# 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.

nexsure		HOME   HELP   SETUP   LOGOUT
SEARCH Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION   REPORTS	Bookmarks: Expand   Add   Remove Selected
Expand Minimize  Actions Color Schemes Color Schemes Color John Management Opportunities Print Blank Forms Programs Cocument Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Additional Interest Types Interest Types	Interest Types Select Item Add New Certificate Holder Default Finance Company
		[ Add New ]

# 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.

Setup Console 🛛 🗵	lookup management	
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a <b>Category</b> and a <b>Type</b> to update a dropdown menu <b>Category</b> Additional Interest <b>Types</b> Interest Types	Interest Types Select Itam Certificate Holder Default Finance Company Interest Type: Finance Company [ Delete ] [ Update ]
Microsoft Interne	et Explorer ure you want to delete this reco Cancel	Microsoft Internet Explorer         vrd?         Unable to delete!         Interest Type is in use.         OK

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### Notes

# **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.

SEARCH   ORCANIZATION   REPORTS   CAMPAIGNS       Bookmarks: Expand   Add   Remove Selected          Use the navigation below to access Nextore setup information.         Setup Console       Image: Color Schemes         Actions       Color Schemes         Color Schemes       Additional Interest         Integration       Opportunities         Downloads       Interest Types         Lookup Management       Opportunities         Print Blank Forms       Programs         Document Templates       Security Administration	nevsure		HOME   HELP   SETUP   LOGOL
Expand Minimize   Actions   Client Access   Category   Additional Interest   Additional Interest   Additional Interest   Types   Integration   Downloads   Lockup Management   Opportunities   Print Blank Forms   Programs   Document Templates   Security Administration     Security Administration     Select a Category and a Type to update a dropdown menu     Salect a Category     Interest     <	SEARCH   ORCAN Use the navigation below to access Nexsure setup information. Setup Console	IIZATION   REPORTS   CAMPAIGNS	Bookmarks: Expand   Add   Remove Selected 🥳
	Expand Minimize Actions Client Access Color Schemes Integration Downloads Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	elect a Categoryand a Type to update dropdown menu ategory Additional Interest ypes Interest Types Location Types (Addl Interest)	Interest Types Select Item Add New Certificate Holder Default Finance Company Interest Type: [Add New ]

### 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.

nexsure			TE   CAMDATONS		Bookmarks, Expan	HOME   HELP   :	SETUP   LOGOU				
Hello, Betsy Cormier											
search											
You must search	for a record prior to en	tering a new one.	After the results are returned you will be giv	en the option to add a new	record.						
=	A LINE AND A REAL		ADDITIONAL INTEREET								
Entity:	Additional Interest	4 Record(c) Found	- ADDITIONAL INTEREST	nwing Dage 1 of 1	4	Galta					
Search Type:		4 Record(s) Found		owing Page 1011 (P)		00101	rage I V				
Add. Interest:		Details	Name	City	St./Prov.	Zip/Postal	Remove				
Phone Number:		<b>&gt;</b>	SteelMaster Contracting Services, Inc.	Nashua	NH	03061	<b>E</b>				
Location Address:		<b>*</b>	Boughton Contracting	Oklahoma City	ок	77063	E				
Location City:		<b>P</b>	Compass Bank	Denver	со	80211					
Location Zip/Postal:		<b>*</b>	Wells Fargo Home Mortgage	Denver	со	80211	<b>B</b>				
First Name:						Searc	b Clear				
Last Name:											
You must search	for a record prior to en	tering a new one.	After the results are returned you will be giv	ren the option to add a new	record.						
							search				

SHARCH:     ORGANIZATION     REPORTS     CAMPAIGNS       itional Interest Name:     Compass Bank       file     contacts     locations     additional interest name       Compass Bank Information Website:     Mailing Address       Address:     3804 West 320	Bookmarks: Expand   Add   Remove S	Selected
tional Interest Name: Compass Bank I file contacts locations additional interest name Compass Bank Information Website: N/A Mailing Address Address: 3804 West 320	► Additiona	al Intere
itional Interest Name: Compass Bank I file contacts locations additional interest name Compass Bank Information Website: N/A Mailing Address Address: 3804 West 320	Additiona	al Intere
file contacts locations additional interest name Compass Bank Information Website: N/A Mailing Address Address: 3804 West 320		
Compass Bank Information Website: N/A Address 3804 West 320		
Compass Bank Information Website: N/A Address 3804 West 32n		
Compass Bank Information Mailing Address Website: N/A Address: 3804 West 32n		
Website: N/A Address: 3804 West 32n		
	nd Ave	
Type: Loss Payee City: Denver	State/Province: CO	
Primary Contact Zip/Postal: 80211		
Name: Unassigned Country:		
Title: International Info:		
E-Mail: Unknown Unknown Location Address		
Address: 3804 West 32n	nd Ave	
City: Denver	State/Province: CO	
Zip/Postal: 80211		
Business Phone: (303) 561-380	04	

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

nexsure		HOME   HELP   SETUP   LOGOUT
GEARCH   ORGANIZATION   REPOR	TS   CAMPAIGNS	Bookmarks: Expand   Add   Remove Selected 🛛 🂝
Additional Interest Name: Compass Bank		Additional Interest
card file contacts locations additional interest name		
Additional Interest		[Update] [Cancel]
Additional Interest Type:	Loss Payee	
Additional Interest Name:	Compass Bank	
Website:		
Last Updated By: Betsy Cormier Date Updated: 11/25/2	008 1:35:08 PM PST	
		additional interest name / locations / contacts / card file

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.

nevsure	HOME   HELP   SETUP   LOGOUT
SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS	Bookmarks: Expand   Add   Remove Selected 🌾
Additional Interest Name: Compass Bank	Additional Interest
card file contacts locations additional interest name	
Location Information (* indicates required field)	[Update] [Cancel]
Location Type: Corporate Headquarters 💙 *	Physical Address
This Location Is Set To <b>Primary</b> For The Account.	Address: 3804 West 32nd Ave *
Location Numbers [Add New]	Address 2:
	City: Denver *
Details Primary Phone Type Phone Ext Desc Delete	State/Province: Colorado 💌 * Zip/Postal: 80211 📖 *
Business Phone (303) 561-3804	Country:

# **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.

nevsure	ORGANIZATION   REPORTS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selectec
Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Carrier Types Location Types (Carrier)	Location Types (Carrier)         Select Item         Add New         Accounting Office         Approximation of the second sec

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.

						HOME	HELP   SE	TUP   LOGO
	SEARCH   ORGAN	NIZATION   F	REPORTS		Bookma	rks: Expan	d   Add   Re	move Selec
ello, Mary Ober	eitner							
arch								
ou must search for a	record prior to ent	tering a new	one. After the results are returned yo	u will be given the option to	add a new record.			
intity: Carr	er 💌	HISTORY RE	SULTS - CARRIER		N N			
Search Type: Cont	ains 💌	7 Record(s) F	ound N	Showing Page 1 of 1	► N		Go To Pa	ge 1 💙
Carrier:		Details	Name	Location Type	City	St/Prov.	Zip/Postal	Remove
hone Number:		<b>*</b>	Auto Owners	Underwriting	Sweetser	IN	46987	<b>B</b>
ocation Address:		<b>*</b>	Southern Cross Underwriters	Accounting Office	Oxford	AL	47890	<b>B</b>
ocation City:		<b>&gt;</b>	Premium Assignment	Accounting Office	Brea	СА	92821	
.ocation ?ip/Postal:		<b>&gt;</b>	safeco	Accounting Office	Brea	CA	92821	<b>B</b>
ïrst Name:		<b>&gt;</b>	Carriers Insurance	Accounting Office	Huntington Beach	CA	92605	
.ast Name:		<b>P</b>	Premium Finance	Accounting Office	Brea	CA	92821	
	lear Search	<b>&gt;</b>	ABC Surplus Lines Broker - Condominum	Corporate Headquarters	Wymore	NE	68466	<b>B</b>

	SEARCH   ORGANIZATION   REPORTS				HOME   HELP   SETUR					
SEARCH ONGANIEATION	Bookmarks: Expand   Add   Keniove se									
rrier Name: Auto Owners					Carrier					
rd file contacts locations carrier names c	ommissions									
Primary Contact	Mailing Address									
Name: Elaine Sweet	Location Type: Underwriting									
Title: Account Manager	Address: P.O. box 32									
E-Mail: sweet.elaine@aoins.com	City: Sweetser									
	State/Province: IN									
	Zip/Postal: 46987									
	Phone: (800) 523-5846									
	Fax Number: (765) 384-5519									
		commissions	carrier names	locations	contacts	card file				
		commissions	carrier fiames	locations	concacts	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.

