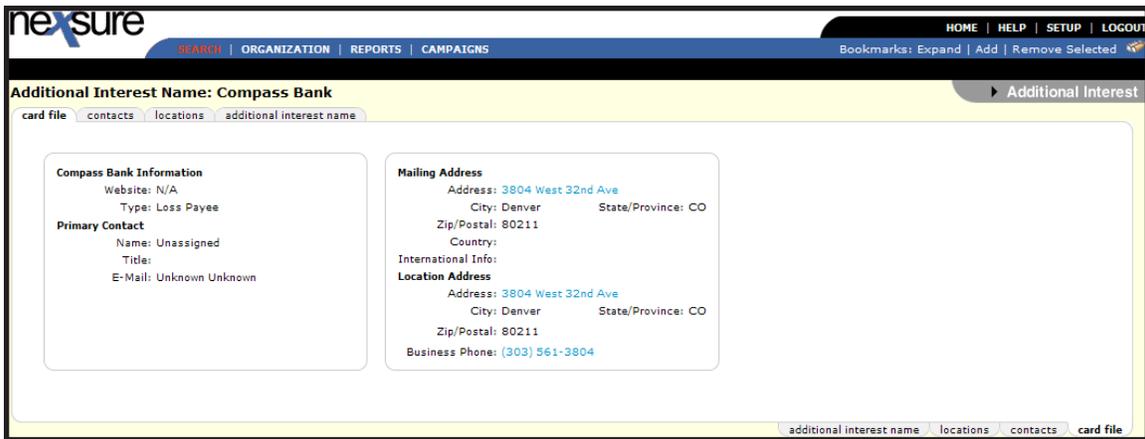


The Interest Type field is located as follows:

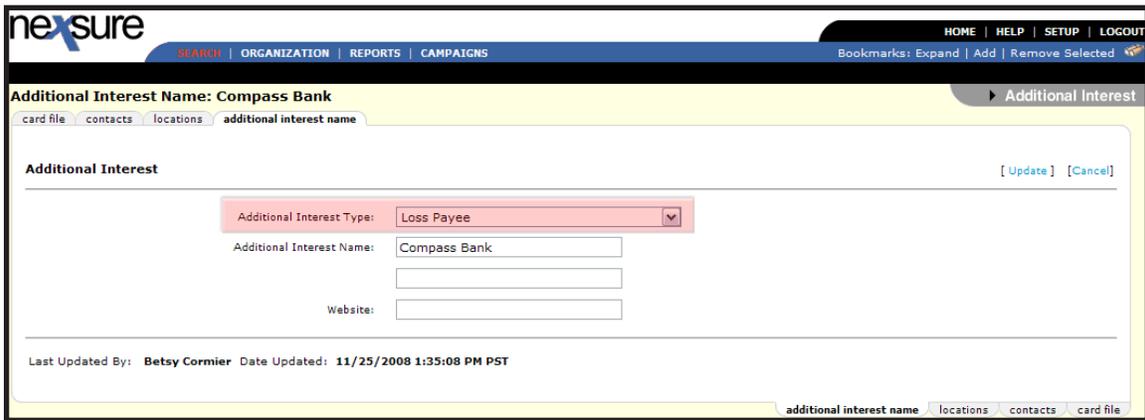
Click the **Search** link located on the Primary menu and use the entity drop-down box to select Additional Interest.

Enter a few characters of an already existing interest; click the **Details**  icon to display the card file.



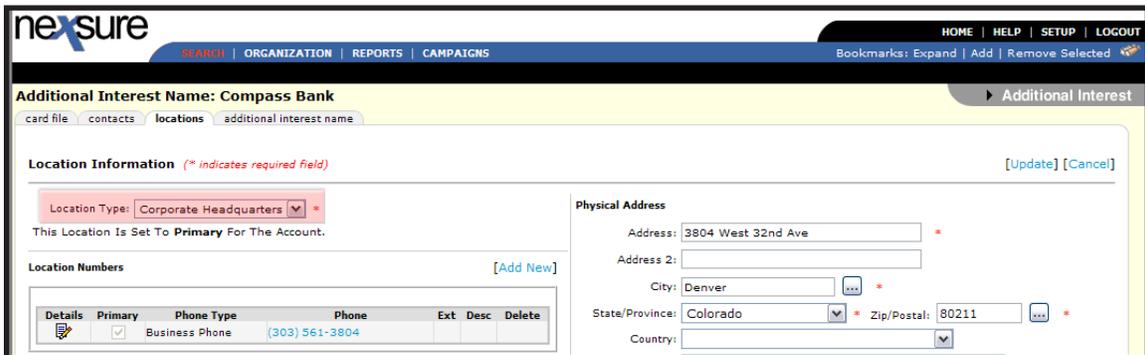


Click the **additional interest name** tab. The Additional Interest Type is the first field on the page. This is the field being defined.



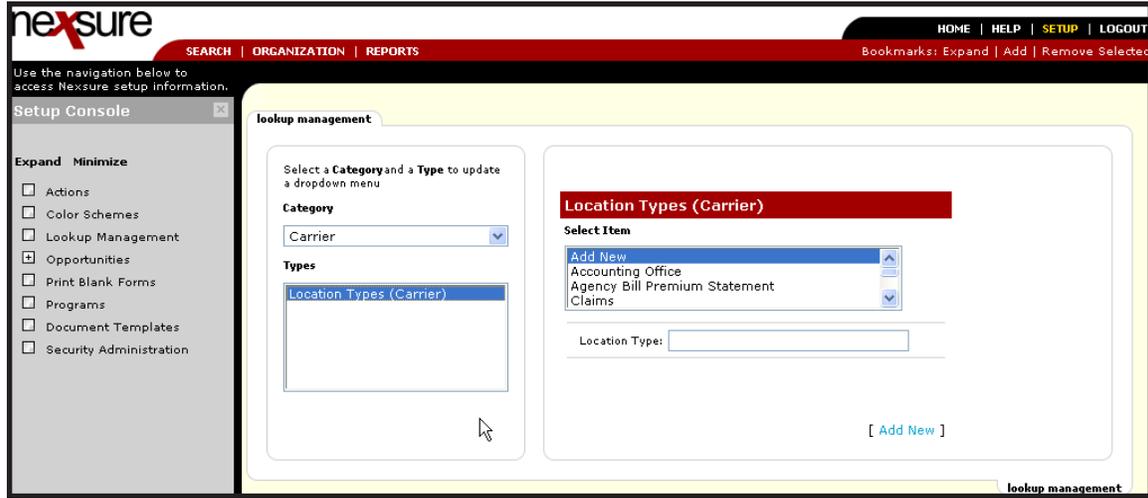
The **Location Types (Addl Interest)** is located as follows:

Click the **locations** tab then the **Details**  icon of an additional interest's location. The **Location Type** is the first field on the page. This is the field being defined.



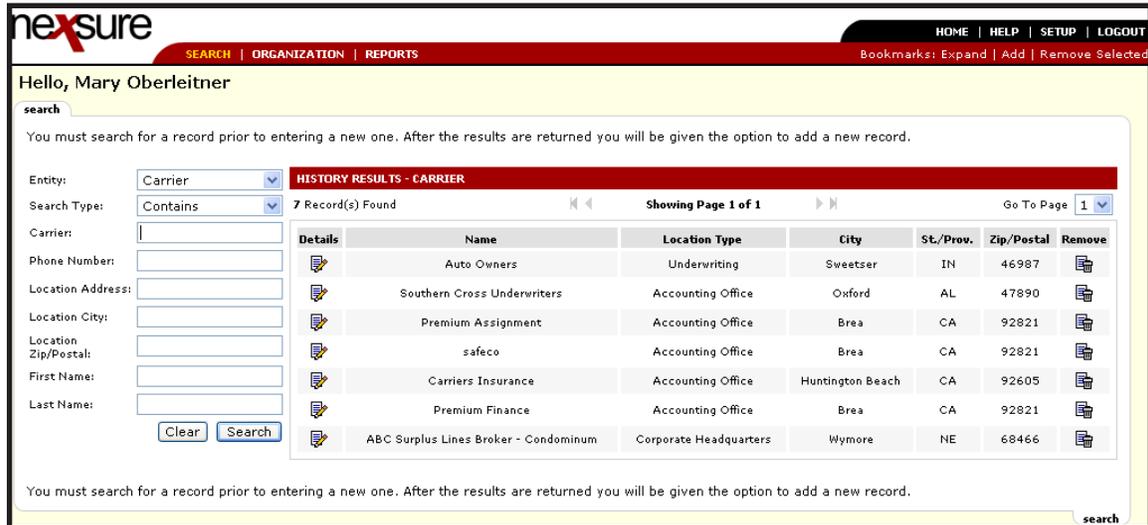
Carrier Category

Using the Category drop-down box select Carrier. The category of Carrier refers to Carriers found on the Nexsure Search Screen. The Location Types (Carrier) identifies the location type to help identify each location. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



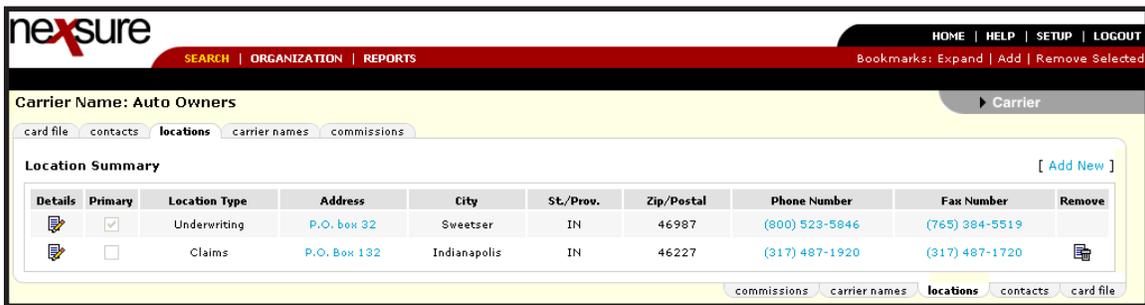
The Location Types (Carrier) field is located as follows:

Click the **Search** link located on the Primary menu and use the entity drop-down box to select Carrier. Enter a few characters of an already existing Carrier; click the **Details**  icon to display the card file.

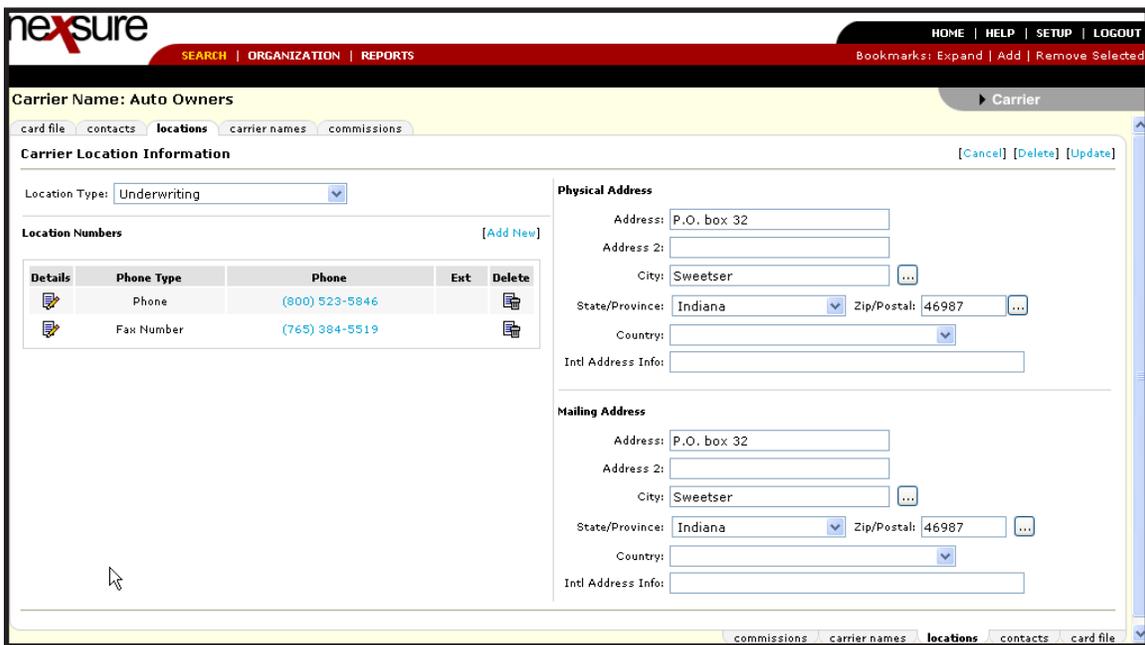




Click the **locations** tab to display the location summary. Click the **Details**  icon for one of the locations to display the location detail.



The Location Type is the first field on the page. Modify as needed in Lookup Management which will be used globally to identify the Carrier locations for the entire Organization.



Client Category

Using the Category drop-down box select Client. The category of Client refers to Clients found on the Nexsure Search Screen. There are several different types under the category of Client. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed but only unused items may be removed.

Client Relationship and How Relates Types

The Client Relationship and How Relates Types are both used on the Related Accounts tab found at client level. These drop-down items identify the client relationships to one another. Modifying these items work slightly differently than unrelated types. Follow the steps below to modify these items:

The screenshot shows the Nexsure Setup Console interface. On the left is a 'Setup Console' sidebar with a list of expandable sections: Actions, Color Schemes, Integration, Downloads, Lookup Management, Opportunities, Print Blank Forms, Programs, Document Templates, and Security Administration. The main content area is titled 'lookup management' and contains instructions: 'Select a Category and a Type to update a dropdown menu'. The 'Category' dropdown is set to 'Client'. The 'Types' dropdown is open, listing 'Client Relationship Types' (highlighted), 'Code Classes', 'Code Designation', 'Demographic Data Fields', 'Home Ownership', 'How Relates', and 'Location Types (Client)'. To the right, the 'Client Relationship Types' panel is active, showing a 'Select Item' dropdown with 'Commercial' selected. Below this is a 'Relationship Type' input field and an '[Add New]' button.

Begin by selecting the Category of Client Relationship types. Notice when selected that an extra drop-down box is present on the right side just above the items. Choices are, Personal, Commercial and Both. This is where identification is made of where the items being added should be available.

This screenshot is similar to the previous one, but the 'Select Item' dropdown in the 'Client Relationship Types' panel now shows 'Commercial' selected, with 'Personal' and 'Both' also visible in the list. The 'Relationship Type' input field and the '[Add New]' button remain the same.

To add a new item, select where the item should be added, then at the top of the select items list, click **Add New**.

- Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item.
- Click the [\[Add New\]](#) link below the field to add the item.

The screenshot shows a web interface titled "lookup management". On the left, there is a section for selecting a category and type. The "Category" dropdown is set to "Client". The "Types" list includes "Client Relationship Types", "Code Classes", "Code Designation", "Demographic Data Fields", "Home Ownership", "How Relates", and "Location Types (Client)". The "Client Relationship Types" item is highlighted. On the right, the "Client Relationship Types" section is active, showing a "Select Item" dropdown set to "Both". Below it is a list of items: "Add New", "Commercial/Personal Account", "Property Management/Residential", and "Source Client/Destination Client". The "Add New" item is highlighted. Below the list is a text input field labeled "Relationship Type:" containing the text "Condo Assn/UnitOwner". At the bottom right of this section is a blue link labeled "[Add New]".

To modify an item, in the drop-down box on the right side just above the items select Personal, Commercial or Both, wherever the item is that requires modification. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the [\[Update\]](#) link to save the changes.

To delete an item, in the drop-down box on the right side just above the items select Personal, Commercial or Both, wherever the item is that should be removed. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label.
- Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.



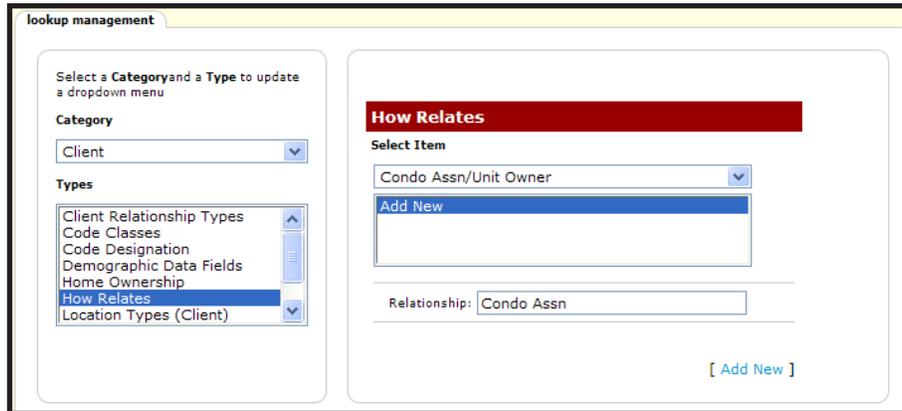
The *How Relates Type* identifies the relationship between the two related accounts and is used in conjunction with Client Relationship Types. The Client Relationship Type should be added first and then associate the Relationships with the How Relates Types. Use the directions below to make modifications.

Begin by selecting the Category of How Relates type. Notice when selected that an extra drop-down box is present on the right side just above the items. Choices are anything that has been added to Client Relationship Type. This is where identification is made of where the items being added should be available.

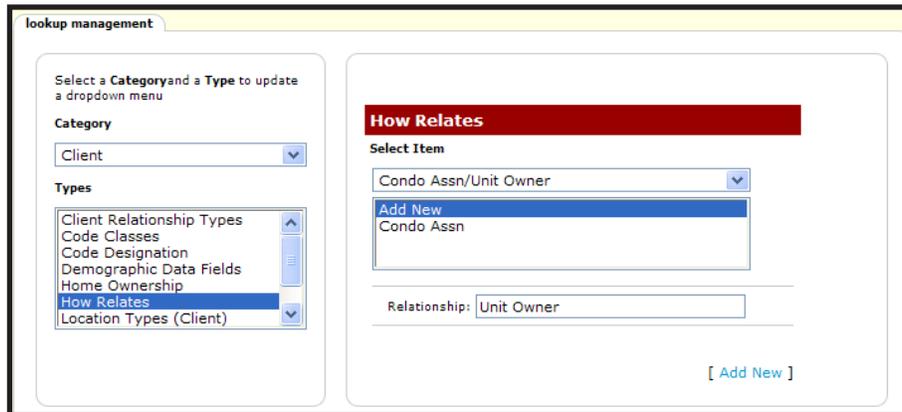
To add a new item select the appropriate **Client Relationship** by using the drop-down box, then at the top of the **Select Items** list, click the **Add New** line item.

- Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item.

- Click the **[Add New]** link below the field to add the item.



- To add the second item in the relationship, select where the item should be added a second time, click the **Add New** line item and repeat the steps to add the new item.

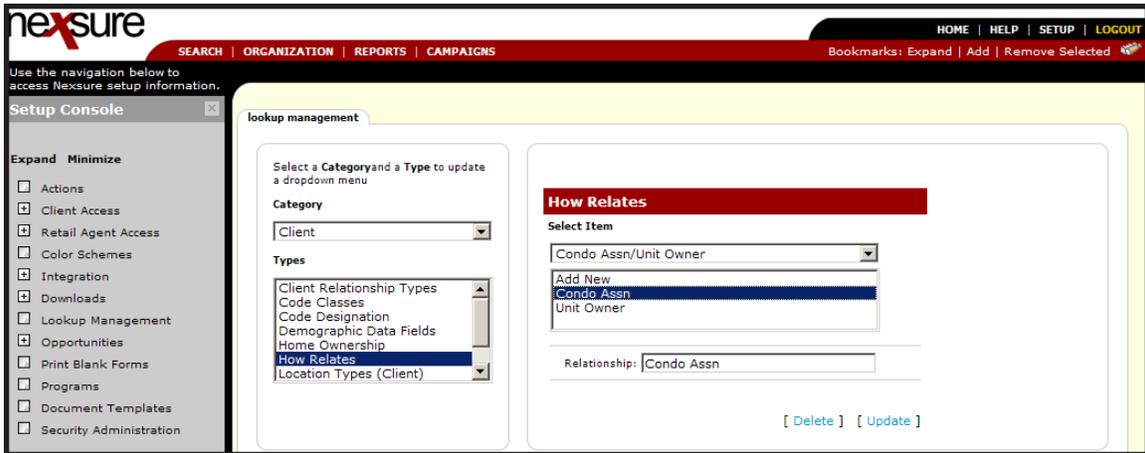


To modify an item, in the drop-down box on the right side just above the items select the appropriate Client Relationship item from the drop-down box. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the **[Update]** link to save the changes.

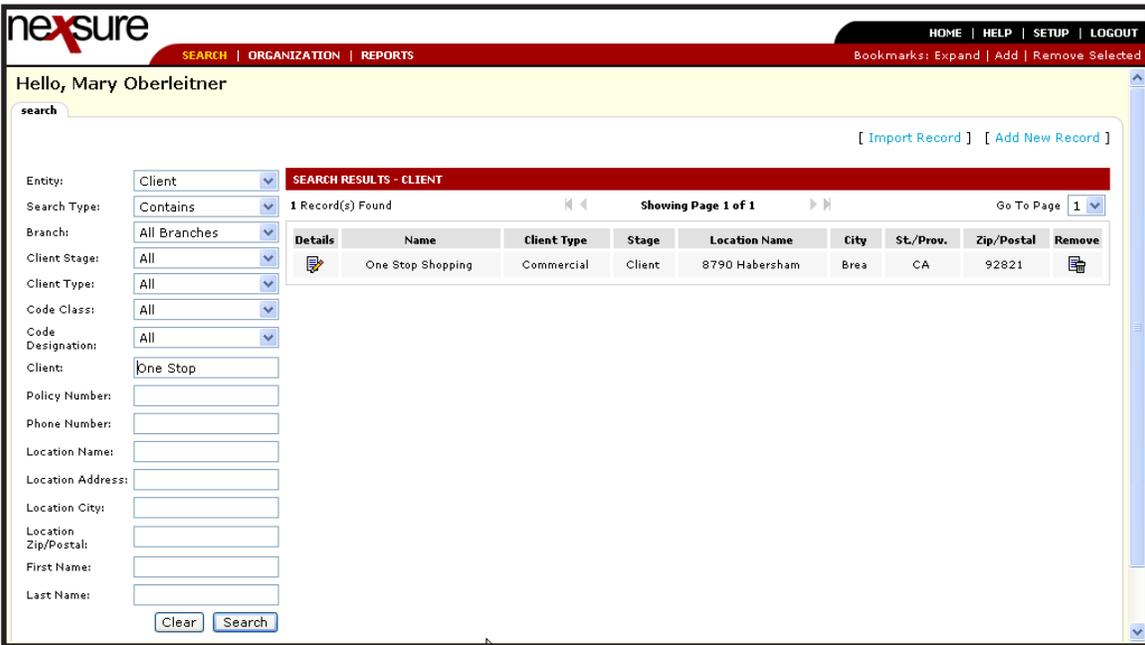
To delete an item, in the drop-down box on the right side just above the items select the appropriate Client Relationship item from the drop-down box. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label.
- Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.



The Client Relationship Type and How Related Type fields are located as follows:

Click the **Search** link located on the Primary menu and use the entity drop-down box to select Client. Enter a few characters of an already existing Client; click the **Details**  icon to display the card file. Notice the Location name displayed on the Search screen, this is used to help identify the client.



Click the **related accounts** tab to display the related accounts summary page.

The screenshot shows the 'Client Profile' page for 'One Stop Shopping'. The navigation bar includes 'SEARCH | ORGANIZATION | REPORTS' and 'HOME | HELP | SETUP | LOGO'. The main menu has 'CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG'. The client name is 'One Stop Shopping' and it is a 'Commercial Account'. The 'related accounts' tab is selected. The page is divided into several sections: 'Primary Contact' (Name: Mr. Lucy Crenz, Title: Accountant, E-Mail: rengam@sca-ins.com), 'Mailing Address' (Location Type: Corporate Headquarters, Address: 8790 Habersham, City: Brea, State/Province: CA, Zip/Postal: 92821, Fax Number: (714) 672-8908), 'Tracker' (Date Created: 1/26/2004 CST, Client Since: 1/26/2004 CST, Related Accounts: 1), 'Alerts' (Open Actions: 0), 'Stick-e-note' (No Current Notes), and 'Assignment' (Table with columns: Primary, Branch, Department, Unit, Responsibility, Name). The 'In Force...' section lists policy types: Commercial Auto, Commercial Property, Directors and Officers, Employers Liability, Equipment Floater, and Garage and Dealers.

The screenshot shows the 'Related Accounts Summary' table. The navigation bar and main menu are the same as in the previous screenshot. The client name is 'One Stop Shopping'. The 'related accounts' tab is selected. The table has columns: 'Details', 'Related Account', 'Relation Type', 'Related Account Type', 'Related Account Role', and 'Remove'. There is one row with the following data: 'Janet Anderson', 'Commercial/Personal Account', 'Personal', 'Personal'. The page shows 'Page 1 of 1' and 'Filters: [Show] [Add New]'.

Details	Related Account	Relation Type	Related Account Type	Related Account Role	Remove
	Janet Anderson	Commercial/Personal Account	Personal	Personal	

To see how the types are, add a new related account by clicking the [\[Add New\]](#) link. First search for a client name either personal or commercial and enter part of the name and click the **Search** button to display the results. In the list displayed, select one.

The Relationship drop-down box is where all the items are that were added in Setup.

The How relates are assigned below Relationship type beside the current client name and then under that for the Associated Client name. In each of these boxes, choose the appropriate relationship to this client.

The screenshot shows the 'Add New Related Account' form in the Nexsure system. The client name is 'One Stop Shopping'. The form includes a search section for identifying accounts to relate, a list of related accounts, and several dropdown menus for selecting relationship types. Two callout boxes are present:

- Relationship Type:** A dropdown menu with options: '- Select Relationship -', '- Select Relationship -', Franchisor/Franchisee, Partner/Partner, PEO/Client Company, Corporation/Subsidiary, and Parent Company/Subsidiary.
- How Relates:** A section with a 'Relationship Type' dropdown set to 'Parent Company/Subsidiary', and 'One Stop Shopping is:' dropdown set to 'Parent Company'. There is a checked checkbox for 'Add Relationship to Related Account' and another dropdown for 'Mason Electric is:' set to 'Parent Company'.

Code Classes and Code Designations

The Code Classes and Code Designations Types are both used on the **classifications** tab found at client level. They are used to group clients or identify something important to your organization. For example a Language Code Class could be added with Code Designations of the different languages they may speak to better help you to direct calls. These drop-down items identify the Code Classes and Designations as they relate to one another. Modifying the Code Classes is done the way most items are done; however, modifying the Code Designations is slightly different. Follow the steps below to modify these items:

Begin by selecting the Category of Client and the type of Code Designations. Notice when selected that an extra drop-down box is present on the right side just above the items. The items available in the drop-down box are the Code Classes previously added. The item displayed in the drop-down box is where the items will be added, modified or removed from.

To add a new item, select the Class Code to add the Code Designations to, then at the top of the select items list, click **Add New**.

- Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item.
- Click the **[Add New]** link below the field to add the item.

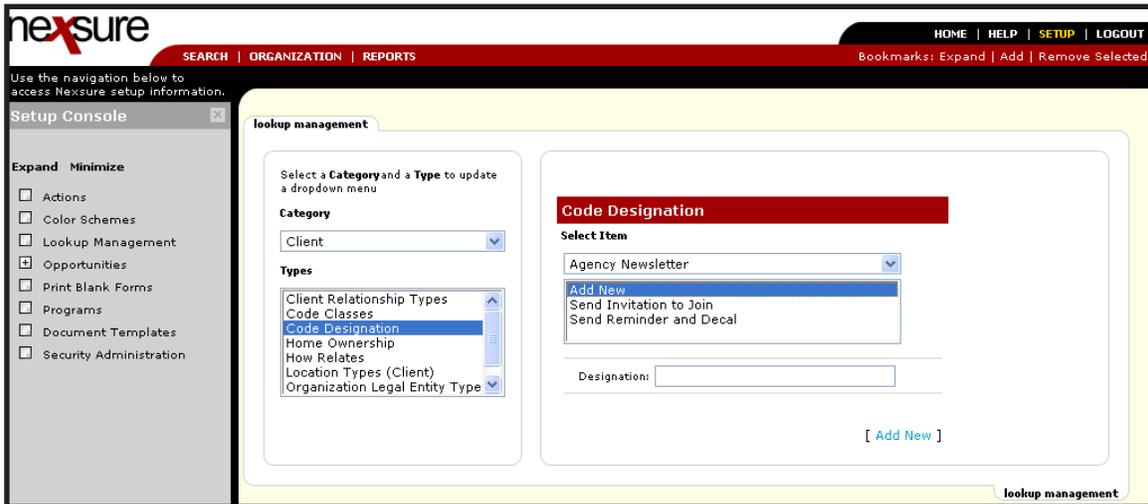
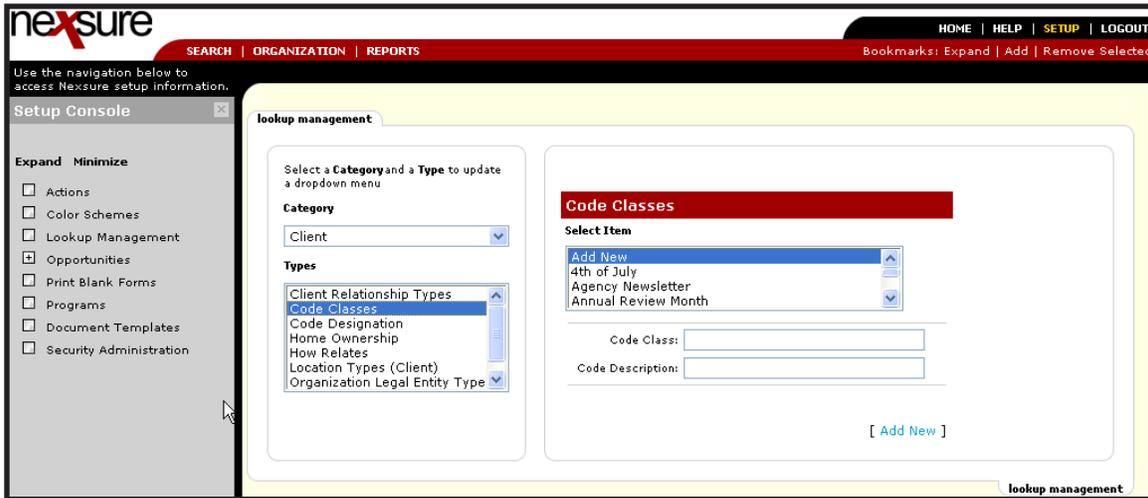
To modify an item, in the drop-down box on the right side just above the items select the appropriate Class Code for the item that requires modification. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the **[Update]** link to save the changes.

To delete an item, in the drop-down box on the right side just above the items select the appropriate Class

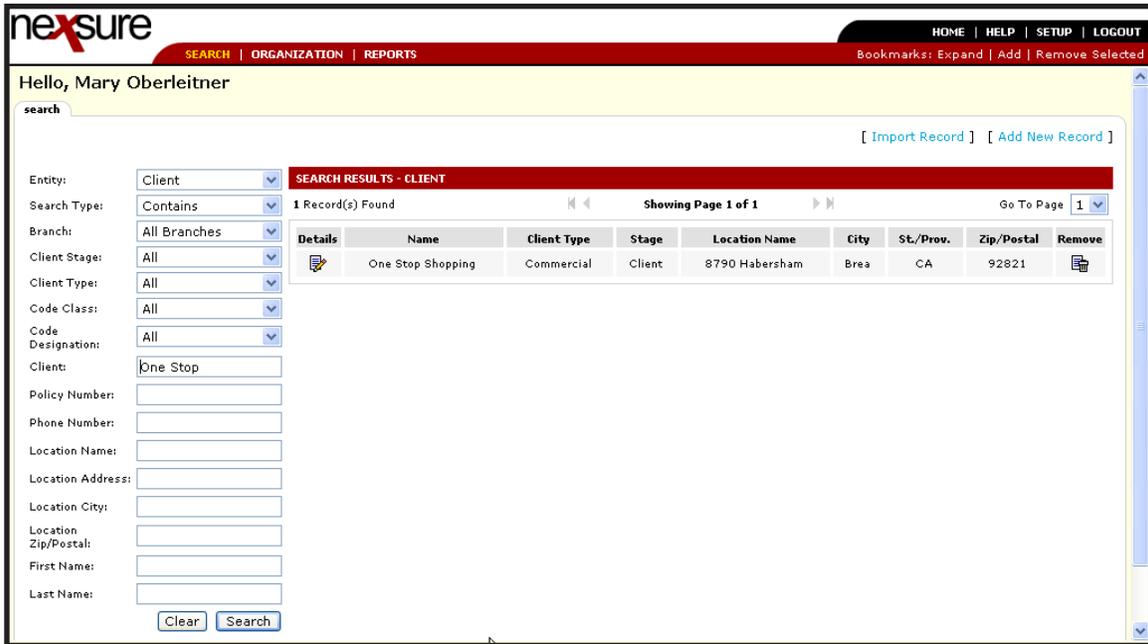
Code for the item that should be removed. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label.
- Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.

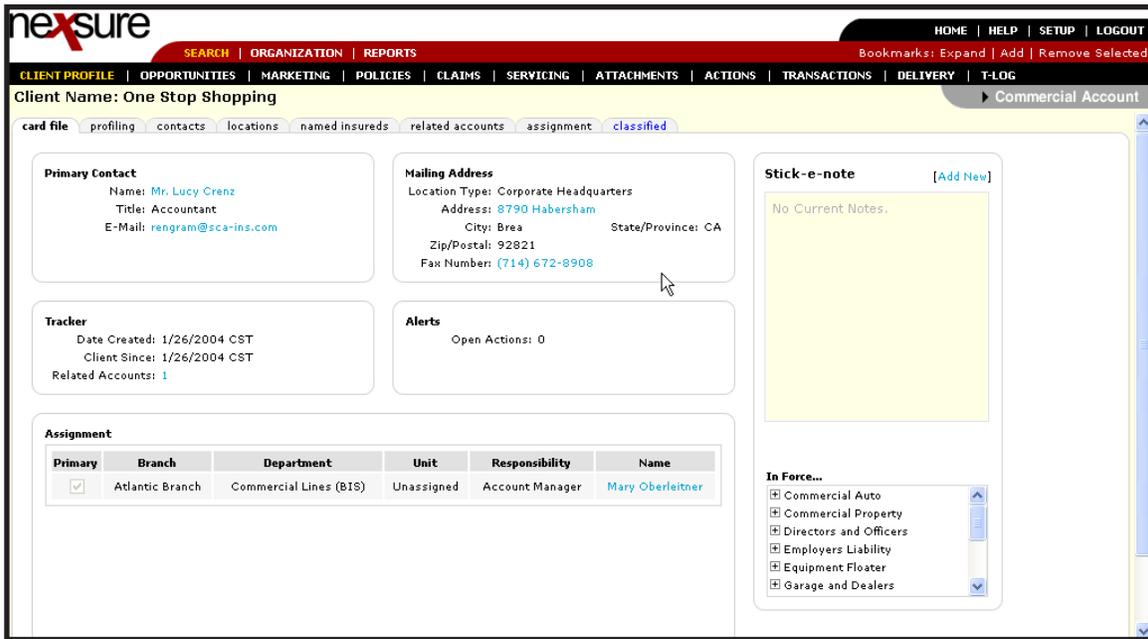


The Code Classes and Code Designations Type fields are located as follows:

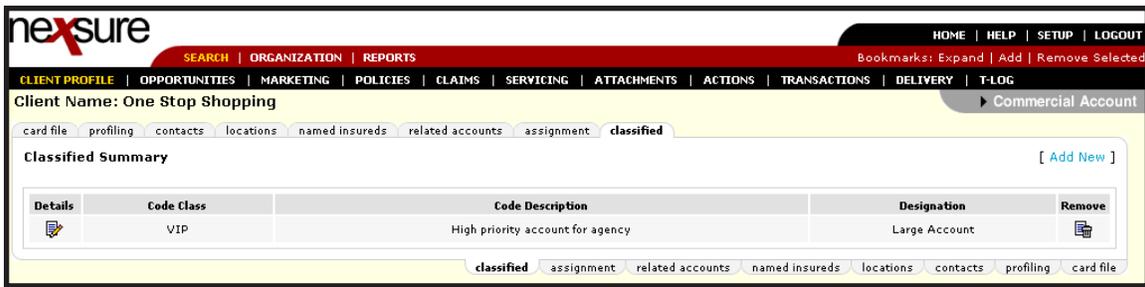
Click the **Search** link located on the Primary menu and use the entity drop-down box to select client. Enter a few characters of an already existing client; click the **Details**  icon to display the card file.