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Carrier N	Jame: Au	Ito Owners	names commissions					► Carrier	
Location	n Summar	·y						I	Add New ]
Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Phone Number	Fax Number	Remove
<b>*</b>	<b>V</b>	Underwriting	P.O. box 32	Sweetser	IN	46987	(800) 523-5846	(765) 384-5519	
<b>&gt;</b>		Claims	P.O. Box 132	Indianapolis	IN	46227	(317) 487-1920	(317) 487-1720	<b>₽</b>
							commissions carrier names	locations contact	s card file

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.

nexs	UIE SEARCH	ORGANIZATION   REPORTS				HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected
Carrier Na	me: Auto Owners	5				► Carrier
card file c	ontacts locations	carrier names commissions				
Carrier Lo	cation Information					[Cancel] [Delete] [Update]
Location Ty	pe: Underwriting	~			Physical Address	
Location Nu	nbers			[Add New]	Address: F Address 2:	P.O. box 32
Details	Phone Type	Phone	Ext	Delete	City: S	Sweetser
<b>&gt;</b>	Phone	(800) 523-5846		<b>B</b>	State/Province:	Indiana 🛛 Zip/Postal: 46987
<b>*</b>	Fax Number	(765) 384-5519		E.	Country:	×
					Intl Address Info:	
					Mailing Address	
					Address: F	P.O. box 32
					Address 2:	
					City: S	Sweetser
					State/Province:	Indiana 🗸 Zip/Postal: 46987 🛄
	N				Country:	×
	4				Intl Address Info:	
						commissions carrier names locations contacts card file

# **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:

nexsure		HOME   HELP   SETUP   LOGOUT
SEARCH Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION   REPORTS   CAMPAIGNS	Bookmarks:Expand   Add   Remove Selected 🖋
Expand Minimize Actions Color Schemes Integration Downloads Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Categoryand a Type to update a dropdown menu Category Client V Types Code Classes Code Classes Code Classes Code Designation Demographic Date Fields Home Ownership How Relates Location Types (Client) V	Client Relationship Types         Select Item         Commercial         Corporation/Subsidiary         Particle         Medical Office         Relationship Type:         [ Add New ]

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.

Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION   REPORTS   CAMPAIGNS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected 💞
Expand Minimize Actions Color Schemes Integration Downloads Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Categoryand a Type to update a dropdown menu Category Client V Types Code Classes Code Classes Code Classes Code Classes Code Designation Demographic Data Fields Home Ownership How Relates Location Types (Client) V	Client Relationship Types Select Item Commercial Personal Both Medical Office Relationship Type: [ Add New ]

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.

a dropdown menu Category	Client Relationship Types	
Client	Select Item	
Турез	Both	
Client Relationship Types Code Classes Code Designation Demographic Data Fields	Add New Commercial/Personal Account Property Management/Residential Source Client/Destination Client	
Home Ownership How Relates Location Types (Client)	Relationship Type: Condo Assn/UnitOwner	

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.

t a <b>Category</b> and a <b>Type</b> to update pdown menu		
jory	Client Relationship Types	
ent 💌	Select Item	
5	Commercial	r
Int Relationship Types	Add New Corporation/Subsidiary Franchisor/Franchisee General Contractor/Subcontractor	
alates n Types (Client)	Relationship Type: General Contractor/Subcontractor	or

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.

Windo	ows Internet Explorer 🔀
⚠	Unable to delete! Relationship Type is in use.
	ОК

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.

Select a Categoryand a Type to up a dropdown menu	odate	
Category		How Relates
Client	*	Select Item
Турез		Condo Assn/Unit Owner
Client Relationship Types Code Classes Code Designation Demographic Data Fields Home Ownership How Relates Location Types (Client)		Add New Relationship: Condo Assn
		[ Add New ]

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.

Category Client	How Relates
Client	Select Item
Types	Condo Assn/Unit Owner 🗸
Client Relationship Types Code Classes Code Designation Demographic Data Fields Home Ownership	Add New Condo Assn
How Relates Location Types (Client)	Relationship: Unit Owner

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.



	ORGANIZATION   REPORTS   CAMPAIGNS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected 🐗
Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize  Actions  Client Access  Color Schemes  Lintegration  Cookup Management  Opportunities  Print Blank Forms  Programs  Document Templates  Security Administration	Select a Categoryand 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)	How Relates         Select Item         Condo Assn/Unit Owner         Add New         Condo Assn         Unit Owner         Relationship:         Condo Assn         [ Delete ]         [ Delete ]

### 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.

nexsur	SEARCH	ORGA	NIZATION	REPORTS				Воо	HOMI kmarks: Exp	and   Add   R	ETUP   LOGOL emove Select
Hello, Mary (	Oberleitner										
search											
								[ Ir	nport Record	i] [Add Ne	w Record ]
Entity:	Client	~	SEARCH R	ESULTS - CLIENT							
Search Type:	Contains	~	1 Record(s	s) Found	К∢	Showi	ng Page 1 of 1 📃 🕨	M		Go To P	age 1 🔽
Branch:	All Branches	~	Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
Client Stage:	All	~		One Stop Shopping	Commercial	Client	8790 Habersham	Brea	CA	92821	<b>B</b>
Client Type:	All	*									
Code Class:	All	*									
Code Designation:	All	*									
Client:	One Stop										
Policy Number:											
Phone Number:											
Location Name:											
Location Address:											
Location City:											
Location Zip/Postal:											
First Name:											
Last Name:											
	Clear Se	arch									

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

file profiling contacts	locations Y named insur	eds Y related acco	ounts 🍸 assignment	Classified			
rimary Contact Name: Mr. Lucy Cren Title: Accountant E-Mail: rengram@sca	iz -ins.com	Mailing Addr Location Tyj Addre: Ci Zip/Post Fax Numb	ess pe: Corporate Headq ss: 8790 Habersham ty: Brea :al: 92821 er: (714) 672-8908	uarters State/Province: CA	Stick-e-note	[Add New]	
racker Date Created: 1/26/2004 Client Since: 1/26/2004 Related Accounts: 1	CST CST	Alerts Oper	ht Actions: 0				
ssignment							
Primary Branch Atlantic Branch	Department Commercial Lines (BIS)	Unit Unassigned	Responsibility Account Manager	Name Mary Oberleitner	In Force ★ Commercial Auto ★ Commercial Propert ★ Directors and Office ★ Employers Liability ★ Equipment Floater ★ Garage and Dealers	y rs	
		PORTS		TTACHMENTS   ACTIONS	Bookmai	HOME   HELP   : rks: Expand   Add   1 LIYERY   T-LOG	SETUP   L Remove S
SEARCH	URGANIZATION   RE S   MARKETING   POL	ICIES   CLAIMS	SERVICING A			) Comm	ercial Aco
SEARCH	ORGANIZATION   RE S   MARKETING   POL pping	ICIES   CLAIMS	SERVICING			Comm	
SEARCH T PROFILE OPPORTUNITIE t Name: One Stop Sho file profiling contacts I tod accounts Summary	ORGANIZATION   RE S   MARKETING   POL pping ocations   named insure	ICIES   CLAIMS	nts assignment	classified		Filters: [ Show ]	[ Add Ney
SEARCH NT PROFILE   OPPORTUNITIE Int Name: One Stop Sho file profiling contacts   ated Accounts Summary	S   MARKETING   POL	ICIES   CLAIMS	nts assignment	classified		Filters: [ Show ]	[ Add N

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.



#### **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.

nexsure		Home   Help   <mark>setup</mark>   logout
SEARCH	ORGANIZATION   REPORTS	Bookmarks: Expand   Add   Remove Selecter
Use the navigation below to access Nexsure setup information.	·	
Setup Console 🛛 🛛 🛛		
	lookup management	
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Client Types Client Relationship Types Code Casses Code Cossignation Home Ownership	Code Classes Select Item Add New Code Class: Code Class:
	Location Types (Client) Organization Legal Entity Type 🗹	Code Description:
SEARCH Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION   REPORTS  ookup management	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected
Expand Minimize  Actions  Color Schemes  Lookup Management	Select a Category and a Type to update a dropdown menu Category Client	Code Designation Select Item
Opportunities     Print Blank Forms     Programs     Document Templates     Security Administration	Types Client Relationship Types Code Classes Code Classes Code Designation Home Ownership How Relates Location Types (Client) Organization Legal Entity Type ♥	Agency Newsletter
		[ Add New ]
		lookup management

#### 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.

nexsur	е								ном	:   HELP   SE	TUP   LOGO
	SEARCH	ORGAN	IZATION	REPORTS				Boo	kmarks: Exp	and   Add   R	emove Select
Hello, Mary (	Oberleitner										
search											
								[ Ir	nport Record	] [Add Nev	w Record ]
Entitu	Client	~	SEARCH R	ESULTS - CLIENT							
Search Tune:	Contains		1 Recordís	) Found	N 4	Showi	ng Page 1 of 1	н		Go To Pa	ae 1 🗸
Branch:	All Branches	~		,			····· /				
Client Stage:		~	Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
Client Type:	All	~	<b>1</b>	One Stop Shopping	Commercial	Client	8790 Habersham	Brea	СА	92821	
Code Class:	All	~									
Code Designation:	All	~									
Client:	One Stop										
Policy Number:											
Phone Number:											
Location Name:											
Location Address:											
Location City:											
Location Zip/Postal:											
First Name:											
Last Name:											
	Clear Sea	rch									
				N							

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

SI	lre						HOME   HE	lp   setup   lo	IGOL
	SEAR	CH   ORGANIZATION   RE	PORTS			Bookm	arks: Expand   #	Add   Remove Se	lecte
nt Name	e: One Ston S	hoppina		45   SERVICING	ATTACHMENTS   ACTO	NS   IRANSACTIONS   I		ommercial Acco	oun
file	filing contacts	locations named insured	related ac	counts assignment	classified				
ine pro	inning concaces	locations manieu mouree	is relaced ac	counts assignment	classified				
Primary Co	ntact		Mailing Add	iress		Stick-e-note	[Add New]		
	Name: Mr. Lucy C	renz	Location T	ype: Corporate Headq	uarters				
	Title: Accountant E-Mail: reporter @c	t caring com	Addr	ress: 8790 Habersham Citur Brea	State/Brouince: CA	No Current Notes.			
	E main rengranies	ca matem	Zip/Po	stal: 92821	State/Province: OF				
			Fax Num	nber: (714) 672-8908					
					4				
Tracker			Alerts						
Date	Created: 1/26/200	04 CST	Op	en Actions: O					
Clie	nt Since: 1/26/200	04 CST							
Kelated A	ccounts: 1								
Assignmen	t								
Primary	Branch	Department	Unit	Responsibility	Name				
$\checkmark$	Atlantic Branch	Commercial Lines (BIS)	Unassigned	Account Manager	Mary Oberleitner	In Force			
						E Commercial Property			
							s 📒		
						Employers Liability			
						Equipment Floater     Garage and Dealers	~		

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

nexsu	lre							Home   Help	SETUP   LOGO
	SEARCH	ORGANIZATION   REPO	IRTS				Bookma	rks: Expand   Add	Remove Selec
LIENT PROFIL	E   OPPORTUNITIES	MARKETING   POLIC	IES   CLAIMS   S	ERVICING   A	TTACHMENTS	ACTIONS   TRAM	SACTIONS   DE	LIVERY   T-LOG	
ient Name	e: One Stop Shop	oping						► Com	mercial Accoui
ard file pro	filing contacts loo Summary	cations named insureds	related accounts	assignment	classified				[ Add New ]
Details	Code Class		Co	le Description			D	esignation	Remove
<b>&gt;</b>	VIP		High priority account for agency Large Account					<b>B</b>	
			classif	<b>ied</b> assignme	ent / related ac	counts / named ins	ureds / location:	s / contacts / pro	filing $igsymbol{\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $

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

nexsure	Home   Help   Setup   Logout
SEARCH   ORGANIZATION   REPORTS	Bookmarks: Expand   Add   Remove Selected
CLIENT PROFILE   OPPORTUNITIES   MARKETING   POLICIES   CLAIMS   SERVICING   ATTACHMENTS   ACTIONS   TRANSA	CTIONS   DELIVERY   T-LOG
Client Name: One Stop Shopping	Commercial Account
card file profiling contacts locations named insureds related accounts assignment classified	
Account Level Code Classes & Designations [Cancel] [Delete] [Update]	
Code Description: High priority account for agency. Code Class: VIP Code Designation: Large Account	
Note - Additional Class Codes & Designations may be added through Setup under Lookup Management.	
Last Updated By: Mary Oberleitner Date Updated: 1/29/2004 5:11:17 PM CST	
classified assignment related accounts named insured	ds locations contacts profiling card file

#### **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.

Select a <b>Category</b> and a <b>Type</b> to update a dropdown menu	
Category	Demographic Data Fields
Client	Select Item
Types Client Relationship Types Code Classes Code Designation Demographic Data Fields	Add New Annual Payroll Annual Sales Number of Employees Field Description:
Home Ownership How Relates Location Types (Client)	

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.

Select a Categoryand a Type to update a dropdown menu	
Category	Demographic Data Fields
Client 🗸	Select Item
Types Client Relationship Types Code Classes Code Designation Demographic Data Fields Home Ownership How Relates Location Types (Client)	Add New Annual Payroll Annual Sales Number of Employees Field Description: Number of Vehicles

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.

elect a <b>Category</b> and a <b>Type</b> to dropdown menu	update	
egory		Demographic Data Fields
lient	*	Select Item
ypes Client Relationship Types Code Classes Code Designation Demographic Data Fields Home Ownership How Relates Location Types (Client)		Annual Payroll Annual Sales Number of Employees Number of Vehicles
		[Delete] [Undate]

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.

pokup management	
Select a Category and a Type to update a dropdown menu Category	Demographic Data Fields
Client	Select Item
Types Cide Classes Code Classes Code Designation Demographic Data Fields Home Ownership How Relates Location Types (Client)	# of Vehicles         Annual Payroll         Annual Sales         Number of Employees         Field Description:         # of Vehicles
	[Delete] [Update]

#### 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**.

nexsu	re								HOME	HELP   SI	etup   logo	DUT
	SEARCH	ORGA	NIZATION	REPORTS   CAMPAIGNS	;		Bookr	narks: Ex	pand   Ad	d   Remov	e Selected 🤞	1
Hello, Betsy	/ Cormier											1
search												
										[ Add Nev	v Record ]	
<b>E</b> 10			CEADOU DE	CULTE CLIENT								
Entity:	Client	~	SEARCH RE	SULTS - CLIENT								
Search Type:	Contains	*	1 Record(s)	Found	N 4 5	Showing P	age 1 of 1 🛛 🕨			Go To Pa	ge 1 💙	
Branch:	All Branches	*	Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove	
Client Stage:	All	*	<b>⊟</b> ≽	Hudson Property	Commercial	Client	Demographic	Hudson	NH	02051	E.	
Client Type:	All	*	134	Management, Inc.	Commerciar	Chent	Account	Hudson	NH	03031		
Code Class:	All	*								Search	Clear	
Code Designation:	All	*										
Status:	All	*										
Client:	hudson											

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.

nex	sure	;			номе	e   Help   Setup   Lo	GOUT
		SEAR	CH   ORGANIZATION   REPORTS   CAMPAIGN	5	Bookmarks: Expand	Add   Remove Selected	1
CLIENT PR	OFILE   C	PPORTUNIT	TIES   MARKETING   POLICIES   CLAIMS	SERVICING   ATTACHMENTS   AC	TIONS   TRANSACTIONS	DELIVERY   T-LOG	
Client Na	me: Huo	lson Pro	perty Management, Inc.			Commercial Acco	unt
card file	profiling	contacts	locations named insureds related accounts	s assignment classified camp	aigns		
profile	demograp	hic data					
						[ Add New ]	
	Details	Year	Field Description	Estimated Value	Actual Value	Remove	
	<b>P</b>	2008	Annual Payroll	\$150,000		<b>E</b>	
	<b>P</b>	2008	Annual Sales	\$1,250,000			
		2008	Number of Employees	65			
		2007	Annual Payroll	\$125,000	140500	<b>B</b>	
	<b>&gt;</b>	2007	Annual Sales	\$1,100,000	\$1,025,000	<b>B</b>	
	<b>*</b>	2007	Number of Employees	50	63		

### 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.

nexsure		HOME   HELP   SETUP   LOGOUT
Use the navigation below to access Nexsure setup information. Setup Console	lookup management	bookmarks: Expand   Add   Kemove Selected
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a <b>Category</b> and a <b>Type</b> to update a dropdown menu <b>Category</b> Client <b>V</b> <b>Types</b> Client Relationship Types Code Classes Code Classes Code Designation Home Ownership Home Ownership Home Ownership Home Ownership Home Ownership Home Ownership Home Ownership	Home Ownership         Select Item         Add New         Condo Owner         Condo Renter         N/A         Ownership Type:         [ Add New ]
	X	lookup management

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

 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.

#### CHAPTER 6

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.

SEARCH   Use the navigation below to access Nexsure setup information.	ORGANIZATION   REPORTS		HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected
Setup Console       Image: Console Con	Iookup management Select a Category and a Type to update a dropdown menu Category Client V Types Client Relationship Types Code Designation How Relates Location Types (Client) Organization Legal Entity Type V	Location Types (Client) Select Item Commercial Personal Personal Church Office Corporate Headquarters Location Type:	Add New ] Lookup management

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

Nevsure	ORGANIZATION   REPORTS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected
Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Cournent Templates Security Administration	Select a <b>Category</b> and a <b>Type</b> to update a dropdown menu <b>Category</b> Client <b>Types</b> Code Classes Code Classes Code Classes Code Classes Location Types (Client) Organization Legal Entity Type Referred By	Referred By         Select Item         Add New         Current Client         DEFAULT         Insurance Company         Referred By:
		[ Add New ]

nexsure	HOME   HELP   SETUP   LOGOUT
SEARCH     ORGANIZATION     REPORTS       Use the navigation below to access Nexsure setup information.     Image: Comparison of the comparison	Bookmarks: Expand   Add   Remove Selected
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Organization Legal Entity Types         Select Item         Orporation         Corporation (S)         DEFAULT         Business Type:         [ Add New ]

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.