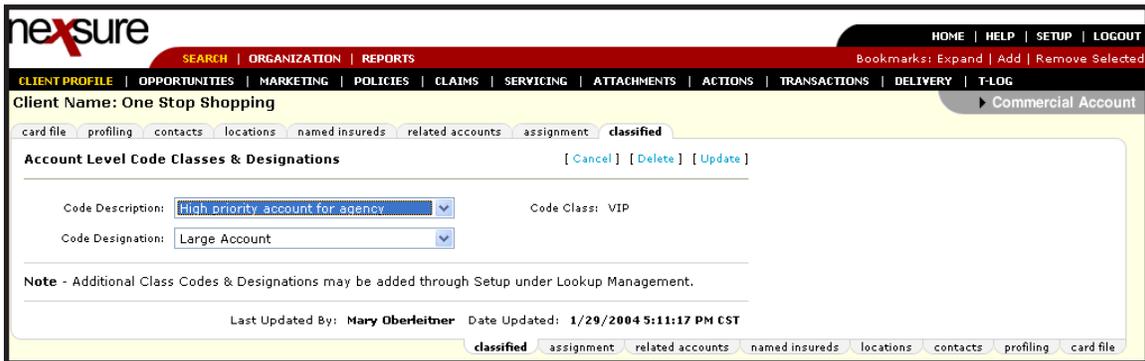
Click the **classified** tab to display the classified summary page.



Click the **Details**  icon of an existing Class Code to display the Detail page.



This is where the Class Code and Code Designations are used.



Demographic Data Fields

Client Demographics are used on the **profiling** sub-tab **demographic data** found at client level. Client Demographics are used to record data by year to facilitate benchmarking of data that will change from year to year. To track data other than the default value of “Annual Payroll”, define additional demographic data fields.

To add a new item, begin by selecting the **Category of Client** and the **Type of Demographic Data Fields**. Notice when the **Type** is selected the **Select Item** box refreshes to display any **Demographic Data Field** descriptions previously added.

lookup management

Select a **Category** and a **Type** to update a dropdown menu

Category
Client

Types
Client Relationship Types
Code Classes
Code Designation
Demographic Data Fields
Home Ownership
How Relates
Location Types (Client)

Demographic Data Fields

Select Item
Add New
Annual Payroll
Annual Sales
Number of Employees

Field Description:

[Add New]

To add a new item, click to highlight and select **Add New** in the **Select Item** box.

- Below the list of items is an empty box labeled **Field Description**. Click in the empty box and enter the new item.
- Click the [**Add New**] link below the field to add the item.

lookup management

Select a **Category** and a **Type** to update a dropdown menu

Category
Client

Types
Client Relationship Types
Code Classes
Code Designation
Demographic Data Fields
Home Ownership
How Relates
Location Types (Client)

Demographic Data Fields

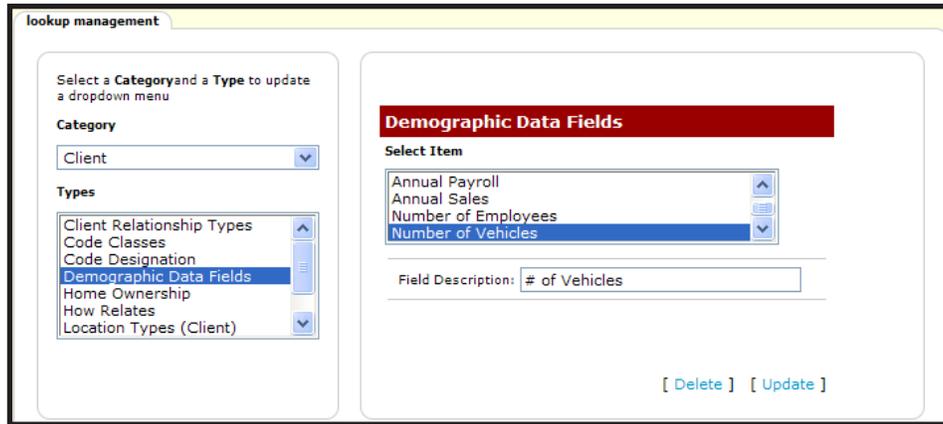
Select Item
Add New
Annual Payroll
Annual Sales
Number of Employees

Field Description:

[Add New]

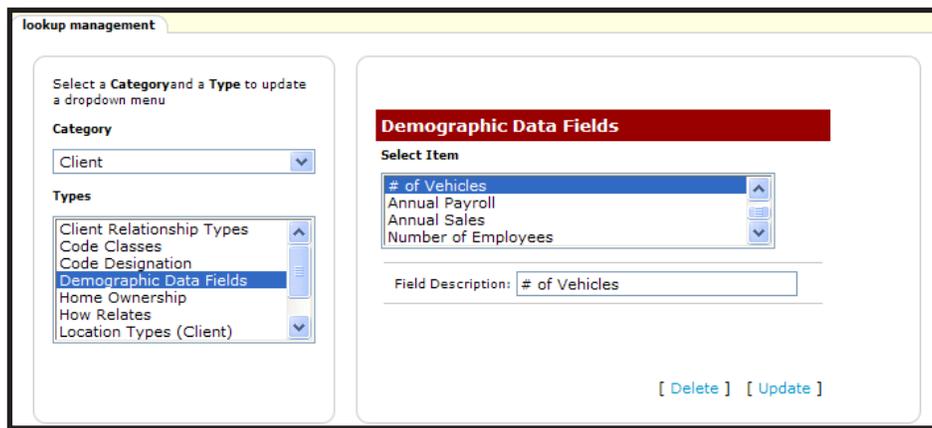
To modify an item, find the item to be modified in the **Select Item** box. Click to highlight and select the item.

- The item description now displays in the **Field Description** box. Make the adjustment.
- Click the [**Update**] link to save the change.



To delete an item, find the item to be deleted in the **Select Item** box. Click to highlight and select the item.

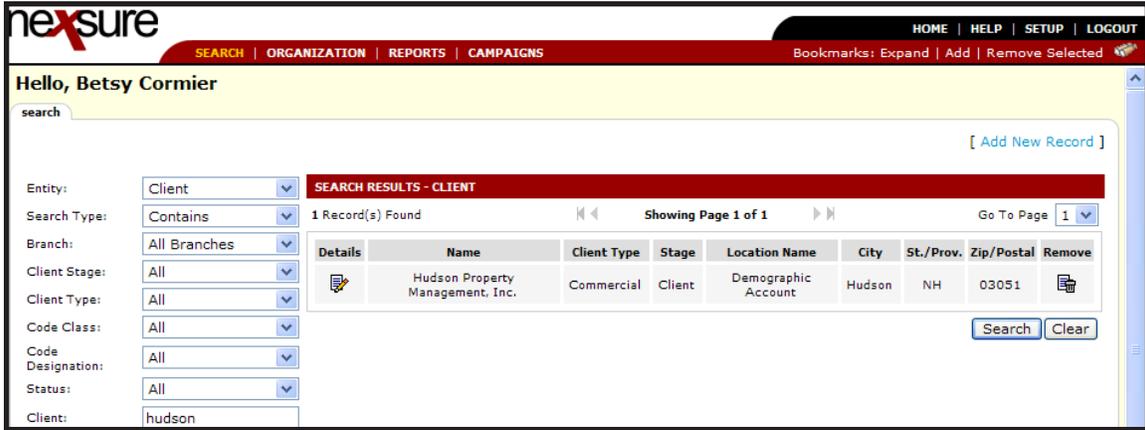
- The item description now displays in the **Field Description** box.
- Click the **[Delete]** link to remove the item. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation, the item is removed.



Demographic Data fields are located as follows:

Click the **SEARCH** link located on the **Primary** menu and use the entity drop-down box to select **Client**. Enter

a few characters of an already existing client; click the **Details** icon to display the **card file**.

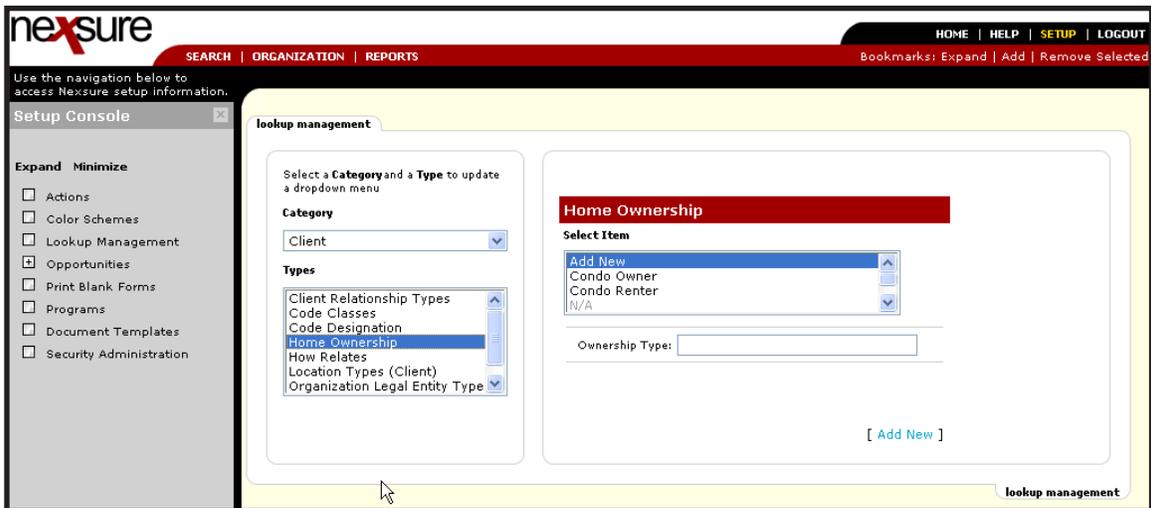


Click the **profiling** tab to display the profiling sub-tabs. Click the **demographic data** sub-tab to display the demographic data summary. This is where the **Demographic Data Fields** are used.



Home Ownership, Location, Referred By and Organization Legal Entity Types

The Home Ownership, Location, Referred By and Organization Legal Entity Types are all used on the Profiling tab found at client level. The Profiling tab contains information to provide a quick look at important criteria with regards to the client. Modification for all items except those for Location Types (Client) is done by following the General instructions provided in this chapter.



To Modify Location Types (Client) follow the steps below:

1. Begin by selecting the Category of Client and the type of Location Types (Client). Notice when selected that an extra drop-down box is present on the right side just above the items. The items available in the drop-down box are Personal and Commercial. Personal and commercial are in the drop-down box because there are two types of profiling pages at client level. One for commercial and the other personal. The content of each page is significantly different because of the type of client. The item displayed in the drop-down box is where the items will be added, modified or removed.

To add a new item, select the Location Types (Client), then at the top of the select items list, click **Add New**.

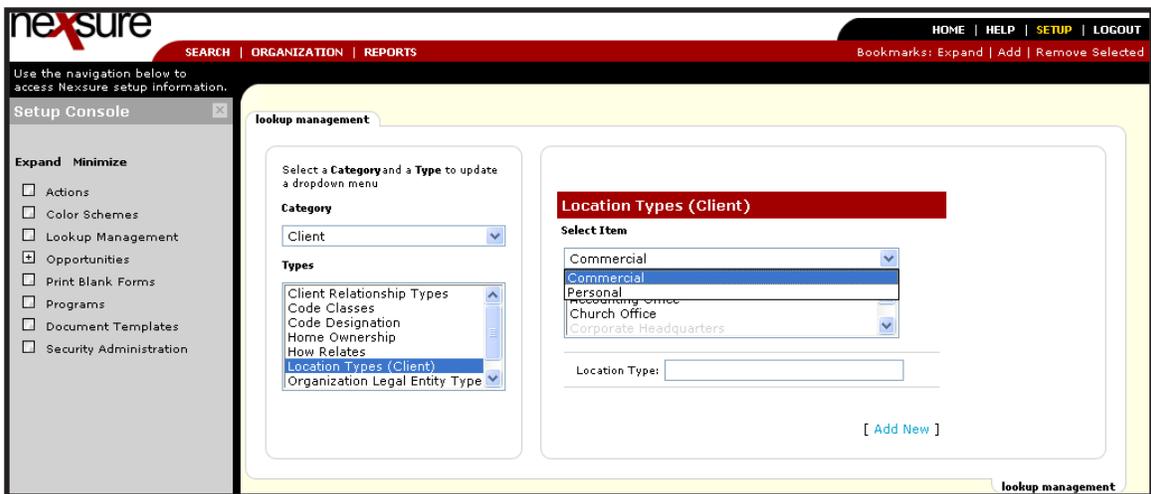
- Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item.
- Click the **[Add New]** link below the field to add the item.

To modify an item, in the drop-down box on the right side just above the items select either Commercial or Personal for the item that requires modification. Next find the item in the list and click to highlight.

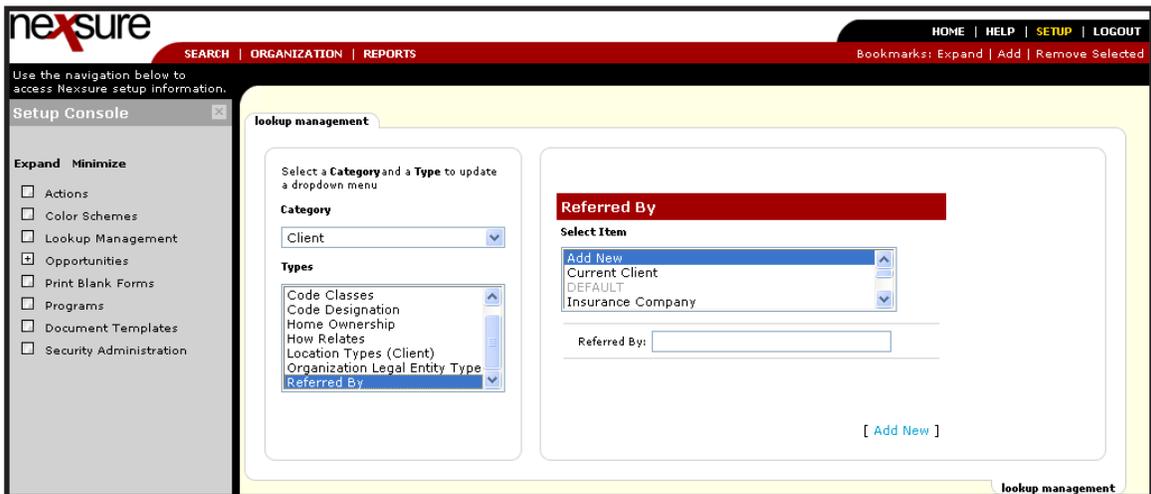
- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the **[Update]** link to save the changes.

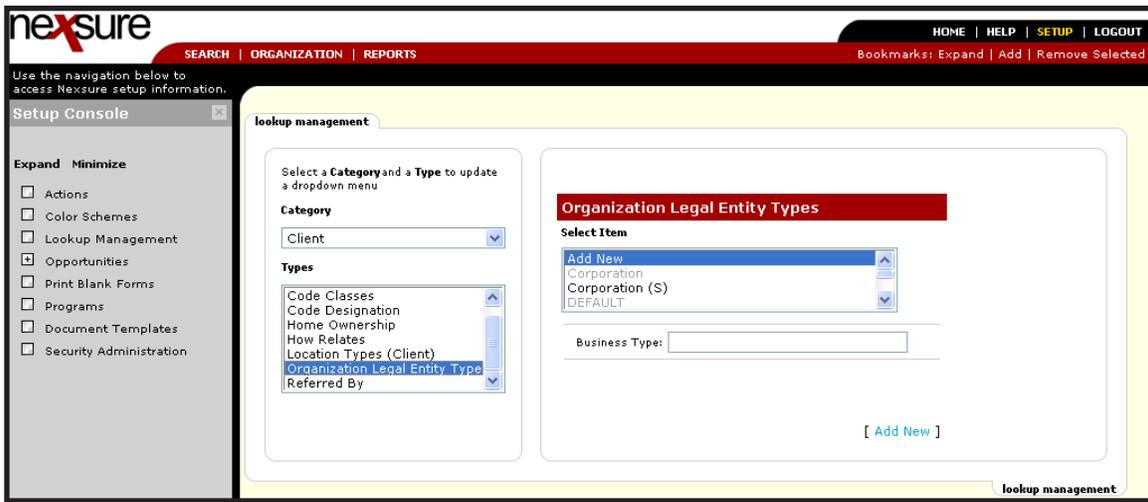
To delete an item, in the drop-down box on the right side just above the items select either Commercial or Personal for the item that should be removed. Next find the item in the list and click to highlight.

- The name now displays in the field below the list beside the type label.
- Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.