HOME   HELP   SETUP   LOGOUT SEARCH   ORGANIZATION   REPORTS Bookmarks: Expand   Add   Remove Selecte											
Hello, Mary (	Oberleitner										
search											
								[ Im	iport Record	] [ Add Ne	w Record ]
Entity:	Client	*	SEARCH R	ESULTS - CLIENT							
Search Type:	Contains	*	7 Record(:	s) Found		N.	Showing Page 1 of 1			Go To P	age 1 🔽
Branch:	All Branches	*	Details	Name	Client Type	Stage	Location Name	City	St./Prov.	Zip/Postal	Remove
Client Stage:	All	*	<b>*</b>	Anthony Smith	Personal	Client		Co Spgs	со	80922	
Client Type:	All	*	<b>*</b>	Bobby Smith	Personal	Prospect					E
Code Class:	All	*	<b>P</b>	Cathy Smith	Personal	Client	234 George Way	Calera	AL	35040	En l
Designation:	All	*		Debby Smith	Personal	Suspect	Primary	Orlando	FL	32825	Ē.
Client:	ly smith		-	Doe, John	Personal	Client	Home	El Paso	тх	79925	E.
Policy Number:			-	Johnny Smith	Nersonal	Client	Home	College Park	MD	20740	- <u>-</u> -
Phone Number:				Smithu Bob	Bergonal	Client	Home	El Dago	TV	79902	- <u>-</u>
Location Name:			3	Sinitity, Bob	Personal	Chenc	Home	ELPASO	10	79902	
Location Address:											
Location City:											
Location Zip/Postal:											
First Name:											
Last Name:											
	Clear Sea	rch									

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

<b>ex</b> sl	lre						Home   Helf	P   SETUP   LOGO
	SEARC	H   ORGANIZATION	REPORTS			Bookm	arks: Expand   Ac	ld   Remove Selec
IENT PROFIL	🛚   OPPORTUNITI	ES   MARKETING	POLICIES   0	CLAIMS   SERVICING	ATTACHMENTS   ACTI	ONS   TRANSACTIONS	DELIVERY   T-LOG	
ent Nam	e: Cathy Smith						► Pe	ersonal Accour
rd file pro	filing contacts	locations named	insureds relate	ad accounts assignme	nt classified			
Primary Co	ntact		Mailin	g Address		Stick-e-note	[Add New]	
	Name: Ms. Cathy Sr	nith		Address: 234 George W	ay Oliveration	No. Comment Nation		
	Fitte: Owner E-Mail: comith@aol.			City: Calera in/Doctal: 25040	State/Province: AL	No Current Notes.		
	- main connengation		Fax	: Number: (205) 668-08	70			
	- k							
Tracker	•		Alerts					
Date	Created: 9/26/2003	CST		Open Actions: 0				
Cile	nt Since: 9/26/2003	i CSI						
Assignmen	t							
Primary	Branch	Department	Unit	Responsibility	Name			
	Atlantic Branch	Personal Lines	Unassigned	Account Manager	Mary Oberleitner			
	Atlantic Branch	Unassigned	Unassigned	Data Conversion	QA User	In Force		
						🗄 Accident		
						+ Homeowners		

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.

nexsure		Home   Help   Setup   Logout
SEARCH   ORGANIZATION   REPORTS	Bo	okmarks: Expand   Add   Remove Selected
CLIENT PROFILE   OPPORTUNITIES   MARKETING   POLICIES	CLAIMS   SERVICING   ATTACHMENTS   ACTIONS   TRANSACTIONS	DELIVERY   T-LOG
Client Name: Cathy Smith		Personal Account
card file profiling contacts locations named insureds r	elated accounts assignment classified	
Profiling Information	[Save]	
Client Type Personal 💌		
Source	Residence Information	
Auto Information	Home: Owned 💌	
No. of Drivers: 1	Residence County:	
	Sq. Feet of Home:	
No. of Young Drivers:	Distance from Fire Hydrant:	
No. of Vehicles: 1	Miles from Fire Department:	
No. of Accidents/Violations: 0		
Zip Code: 35040		
Account Notes:	Construction:	
	Total Number of Locations:	
		· · · · · · · · · · · · · · · · · · ·

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.

nexsure		Home   Help   Settip   Logoi
SEARCH   ORGANIZATION	REPORTS	Bookmarks: Expand   Add   Remove Selecte
CLIENT PROFILE   OPPORTUNITIES   MARKETING	POLICIES   CLAIMS   SERVICING   ATTACHMENTS   ACTIONS	S   TRANSACTIONS   DELIVERY   T-LOG
Client Name: One Stop Shopping		Commercial Account
card file profiling contacts locations named i	nsureds related accounts assignment classified	
Profiling Information	[ :	Save ]
Client Type Commercial 💌		
Source	Organization Information	
Referred By: SureClose.com 💌	Legal Entity Type: Corporation	▼
Account Notes:	Years in business: 25	
No W/C claims in the last 10 years.	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	L <sub>e</sub>
Las	t Updated By: Mary Oberleitner CST Date Updated: 9/15/2004 10:03:	56 AM
	classified $igstarrow$ assignment $igstarrow$ related accounts $igstarrow$	named insureds $igstarrow$ locations $igstarrow$ contacts $igstarrow$ profiling $igstarrow$ card file $igstarrow$

# **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.

nexsure		Home   Help   Setup   Locout
SEARCH Use the navigation below to access Nexsure setup information.	ORGANIZATION   REPORTS	Bookmarks: Expand   Add   Remove Selected
Setup Console	Iookup management Select a Category and a Type to update a dropdown menu Category Category Category	Category Select Tem Claims Client Letters Greeting Category:
		Lookup management

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.

nevsure						но	ME   HELP   <mark>S</mark> I	TUP   LOGOU
SEARCH	ORGANIZA	TION   REPORTS				Bookmarks: E>	pand   Add   R	emove Selecte
Use the navigation below to access Nexsure setup information.								
Setup Console 🛛 🗵	Template							
Expand Minimize	[ Insta	ll ActiveX ]		КК	Showing Page 1 of 31 🕨 🕅	Filters: [ Show	][ Hide ][	Add New ]
Actions	Details	Name	SPC	Category	Description	Status Last Updated By	Last Updated Date	Remove
Color Schemes	<b>&gt;</b>	additional driver questionaire	₩ 🗆 🗹 🗹	Client Letters	ADQ	Draft Test User	07/02/2004	<b>B</b>
Lookup Management	<b>&gt;</b>	Auto Change Request	W 🗆 🗆 🗹	Policy Letters	Use this template when documenting a change	Draft Lisa Archuleta	05/19/2004	<b>B</b>
Opportunities	<b>&gt;</b>	Auto Estimate Information	W 🗆 🗹 🗹	Proposal	Auto Quote	Draft TM Draft Training1001	04/07/2005	<b>B</b>
Princ Blank Ponnis     Programs	<b>&gt;</b>	Auto Proposal Information		Proposal	Auto Info	Draft Craig Stoker	04/09/2004	<b>B</b>
Document Templates	<b>*</b>	Auto Schedule		Policy Letters	Commercial Auto Schedule	Draft Rick Brown	04/02/2004	<b>B</b>
Security Administration								
								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.

🔊 Nexsure - Microsoft	t Internet Explorer					
			_			]
Document Temp	late					
Template Name:			]			
Description:			]			
Document Type:	Microsoft Word	<u>^</u>				
Category:	Claims	<u>^</u>				
Client Stage:	Claims Client Letters					
	Greeting Policy Letters					[ Add New ]
Business Type	Line of Busines	5	Stage	Mode	Required	Remove 🛆

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

		SEARCH	ORGANIZATION   REPOR	TS				Bookma	rks: Expand   Add	Remove Se
IENT PROF	ILE   OPPOR	TUNITIES	MARKETING   POLICIE	S   CLAIMS	SERVICING	ATTACHMENTS	ACTIONS	TRANSACTIONS   DE	LIVERY   T-LOG	
ent Nan	ne: Rugged	Tires							► Comr	mercial Acc
tachments										
Install A	tiveX ]			М	Showing Pag	e 1 of 1 ▶ 🕅		[ DMS ] Filters: [	Show ][ Hide ]	[ Add New ]
Details	Attachment	Name	LOB/Policy # Cert #/Ref #	Category	Description	Document Type	Status	Created By Last Updated By	Date Created	Remove
<b>&gt;</b>	prop	W	Commercial Auto BA-89778-A	Proposal	test	Microsoft Word	Draft	Mary Oberleitner Mary Oberleitner	05/24/2005	
<b>&gt;</b>	vehicles	×	Commercial Auto Unassigned		schedule	Microsoft E×cel		Mary Oberleitner Mary Oberleitner	04/07/2005	E.
<b>P</b>	vehicles		Commercial Auto Unassigned		schedule	Microsoft E×cel		Mary Oberleitner Mary Oberleitner	04/07/2005	

Identify the document and click Next.