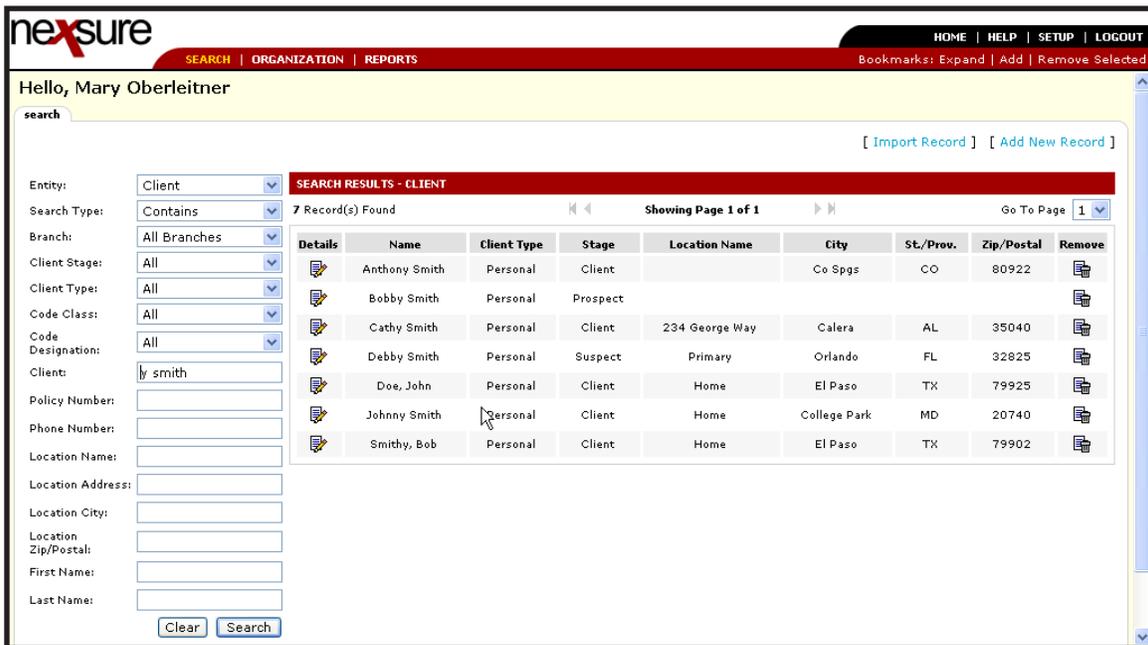
Modification of Referred by and Organization Legal Entity Types are done by following the General instructions provided in this chapter.



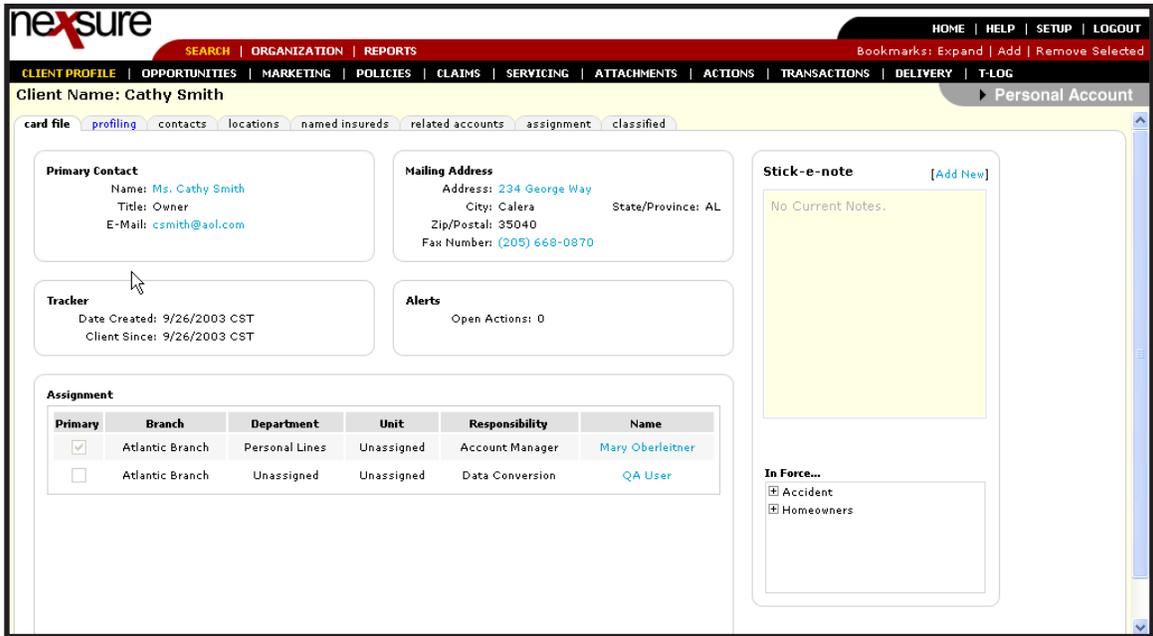


The Home Ownership, Location, Referred By and Organization Legal Entity Type fields are located as follows:

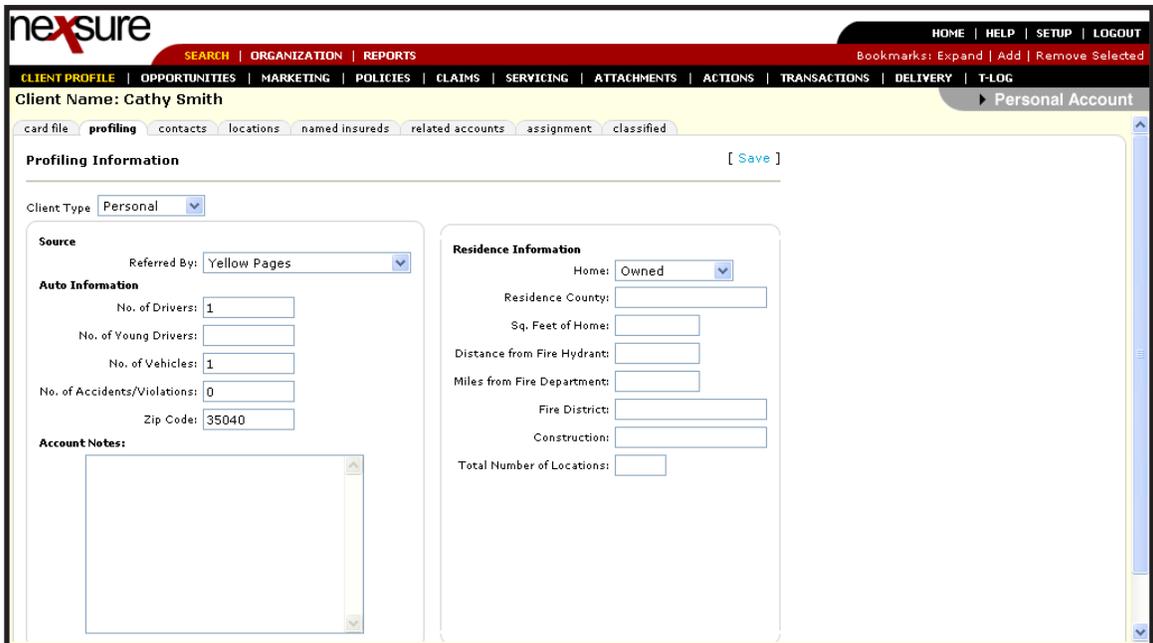
Click the **Search** link located on the Primary menu and use the entity drop-down box to select Client. Enter a few characters of an already existing Client; click the **Details**  icon to display the card file.



Click the **profiling** tab to display the Profiling page.



Depending on the client type selected determines which profiling page is displayed. Selecting a client designated as Personal displays the Personal profiling page. The personal profiled page includes both the type drop-down boxes for Referred by to indicate where the client came from and Home Ownership to indicate level of ownership.



Selecting a client designated as Commercial displays the Commercial profiling page. The Commercial profile page includes both the type drop-down boxes for Referred by to indicate where the client came from and

Organization Legal Entity to indicate level of ownership.

Client Name: One Stop Shopping

Profiling Information [Save]

Client Type: Commercial

Source
 Referred By: SureClose.com
Account Notes:
 No W/C claims in the last 10 years.

Organization Information
 Legal Entity Type: Corporation
 Years in business: 25
 No of Employees: 1000
 No of Locations: 8
 No of vehicles: 16
 Estimated Annual Gross Sales (\$): 1750000000
 Estimated Commission: 100000
 Monthly Payroll (\$): 50000
 No. of States/Provinces: 3
 Home Office State/Province: California
 On-Line business: Yes No
 TV/Radio Advertisement: Yes No

Last Updated By: Mary Oberleitner CST Date Updated: 9/15/2004 10:03:56 AM

Document Integration Category

Category Types

The Category Types are used on the Document Templates setup found at Setup. When setting up templates categories are used to group the template to make them easier to locate when using the template. Modification of Category Types is done by following the General instructions provided in this chapter.

Setup Console

- Expand Minimize
- Actions
- Color Schemes
- Lookup Management
- Opportunities
- Print Blank Forms
- Programs
- Document Templates
- Security Administration

lookup management

Select a Category and a Type to update a dropdown menu

Category
 Document Integration

Types
 Category

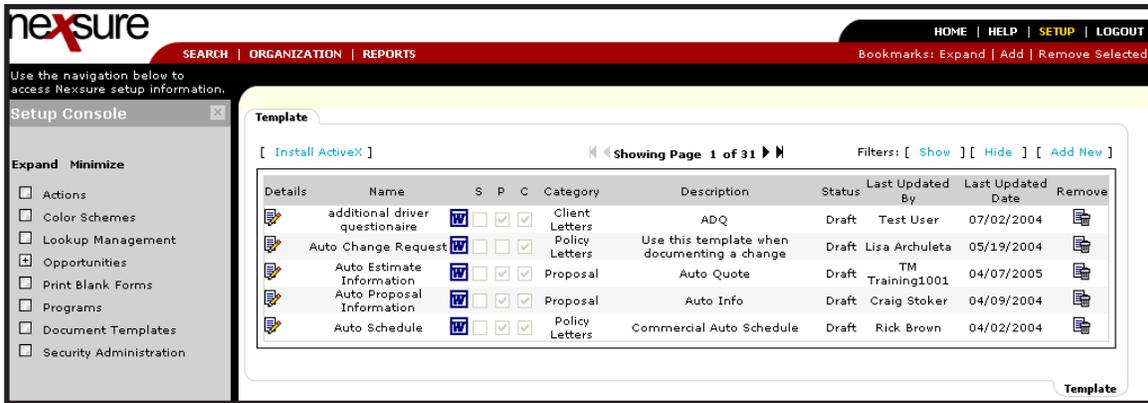
Category
Select Item
 Add New
 Claims
 Client Letters
 Greeting

Category: _____

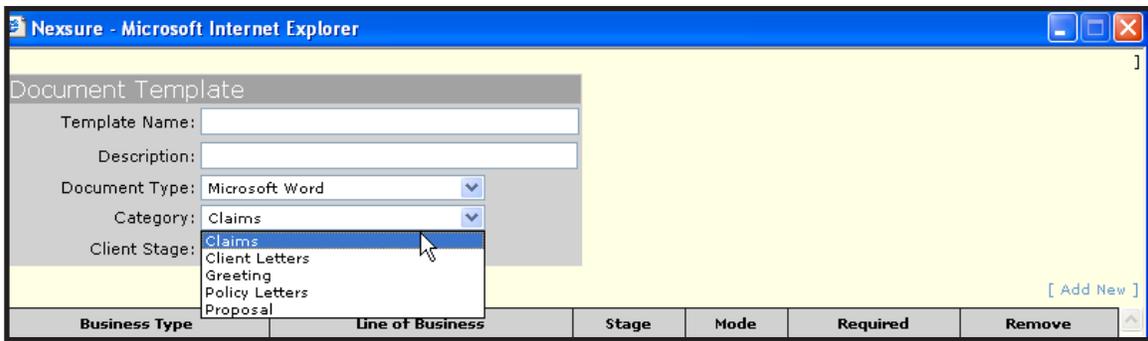
[Add New]

The Category Type field is located as follows:

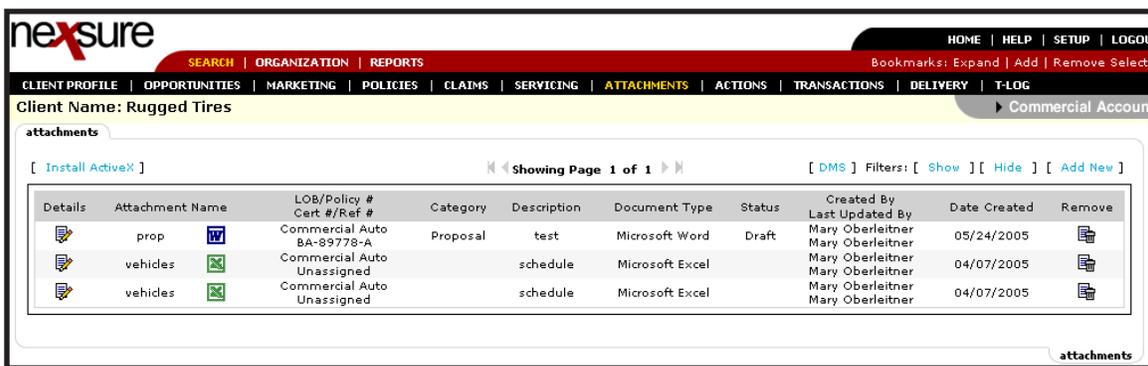
Click the **SETUP** link on the Utility menu, Document Templates to display the Document Template Summary. Then click the Add New link to add a new Template.



The Category type drop-down box is available here to define how to group the documents to assist the user in locating them for use.



At attachment level, click the [\[Add New\]](#) link to create a document with template.



Identify the document and click **Next**.

Nexsure Office Integration nexsure

Add New Attachment

Add Attachment
 Create Document with Template
 Create Document without Template
 Attach Outlook Messages
 Add External Attachment

Attachment Name:

Document Description:

Use the category drop-down box to narrow the list of documents returned for selection.

Nexsure Office Integration nexsure

New Document

Template Name:

Template Description:

Document Type:

Category:

Business Type:

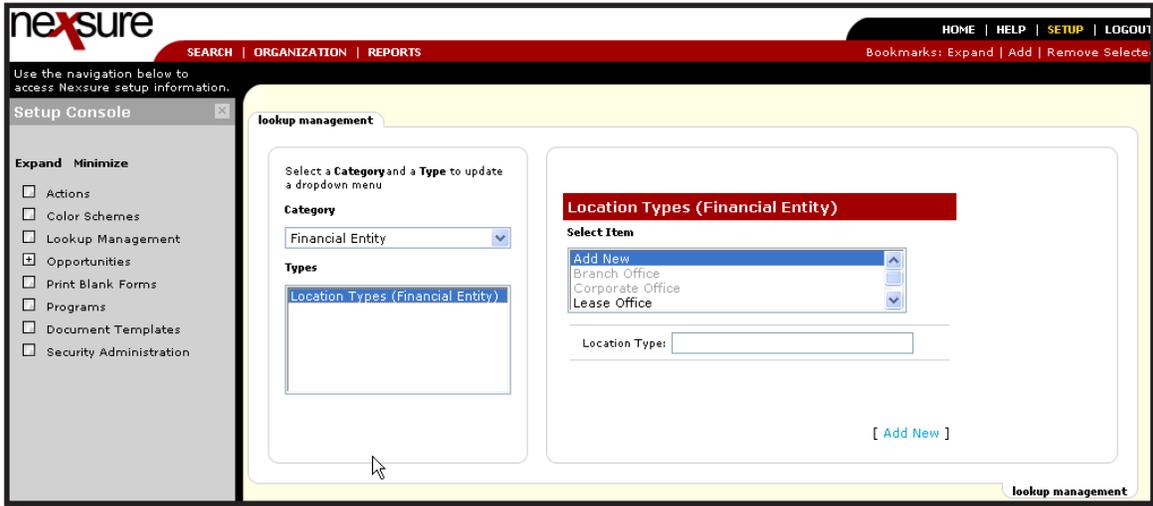
- All
- Claims
- Client Letters
- Greeting
- Policy Letters
- Proposal

Available Templates:

Financial Entity Category

Location Types (Financial Entity)

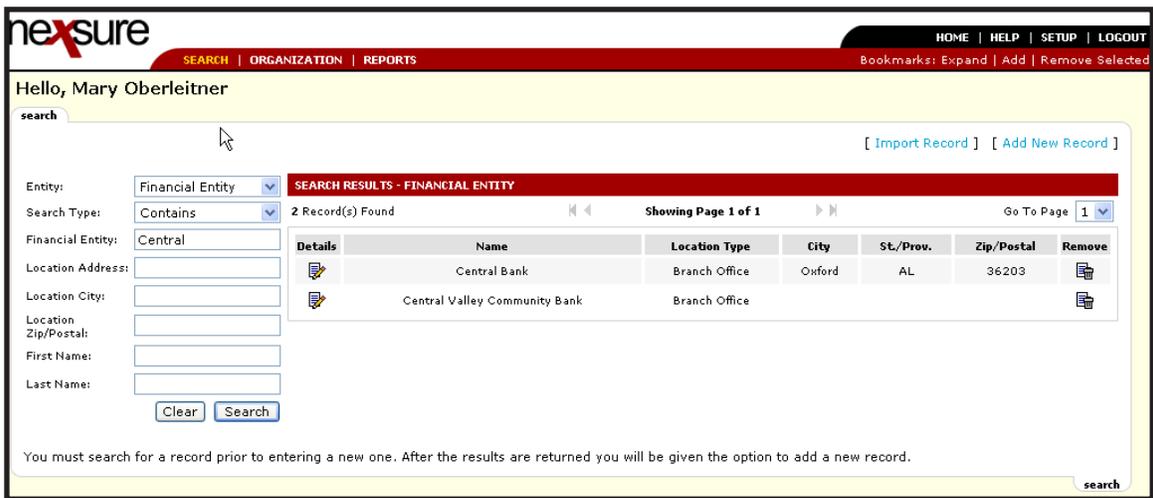
The Location Types (Financial Entity) are used on the Financial Entities location detail page to identify the location. The Financial Entities are the Bank Accounts used in the Accounting section of Nexsure. Modification of this type is done by following the General instructions provided in this chapter.



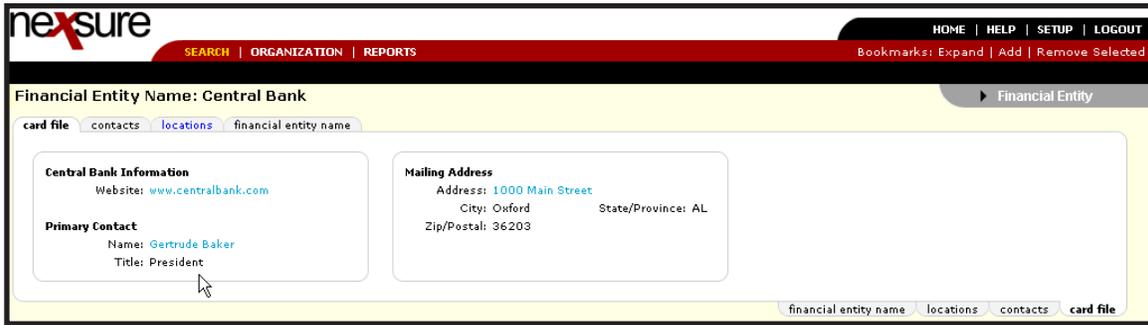
The Location Type (Financial Entity) field is located as follows:

To assign the items in the type drop-down box, click Search on the Primary menu.

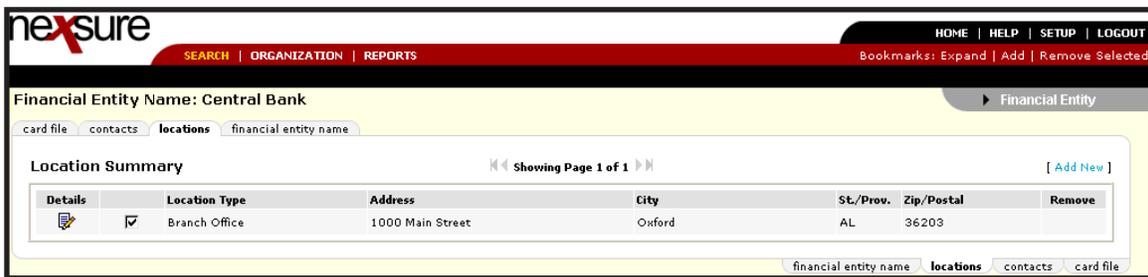
Click the entity drop-down box and select Financial Entities. Enter a few characters of the entity name and click the **Search** link. Notice that the Location Type displays on the search screen. This is used to help identify the location displayed. Click the **Details**  icon to display the Financial Entity Card File.



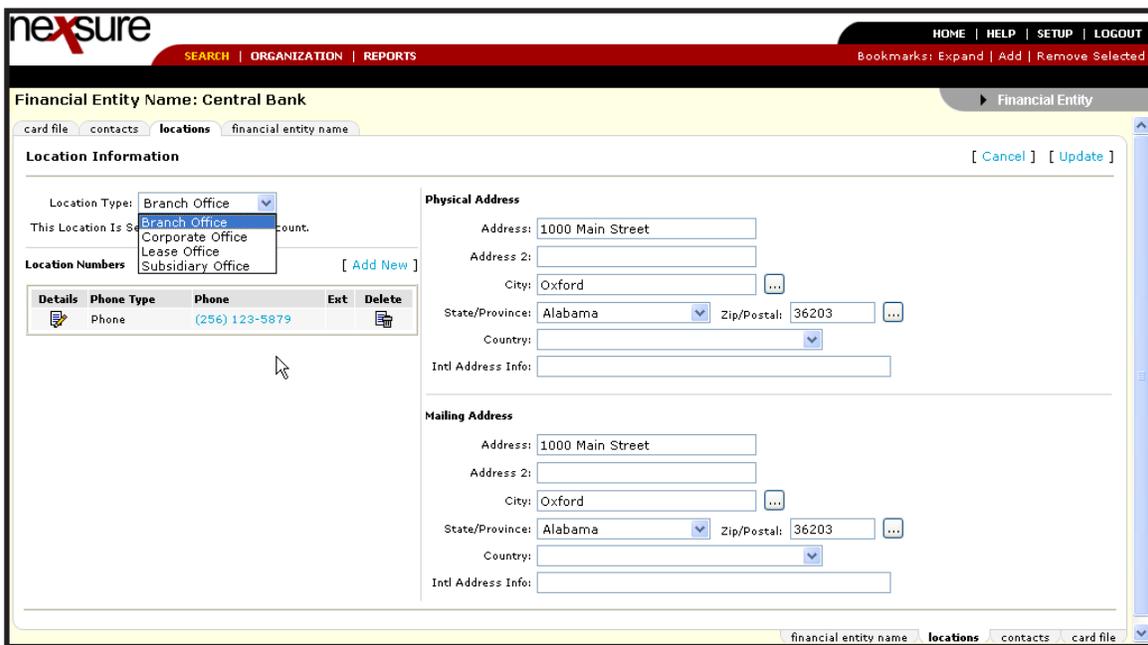
Click the **locations** tab to display the Locations summary.



Click the **Details**  icon for one of the locations to display the detail page.



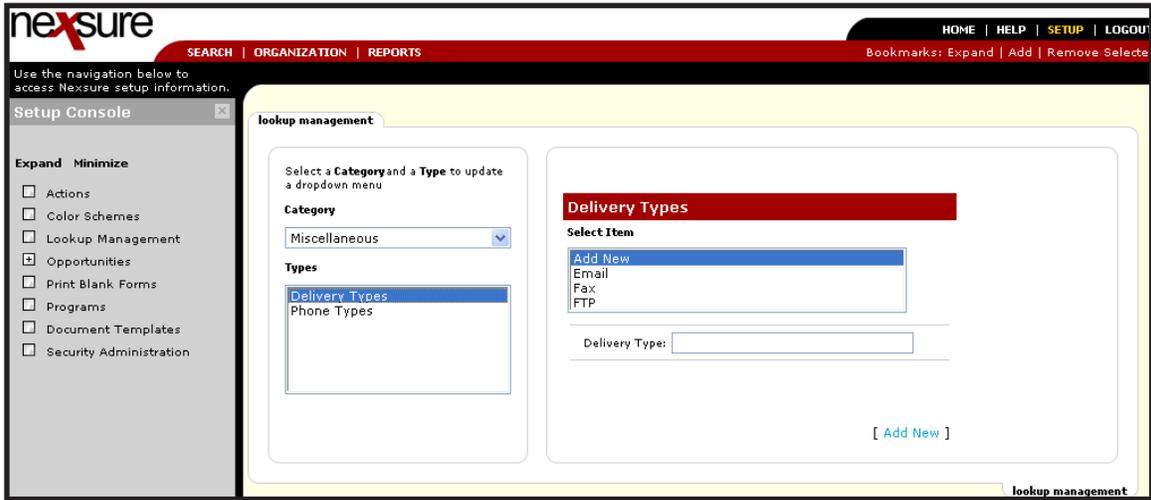
The Financial Entity Type is located at the top of the Location details page.



Miscellaneous Category

Delivery Types

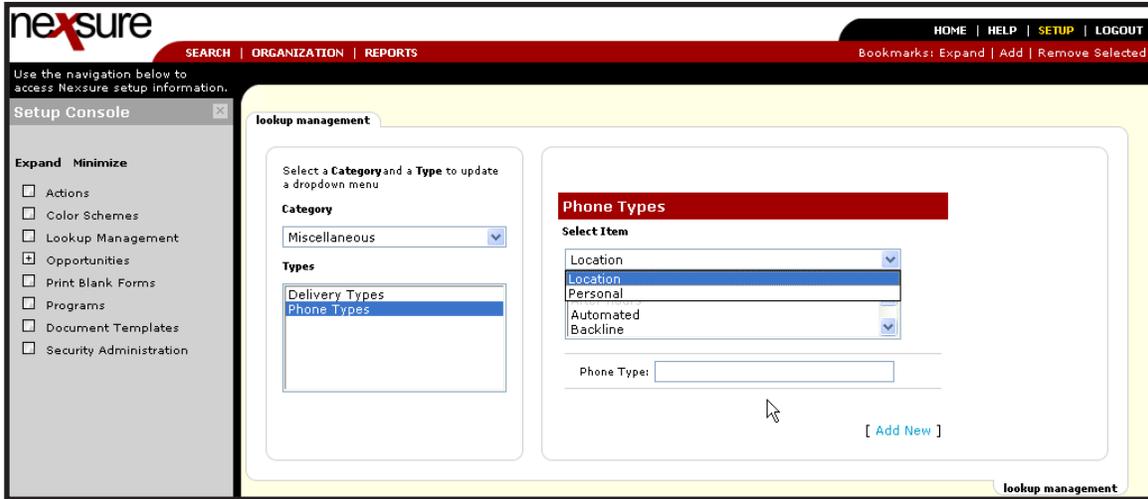
The Delivery Types is used on the Modification for all items except those for Location Modifying or adding items is done by following the General instructions provided in this chapter.



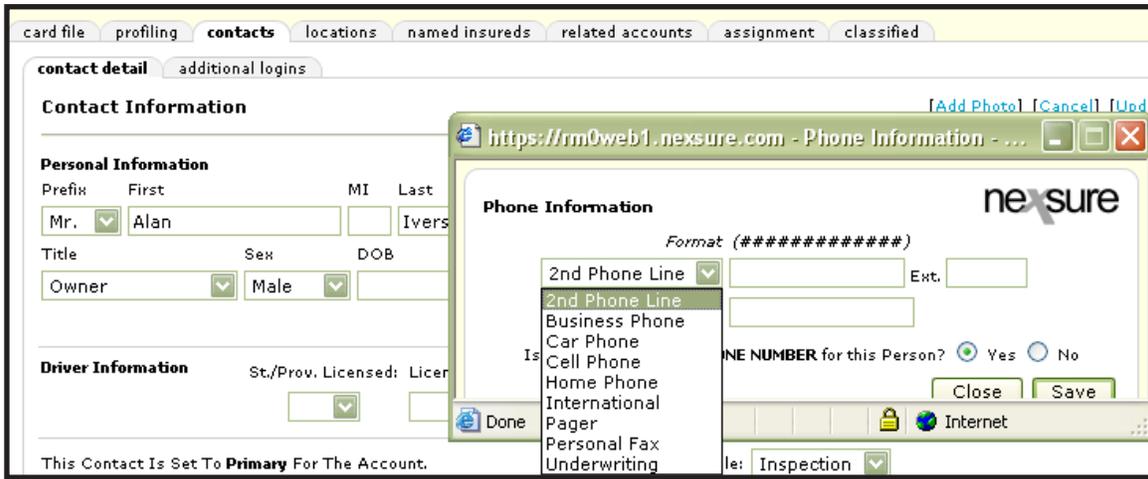
To Modify Phone Types follow the steps below:

- Begin by selecting the Category of Miscellaneous and the type of Phone Types. Notice when selected that an extra drop-down box is present on the right side just above the items. The items available in the drop-down box are Location and Personal. Location and Personal are in the drop-down box because there are two areas where phone numbers are identified, the location details and contact detail. These fields are used on all location details and contact detail such as on clients, carriers, etc. The item displayed in the drop-down box is where the items will be added, modified or removed.
- To add a new item, select the Phone Type, then at the top of the select items list, click **Add New**.
 - ❑ Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item.
 - ❑ Click the **[Add New]** link below the field to add the item.
- To modify an item, in the drop-down box on the right side just above the items select either Location or Personal for the item that requires modification. Next find the item in the list and click to highlight.
 - ❑ The name now displays in the field below the list beside the type label, make the adjustment.
 - ❑ Click the **[Update]** link to save the changes.
- To delete an item, in the drop-down box on the right side just above the items select either Location or Personal for the item that should be removed. Next find the item in the list and click to highlight.
 - ❑ The name now displays in the field below the list beside the type label.

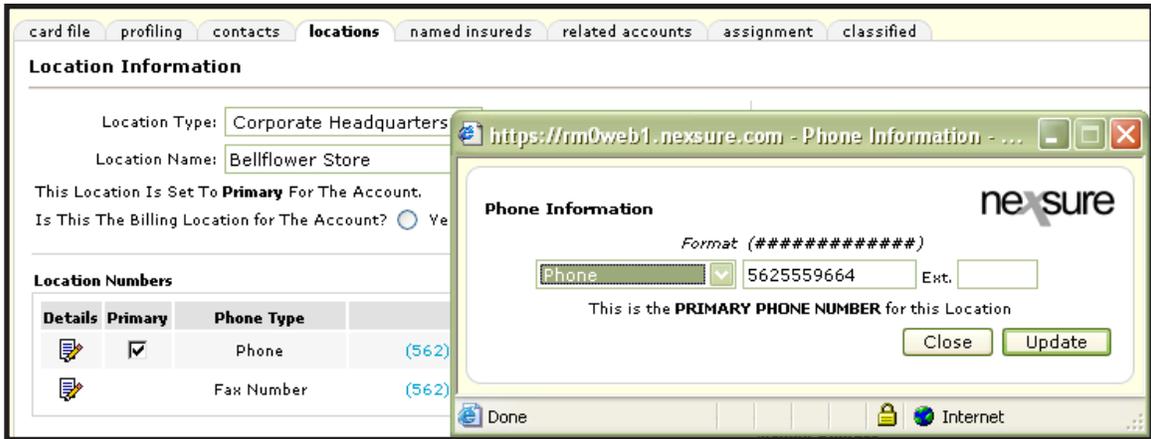
- ❑ Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.



Phone Types are used to identify Location and Personal Phone Types. Personal Phone types can be found on Contact detail screens by clicking the **Details**  icon of an existing phone number or by adding a new contact phone number in the Phone Type drop-down box.

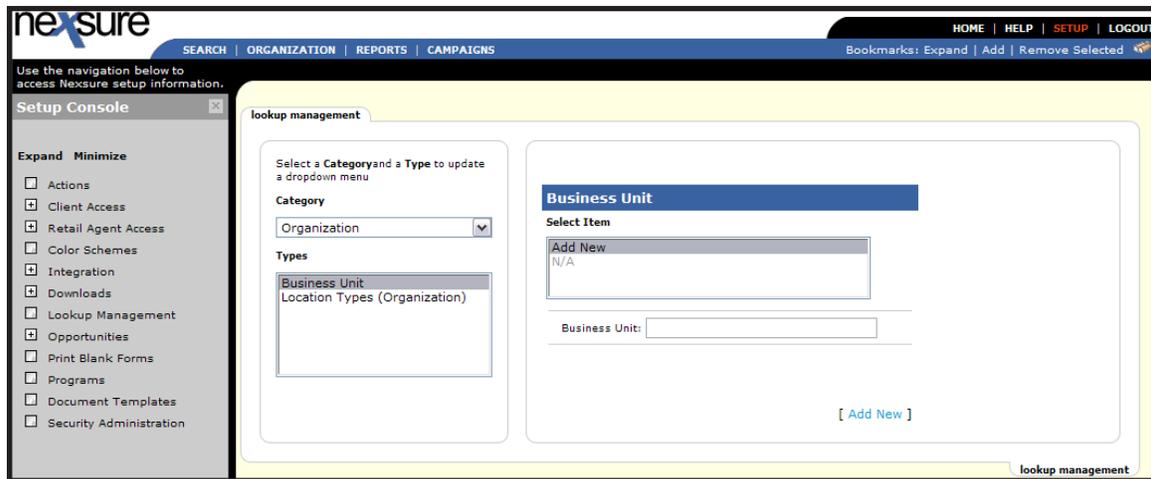


Location Phone types can be found on the Location detail screens by clicking the **Details**  icon of an existing phone number or by adding a new location phone number in the Phone Type drop-down box.



Organization Category Location Types (Organization)

Using the Category drop-down box select Organization. The category of Organization refers to the Organization level of Nexsure. **Business Unit** is used at Region level to add a virtual business unit to the region. The Location Types (Organization) identifies the location type for any location at all levels in the Organization to help identify each location (Organization, Region, Territory and Branch). Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



The **Business Unit** is located as follows:

- Click **ORGANIZATION** link on the **Primary** menu to display the Card File for the Organization.
- Click the **regions** tab and the **Details**  icon of the Region.
- Click **Edit** on the navigation toolbar to display the **Edit Organization Information** dialog box.
- The **Business Unit** selection box is located at the bottom of the dialog box and is used to identify the Business Unit.

Edit Organization Information

Region Name:

Primary Location: ▼

Primary Contact: ▼

Business Unit: ▼

The Location Type (Organization) field is located as follows:

- Click **ORGANIZATION** link on the Primary menu to display the Card File for the Organization. (Also found by clicking Region, Territories and Branches **Details** icons).
- Click the **locations** tab to display the Locations summary page.
- Click the **Details** icon for one location to display the details.
- The Location Type is located at the top of the page and is used to identify the location.

[HOME](#) | [HELP](#) | [SETUP](#) | [LOGOUT](#)
 Bookmarks: [Expand](#) | [Add](#) | [Remove Selected](#)

[ORGANIZATION PROFILE](#) | [ALL EMPLOYEES](#) | [ALL LOCATIONS](#)

Organization Name: XDTI--Training Org 972003 Organization

organization

XDTI--Training Org 972003 >> Main Office

Update

card file | regions | territories | branches | departments | **locations** | employees | accounting | vendors

location detail

Location Information

Location Type: ▼

Location Name:

Location Numbers [Add New]

Details	Phone Type	Phone	Ext	Delete
	Business Phone	(714) 672-8900		
	Fax Number	(714) 672-8908		

Physical Address

Address:

Address 2:

City: ...

State/Province: ▼ Zip/Postal: ...

Country: ▼

Intl Address Info:

Mailing Address

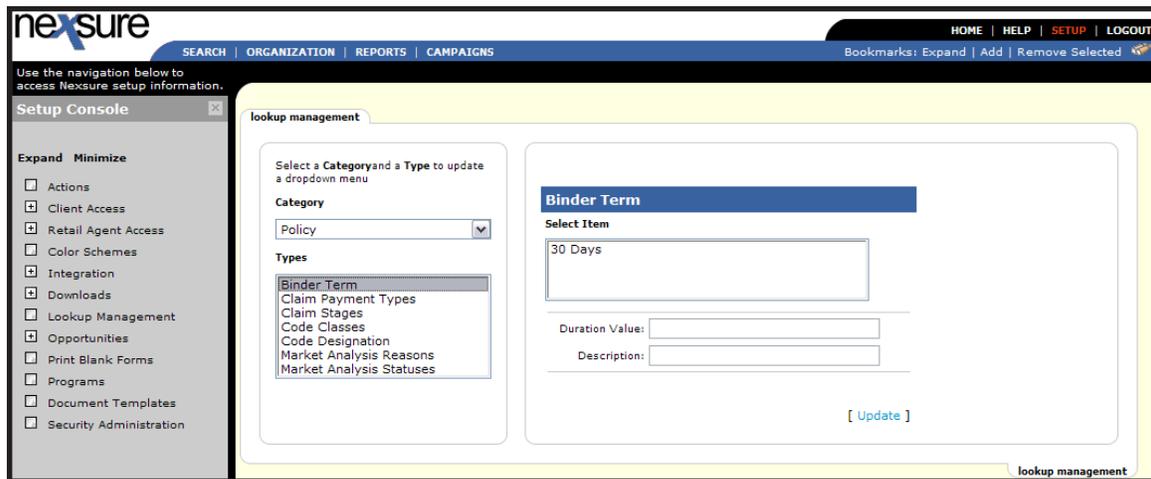
Address:

Address 2:

City: ...