Nexsure Office Integration	ne sure						
Add New Attachment							
O Add Attachment							
Oreate Document with Template							
Create Document without Template							
◯ Attach Outlook Messages							
🔿 Add External Attachment							
Attachment Name: Proposal							
Document Description: Standard Proposal							
Cancel	Next >>						

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

Nexsure Office Integratio	ne sure	
New Document		
Template Name: Template Description:	proposal	
Document Type:	MS Word	~
Category: Business Type: Available Templates:	All Claims Client Letters Greeting Policy Letters Proposal	Bearch
		Cancel Next >>

### **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.

SEARCH       ORGANIZATION       REPORTS       Bookmarks: Expand       Add       Remove Selecter         Use the navigation below to access Naxuer setup information.         Betup Console       Iokup management         Actions       Select a Category and a Type to update a dropdown menu       Select a Category         Color Schemes       Iookup Management       Select Item         Opportunities       Financial Entity       Select Item         Print Blank Forms       Ioocation Types (Financial Entity)       Select Item         Document Templates       Security Administration       Ioocation Types (Financial Entity)	nexsure		Home   Help   setup   logo
Expand Minimize Actions Color Schemes Color Schemes Color Schemes Cookup Management Coportunities Print Blank Forms Programs Cocument Templates Security Administration	SEARCH Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION   REPORTS	Bookmarks: Expand   Add   Remove Select
	Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Financial Entity V Types Location Types (Financial Entity)	Location Types (Financial Entity)         Select Item         Add New         Branch Office         Corporate Office         Lease Office         Location Type:         [ Add New ]

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.

nexsur	e						HO	IME   HELP   S	ETUP   LOGOUT
	SEARCH   ORG	GANIZATION   REF	PORTS				Bookmarks: Ex	xpand   Add   R	ternove Selected
Hello, Mary	Oberleitner								
search									
	$\searrow$						[ Import Reco	ord ] [Add Ne	w Record ]
Entity:	Financial Entity	SEARCH RESUL	IS - FINANCIAL ENTITY						
Search Type:	Contains	2 Record(s) Fou	nd	₩.4	Showing Page 1 of 1	$\mathbb{P}[\mathbb{N}]$		Go To P	age 1 🔽
Financial Entity:	Central	Details	Name		Location Type	City	St./Prov.	Zip/Postal	Remove
Location Address:			Central Bank		Branch Office	Oxford	AL	36203	E
Location City:		<b>P</b>	Central Valley Community E	Bank	Branch Office				E
Location Zip/Postal:									
First Name:									
Last Name:									
	Clear Search								
		_							
You must search	n for a record prior to	entering a new or	e. After the results are retu	urned you w	vill be given the option f	o add a new	record.		
									search

Click the locations tab to display the Locations summary.

nexsure		Home   Help   Setup   Logout
SEARCH   ORGANIZATION	I REPORTS	Bookmarks: Expand   Add   Remove Selected
Financial Entity Name: Central Bank card file contacts locations financial entity nam	ne	Financial Entity
Central Bank Information Website: www.centralbank.com	Mailing Address Address: 1000 Main Street Citru Ovford State/Drouince: Al	
Primary Contact Name: Gertrude Baker Title: President	Zip/Postal: 36203	
		financial entity name locations contacts card file

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

<del>J</del> SUI <sup>A</sup>	е					Home   Hel	.p   Setup   Log
	SEA	RCH   ORGANIZ	ATION   REPORTS		Bookr	narks: Expand   A	dd   Remove Sele
ancial Entit	y Name: (	Central Bank				F	inancial Entity
rd file contact	ts location	financial entit	cy name				
ocation Su	nmary		K Chowin	g Page 1 of 1 🕨			[ Add New ]
	Lacatio	n Tune	Address	City	St./Prov.	Zin/Postal	Bemaua
Details	Locaut	an rype					Kemove

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

SEARCH   ORGANIZATION   REPORTS	HOME   HELP   SETUP   LOGOU Bookmarks: Expand   Add   Remove Selecte	T ed
Financial Entity Name: Central Bank card file contacts locations financial entity name Location Information	Financial Entity [ Cancel ] [ Update ]	~
Location Type: Branch Office This Location Is se Branch Office Lease O		

### 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.

nexsure		Home   Help   S <mark>etu</mark> p   Logout
Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION REPORTS	Bookmarks: Expand   Add   Remove Selecte
Expand Minimize  Actions Color Schemes  Document Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Miscellaneous Types Delivery Types Phone Types	Delivery Types         Add New         Email         Fax         FTP         Delivery Type:         [ Add New ]
		lookup management

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.

nexsure		HOME   HELP   SETUP   LOGOUT
SEARCH ORGANIZATION Use the navigation below to access Nexsure setup information. Setup Console	REPORTS	Bookmarks: Expand   Add   Remove Selected
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Itegory and a Type to update inenu     Phone Types       Iteous     Iteous       Types     Location       Vpes     Automated Backline       Phone Type:	Add New ]

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.

ard file profiling contacts locations named insureds related accounts assignment classified							
contact detail additional logins							
Contact Information	[Add Photo] [Cance https://rm0web1.nexsure.com - Phone Information 🔳						
Personal Information							
Prefix First MI Last Mr. 💟 Alan Ivers	Phone Information NO SU	re					
Title Sey DOB	Format (####################################						
Owner Male	2nd Phone Line   Ext.     2nd Phone Line   Ext.						
Driver Information St./Prov. Licensed: Licer	Is Car Phone Is Cell Phone Home Phone International Pager Phone International	e					
This Contact Is Set To <b>Primary</b> For The Account.	Personal Fax Underwriting	.:					

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.

card file	card file profiling contacts locations named insureds related accounts assignment classified Location Information							
Lor	Location Type: Corporate Headquarters Antips://rm0web1.nexsure.com - Phone Information 💶 🗆 🗙							
This Locati Is This The	This Location Is Set To Primary For The Account. Is This The Billing Location for The Account? Yee Phone Information							
Location Nu	mbers			Format (####################################				
Details Pr	imary	Phone Type		This is the <b>PRIMARY PHONE NUMBER f</b> or this Location				
<b>&gt;</b>	V	Phone	(562)	Close Update				
•		Fax Number	(562)	🖉 Done				

### 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.

SEARCH   ORGANIZATION   REPORT	TS   CAMPAIGNS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected 💞
Use the navigation below to access Nexsure setup information. Setup Console		
Expand Minimize       Select a Category and a dropdown menu         Actions       Category         Client Access       Organization         Color Schemes       Organization         Integration       Downloads         Lookup Management       Doportunities         Print Blank Forms       Programs         Document Templates       Security Administration	s Type to update  Business Unit Select Item  Add New  NA  ganization) Business Unit:	[ Add New ]

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 I	nformation Ne SUITE	;
Region Name:	Training-Documentation Region	
Primary Location:	Brea, CA [145 S. State College Blvd.] 💌	
Primary Contact:	Oberleitner, Mary 💌	
Business Unit:	N/A 💌	
	Close Save	)

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 ricons).
- 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.

exsure			Home Help   Setup   Logout
SEARCH   ORGANIZATIO	IN   REPORTS		Bookmarks: Expand   Add   Remove Selected
RGANIZATION PROFILE   ALL EMPLOYEES   ALI	LOCATIONS		
rganization Name: XDTITraining Org	972003		Organization
rganization			2
YDTITraining Org 972003 >> Main Offic	0		
Previous Page	6		Update
card file regions territories branches de	nartments locations emp	overs accounting vendors	
		· · · · · · · · · · · · · · · · · · ·	
location detail			
Location Information			
Location Type: Corporate Office 💙		Physical Address	
		Address: 4479 Poptiac	alve Dd Ste 2
Location Name: Main Office		Address: 4479 Politiac	Lake Ku Ste 2
Location Numbers	[ Add New ]	Address 2:	
	[ Hou now ]	City: Waterford	
Details Phone Type Phone	Ext Delete		
Business Phone (714) 672-890	• 🖷	State/Province: Iowa	✓ Zip/Postal: 48328
Fax Number (714) 672-890	8 🖷	Country: United States	▼
		Intl Address Info:	
		Mailing Address	
		Address: 4479 Pontiac	ake Rd Ste 2
		Address 2:	

# 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.

ne sure	ORGANIZATION   REPORTS   CAMPAIGNS	HOME   HELP   SETUP   LOCOUT Bookmarks: Expand   Add   Remove Selected
Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize  Actions  Client Access Color Schemes  Downloads Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Categoryand a Type to update a dropdown menu Category Policy Types Binder Term Claim Payment Types Claim Stages Code Classes Code Classes Code Classes Code Classes Code Designation Market Analysis Reasons Market Analysis Statuses	Binder Term         Select Item         30 Days         Duration Value:         Description:         [Update ]

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

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

**PAGE 176** 

sure			HOME   HELP   SETUP   LOGOU
SEARCH	ORGANIZATION   RE	PORTS	Bookmarks: Expand   Add   Remove Select
ENT PROFILE   OPPORTUNITIE	S   MARKETING   POL	ICIES   CLAIMS   SERVICING   ATTACHMENTS   ACTION	S   TRANSACTIONS   DELIVERY   T-LOG
ent Name: Alverson Spo	orts Equipment		Commercial Account
d file profiling contacts	locations named insured	s related accounts assignment classified	
ontact detail additional logins			
			Over all fills detail
ontact Information		[Add Photo] [	Cancelj [Opdate]
Personal Information			
Prefix First	MI Last	Suffix Goes By	
Mr. 💟 Alan	Alverson	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	v. Licensed: License Numb	er: Date Licensed:	
c	A 🔽 7989880989	4/12/1987	
This Contact Is Set To <b>Primary</b> Fo	or The Account.	Contact Role: Inspection 💟	
Personal Numbers		[Add New] E-Mail Address	
Details Primary Phone Type	e Phone	Ext Desc Delete E-Mail: alan@sportsequip.	com
Business Pho	ne (714) 672-5555	after 7am E-Mail 2:	

### **Employee Information Screen**

d file regions territories branches departments loc mployee detail identity additional logins security com	ations <b>employees</b> accounting ve missions accounting transactions	ndors
mployee Information		
Prefix First MI Last           Image: Mary         Oberleitner	Suttix Goes By	
Title Sex DOB	Social Security No. Marital Status (000-00-0000)	
river Information St./Prov. Licensed License Number	Date Licensed	
s this the <b>PRIMARY CONTACT</b> for this organization? 🛛 Ves 💿	No Contact Role:	
he <b>PRIMARY LOCATION</b> for this employee is: Brea, CA [123]	Vest Accounting Office] 💟	
Personal Numbers	[ Add New ]	
Details Phone Type Phone	Ext Desc Delete	

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

	RCH   ORGANIZATION   REPO	DRTS		
CLIENT PROFILE OPPORTUNI Client Name: Alverson S card file profiling contact:	TIES   MARKETING   POLIC Ports Equipment https://rm0web1.nexsu	IES   CLAIMS   SERVICING Ire.com - Contact Record - 1	ATTACHM Microsoft	IENTS   ACTIONS   Tr
Primary Contact Name: Mr. Alan Title: Owner E-Mail: alan@spo Business Phone: (714) 67	Contact Record Online (Available) Name: Mary Oberleite Goes By: Mary Email 1: maryo@xdti.cc Notes: potes	er m		I Close ]
<b>Tracker</b> Date Created: 1/4/20 Client Since: 1/4/20 Website: www.alv	PR Phone Type Business Phone	Phone (256) 831-2567	Ext	Description
Assignment Primary Branch	Done Department	Unit Responsibility	A Salar	me In Fo
Alabama Branch	n 1-AB1/DB1-PP1 U	nassigned Producer	Mary Ob	erleitner 🗄 G

**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.

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  Oportunities  Print Blank Forms  Programs  Document Templates  Security Administration  Security Administration	Binder Term         Select Item         60 Days         Duration Value:         Duration Value:         Description:         [Update ]

### 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.

icies history certificate etails delivery	s binders v	erifications summa	y of insurance		
Branch:	Southern Ins	urance Polic	y Term: 08/05 08/05	/2005 12:01AM PST /2006 12:01AM PST	
Policy Type:	Monoline	Cove	rage Term: 08/05 09/05	12:01AM /2005 PST /2005 12:01AM	
Issuing Co:	Hartford	Stag	e: Policy		
Billing Co:	Hartford	Mod	≘: New		
Policy Number:	GL-87987987	Polic	y Status: In For	ce	
Binder Number:	8890	Bind	er Status: Open		
Authorized Representative	: Mary Oberlei	tner 🔽			
-	Abort	Print	Deliver	Save Changes	1
ne of Business:	- ibort		benter	ouve changes	1
Line Of Business		Form		Description	
General Liability		ACORD 126	Commer	cial General Liability Section 126	

### **Claim Payment Types**

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

nevsure	HOME   HELP   SETUP   LOGOUT
SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS	Bookmarks: Expand   Add   Remove Selected 🐗
Use the navigation below to access Nexsure setup information. Setup Console	
Expand Minimize  Actions  Client Access  Color Schemes  Color Schemes  Color Schemes  Downloads  Code Designation  Print Blank Forms  Programs Decument Templates Security Administration	Claim Payment Types Select Item Adl New BI Liab Coll Description: [ Add New ]
	lookup management

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

nexsure							HOME	HELP   SE	TUP   LOGOUT
	SEARCH   ORGANIZATION	REPORTS				Вос	okmarks: Expand	d   Add   Re	move Selected
CLIENT PROFILE   OPPOR	TUNITIES   MARKETING	POLICIES   CLAIMS	SERVICING	ATTACHMEN	NTS   ACTIONS	TRANSACTIONS	DELIVERY	T-LOG	
Client Name: Janet A	Anderson							Person	al Account
underwriting policy info	assignment attachments	actions qualification	history	transactions	claims				~
details claim payment	S								
Branch:	Atlantic Branch	Policy Term		10/24/2002 10/24/2003	12:01AM IDLW 12:01AM IDLW				
Policy Type:	Monoline	Coverage T	erm:	10/24/2002 10/24/2003	12:01AM IDLW 12:01AM IDLW				
Issuing Co:	Safeco Ins.	Stage:		Policy					
Billing Co:	Safeco Ins.	Mode:		New					
Policy Number	AL-9890890	Status:		Cancelled					
- 15	Reopen Claim	Abort Claim	Post	Claim	Save Change	5			
Adjuston Information									

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

		2	https://nexweb16.nexsi	ıre.com - Claim Pay	ment - M <b>-</b> 'o 🔳 🗖			[Add New Pay	ment]
	Draft Date				ne sure		Date		
Details	Draft #	Amoun	Payment type:	PD Liab	× *	· · · · ·	Updated	Remove	
<b>*</b>	10/24/2005	\$0.00	Draft date:	10/24/2005	¢	itner	10/24/2005	E	<u>^</u>
v	1256	20100	Draft#:	1256		and a			
			Payment amount: \$	0	*				
			Payee:	Payee	*				
			Description:	Description					
			Claimant:	John Doe	*				
			Reduce reserves?						
			* indicates required field						
				C	Cancel Update				

### **Claim Stages Types**

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

nexsure	HOME   HELP   SETUP   LOGOUT
SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS	Bookmarks: Expand   Add   Remove Selected 💞
Use the navigation below to access Nexsure setup information. Setup Console	
Expand Minimize       Select a Categoryand a Type to update a dropdown menu         Actions       Category         Color Schemes       Policy         Integration       Binder Term         Downloads       Category         Lookup Management       Code Classes         Opportunities       Code Classes         Programs       Document Templates         Security Administration       Security Administration	Claim Stages         Selet Item         Add New         Draft issued by Agency         Level 1 (low)         Claim stages:         [ Add New ]

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.

2 SU	re						
20		SEARCH   ORGANIZA	TION   REPORTS			Boo	kmarks: Expand   Add   Remove Selector
	OPPOR	Owner Marken		CLAIMS   SERV	ATTACHMENTS	ACTIONS   TRANSACTIONS   DE	Commercial Aca
t Name:	Powers	Construction Co	., Inc.				Commercial Acc
erwriting p	oolicy info	assignment attach	ments actions	qualification hi	story transactions claim	5	
etails cla	im payments	5					
						10/01/2000	
Branch:		Ace In	surance Branch		Policy Term:	10/01/2008	12:01AM 12:01AM
Policy Type	PrimarySt	ate: Monolii	ne / NH		Coverage Term:	10/01/2008 10/01/2009	12:01AM 12:01AM
Issuing Co		Hartfo	rd Accident and I	Indemnity Compar	iy Stage:	Policy	
Billing Co:		Hartfo	rd Insurance Gro	up	Mode:	Renew	
Policy Num	ber:	BA987	456321		Status:	In Force	
Policy Desc	ription:		Reenen Cl-i		Origination Date:	10/01/2007 Doct Claim	Save Changes
	-	I	Reopen Claim	1	Abort Claim	Post Claim	Save changes
Actions: Details	Tonic	Type	Status			Memo	
	Claim	Annotation	Closed	Process claim		Themos and the second s	
Claims Info Dat Date	ormation: e Of Loss: Reported:	12/10/2008					
Cla	im Stage:	Level 1 (low)	~				
	Claim No:	4523542543252					
Estimate	d Amount:						
Reserve	d Amount:						
Total Pai	d Amount:						
	Memo:	IV R/E OP		<			
Claimant S	Summary:						[Add New Claimant]
Details	#	Claimant Name	Contact	Name F	Phone Number Fax	Number E-Mail Not	e Remove

### **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.

		HOME   HELP   SETUP   LOGOUT
SEARCH	ORGANIZATION   REPORTS   CAMPAIGNS	Bookmarks: Expand   Add   Remove Selected 💖
Use the navigation below to		
Setun Console		
	lookup management	
Expand Minimize Actions Client Access Retail Agent Access Color Schemes Integration Downloads	Select a Categoryand a Type to update a dropdown menu Category Policy Types Binder Term Claim Payment Types	Code Classes Select Item Add New Assigned Risk High Home Values Iservice Center Policy
Lookup Management	Claim Stages	
Opportunities     Print Blank Forms     Programs	Code Classes Code Designation Market Analysis Reasons Market Analysis Statuses	Code Class:
Document Templates		[ Add New ]
Security Administration		[ hou how ]
		lookup management
SEARCH Use the navigation below to access Nexcure setup information. Setup Console	ORGANIZATION   REPORTS   CAMPAIGNS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected 💞
SEARCH Use the navigation below to access Nexcure setup information. Setup Console	ORGANIZATION   REPORTS   CAMPAIGNS	HOME   HELP   SETUP   LOGOUT Bookmarks: Expand   Add   Remove Selected 💞
Expand Minimize Color Schemes	ORGANIZATION       REPORTS       CAMPAIGNS         lookup management       Select a Categoryand a Type to update a dropdown menu         Category       Policy       V         Policy       V       Types         Binder Term       Claim Payment Types       Code Classes         Code Classes       Code Classes       Code Classes         Market Analysis Reasons       Market Analysis Statuses	HOME   HELP   SETUP   LOGOUT         Bookmarks: Expand   Add   Remove Selected         Code Designation         Select Item         Service Center Policy         Add New         Carrier Name         Designation:         [Add New ]

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.

#### CHAPTER 6

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 **Cliess** 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.

nexsu	lre										но	IME   HELP	SETUP   LOGOU
		SEARCH	ORGANIZATION	REPORTS	CAMPAIGNS					Bookmar	ks: Expand	Add   Remo	ove Selected 🚿
CLIENT PROFI	LE   OPPOR	TUNITIES	MARKETING	POLICIES	CLAIMS	SERVICING	ATTACHMEN	ITS   AC	TIONS   TRANSACTIO	NS   DELIVER	RY   T-LO	G	
Client Name	e: Powers	Construc	tion Co., In	с.								Comm	ercial Account
underwriting	policy info	assignmen	t attachments	actions	qualification	history	transactions	claims	summary of insurance	classifieds	delivery		
Classified S	Summary												[ Add New ]
Details	(	Code Class			Code I	Description			Design	ation		Туре	Remove
<b>P</b>		ASR			Assi	gned Risk			CA A	RP		P	E
		delivery	classifieds 人 s	summary of in:	surance ∕ clai	ims 人 tran	sactions $igstarrow$ hist	ory $igsty$ qua	lification $igstacked$ actions $igstacked$	attachments $ig angle$	assignment	↓ policy info	underwriting

#### Market Analysis Reasons

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

nexsure		Home   Help   <mark>setup</mark>   logout
SEARCH	ORGANIZATION   REPORTS	Bookmarks: Expand   Add   Remove Selected
Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize Actions Color Schemes Lookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Policy Types Binder Term Claim Payment Types Market Analysis Reasons Market Analysis Statuses	Market Analysis Reasons Select Item Add New Client Preferred Carrier Client Preferred Coverage Client Preferred Premium Analysis Reason:
		[ Add New ]

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

Market Analysis ID: 2 Created: 03/02	12/2006	Status:	Pending 🔽		<u>.</u>
Analysis Source: Unas:	y Oberleitner ssigned				
Description: Com	nparison for upcoming renewal 2006.	Tingling		0 0k	 dia an

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

Nexsure M	larket Analysis		ne s	ure
Finalize	Selection			
Select whi	ch Market has been chosen.	When your finished, click Finalize.		
⊙ 1 -	Stage: Issuing Carrier: Policy# - Type: Ferm:	Marketing Allied Insurance Unassigned - Package 07/18/2006 - 07/18/2007		
0	Stage: (ssuing Carrier: Policy# - Type: Ferm:	Marketing Travelers Unassigned - Package 07/18/2006 - 07/18/2007		
Selection	Reason			
Reason:	Client Preferred Premium	<b>*</b>		
Notes:	Coverages were equivaler less.	nt to Travelers quote but the premium v	vas \$250.00	<
		[	Close Fin	alize

### **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.

nexsure	HOME   HELP   SETUP   LOGOUT
SEARCH   ORGANIZATION   REPORTS Use the navigation below to access Nexsure setup information. Setup Console Iookup management	Bookmarks: Expand   Add   Remove Selected
Expand Minimize  Actions Color Schemes Color Schemes Color Schemes Print Blank Forms Programs Comment Templates Security Administration Security Admi	Market Analysis Statuses Select Item Analysis Status: [ Add New [ Analysis Status: [ Add New ]

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

Export	Add Existing	Finalize	Save Changes	Close
Description	Comparison for upcoming renewal 2006.			
Created: Created By Analysis Source:	03/02/2006 Mary Oberleitner Unassigned		ang v	
market analysis	2	Status: Pen	ting 🗙	

# 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.

nexsure	HOME   HELP   SETUP   LOGOUT
SEARCH   ORGANIZATION   REPORTS Use the navigation below to access Nexsure setup information. Setup Console Iookup management	Bookmarks: Expand   Add   Remove Selected
Expand Minimize  Actions Color Schemes Color Schemes Color Schemes Cookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Location Types (Premium Finance Co.)         Select Item         Add New         Corporate Headquarters         Home Office         Satellite Office         Location Type:         [ Add New ]

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

search								
You must search	for a record prior to en	itering a new	one. After the results are returned yo	u will be given the option to add	a new re	ecord.		
Entity:	Premium Finance (	HISTORY RE	SULTS - PREMIUM FINANCE COMPANY					
Search Type:	Contains 🔽	1 Record(s) F	Found N 4	Showing Page 1 of 1			Go To P	age 1 🔽
Finance Co.:		Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
Location Address:		<b>P</b>	New American Premium Finance	Corporate Headquarters				E
Location City:								
Location Zip/Postal:								
First Name:								
Last Name:								
	Clear Search							
You must search	for a record prior to en	itering a new	one. After the results are returned yo	u will be given the option to add	a new re	ecord.		
								search

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

catior	Summ	ary	M Showir	ng Page 1 of 1 🕨			[ Add New
)etails	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Remove
<b>&gt;</b>	<b>v</b>	Corporate Headquarters	159 Tenth Street	Brea	CA	92821	

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		
Location Information			[ Cancel ] [ Update ]
Location Type: Corporate Headquarters V This Location I Corporate Headquarters Home Office Satellite Office Location Numbers Details Phone Type Building Security (714) 589-5632	[ Add New ] Ext Delete	Physical Address Address: Address 2: City: State/Province: Country: Intl Address Info:	159 Tenth Street
		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.

ne sure	HOME   HELP   SETUP   SUPPORT   LOGOUT
SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS   ELINKS	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 Color Schemes Downloads Lookup Management Code Designation License Types (Retail Agent) Code Designation License Types (Retail Agent) Code Designation License Types (Retail Agent) Organization Legal Entity Type Code Description: Code Description: Code Description: Code Description: Code Description: Code Description: Code Nameses Code Description: Code Description:	W]

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.

nexsure					HOME   HELP   SETUP	LOGOUT
SEARCH   ORGANIZATION   REPORTS	CAMPAIGNS   ELINKS			Bookmarks: Expa	and   Add   Remove Se	elected 🐲
RETAIL AGENT PROFILE   ACTIONS   OPPORTUNITIES   MARKE	TING   POLICIES   ATTACHMENTS   TRANSACTIONS	DELIVERY   T-LO	DG			
Retail Agent Name: Insurance Planners card file contacts locations retail agent name assignments	classifieds contracts commissions posting rules				▶ Retail Ager	nts
Classified Summary	II	Page 🔽				[Add New]
Details Code Class	Code Description		Designation	Туре	Remove	
	No records found for you	ir search.				
	posting rules	commissions con	tracts classifieds assignment	ts / retail agent name	locations contacts	card file

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.

#### CHAPTER 6

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.

Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize Actions Client Access Color Schemes Color Schemes Downloads Downloads Lookup Management Opportunities Lines of Business Programs	Select a Categoryand a Type to update a dropdown menu Category Retail Agent Type Code Classes Code Classes Code Designation Code Types (Retail Agent) Location Types (Retail Agent) Location Types (Retail Agent) Organization Legal Entity Type	License Types (Retail Agent) Select Item Add Note: Bond Broker RA Commercial Lines Agent Fire & Casualty Broker-Agent
Document Templates     Security Administration		[ Add New ]

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

ntity:	Retail Agent	HISTORY RE	SULTS - RETAIL AGENT					
arch Type:	Contains	1 Record(s) F	ound K 🔍	Showing Page 1 of 1	$\mathbb{P}[\mathbb{N}]$		Go To Pa	age 1 🔽
atus:	All	Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
tail Agent:		<b>P</b>	Baronne United Agents & Brokers	Corporate Headquarters	San Diego	CA	92130	E.
ation Address:								
cation City:								
cation D/Postal:								
st Name:								
st Name:								
	Clear Sear	:h						

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.

nexsure		HOME   HELP   SETUP   LOGOUT
SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS	ELINKS	Bookmarks: Expand   Add   Remove Selected 🕷
RETAIL AGENT PROFILE   ACTIONS   OPPORTUNITIES   MARKETING   POLICIES	G   ATTACHMENTS   TRANSACTIONS   DELIVERY   T-LOG	
Retail Agent Name: Insurance Planners		► Retail Agents
card file contacts locations retail agent name assignments classifie	ds contracts commissions posting rules	
Contract Details		[Save Contract] [Copy] [Cancel]
Contract Information	Errors & Omissions Coverage	
Contract Number: 12555 * Effective Date: 10/1/2008	🖓 * Carrier Name:	
Contract Name: Expiration Date: 10/1/2030	Effective Date	
Description:	Expiration Date	te: 😽
	Update a Contract Ne SUIC	
License Information	State/Province: Alabama	[Add New]
Details State/Province License Number	License No: 243434342111 Effective D	Date Expiration Date Delete
Alabama 243434342111	License Type: Fire & Casualty Broker-Agent Y	08 💼
Last Updated By: Mary Oberleitner Date Updated: 10/9/2009 3:42:59 PM C	Effective Date: Fire & Casualty Broker-Agent Mutual Life Insurance Agent	
	Expiration Group Benefits Broker leds assignments re	tail agent name locations contacts card file
	Bond Broker	
	Commercial Lines Agent	
	License 1.95.5	

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.

Use the navigation below to access Nexsure setup information. Setup Console	lookup management	
Expand Minimize Cations Client Access Client Access Color Schemes Color	Select a Categoryand a Type to update a dropdown menu Category Retail Agent V Types Code Classes Code Designation License Types (Retail Agent) Location Types (Retail Agent) Organization Legal Entity Type	Location Types (Retail Agent)         Selet Item         Accounting Office RA Corporate Headquarters         Financial Distribution RA         Location Type:         [Add New ]

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

nexa	sure							HOME   HELP   S	ETUP   LOGOUT
		SEARCH   ORGANIZATION   RE	PORTS   CAMPAIGNS   ELINKS				В	ookmarks: Expand   Add   Remo	ve Selected 🛛 🏶
RETAIL AG	ENT PROFILE	ACTIONS   OPPORTUNITIES	MARKETING   POLICIES   ATTAC	HMENTS   TRANS	ACTIONS   DE	LIVERY   T-LOG			
Retail Ag	ent Name:	Insurance Planners						🕨 Retail	Agents
card file	contacts lo	cations retail agent name assig	nments classifieds contracts	commissions p	osting rules				
Locatio	n Summary		N H	Showing page 1	of 1 ⊨ )  Pa	ge 1 🛩		Filters: [ S	ihow ] [Add New]
Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Phone Number	Fax Number	Remove
<b></b>	×	Corporate Headquarters	103 East 13th Street	Anniston	AL	36201	(256) 237-7541		

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

SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS   ELINKS	Bookmarks: Expand   Add   Remove Selected
RETAIL AGENT PROFILE   ACTIONS   OPPORTUNITIES   MARKETING   POLICIES   ATTACHMENTS   TRANSACTIONS   DELIVERY   T-LOC	
Retail Agent Name: Insurance Planners	► Retail Agents
card file contacts locations retail agent name assignments classifieds contracts commissions posting rules	
Location Information (* indicates required field)	[Update] [Cancel]
Location Type: Corporate Headquarters V * Physical Address	
This Location Is Accounting Office RA nt. Address: 103 East 13th Street	
Francis Database Control of Contr	
Location numbers Office To Land New J	
Retail Agent Location RA Pataile Dring Stelling Office Alabama V # 7/n/Dottaile	36201 *
TDA Office RA (256) 237-7541 Country: United States	▼
Inti Address Info	
Mailing Address	
Address: 103 East 13th Street	
City: Application	
	201
Country Holder States	

#### CHAPTER 6

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.

nevsure			Home   Help   Setup   Support   Logout
SEARCH	ORGANIZATION   REPORTS   CAMPAIGNS   E	LINKS	Bookmarks: Expand   Add   Remove Selected 💞
Use the navigation below to access Nexsure setup information. Setup Console	lookup management		
Expand Minimize Actions Client Access Retail Agent Access Color Schemes Douloads Lookup Management Opportunities Lunes of Business Programs Occument Templates Security Administration	Selact a Categoryand a Type to update a dropdown menu Category Retail Agent V Types Code Classes Code Classes Code Classes Code Classes (Code Classes) Location Types (Retail Agent) Location Types (Retail Agent)	Organization Legal Entity Type         Select Item         Add New       Corporation         Partnership       Business Type:         Business Type:       [Add New ]	lookup management

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

search										
									[ Add Ne	ew Record ]
Entity:	Retail Agent	*	SEARCH R	ESULTS - RETAIL AGENT						
Search Type:	Contains	*	1 Record(s	) Found	₩.4	Showing Page 1 of 1	$\mathbb{H}$		Go To I	Page 1 💌
Status:	All	*	Details	Name		Location Type	City	St./Prov.	Zip/Postal	Remove
Retail Agent:				First Choice Insurance Agency		Corporate Headquarters	Chicago	IL	65607	E:
Location Address:									Connel	
Location City:									Searci	Clear
Location Zip/Postal:										
First Name:										
Last Name:										
Enterprise Code:										
You must search	for a record prior	to en	tering a ne	w one. After the results are returned you	u will be g	given the option to add a new rec	ord.			
										search

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

nexsure	HOME   HELP   SETUP   SUPPORT   LOGOU
SEARCH   ORGANIZATION   REPORTS   CAMPAIGNS   ELINKS	Bookmarks: Expand   Add   Remove Selected 🕷
RETAIL AGENT PROFILE   ACTIONS   OPPORTUNITIES   MARKETING   POLICIES   ATTACHMENTS   TRANSACTIONS   DELIVERY   T-LOG	
etail Agent Name: First Choice Insurance Agency	Retail Agents
card file contacts locations retail agent name assignments classifieds contracts commissions posting rules	
Retail Agent	[Update] [ Inactivate] [Cancel]
Retail Agent Name: First Choice Insurance Agency	
Organization Legal Entity Type: Corporation	
FEIN Social Security Number     Corporation     (000-00-0000)     Partnershin	
Website: www.xdti.com [www.xdti.com]	
Enterprise Code: 9800	
Last Updated By: Mary Oberleitner Date Updated: 7/28/2009 3:06:02 PM CST	
posting rules <a href="commissions-contracts-classifieds-cassignmen">contracts</a> <a href="classifieds-classified</th> <td>ts <b></b></td>	ts <b></b>

### 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.

nevsure			HOME   HELP   SETUP   LOGOUT
SEARCH   O	RGANIZATION   REPORTS		Bookmarks: Expand   Add   Remove Selected
access Nexsure setup information. Setup Console	ookup management	L <sub>g</sub>	
Expand Minimize Actions Color Schemes Cookup Management Opportunities Print Blank Forms Programs Document Templates Security Administration	Select a Category and a Type to update a dropdown menu Category Tax Authority V Types Location Types (Tax Authority)	Location Types (Tax Authority) Select Item Add New Corporate Headquarters Home Office Satellite Office Location Type:	[ Add New ]

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

search								
You must search	for a record prior to er	ntering a ne	w one. After the results are n	eturned you will be given the opti	on to add a new r	ecord.		
Entity:	Tax Authority	HISTORY F	ESULTS - TAX AUTHORITY					
Search Type:	Contains 💟	1 Record(s)	I Found	Showing Page 1 of	1 ▶ 10		Go To P	age 1 🔽
Tax Authority:		Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
Location Address:		<b>*</b>	California Surplus Lines	Corporate Headquarters	Sacramento	CA	90210	E
Location City:								
Location Zip/Postal:								
First Name:								
Last Name:								
	Clear Search							
r'ou must search	for a record prior to er	ntering a ne	w one. After the results are r	eturned you will be given the opti	on to add a new r	ecord.		
								search

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

d file c	ontacts	locations tax authority name	e states terms				
ocatior	Summ	ary		Showing Page 1 of 1			[ Add New ]
Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Remove
<b>*</b>	<b>v</b>	Corporate Headquarters	Main Office	Sacramento	CA	90210	

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



ax Authority Name: California Surplus Lines ard file contacts <b>locations</b> tax authority name state	s terms		Tax Authority		
Location Information			[Cancel] [Update]		
Location Type: Corporate Headquarters 🔽	Physical Address				
This Location Is Corporate Headquarters	Address:	Main Office			
ocation Numbers [ Add	New ] Address 2:				
No shape record(s) found	City:	Sacramento			
No phone record(s) round.	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.

SEARCH   ORGANIZATION   REPORTS	HOME   HELP   SETUP   LOGOUT Bookmarks: Epand   Add   Remove Selected
Use the navigation below to access Nexsure setup information. Setup Console	
Expand Minimize Actions Color Schemes Lookup Management	Location Types (Vendor) Select Tem Accounting Office Corporate Headquarters Home Office Location Type: [ Add New ]

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:	Vendor 🔽	HISTORY RE	SULTS - ¥ENDOR						
Search Type:	Contains 💟	1 Record(s)	Found K		Showing Page 1 of 1	► N		Go To Pa	age 1 🔽
Vendor:		Details	Name		Location Type	City	St./Prov.	Zip/Postal	Remove
Location Address:		<b>*</b>	California Mountain Spring Water		Corporate Headquarters	Bakersfield	CA	93301	<b>B</b>
Location City:									
Location Zip/Postal:									
First Name:									
Last Name:									
	Clear 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.									
									search

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

ocatior	n Summa	nmary 🔣 Showing Page 1 of 1 🕅				[ Add New ]	
Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Remove
<b>&gt;</b>	<b>N</b>	Corporate Headquarters	654 Main Street	Bakersfield	CA	93301	
<b>&gt;</b>		Accounting Office	543 Main Street	Bakersfield	CA	93301	<b>E</b>

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: Corporate Headquarters 💟	Physical Address						
This Location Is Accounting Office Corporate Headquarters	Address: 654 Main Street						
Home Office	Address 2: Suite 456						
Satellite Office	City: Bakersfield						
Details         Phon(Service Center         Ext         Delete           Toll Free         (800) 326-3166         Image: Center         Image: Ce	State/Province: California 💟 Zip/Postal: 93301						
	Country:						
	Intl Address Info:						
Mailing Address							
	Address: 654 Main Street						

### Notes