People Category

Using the Category drop-down box select People. The category of People refers to Employees or Contacts found in Nexsure at Organization and CRM level. There are several different types under the category of People. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed but only unused items may be removed by following the General instructions provided in this chapter.



The following types are found on Employee and all Contact records:

- Contact Roles
- Marital Status
- Name Prefixes
- Name Suffixes
- Responsibility
- Titles

nexsure HOME | HELP | SETUP | LOGOUT
 SEARCH | ORGANIZATION | REPORTS Bookmarks: Expand | Add | Remove Selected

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

Client Name: Alvenson Sports Equipment Commercial Account

card file | profiling | **contacts** | locations | named insureds | related accounts | assignment | classified

contact detail additional logins [Add Photo] [Cancel] [Update]

Contact Information

Personal Information

Prefix First MI Last Suffix Goes By
 Mr. Alan Alvenson Alan

Title Sex DOB Social Security No. Marital Status
 Owner Male 4/12/1967 111-11-1111 Married
 (000-00-0000)

Driver Information St./Prov. Licensed: License Number: Date Licensed:
 CA 7989880989 4/12/1987

This Contact Is Set To **Primary** For The Account. Contact Role: Inspection

Personal Numbers [Add New] **E-Mail Address**

Details	Primary	Phone Type	Phone	Ext	Desc	Delete
	<input checked="" type="checkbox"/>	Business Phone	(714) 672-5555		after 7am	

E-Mail: alan@sportsequip.com
 E-Mail 2:

Locations
 Select the Primary Account Location for this contact: Bellflower Store - 123 Main Street

Employee Information Screen

card file | regions | territories | branches | departments | locations | **employees** | accounting | vendors

employee detail identity | additional logins | security | commissions | accounting transactions

Employee Information

Prefix First MI Last Suffix Goes By
 Mary Oberleitner Mary

Title Sex DOB Social Security No. Marital Status
 Male (000-00-0000)

Driver Information St./Prov. Licensed: License Number: Date Licensed:

Is this the **PRIMARY CONTACT** for this organization? Yes No Contact Role:

The **PRIMARY LOCATION** for this employee is: Brea, CA [123 West Accounting Office]

Personal Numbers [Add New]

Details	Phone Type	Phone	Ext	Desc	Delete
	Business Phone	(256) 831-2567			

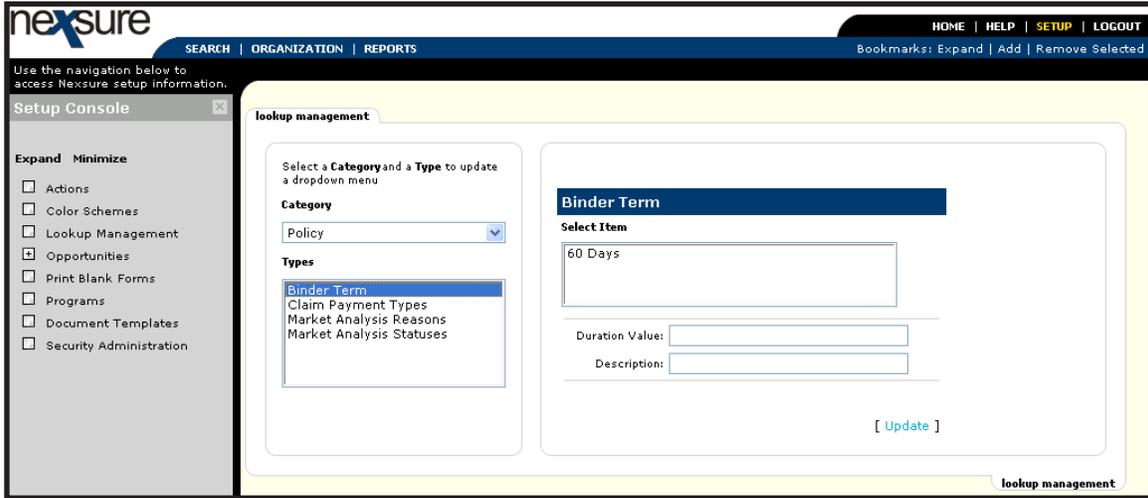
The type of People availability status is available for the user by clicking on a link for their name.

The screenshot displays the Nexsure web application interface. At the top, there is a navigation bar with 'SEARCH | ORGANIZATION | REPORTS'. Below this is a secondary navigation bar with 'CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TR'. The main content area shows the 'Client Name: Alverson Sports Equipment'. A 'Contact Record' window is open, showing details for 'Mary Oberleitner' with a status of 'Online (Available)'. The window includes fields for Name, Goes By, Email 1, and Notes. Below the notes is a table with columns: PR, Phone Type, Phone, Ext, and Description. The table contains one row: Business Phone, (256) 831-2567. The background shows the 'Primary Contact' section with 'Mr. Alan' as the owner, and an 'Assignment' table with columns: Primary, Branch, Department, Unit, Responsibility, and Name. The assignment table has one row: checked, Alabama Branch, 1-AB1/DB1-PP1, Unassigned, Producer, Mary Oberleitner.

Note: Using the word Online as the first part of the item still allows the employee to display by default to the All Employees screen if logged in. When any other word is used, the employee will not display on the All Employees screen even if the employee is logged in.

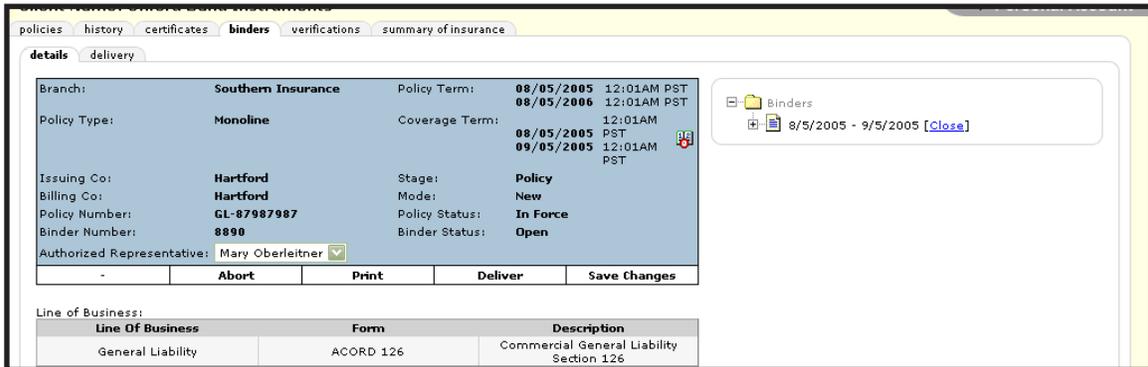
Policy Category

Using the **Category** drop-down box, select **Policy**. The category of **Policy** refers to the policy. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed but only unused items may be removed by following the general instructions provided in this chapter.



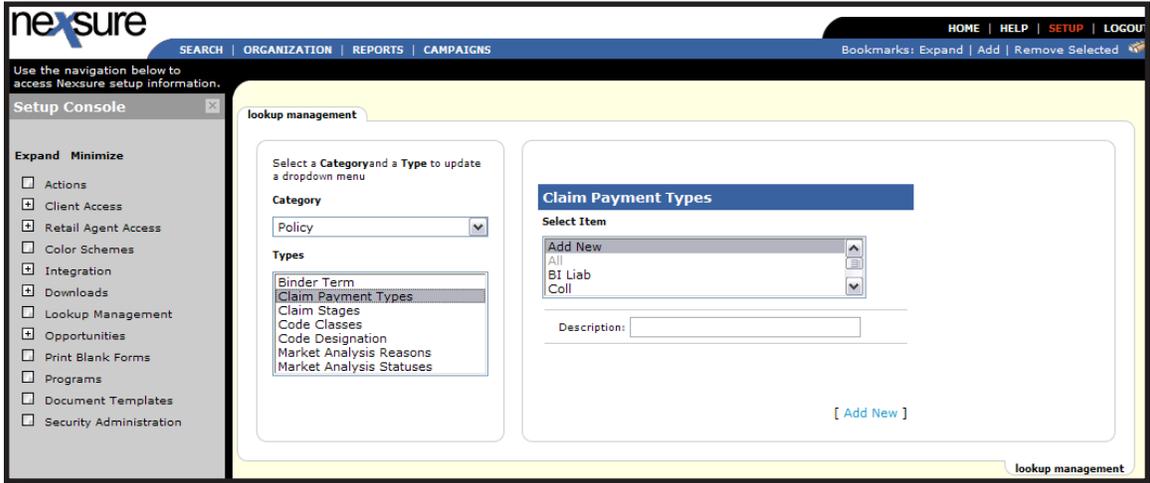
Binder Term

The Binder Term entered in setup is used when creating binders for client policies. The number of days entered is the number of default days that will populate on the binders. Enter the number of days in the **Duration Value** field and a description in the **Description** field provided.



Claim Payment Types

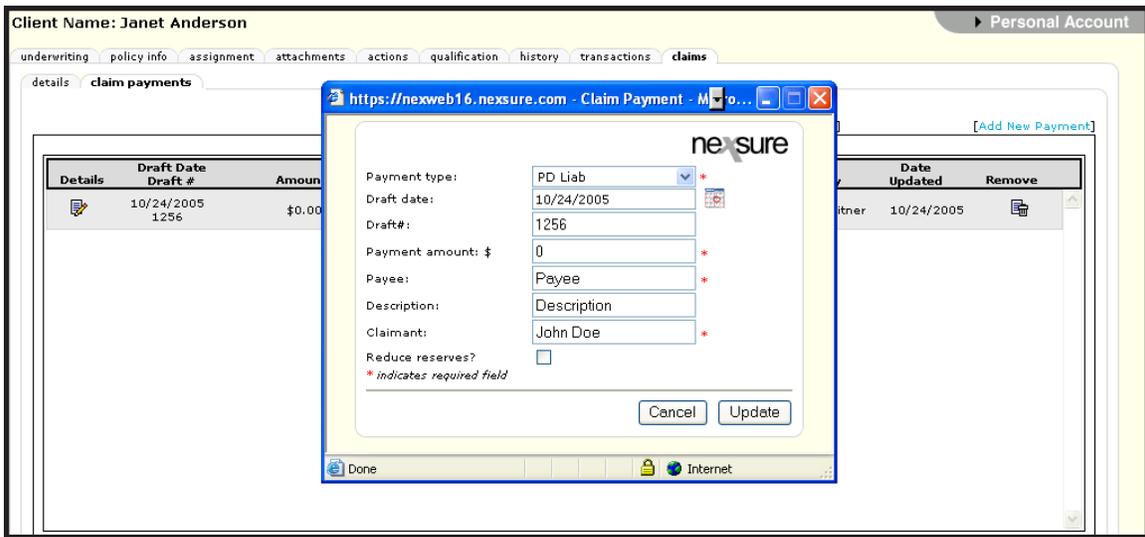
Claim Payment Types are added to identify the payments added on the **claims** tab under claim detail.



To access the **claim payments** tab, click the **details** tab of a claim on the **claims** tab and then click the **claim payments** tab.

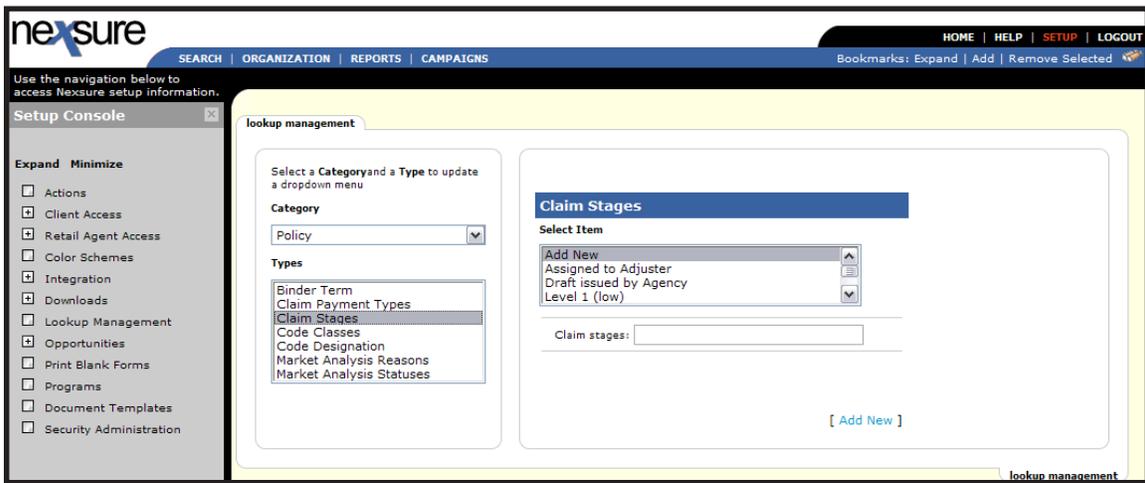


Adding a new payment allows the selection drop-down box for **Payment type**.



Claim Stages Types

Claim Stages Types are added to identify the claim's stage.



Access the **Claim Stage** on the claim **details** tab. The **Claim Stage** is located under the **Claims Information** Date Of Loss and Date Reported information.

The screenshot displays the Nexsure web application interface. At the top, there is a navigation bar with tabs for SEARCH, ORGANIZATION, REPORTS, and CAMPAIGNS. Below this is a secondary navigation bar with tabs for CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The main header shows the Client Name: Powers Construction Co., Inc. and a Commercial Account link. Below the header, there are tabs for underwriting, policy info, assignment, attachments, actions, qualification, history, transactions, and claims. The current view is the 'claims' tab, which is further divided into 'details' and 'claim payments'. The 'details' section contains a table with policy information:

Branch:	Ace Insurance Branch	Policy Term:	10/01/2008 12:01AM
Policy Type/PrimaryState:	Monoline / NH	Coverage Term:	10/01/2009 12:01AM
Issuing Co:	Hartford Accident and Indemnity Company	Stage:	10/01/2008 12:01AM
Billing Co:	Hartford Insurance Group	Mode:	10/01/2009 12:01AM
Policy Number:	BA987456321	Status:	Policy
Policy Description:		Origin Date:	Renew
			In Force
			10/01/2007

Below the table are buttons for Reopen Claim, Abort Claim, Post Claim, and Save Changes. An 'Actions' section contains a table with columns for Details, Topic, Type, Status, and Memo:

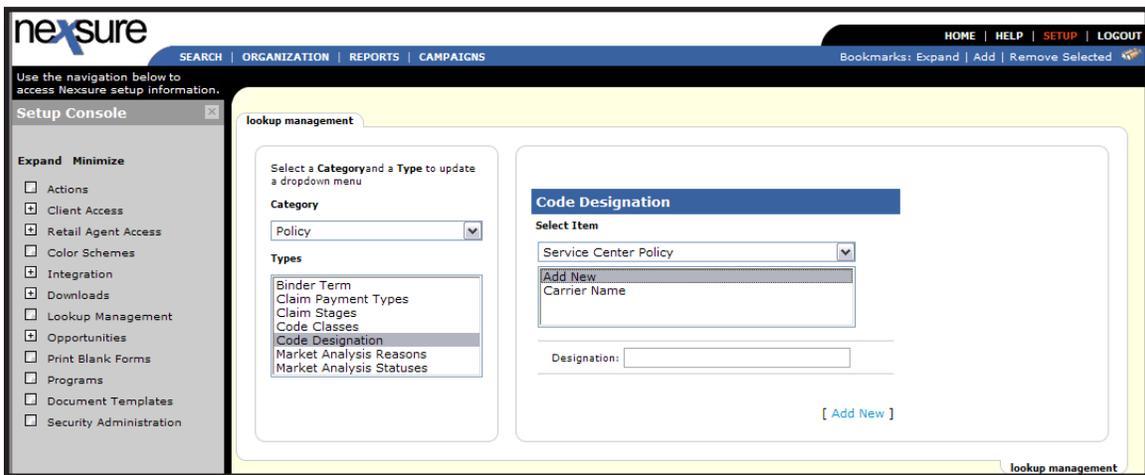
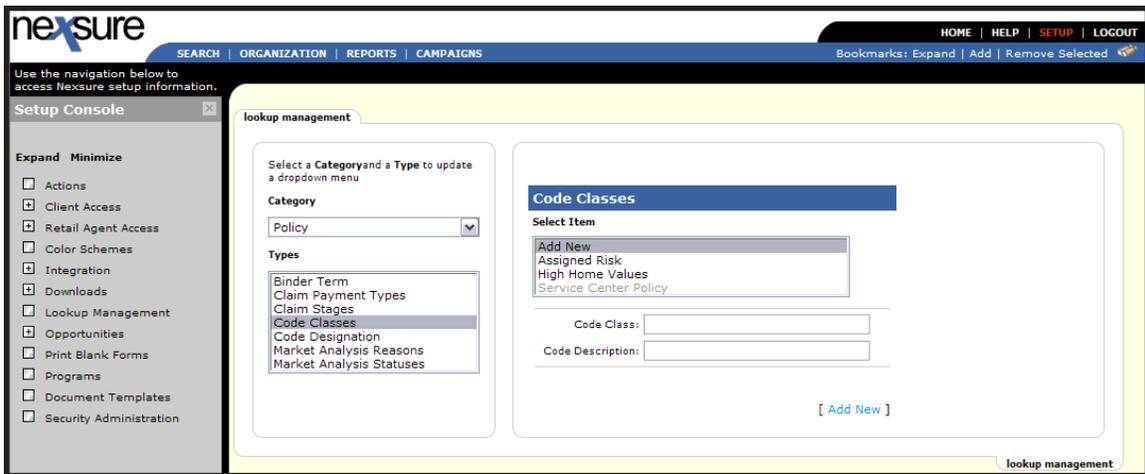
Details	Topic	Type	Status	Memo
	Claim	Annotation	Closed	Process claim.

The 'Line of Business' is Auto - Commercial. The 'Adjustor Information' section includes fields for Adjustor Name (John Doe) and Adjustor Phone (7145556666). The 'Claims Information' section includes fields for Date Of Loss (12/10/2008), Date Reported (12/10/2008), Claim Stage (Level 1 (low)), Claim No (4523542543252), Estimated Amount, Reserved Amount, Total Paid Amount, and a Memo field containing IV R/E OP. At the bottom, there is a 'Claimant Summary' section with a table:

Details	#	Claimant Name	Contact Name	Phone Number	Fax Number	E-Mail	Note	Remove
[Add New Claimant]								

Code Classes and Code Designations Types

Code Classes and Code Designations Types are both used on the **classified** tab found at Opportunity, Marketing, and Policy stages of a policy. They are used to categorize policies by something important to your agency. For example, Code Classes and Code Designations can be used to identify how a policy is to be handled by your agency. Code Designations available at policy level are determined by the Code Class they are related to in setup.



Adding and modifying Code Classes is done the way most items are done; however, modifying the Code Designations is slightly different. Follow the steps below to modify these items:

Begin by selecting the Category of Policy and the type of Code Designations. Notice when selected that an extra drop-down box is present on the right side just above the items. The items available in the drop-down box are the Code Classes previously added. The item displayed in the drop-down box is where the items will be added, modified or removed from.

To add a new item, select the Class Code to add the Code Designations to; then, at the top of the select items list, click **Add New**. Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item. Click the **[Add New]** link below the field to add the item. To modify an item, in the drop-down box on the right side just above the items select the appropriate Class Code for the item that requires modification. Next find the item in the list and click to highlight. The name now displays in the field below the list beside the type label, make the adjustment. Click the **[Update]** link to save the changes.

To delete an item, in the drop-down box on the right side just above the items select the appropriate Class Code for the item that should be removed. Next find the item in the list and click to highlight. The name now displays in the field below the list beside the type label.

Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.

The Policy Code Classes and Code Designations Type fields are located as follows:

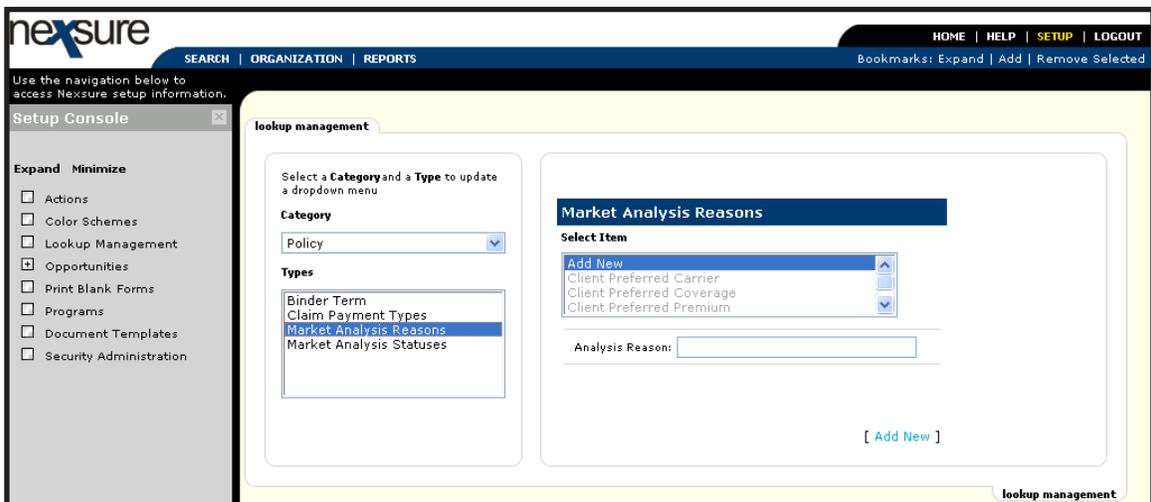
Click the **SEARCH** link located on the **Primary** menu and use the entity drop-down box to select **Client**. Enter a few characters of an already existing client; click the **Details**  icon to display the card file. Click the **OPPORTUNITIES**, **MARKETING** or **POLICIES** link on the **Client** menu to display the summary page. Click the **Details**  icon to display the policy record. To display the classified summary page, click the **classifieds** tab. Click the **Details**  icon of an existing **Class Code** to display the Detail page. This is where the Policy Class Code and Code Designations are used.



Details	Code Class	Code Description	Designation	Type	Remove
	ASR	Assigned Risk	CA ARP	P	

Market Analysis Reasons

Market Analysis Reasons are used to identify why a particular market was selected.



To use the Market Analysis Reasons, an analysis must have been added. Click the **Finalize** link on the navigation toolbar.

Client Name: Masons Grill Commercial Account

market analysis

Market Analysis ID: 2 Status: Pending

Created: 03/02/2006
 Created By: Mary Oberleitner
 Analysis Source: Unassigned
 Description: Comparison for upcoming renewal 2006.

Export Add Existing Finalize Save Changes Close

The Reason drop-down box is found on the bottom of the Finalize Selection screen.

Nexsure Market Analysis nexsure

Finalize Selection

Select which Market has been chosen. When your finished, click Finalize.

<input checked="" type="radio"/>	Stage: Marketing Issuing Carrier: Allied Insurance Policy# - Type: Unassigned - Package Term: 07/18/2006 - 07/18/2007
<input type="radio"/>	Stage: Marketing Issuing Carrier: Travelers Policy# - Type: Unassigned - Package Term: 07/18/2006 - 07/18/2007

Selection Reason

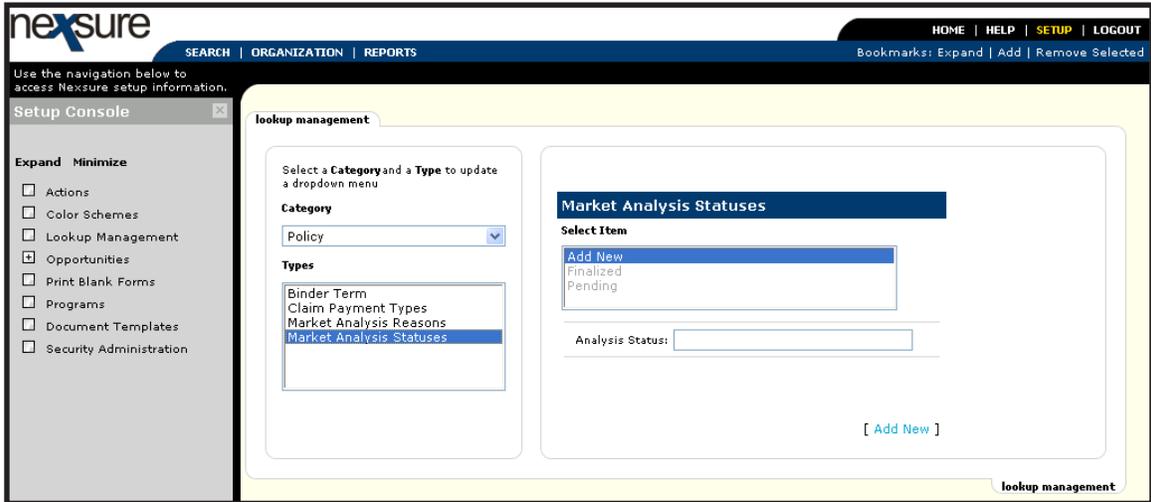
Reason: Client Preferred Premium

Notes: Coverages were equivalent to Travelers quote but the premium was \$250.00 less.

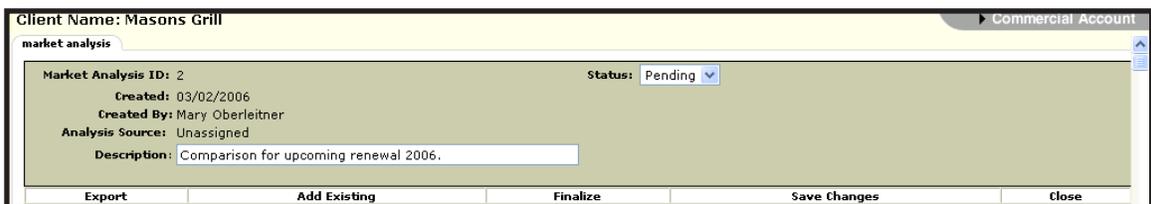
Close Finalize

Market Analysis Statuses

These statuses are used to identify where the current analysis is in the process. Add only as needed to suit the organization-specific business requirements.



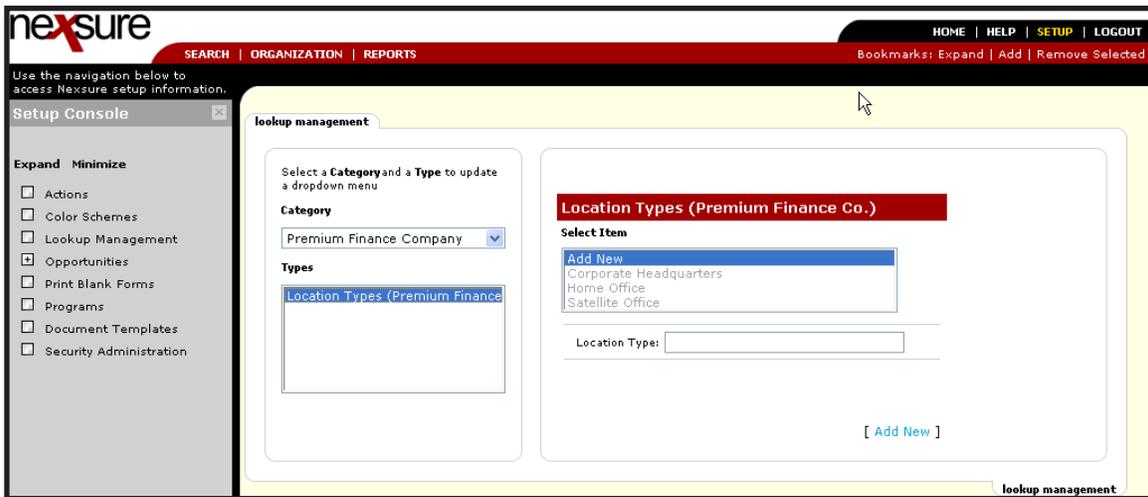
To use the statuses, an analysis must have been added. Click the **Details**  icon of the market analysis to edit the status.



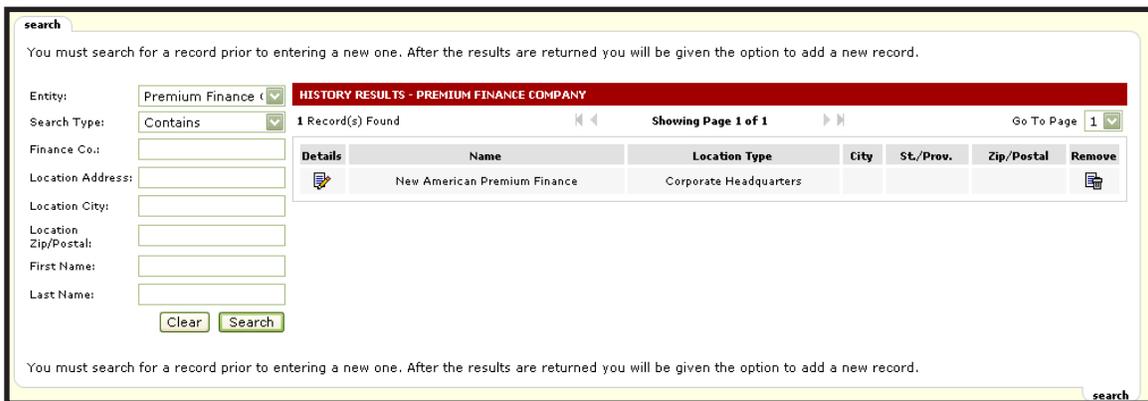
Premium Finance Company Category

Location Types (Premium Finance)

Using the Category drop-down box select Premium Finance Company. The category of Premium Finance Company can be found at Search level of Nexsure. The Location Types (Premium Finance) identifies the location type for any location at all levels in the Premium Finance Company to help identify each location. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



At Search level, search for a Premium Finance Company, click the **Details**  icon to display the card file.



Click the **locations** tab to display the location summary page.



Click the **Details**  icon to display the location detail page and the location type is located on the upper left of the page.

card file contacts **locations** premium finance company name [Cancel] [Update]

Location Information

Location Type: Corporate Headquarters
 This Location Is: Corporate Headquarters
 Home Office
 Satellite Office

Location Numbers [Add New]

Details	Phone Type	Phone	Ext	Delete
	Building Security	(714) 589-5632		

Physical Address

Address: 159 Tenth Street
 Address 2:
 City: Brea
 State/Province: California Zip/Postal: 92821
 Country: United States
 Intl Address Info:

Mailing Address

Address: 159 Tenth Street
 Address 2:
 City: Brea
 State/Postal: California Zip/Postal: 92821
 Country: United States
 Intl Address Info:

Retail Agent Category License and Location Types (Retail Agent)

Code Classes and Code Designations Types

Code Classes and Code Designations Types are both used on the **classifieds** tab found at the **Retail Agent** card file. They are used to add classified information to the retail agent record. Code Designations available are determined by the Code Class they are related to in setup.

nexsure SEARCH | ORGANIZATION | REPORTS | CAMPAIGNS | ELINKS HOME | HELP | SETUP | SUPPORT | LOGOUT
 Bookmarks: Expand | Add | Remove Selected

Use the navigation below to access Nexsure setup information.

Setup Console

Expand Minimize

- Actions
- Client Access
- Retail Agent Access
- Color Schemes
- Integration
- Downloads
- Lookup Management
- Opportunities
- Lines of Business
- Programs
- Document Templates
- Security Administration

lookup management

Select a Category and a Type to update a dropdown menu

Category: Retail Agent

Types:

- Code Classes
- Code Designation
- License Types (Retail Agent)
- Location Types (Retail Agent)
- Organization Legal Entity Type

Code Classes

Select Item

- Add New
- a b c
- New Business Submissions
- Processing Practice

Code Class:

Code Description:

[Add New]

lookup management

Adding and modifying Code Classes is done the way most items are done; however, modifying the Code Designations is slightly different. Follow the steps below to modify these items:

Begin by selecting the Category of Policy and the type of Code Designations. Notice when selected that an extra drop-down box is present on the right side just above the items. The items available in the drop-down box are the Code Classes previously added. The item displayed in the drop-down box is where the items will be added, modified or removed from.

To add a new item, select the Class Code to add the Code Designations to; then, at the top of the select items list, click **Add New**. Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item. Click the **[Add New]** link below the field to add the item. To modify an item, in the drop-down box on the right side just above the items select the appropriate Class Code for the item that requires modification. Next find the item in the list and click to highlight. The name now displays in the field below the list beside the type label, make the adjustment. Click the **[Update]** link to save the changes.

To delete an item, in the drop-down box on the right side just above the items select the appropriate Class Code for the item that should be removed. Next find the item in the list and click to highlight. The name now displays in the field below the list beside the type label.

Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.

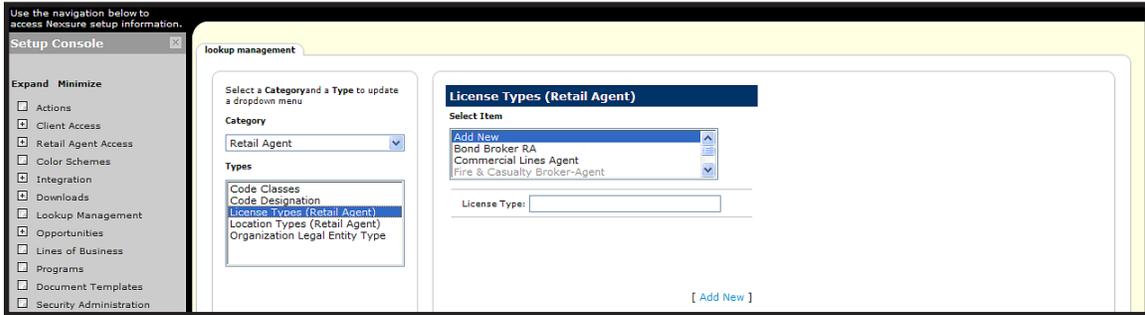
Retail Agent Code Classes and Code Designations Type fields are located as follows:

Click the **SEARCH** link located on the **Primary** menu and use the **entity** drop-down box to select Retail Agent. Enter a few characters of an already existing Retail Agent; click the **Details**  icon to display the card file. Click the **classifieds** tab to display the summary page. Click **[Add New]** link to add a new classified, click the **Details**  icon to display or edit an existing code. This is where Retail Agent Class Code and Code Designations are used.

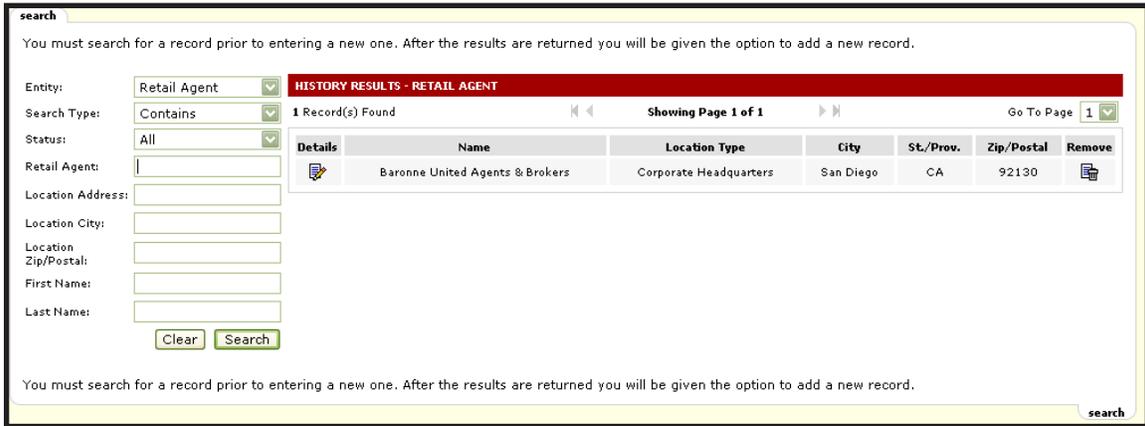


Using the **Category** drop-down box select Retail Agent. The category of License Types (Retail Agents) identifies the types of licenses that exist. The category of Retail Agent can be found at Search level of Nexsure. The Location Types (Retail Agent) identifies the location type for any location at all levels in the Retail Agent to help identify each location. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.

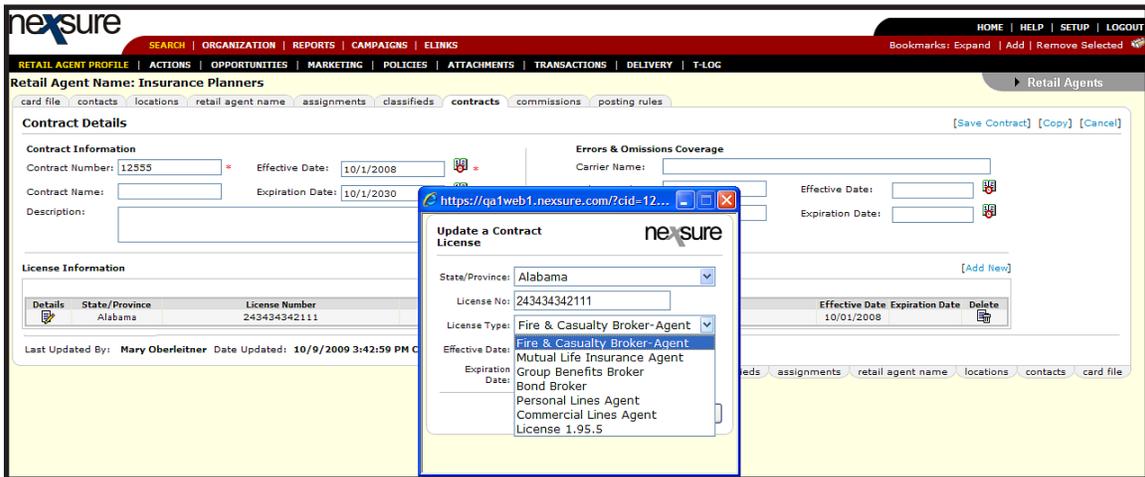
Select **Retail Agent** from the **Category** list and select **License Types** in the **Types** box. The **License Types** can be found on the Retail Agent by locating at Search level in Nexsure. **License Types** are used to identify the agreement between the Retail Agent and Org. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



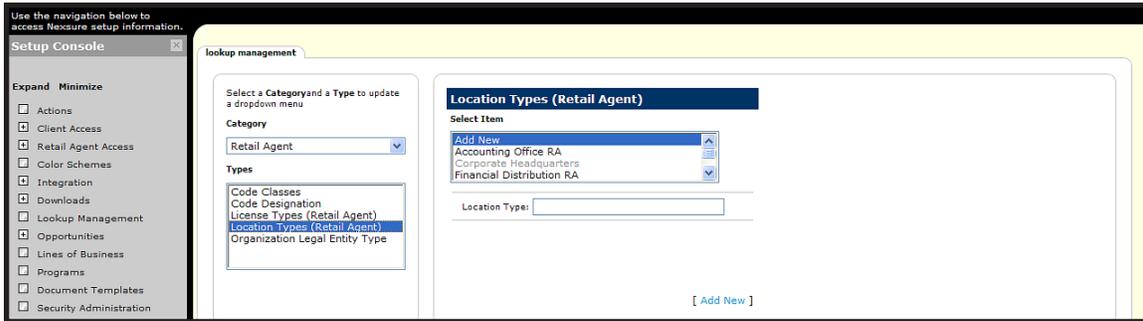
At Search level, search for a Retail Agent; click the **Details**  icon to display the card file.



The License type is found on the Retail Agents Contract Tab. Click the **Details**  icon of the contract to display the contract details. The License Type is assigned to each License added to the contract.



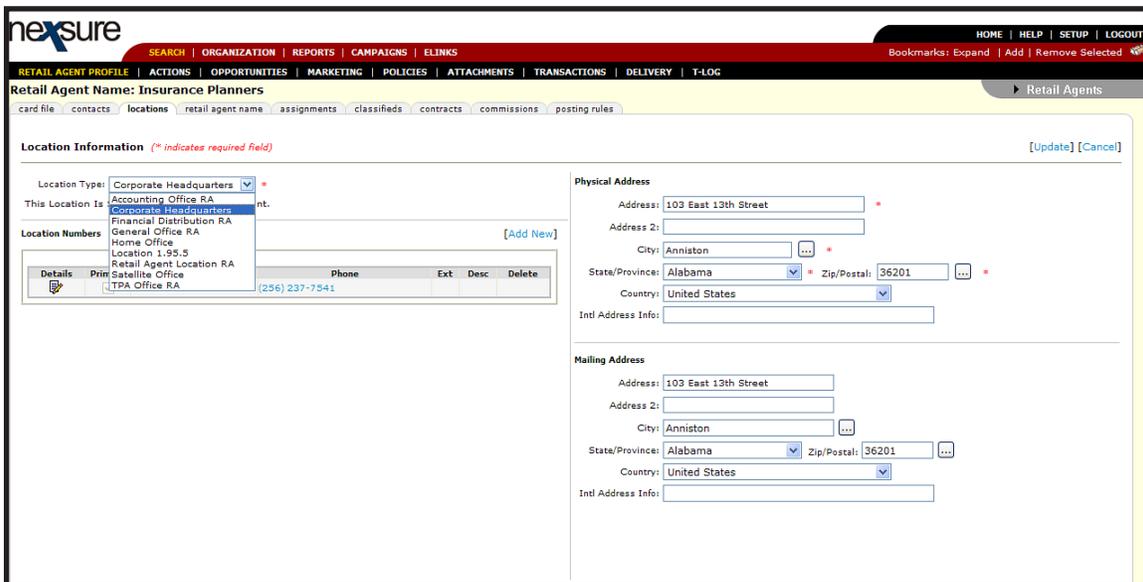
Select **Retail Agent** from the **Category** list and select **Location Types** in the **Types** box. The **License Types** can be found on the Retail Agent by locating at Search level in Nexsure. The **Location Types** identify the Retail Agent location. This is a required field that must be added on all Retail Agent locations. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



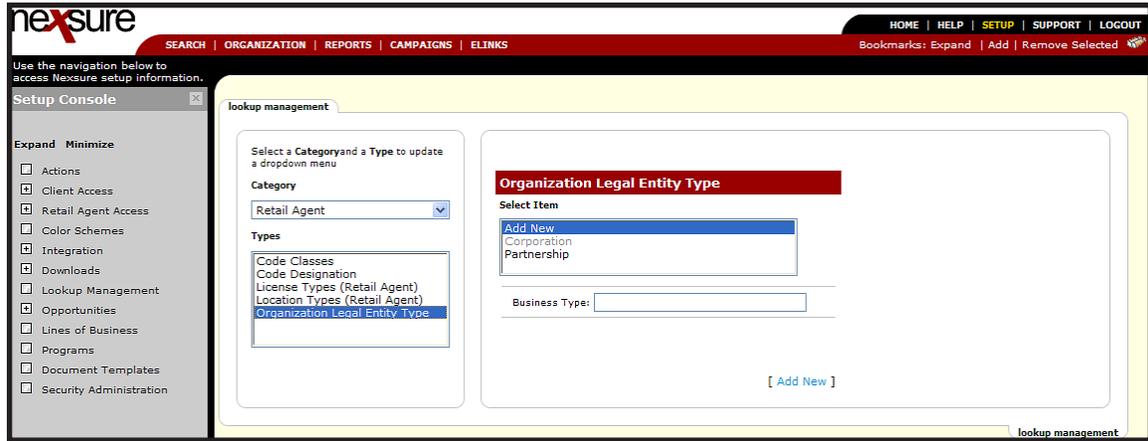
Click the **locations** tab to display the location summary page.



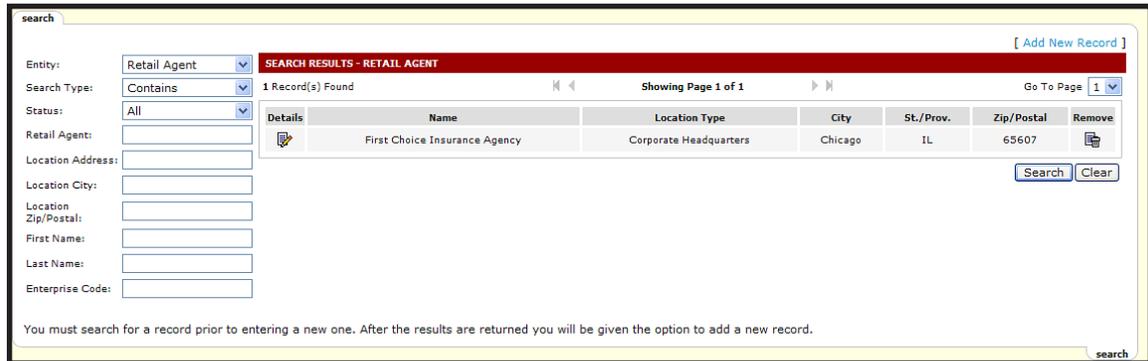
Click the **Details** icon to display the location detail page and the location type is located on the upper left of the page.



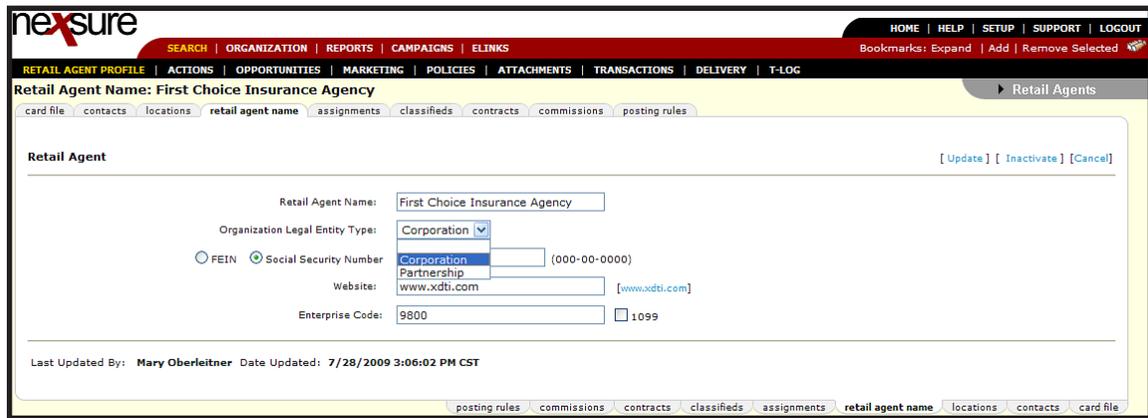
Select **Retail Agent** from the **Category** list. Select **Organization Legal Entity Type** from the **Types** box. This field can be found on the Retail Agent by locating at Search level in Nexsure. The **Organization Legal Entity Type (Retail Agent)** identifies the **Legal Entity Type** for Retail Agent to help identify each entity. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



At Search level, search for a **Retail Agent**; click the **Details**  icon to display the card file.



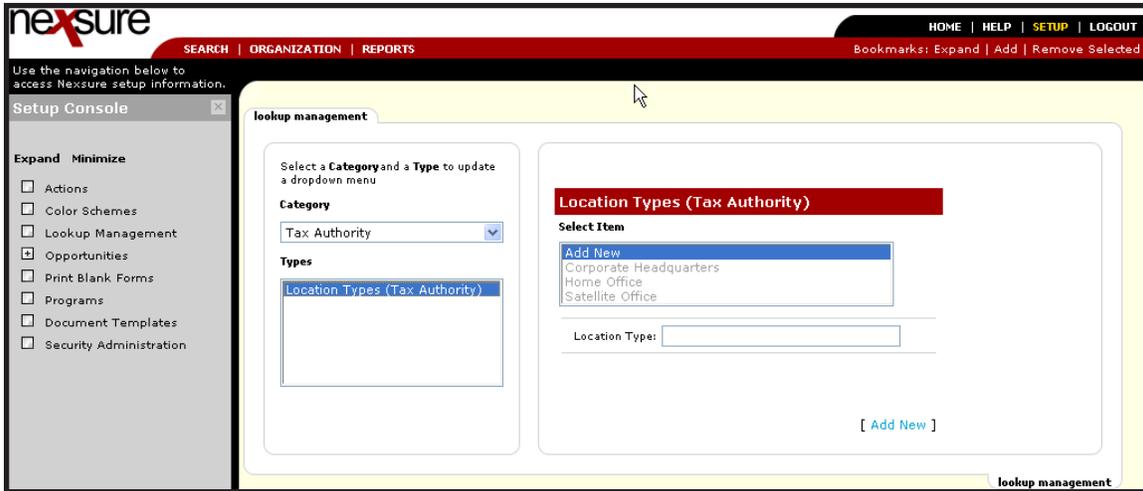
The **Organization Legal Entity Type** is found on the **retail agent name** tab.



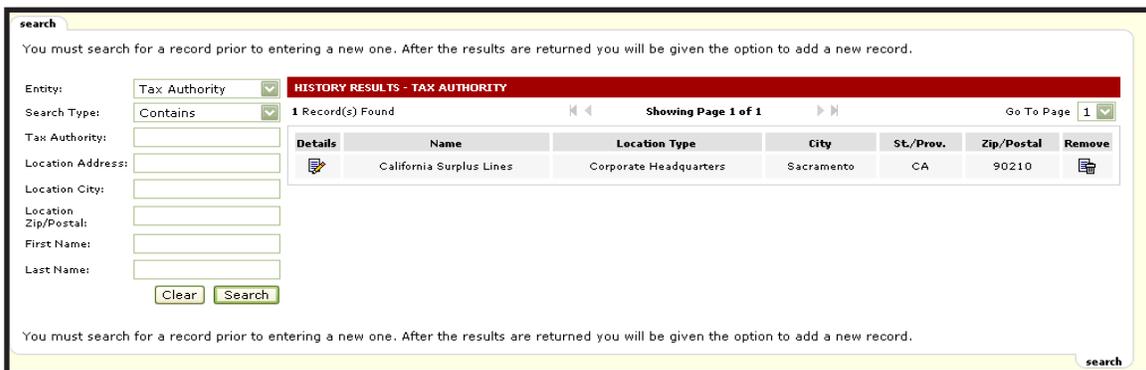
Tax Authority Category

Location Types (Tax Authority)

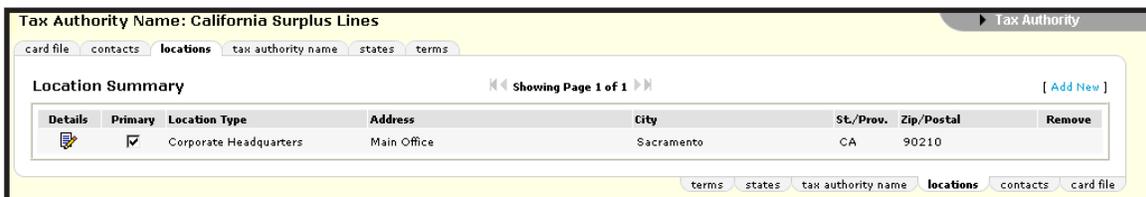
Using the Category drop-down box select Tax Authority. The category of Tax Authority can be found at Search level of Nexsure. The Location Types (Tax Authority) identifies the location type for any location at all levels in the Tax Authority to help identify each location. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.



At Search level, search for a **Tax Authority**; click the **Details**  icon to display the card file.



Click the **locations** tab to display the location summary page.



Click the **Details**  icon to display the location detail page and the location type is located on the upper left of the page.

Tax Authority Name: California Surplus Lines Tax Authority

card file | contacts | **locations** | tax authority name | states | terms

Location Information [Cancel] [Update]

Location Type: Corporate Headquarters
 This Location Is: Corporate Headquarters
 Home Office
 Satellite Office

Location Numbers [Add New]
 No phone record(s) found.

Physical Address

Address: Main Office
 Address 2:
 City: Sacramento
 State/Province: California Zip/Postal: 90210
 Country:
 Intl Address Info:

Mailing Address

Address: Main Office
 Address 2:
 City: Sacramento

Vendor Category Location Types (Vendor)

Using the Category drop-down box select Vendor. The category of Vendor can be found at Search level of Nexsure. The Location Types (Vendor) identifies the location type for any location at all levels in the Vendor to help identify each location. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify any other item as needed and only unused items may be removed.

nexsure HOME | HELP | **SETUP** | LOGOUT

SEARCH | ORGANIZATION | REPORTS Bookmarks: Expand | Add | Remove Selected

Use the navigation below to access Nexsure setup information.

Setup Console

Expand Minimize

- Actions
- Color Schemes
- Lookup Management
- Opportunities
- Print Blank Forms
- Programs
- Document Templates
- Security Administration

lookup management

Select a **Category** and a **Type** to update a dropdown menu

Category
 Vendor

Types
 Location Types (Vendor)

Location Types (Vendor)

Select Item

- Add New
- Accounting Office
- Corporate Headquarters
- Home Office

Location Type:

[Add New]

lookup management

At Search level, search for a Vendor, click the **Details**  icon to display the card file.

search

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

Entity: **HISTORY RESULTS - VENDOR**

Search Type: 1 Record(s) Found Showing Page 1 of 1 Go To Page

Vendor:

Location Address:

Location City:

Location Zip/Postal:

First Name:

Last Name:

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

Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
	California Mountain Spring Water	Corporate Headquarters	Bakersfield	CA	93301	

search

Click the **locations** tab to display the location summary page.

Vendor Name: California Mountain Spring Water Vendor

card file contacts **locations** vendor name

Location Summary Showing Page 1 of 1 [Add New]

Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Remove
	<input checked="" type="checkbox"/>	Corporate Headquarters	654 Main Street	Bakersfield	CA	93301	
	<input type="checkbox"/>	Accounting Office	543 Main Street	Bakersfield	CA	93301	

vendor name **locations** contacts card file

Click the **Details**  icon to display the location detail page and the location type is located on the upper left of the page.

Vendor Name: California Mountain Spring Water Vendor

card file contacts **locations** vendor name

Location Information [Cancel] [Update]

Location Type:
 This Location Is:

 [Add New]

Location Number: [Add New]

Details **Phone**
 Toll Free (800) 326-3166 

Physical Address

Address:

Address 2:

City: ...

State/Province: Zip/Postal: ...

Country:

Intl Address Info:

Mailing Address

Address:

