Chapter 6

Lookup Management

IN THIS CHAPTER

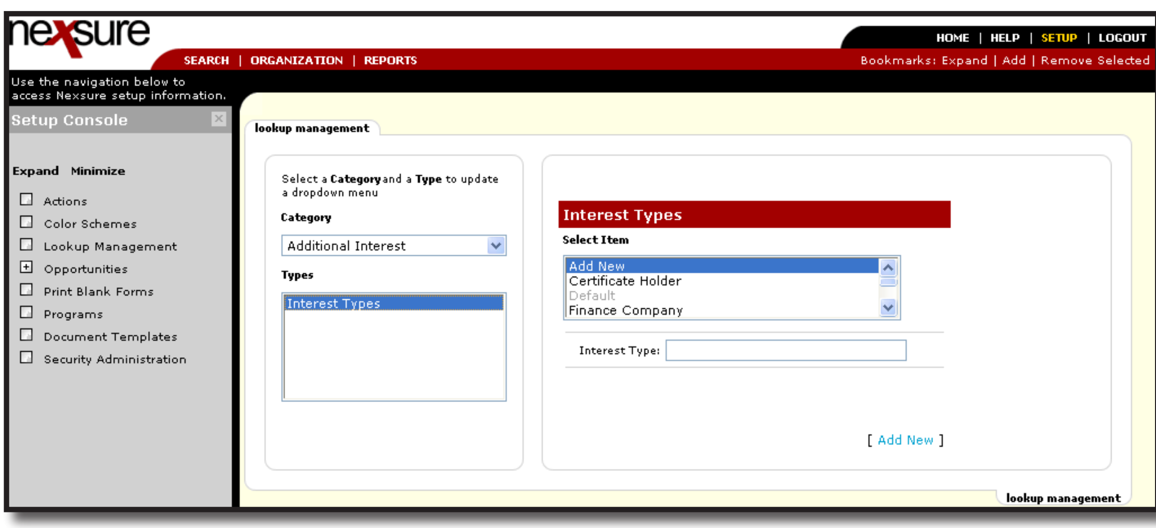
- Modifying Category types in Lookup Management
- General Instructions to Add/Modify/Delete Items
- Category Type Locator Including Modification Exceptions

Modifying Category Types in Lookup Management

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

To access Lookup Management:

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



General Instructions to Add/Modify/Delete Items

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

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

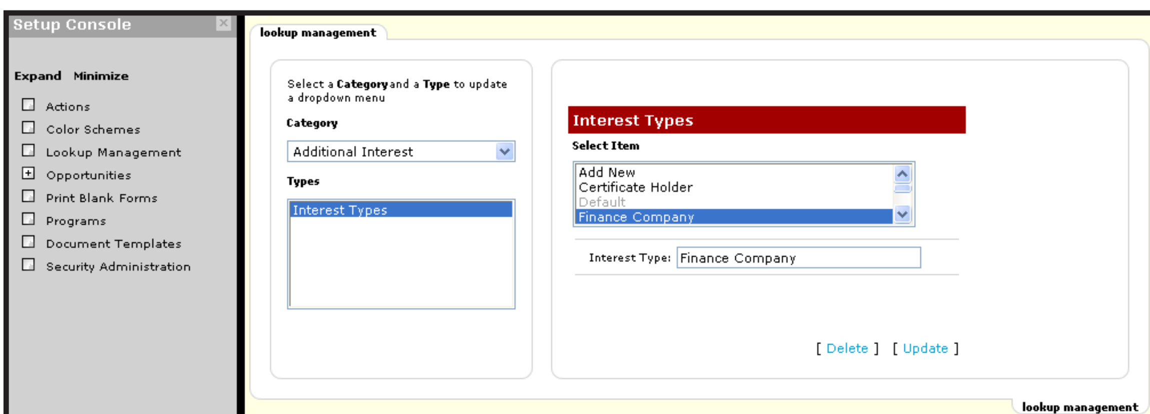
- Below the list is a empty field with a label beside it of the type selected, click in the field and enter the new item.
- Click the **[Add New]** link below the field to add the item.

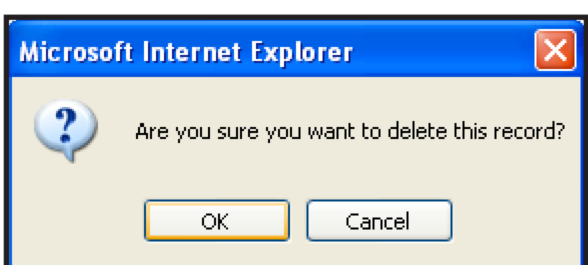
To modify an item, find the item in the list and click to highlight.

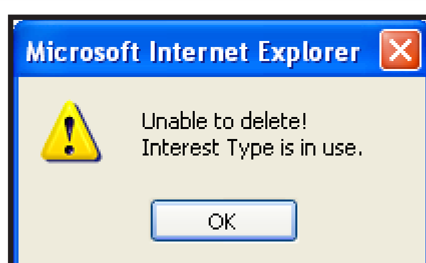
- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the **[Update]** link to save the changes.

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

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





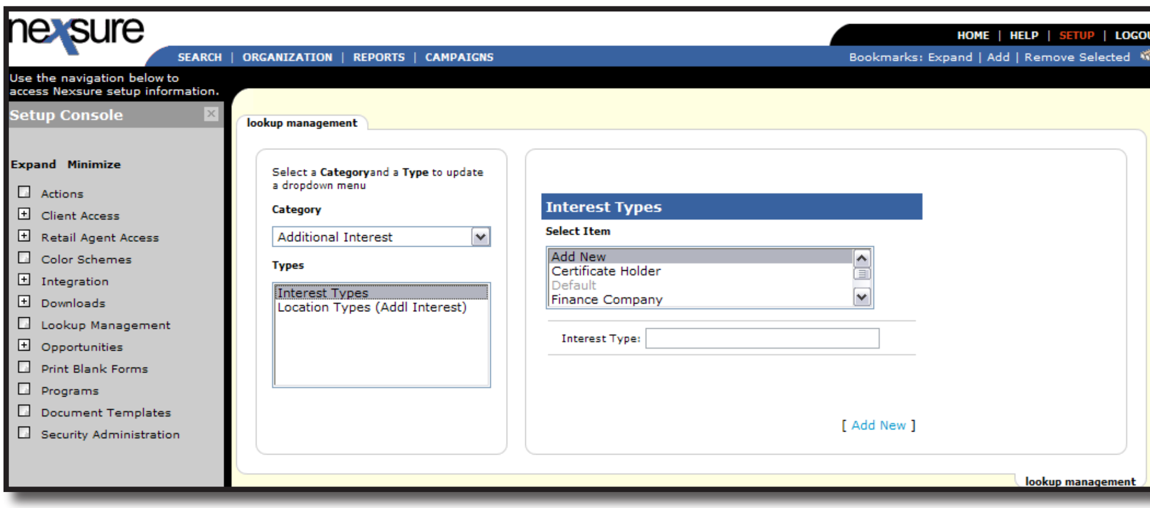


Notes

Category Type Locator Including Modification Exceptions

Additional Interest Category

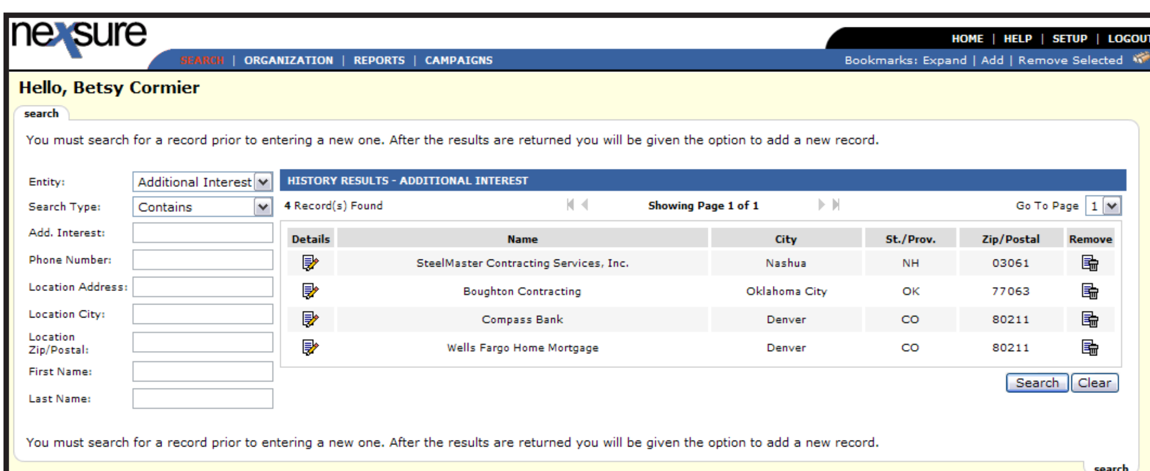
The Additional Interest is the first Category in the list and only has one type, Interest Types. The category of Additional Interest refers to Additional Interest found on the Additional Interest Name page. The Interest Type identifies the particular interest type to identify their interest. Any item 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.

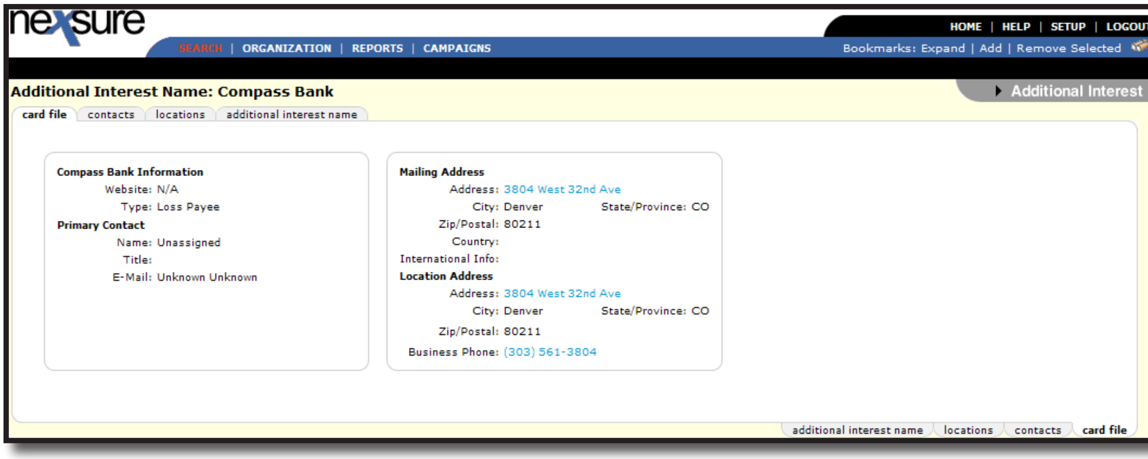


The Interest Type field is located as follows:

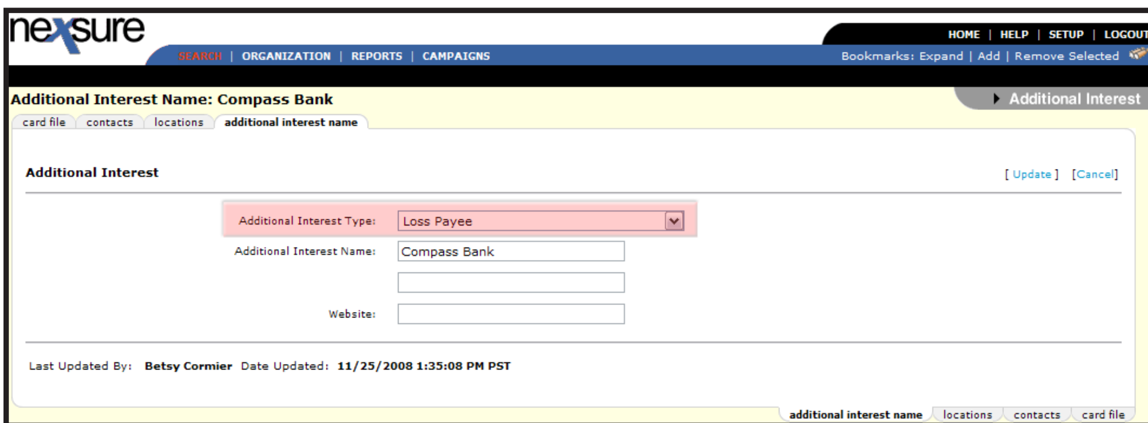
Click the **Search** link located on the Primary menu and use the entity drop-down box to select Additional Interest.

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



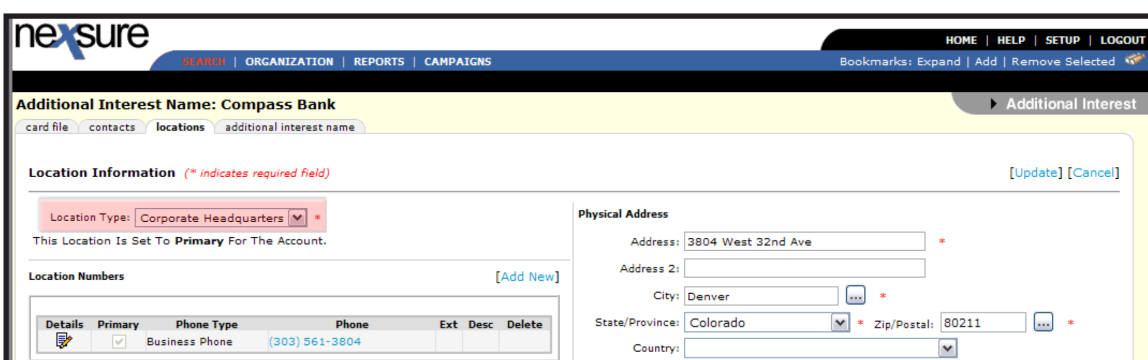


Click the **additional interest name** tab. The Additional Interest Type is the first field on the page. This is the field being defined.



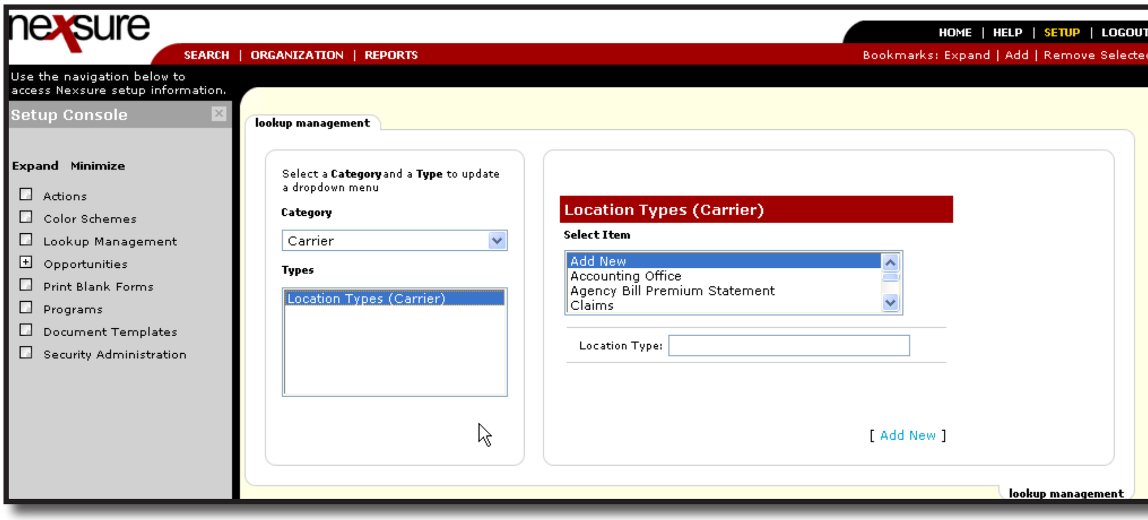
The **Location Types (Addl Interest)** is located as follows:

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



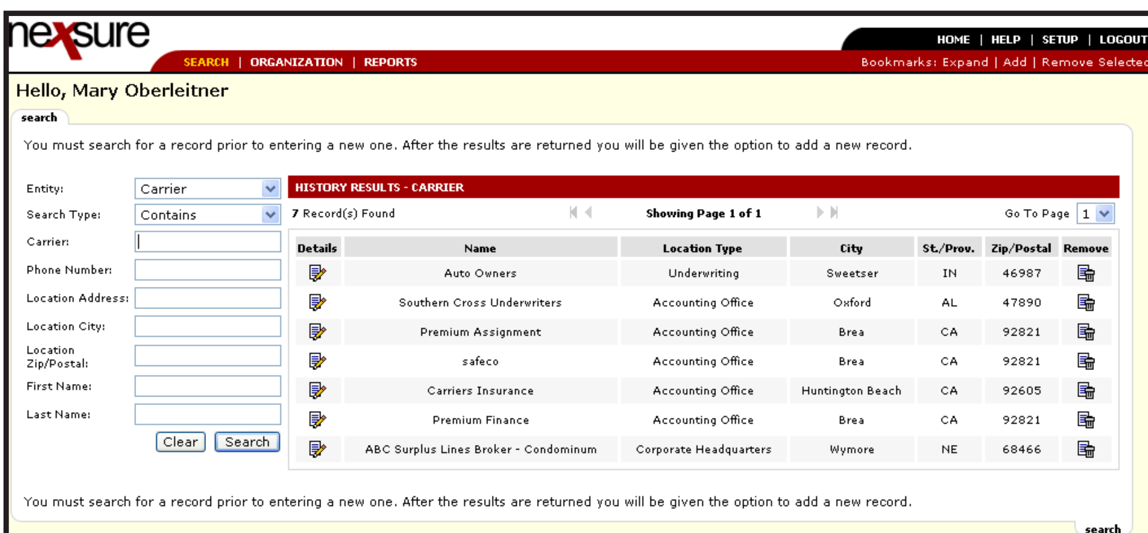
Carrier Category

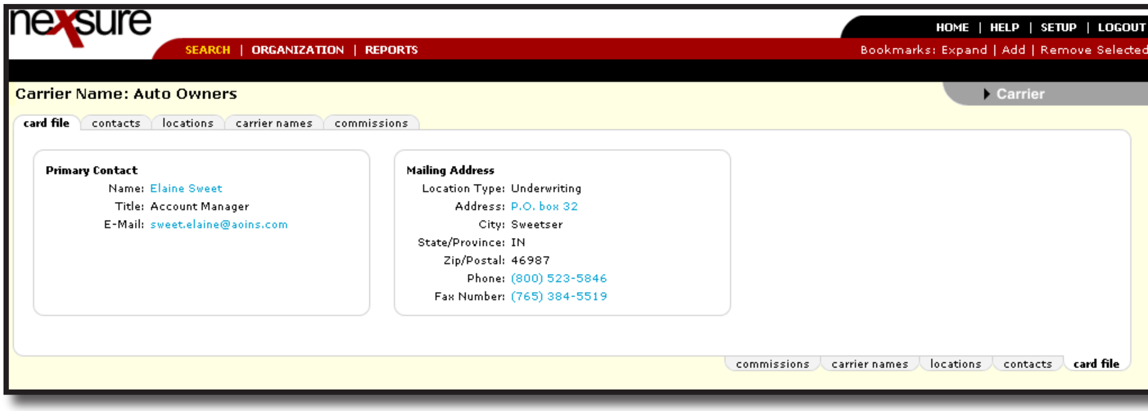
Using the Category drop-down box select Carrier. The category of Carrier refers to Carriers found on the Nexsure Search Screen. The Location Types (Carrier) identifies the location type to help identify each location. Any item that is gray is one that is required for use by Nexsure and therefore, cannot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



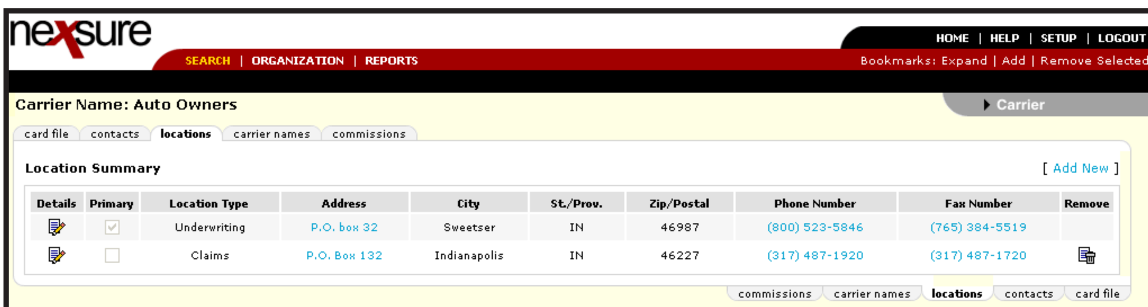
The Location Types (Carrier) field is located as follows:

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

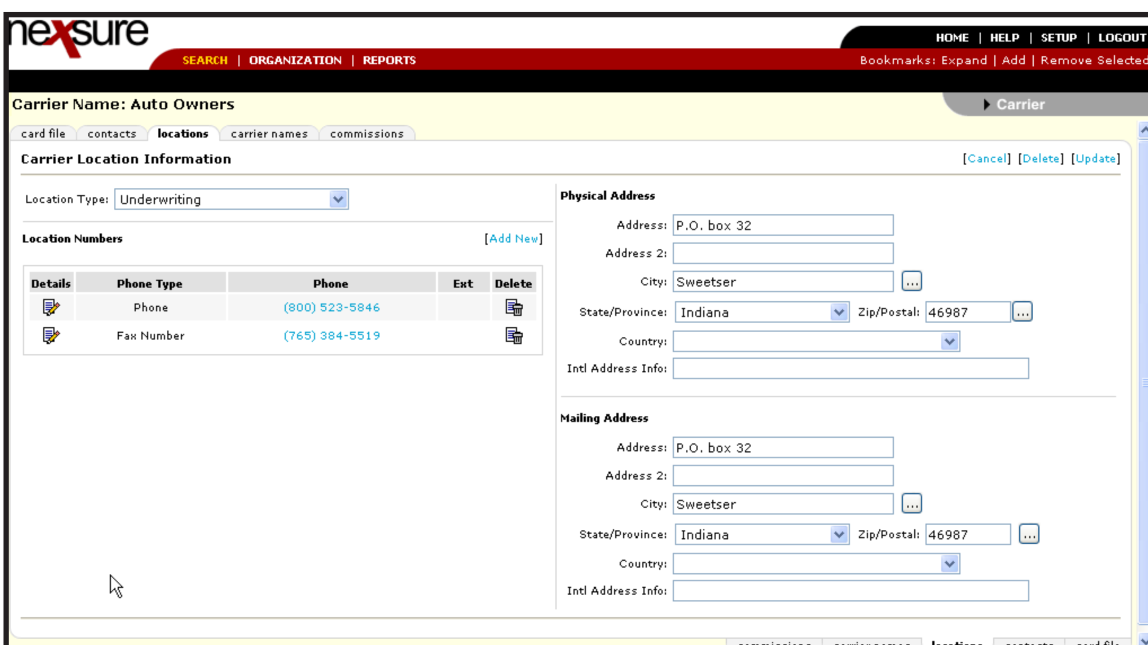




Click the **locations** tab to display the location summary. Click the **Details** icon for one of the locations to display the location detail.



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

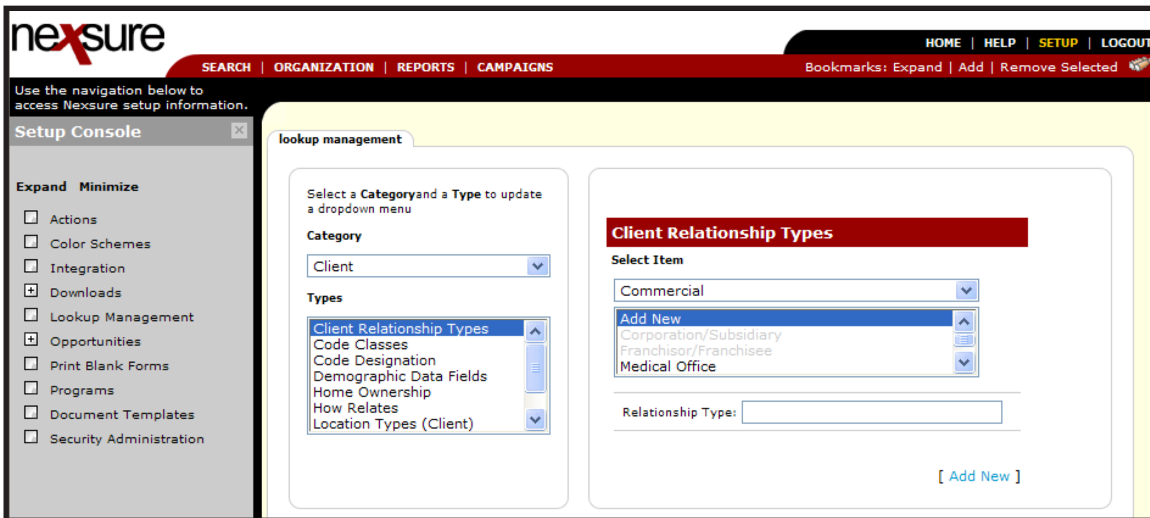


Client Category

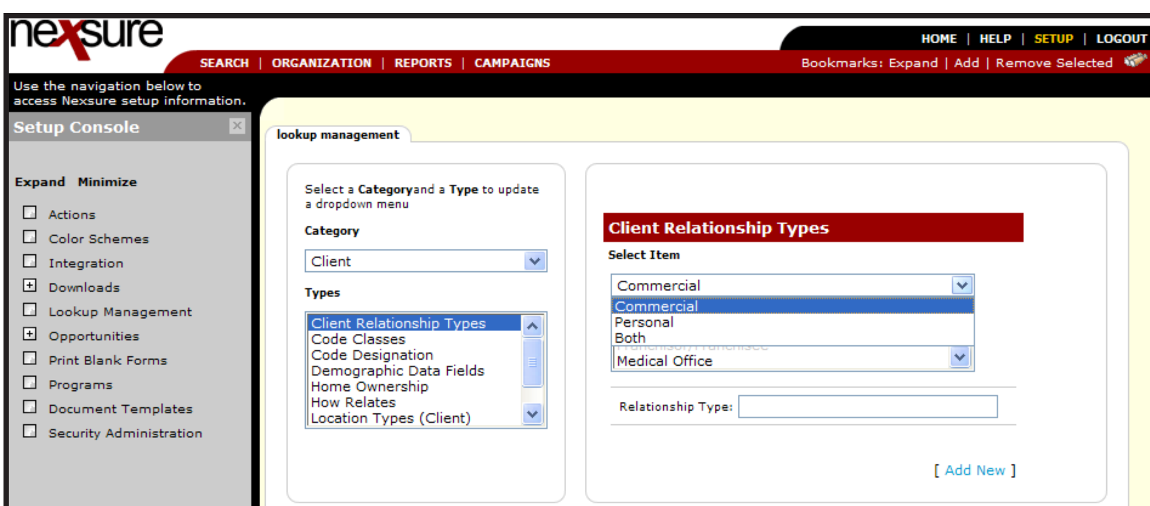
Using the Category drop-down box select Client. The category of Client refers to Clients found on the Nexsure Search Screen. There are several different types under the category of Client. Any item that is gray is one that is required for use by Nexsure and therefore, cannot be modified or removed. Modify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

Client Relationship and How Relates Types

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

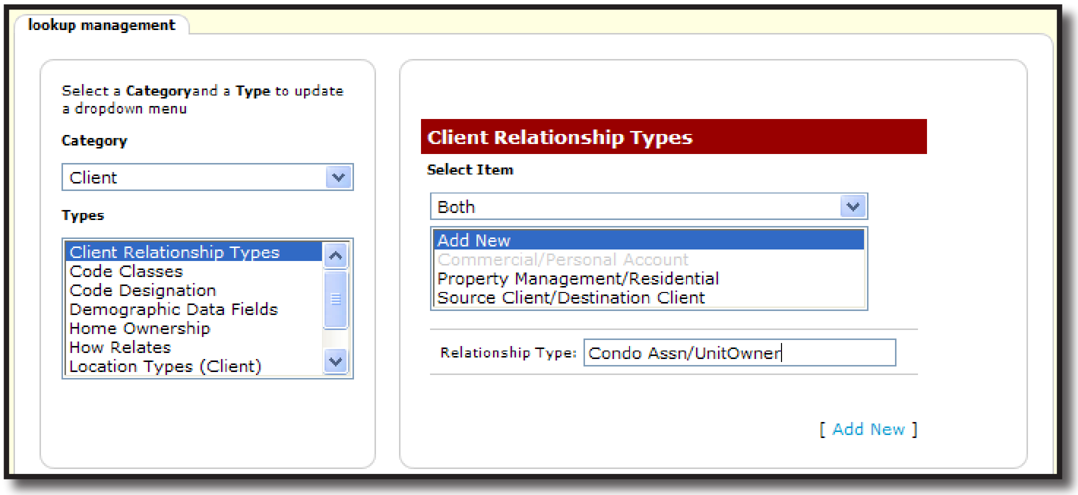


Begin by selecting the Category of Client Relationship types. Notice when selected that an extra drop-down box is present on the right side just above the items. Choices are, Personal, Commercial and Both. This is where identification is made of where the items being added should be available.



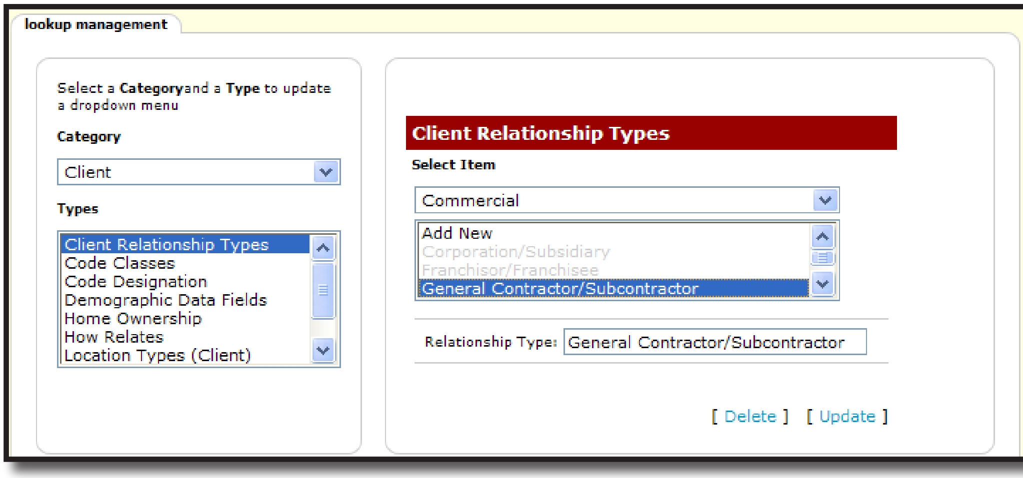
To add a new item, select where the item should be added, then at the top of the select items list, click **Add New**.

- 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.



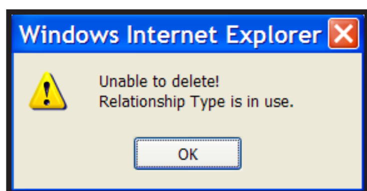
To modify an item, in the drop-down box on the right side just above the items select Personal, Commercial or Both, wherever the item is that requires modification. Next find the item in the list and click to highlight.

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



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

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



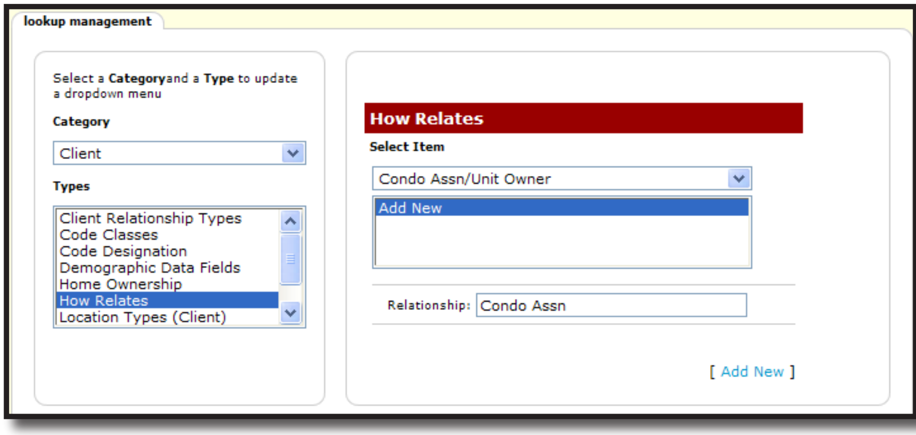
The *How Relates Type* identifies the relationship between the two related accounts and is used in conjunction with Client Relationship Types. The Client Relationship Type should be added first and then associate the Relationships with the How Relates Types. Use the directions below to make modifications.

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

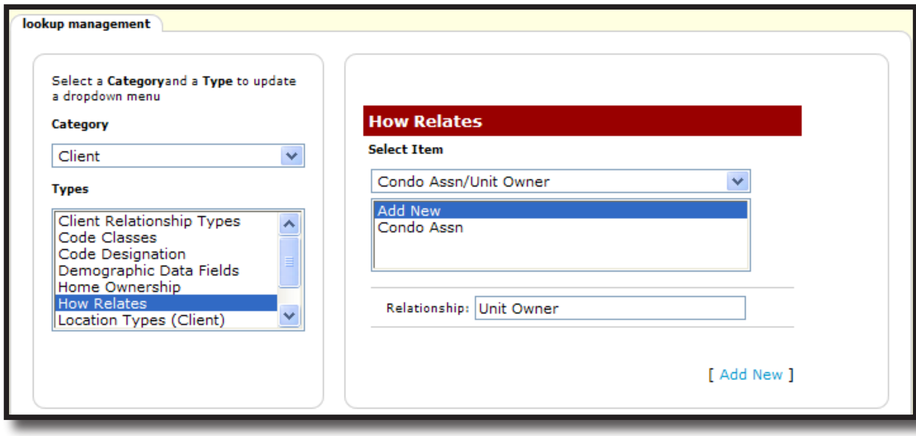
To add a new item select the appropriate **Client Relationship** by using the drop-down box, then at the top of the **Select Items** list, click the **Add New** line item.

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

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



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

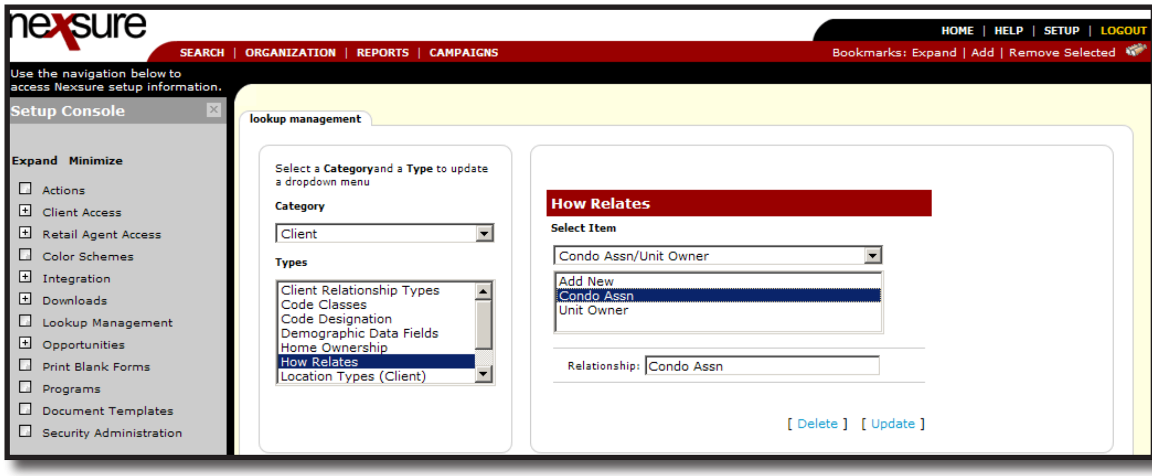


To modify an item, in the drop-down box on the right side just above the items select the appropriate Client Relationship item from the drop-down box. Next find the item in the list and click to highlight.

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

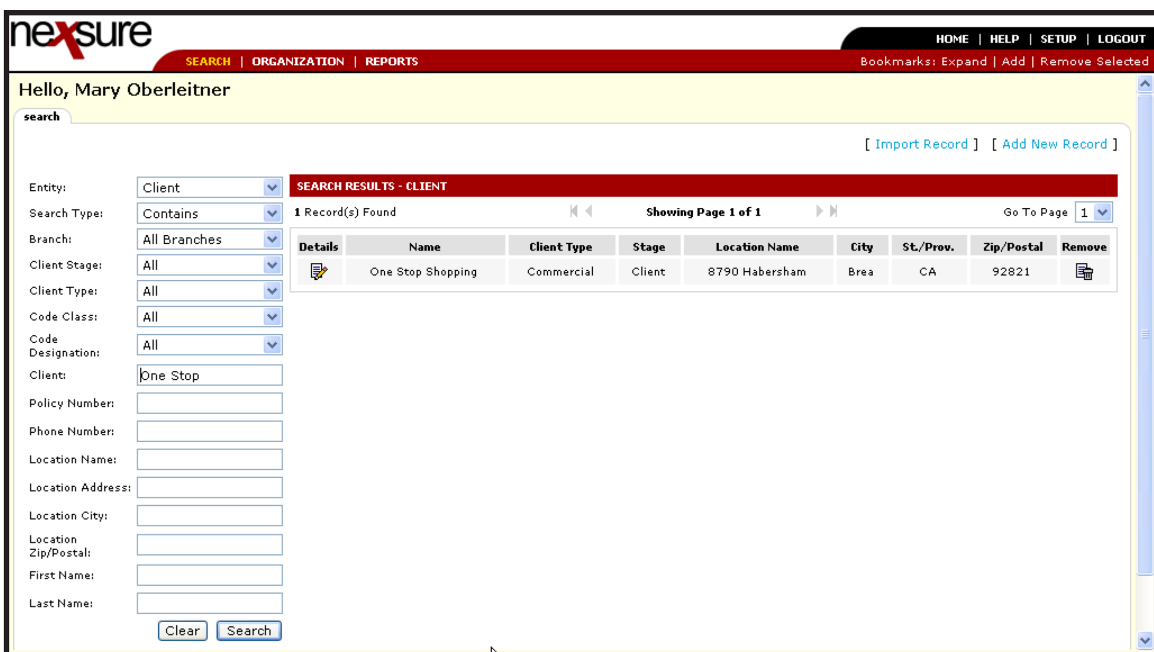
To delete an item, in the drop-down box on the right side just above the items select the appropriate Client Relationship item from the drop-down box. Next find the item in the list and click to highlight.

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

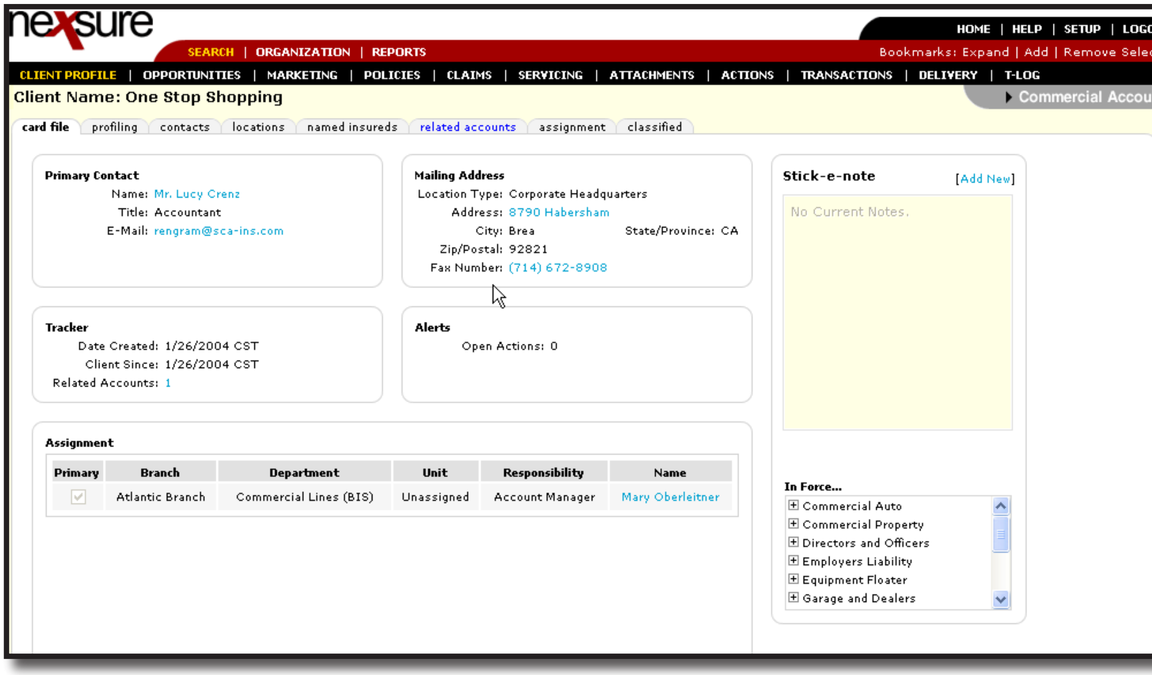


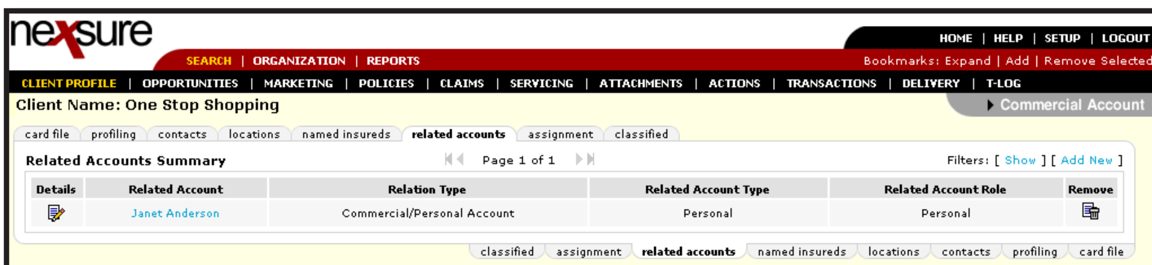
The Client Relationship Type and How Related Type fields are located as follows:

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



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

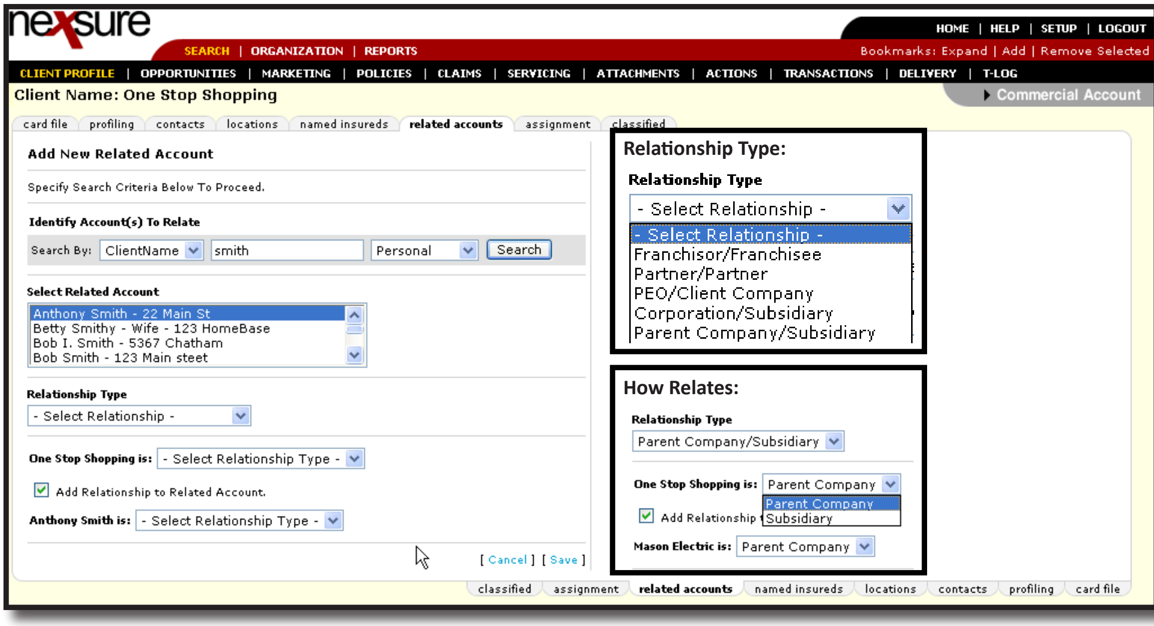




To see how the types are, add a new related account by clicking the **[Add New]** link. First search for a client name either personal or commercial and enter part of the name and click the **Search** button to display the results. In the list displayed, select one.

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.

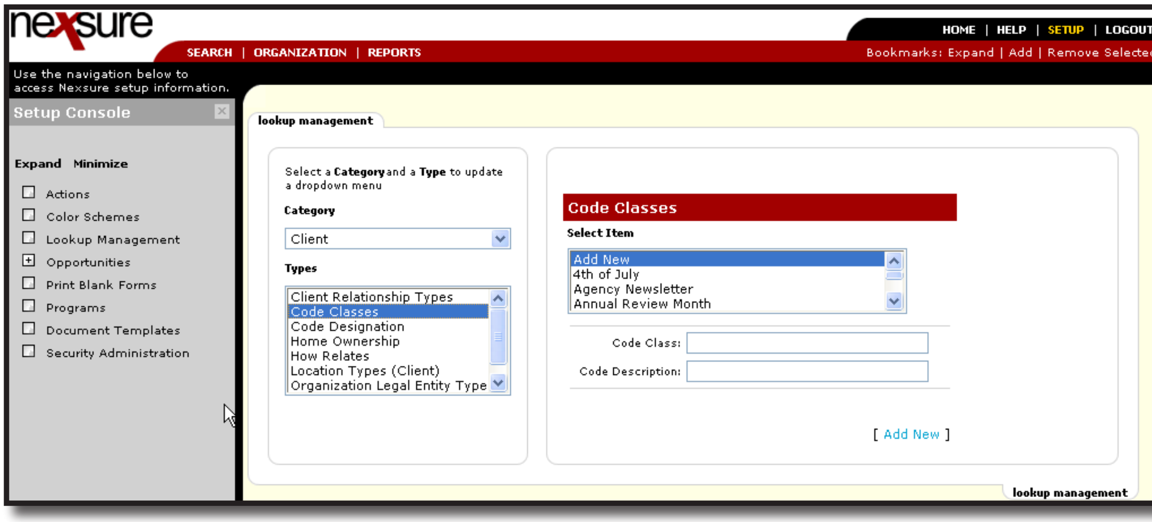
To modify an item, in the drop-down box on the right side just above the items select the appropriate Class Code for the item that requires modification. Next find the item in the list and click to highlight.

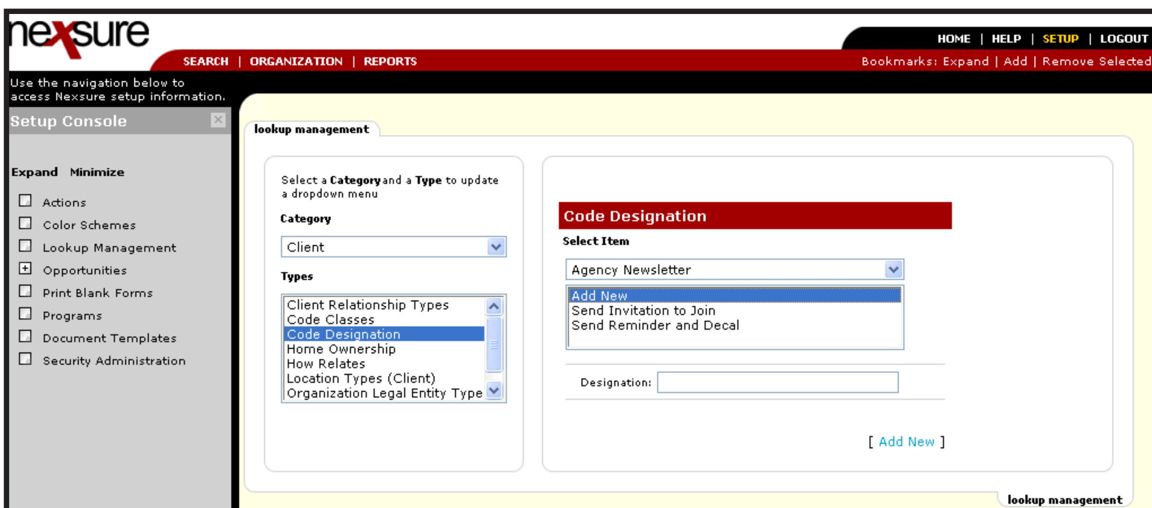
- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the **[Update]** link to save the changes.

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.

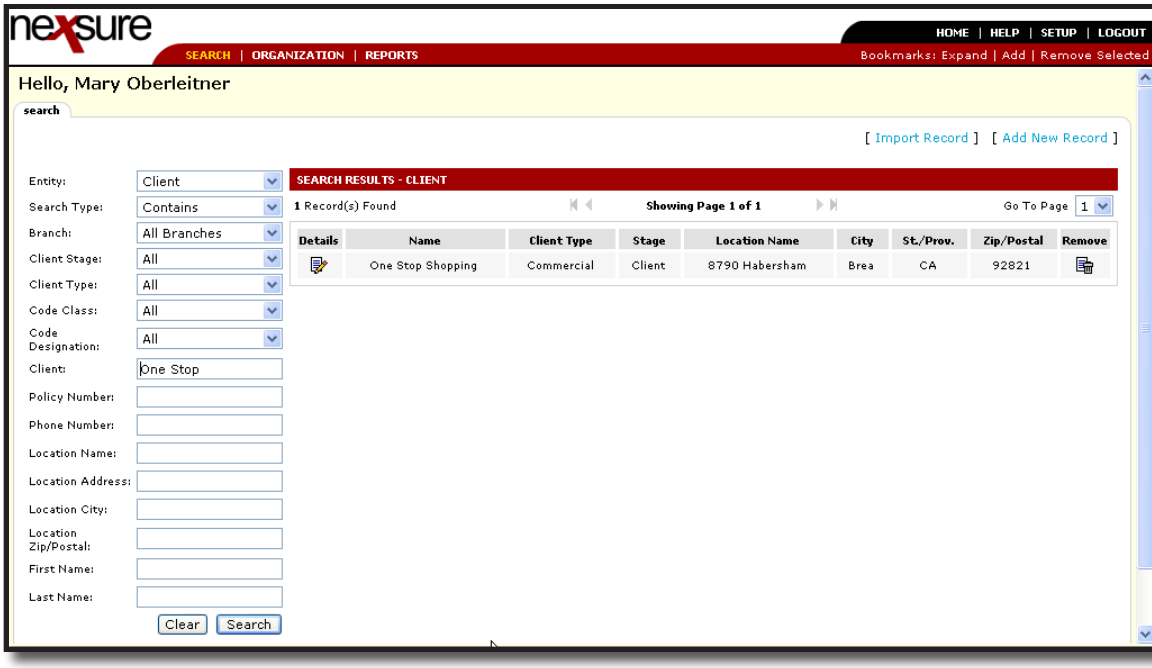
- The name now displays in the field below the list beside the type label.
- Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation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



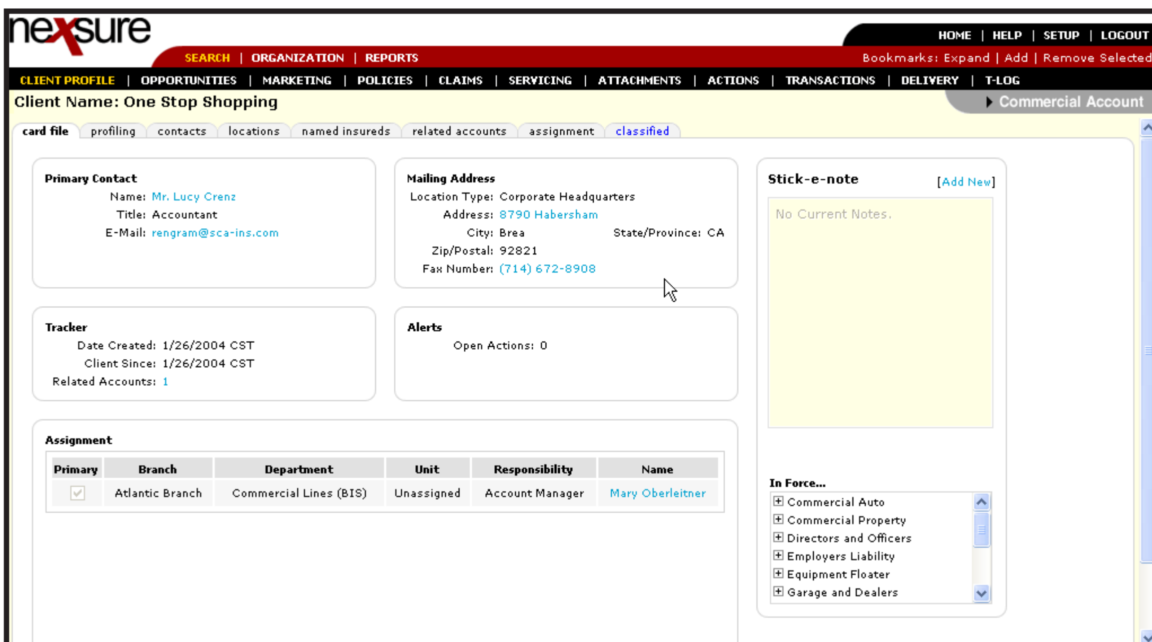


The Code Classes and Code Designations Type fields are located as follows:

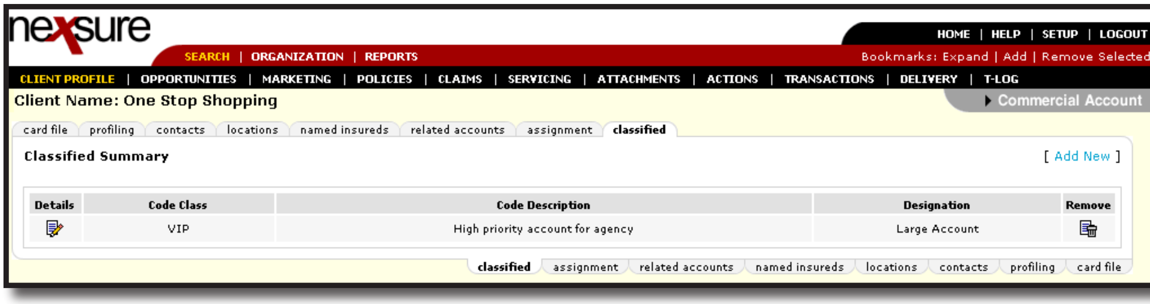
Click the **Search** link located on the Primary menu and use the entity drop-down box to select client. Enter a few characters of an already existing client; click the **Details** icon to display the card file.



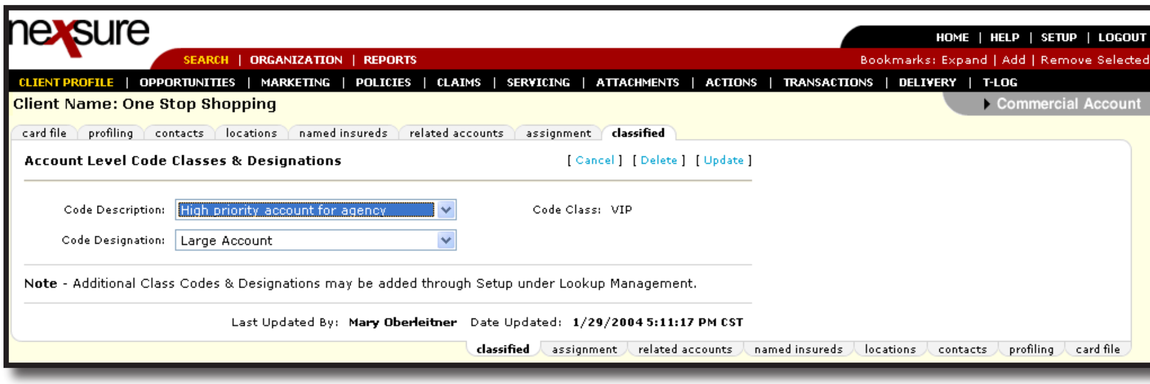
Click the **classified** tab to display the classified summary page.



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



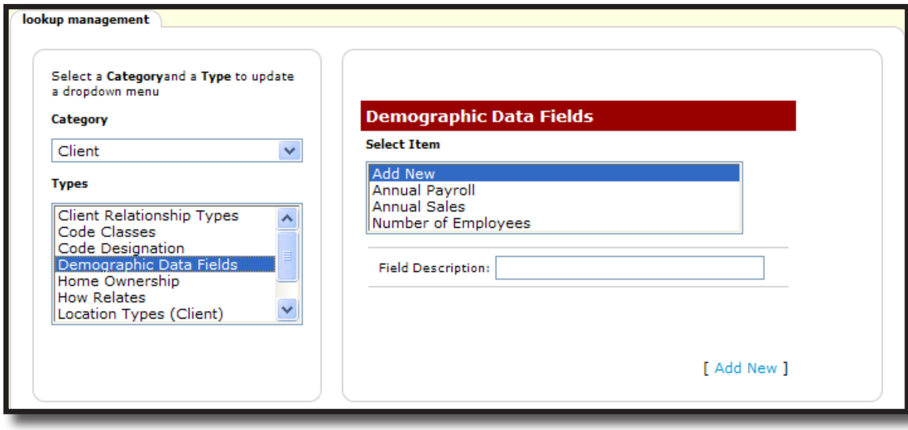
This is where the Class Code and Code Designations are used.



Demographic Data Fields

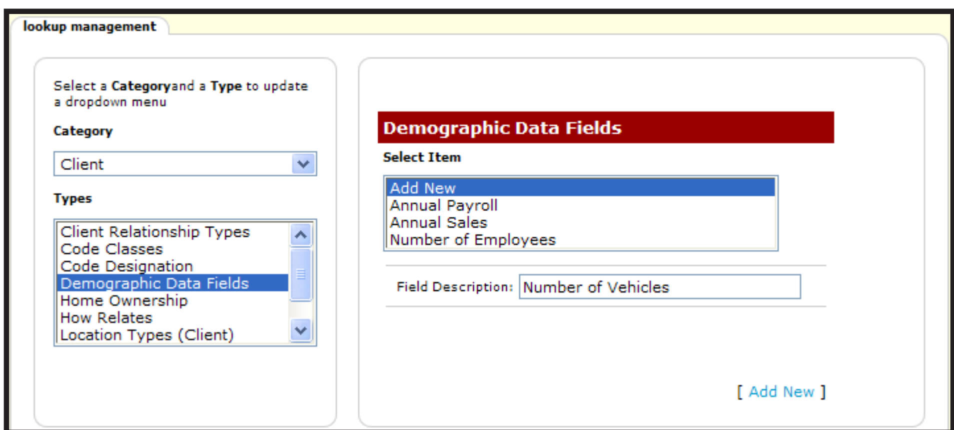
Client Demographics are used on the **profiling** sub-tab **demographic data** found at client level. Client Demographics are used to record data by year to facilitate benchmarking of data that will change from year to year. To track data other than the default value of “Annual Payroll”, define additional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

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



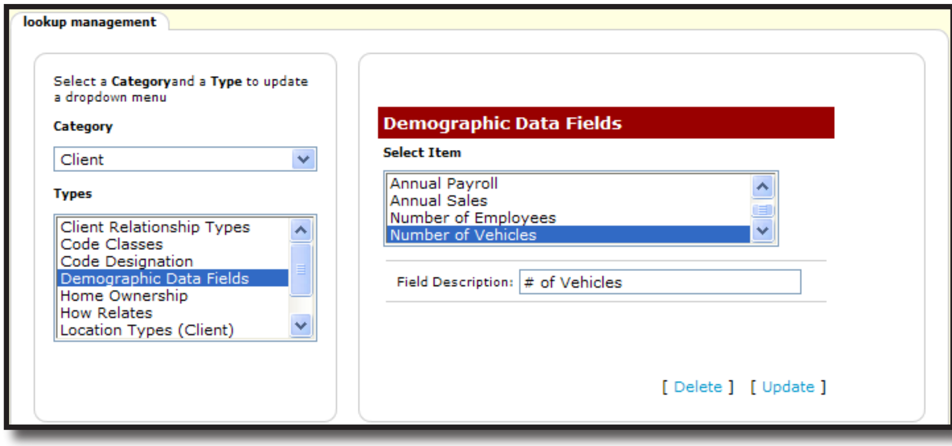
To add a new item, click to highlight and select **Add New** in the **Select Item** box.

- 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.



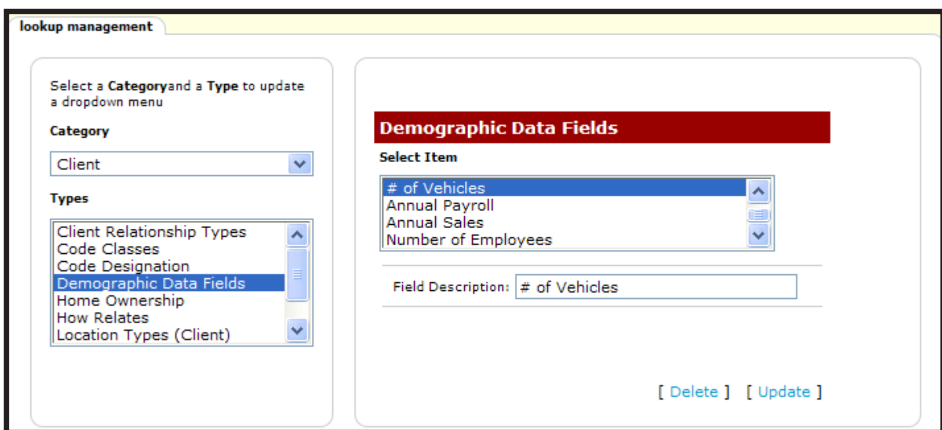
To modify an item, find the item to be modified in the **Select Item** box. Click to highlight and select the item.

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



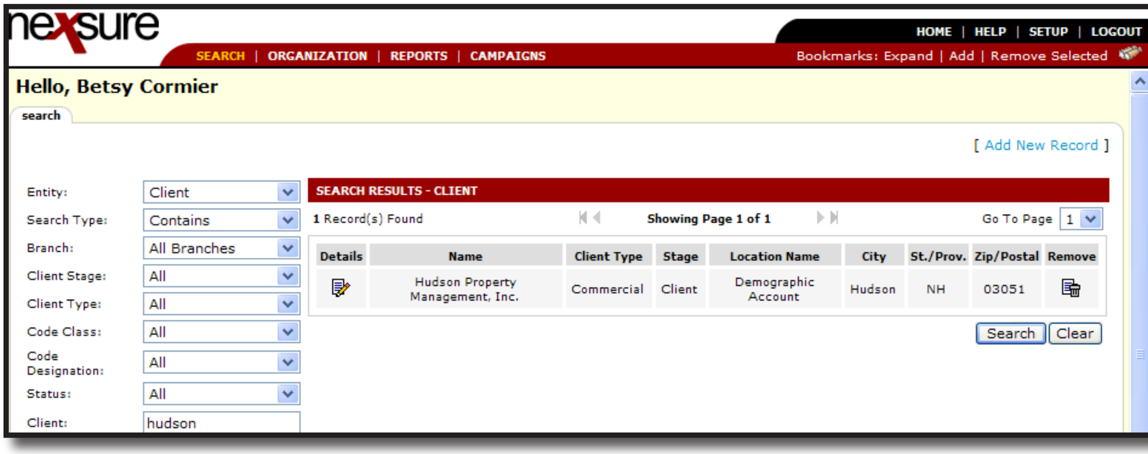
To delete an item, find the item to be deleted in the **Select Item** box. Click to highlight and select the item.

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

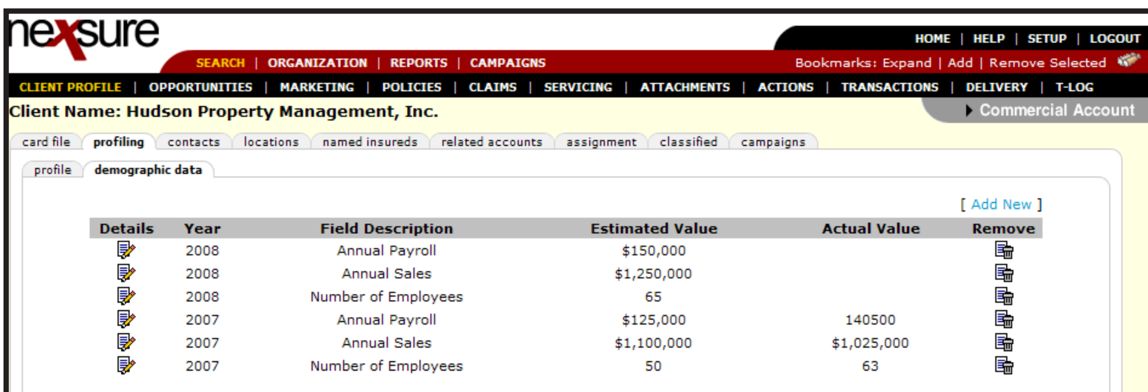


Demographic Data fields are located as follows:

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

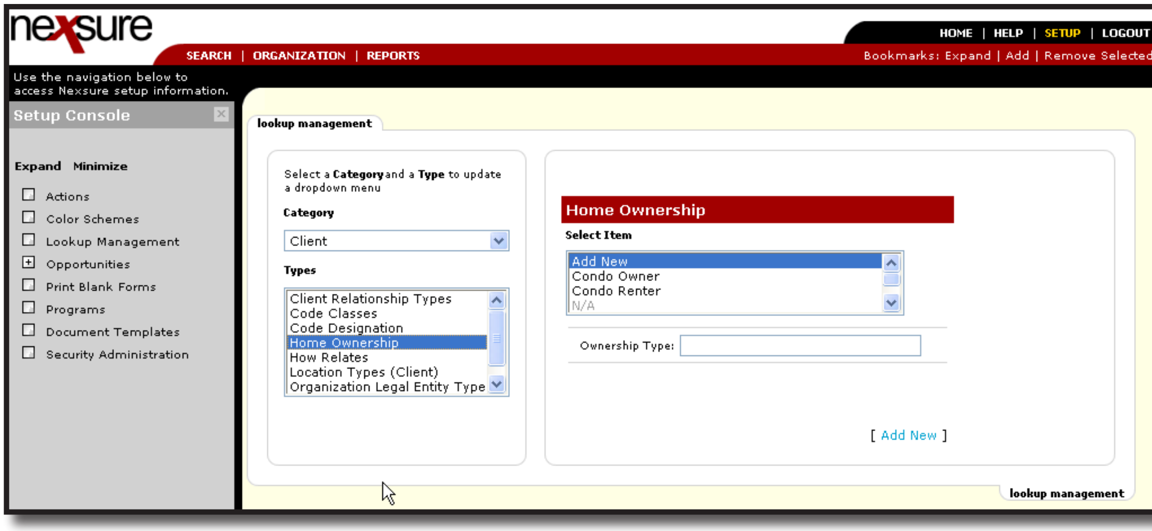


Click the **profiling** tab to display the profiling sub-tabs. Click the **demographic data** sub-tab to display the demographic data summary. This is where the **Demographic Data Fields** are used.



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

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



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

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

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

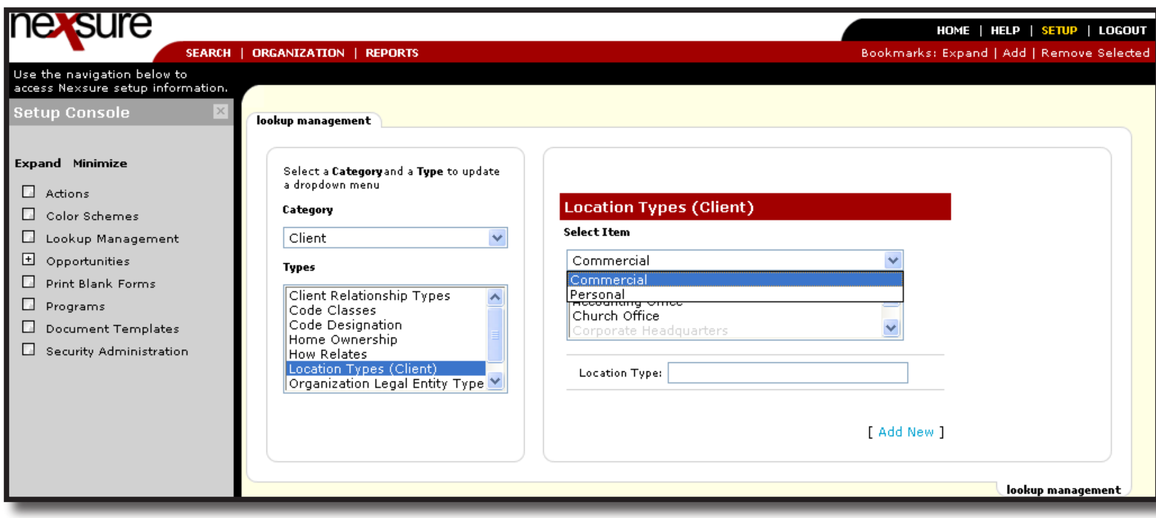
- Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item.
- Click the **[Add New]** link below the field to add the item.

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

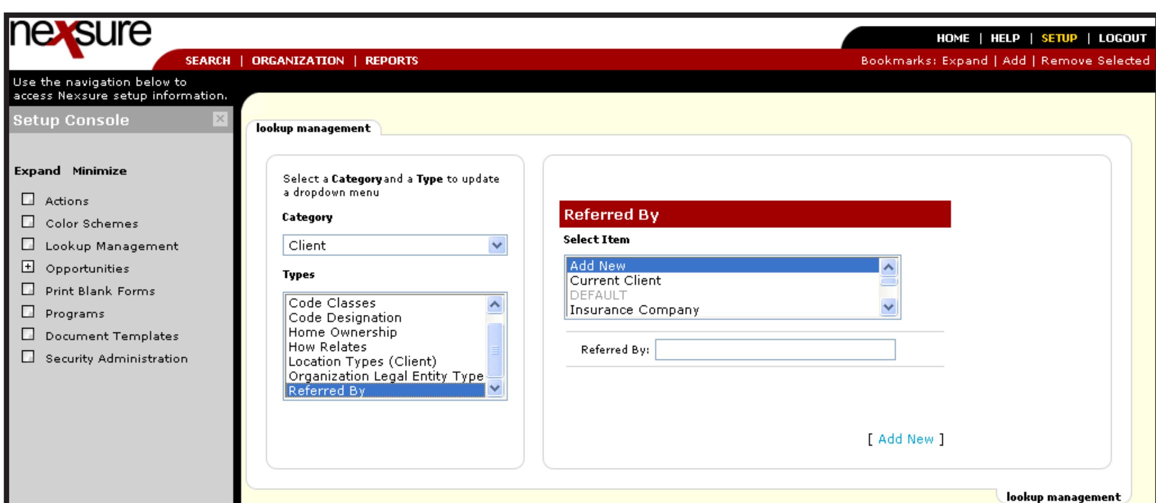
- The name now displays in the field below the list beside the type label, make the adjustment.
- Click the **[Update]** link to save the changes.

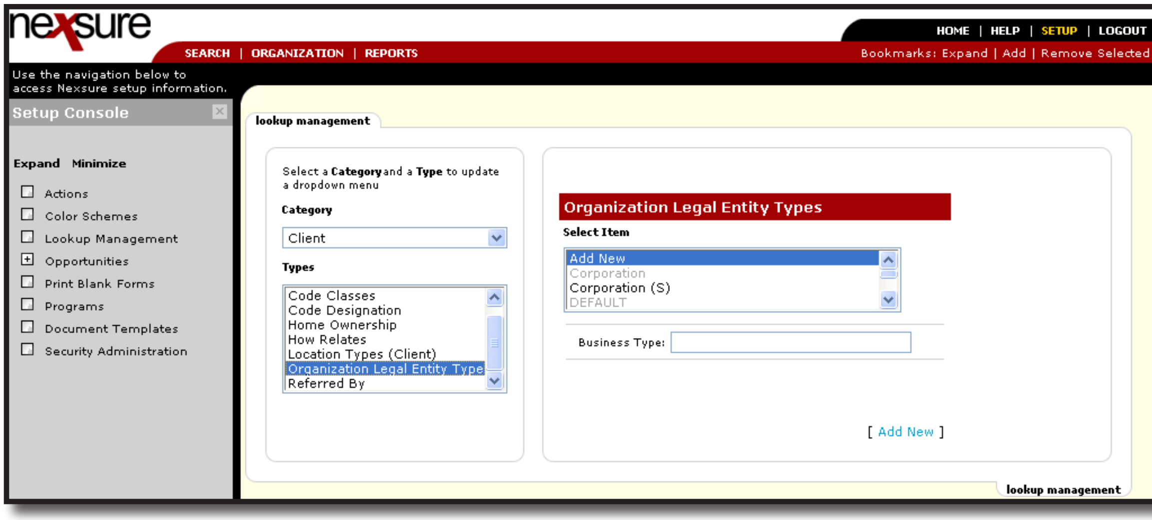
To delete an item, in the drop-down box on the right side just above the items select either Commercial or Personal for the item that should be removed. Next find the item in the list and click to highlight.

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



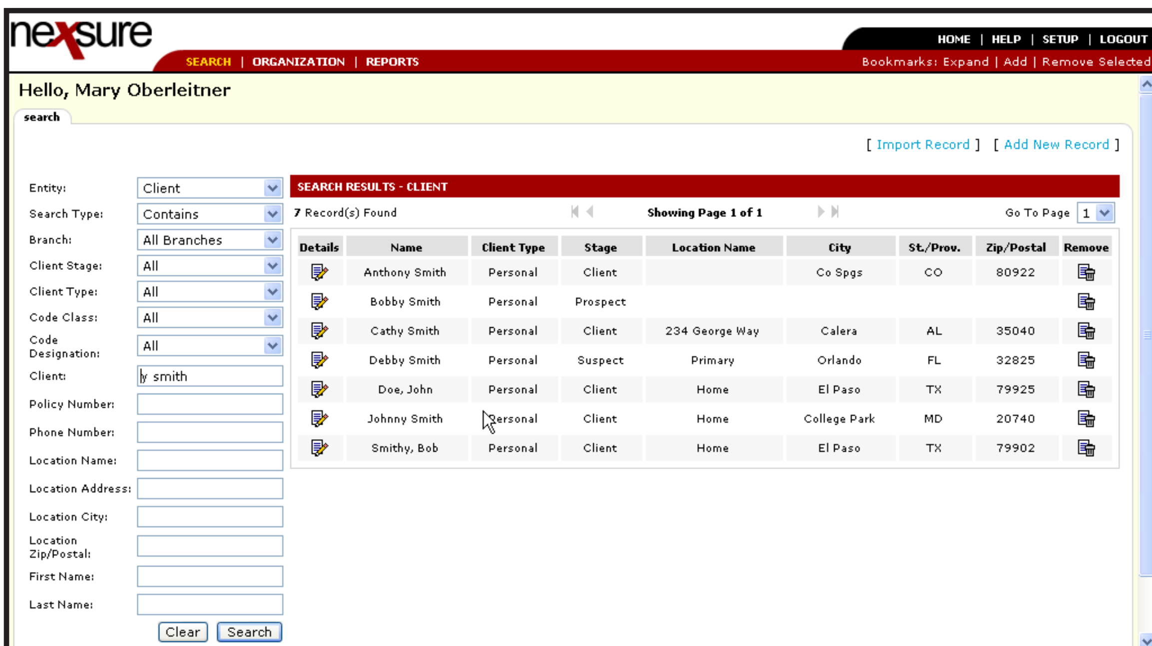
Modification of Referred by and Organization Legal Entity Types are done by following the General instructions provided in this chapter.



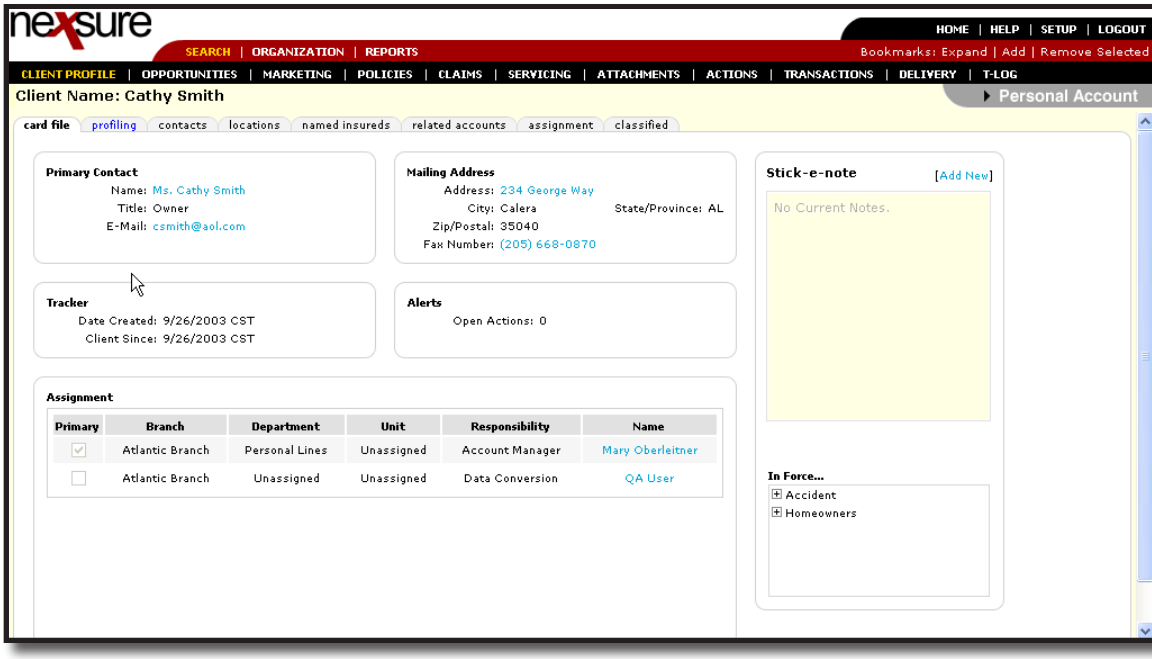


The Home Ownership, Location, Referred By and Organization Legal Entity Type fields are located as follows:

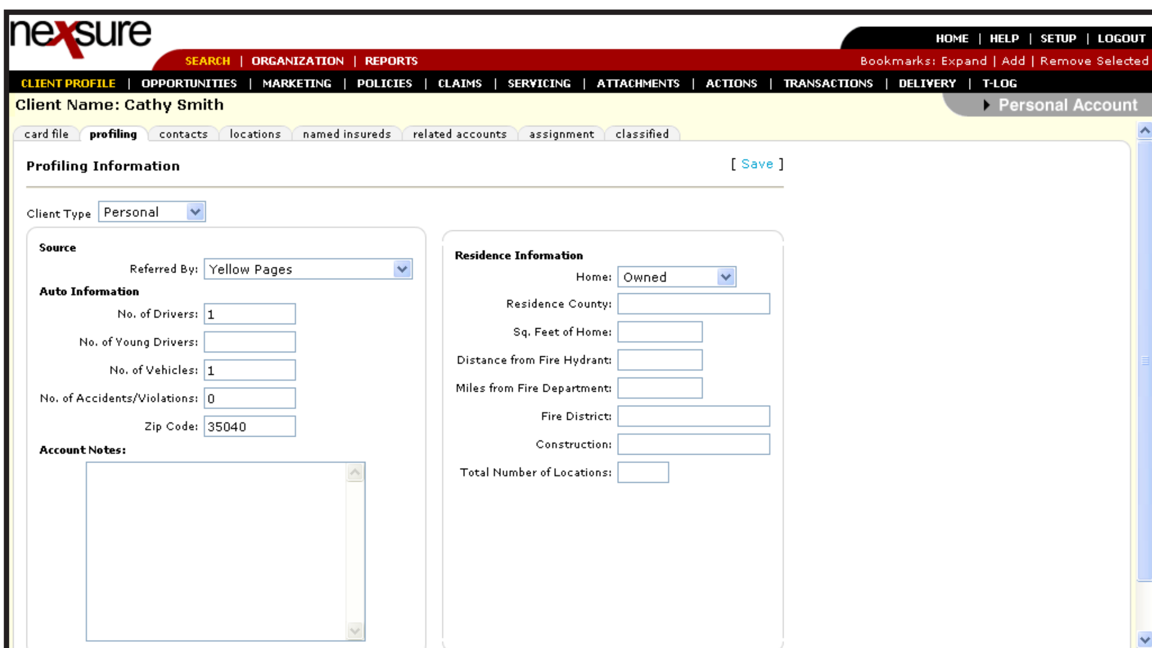
Click the **Search** link located on the Primary menu and use the entity drop-down box to select Client. Enter a few characters of an already existing Client; click the **Details**  icon to display the card file.



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

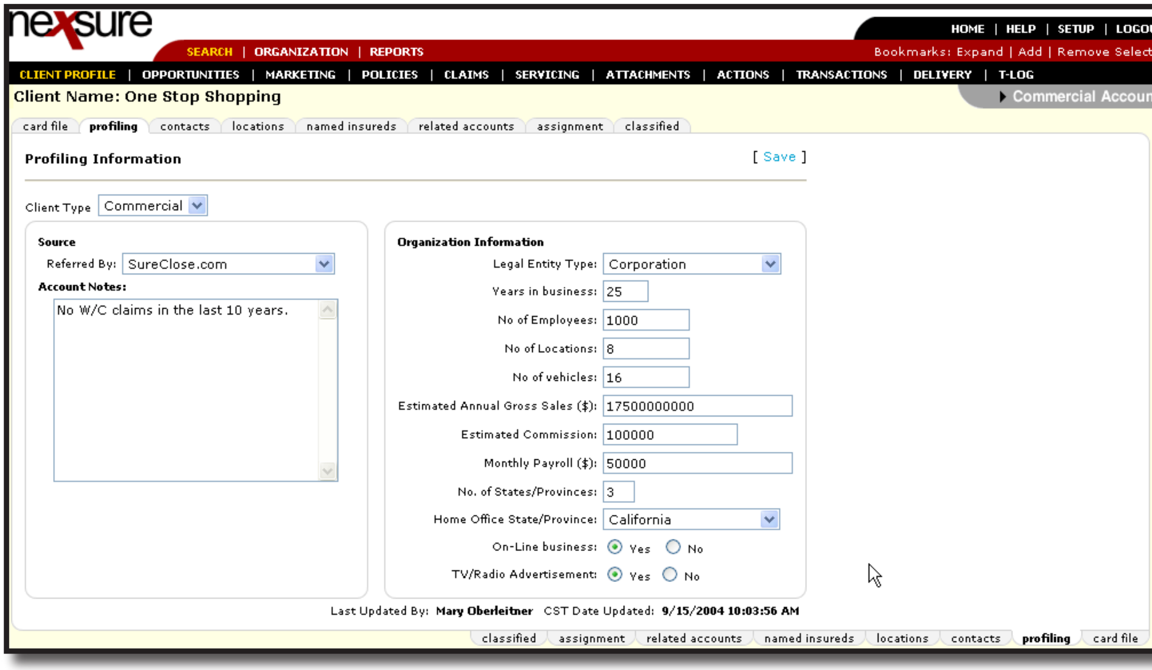


Depending on the client type selected determines which profiling page is displayed. Selecting a client designated as Personal displays the Personal profiling page. The personal profiled page includes both the type drop-down boxes for Referred by to indicate where the client came from and Home Ownership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



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

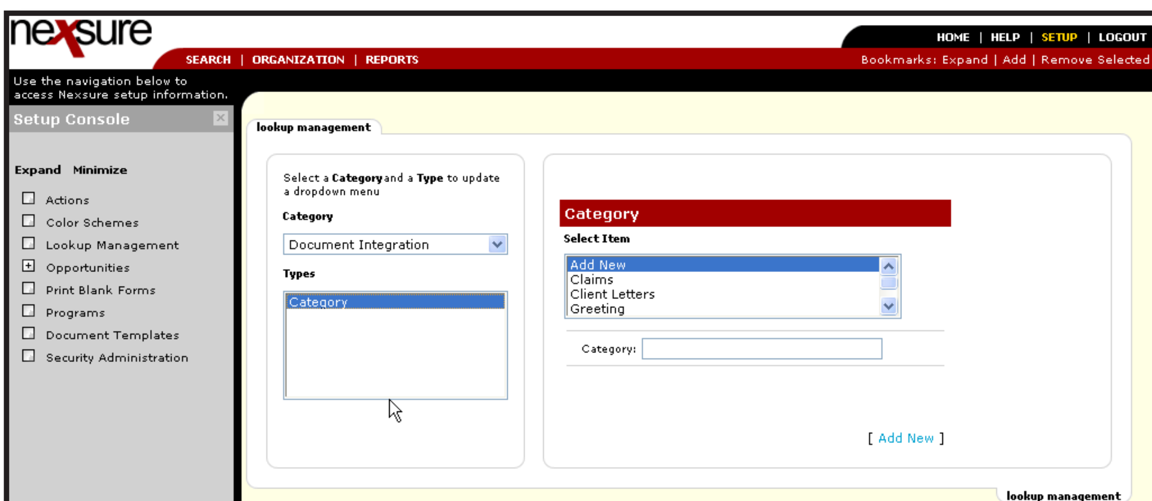
Organization Legal Entity to indicate level of ownership.



Document Integration Category

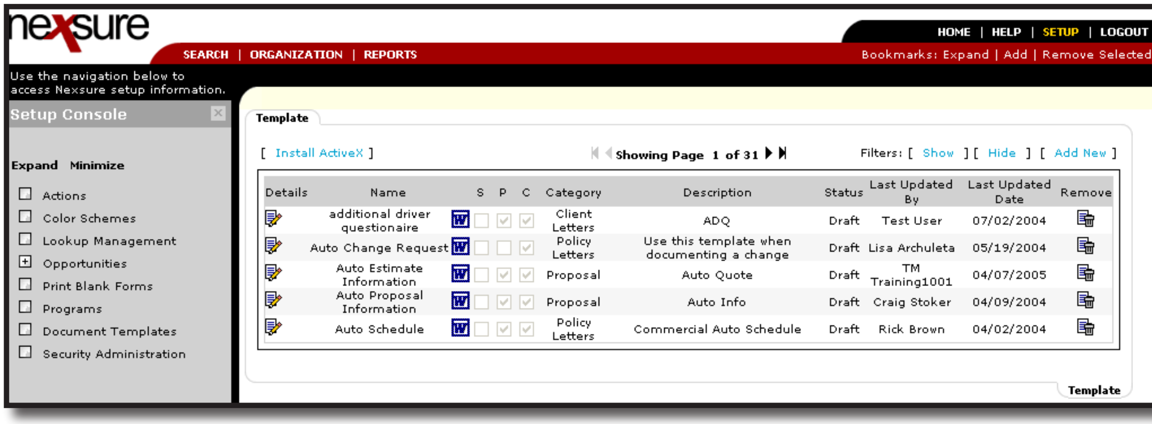
Category Types

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.

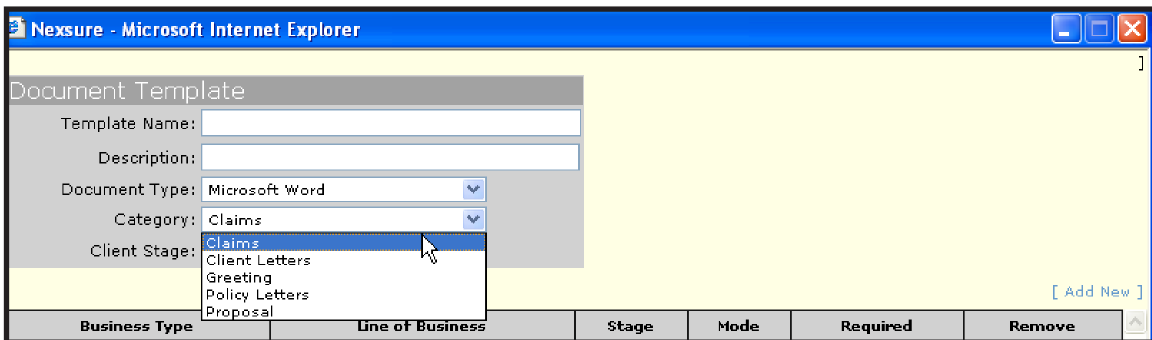


The Category Type field is located as follows:

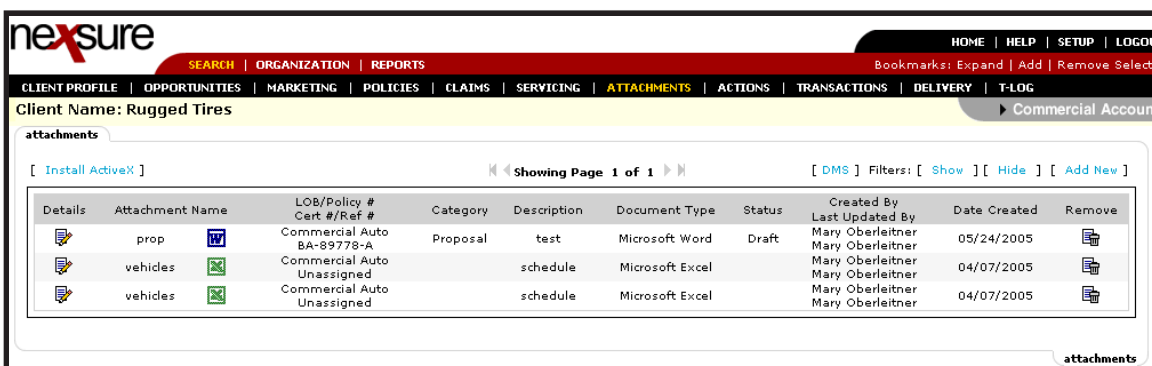
Click the **SETUP** link on the Utility menu, Document Templates to display the Document Template Summary. Then click the Add New link to add a new Template.



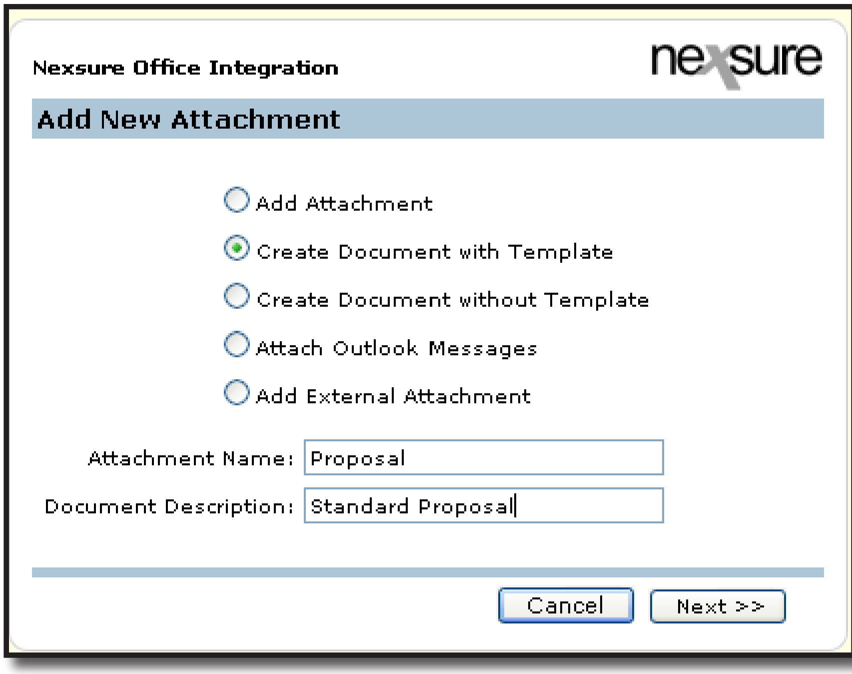
The Category type drop-down box is available here to define how to group the documents to assist the user in locating them for use.



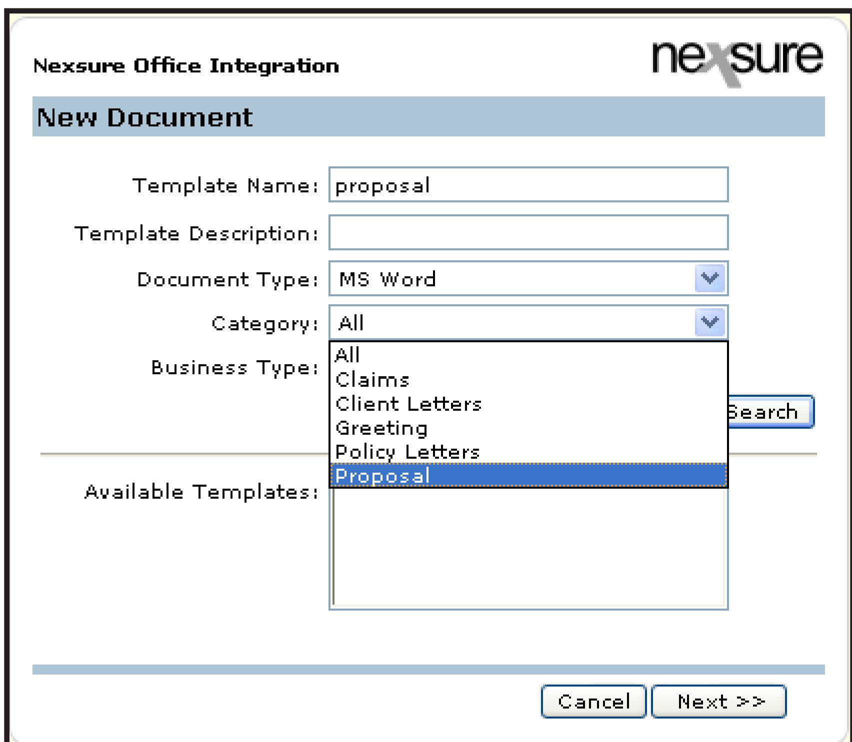
At attachment level, click the **[Add New]** link to create a document with template.



Identify the document and click **Next**.



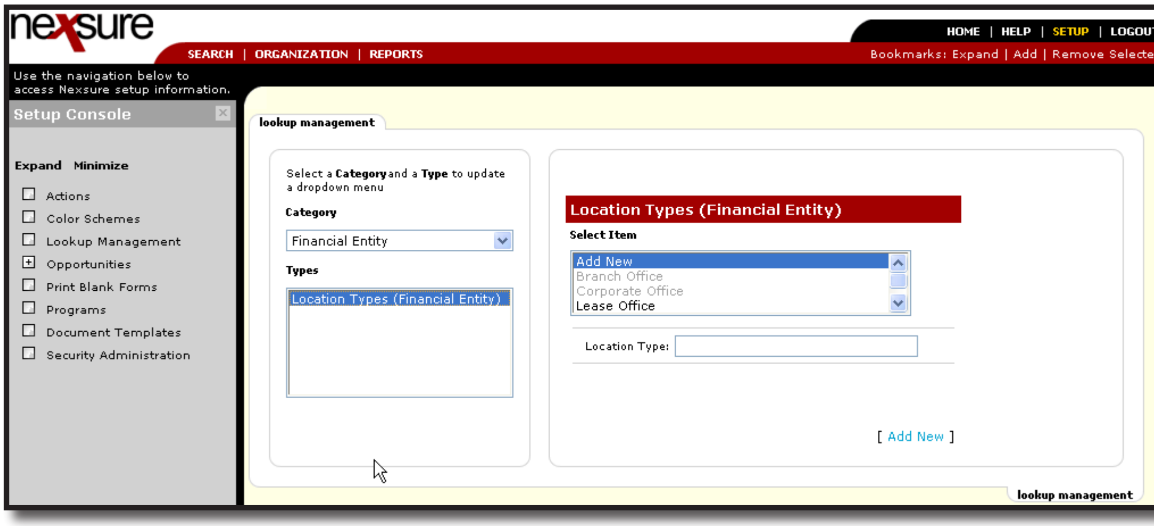
Use the category drop-down box to narrow the list of documents returned for selection.



Financial Entity Category

Location Types (Financial Entity)

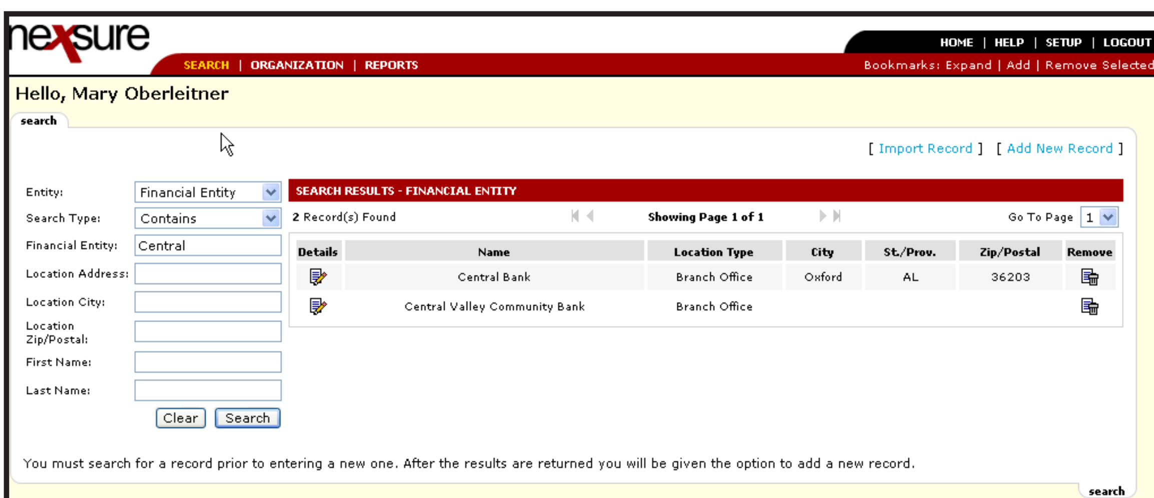
The Location Types (Financial Entity) are used on the Financial Entities location detail page to identify the location. The Financial Entities are the Bank Accounts used in the Accounting section of Nexsure. Modification of this type is done by following the General instructions provided in this chapter.



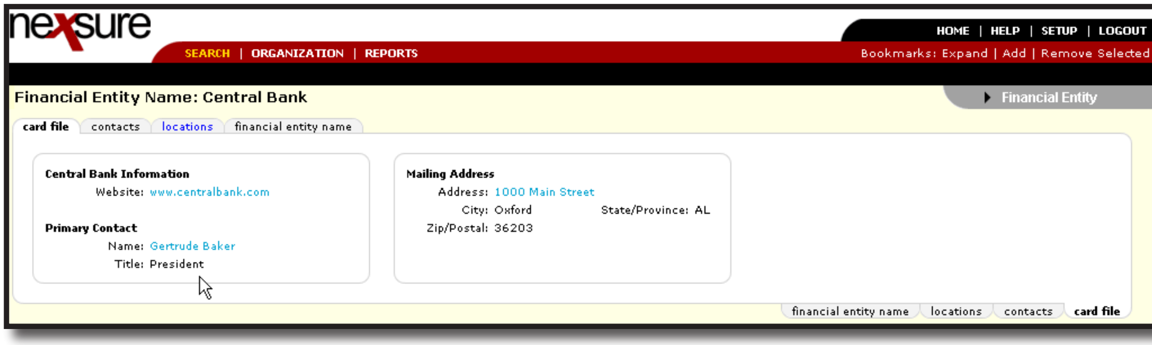
The Location Type (Financial Entity) field is located as follows:

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

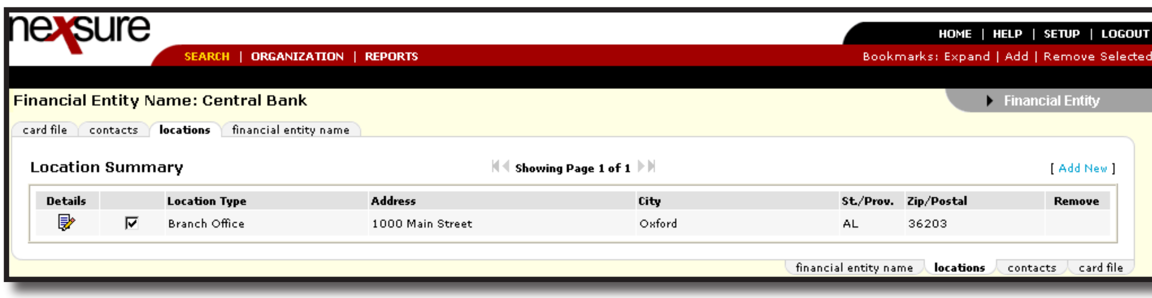
Click the entity drop-down box and select Financial Entities. Enter a few characters of the entity name and click the **Search** link. Notice that the Location Type displays on the search screen. This is used to help identify the location displayed. Click the **Details** icon to display the Financial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



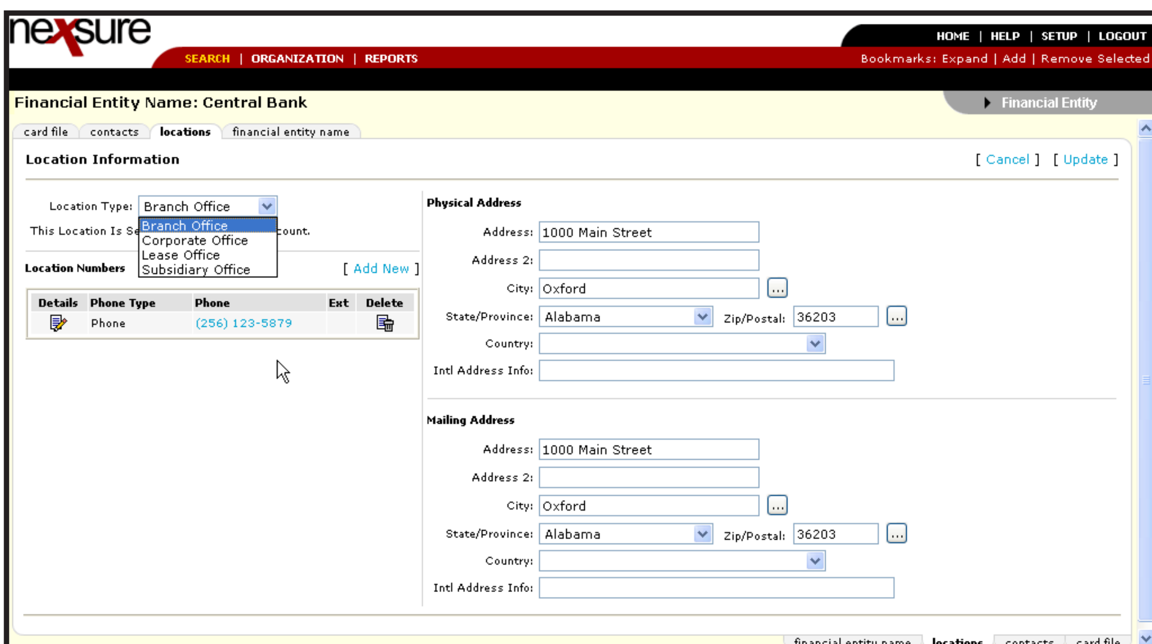
Click the **locations** tab to display the Locations summary.



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



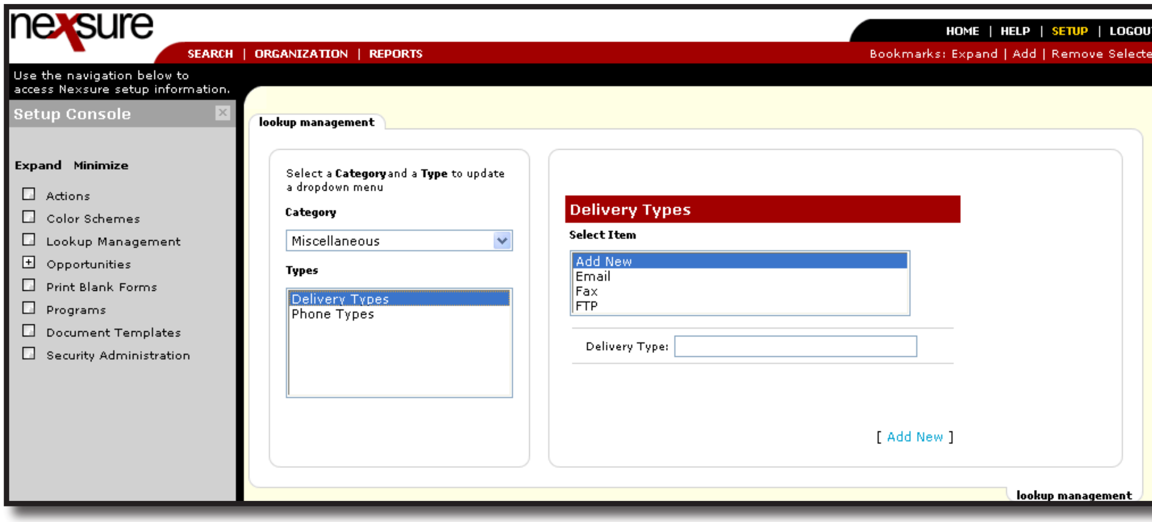
The Financial Entity Type is located at the top of the Location details page.



Miscellaneous Category

Delivery Types

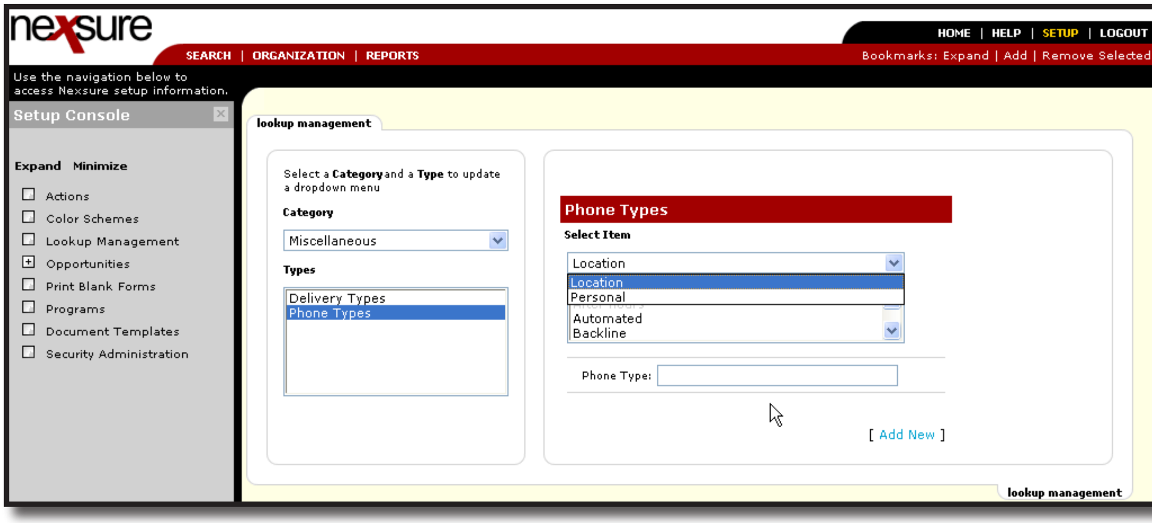
The Delivery Types is used on the Modification for all items except those for Location Modifying or adding items is done by following the General instructions provided in this chapter.



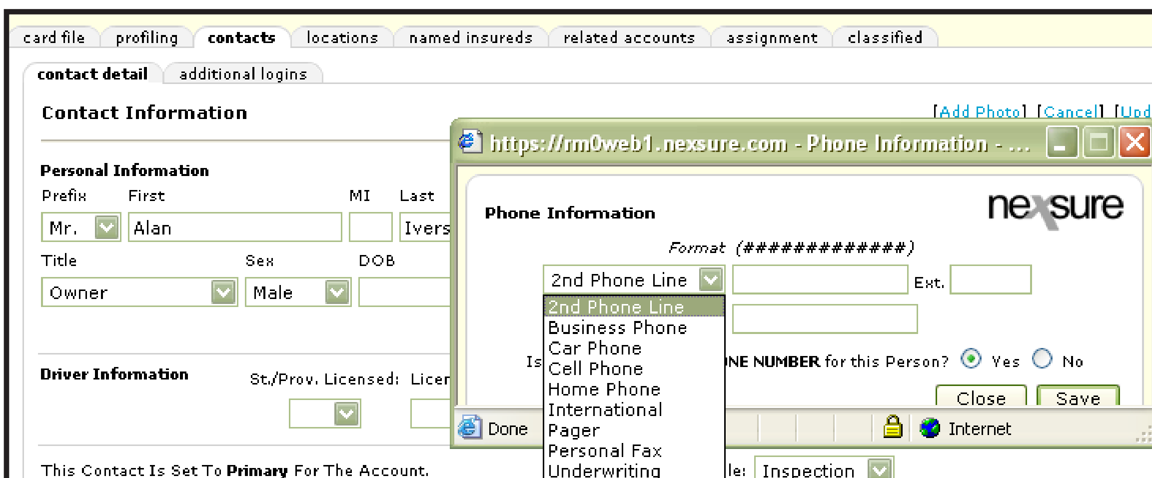
To Modify Phone Types follow the steps below:

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

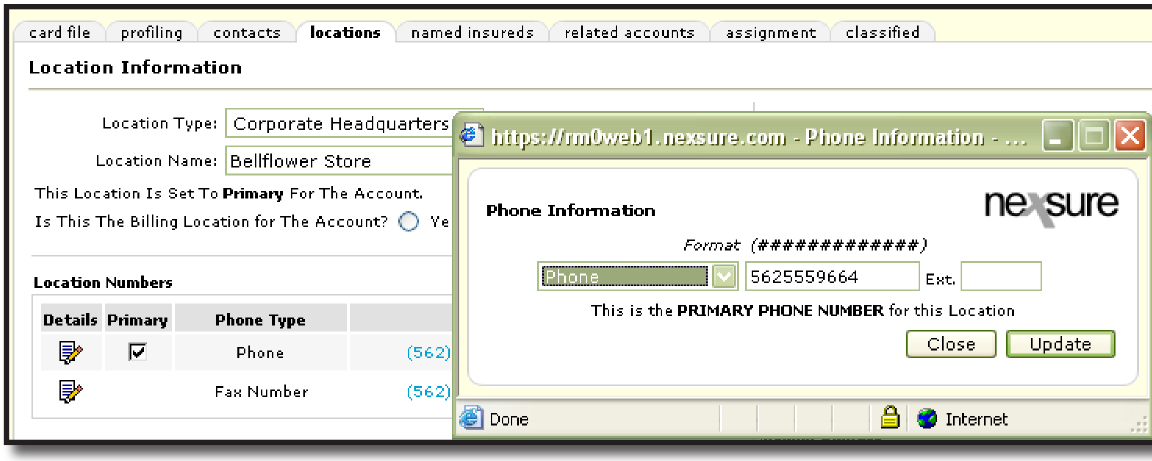
- Click the **[Delete]** link to remove. If the item has been used a message displays advising that it is in use and may not be removed. If not in use a message is displayed asking for deletion confirmation. After confirmation is provided the item is removed.



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



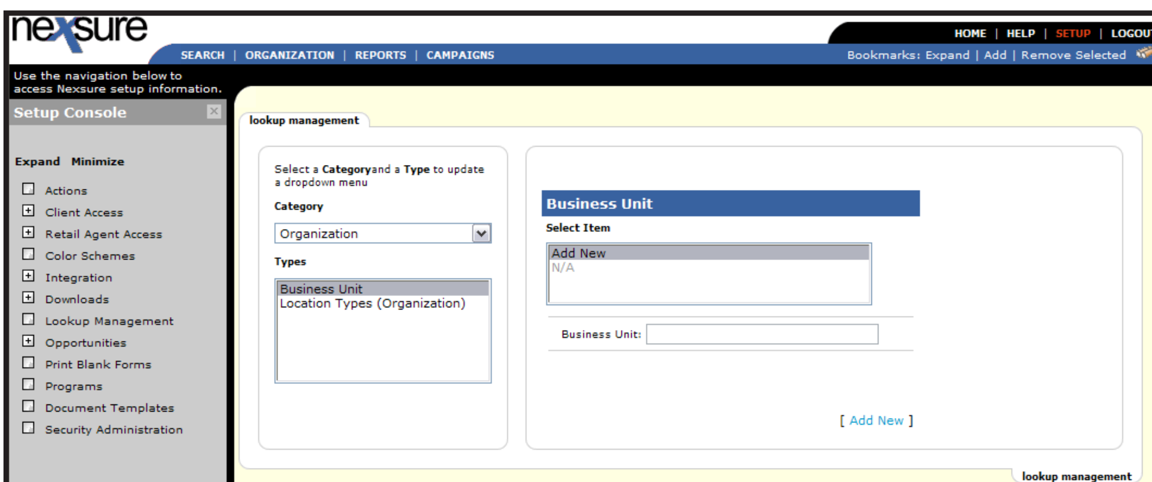
Location Phone types can be found on the Location detail screens by clicking the **Details** icon of an existing phone number or by adding a new location phone number in the Phone Type drop-down box.



Organization Category

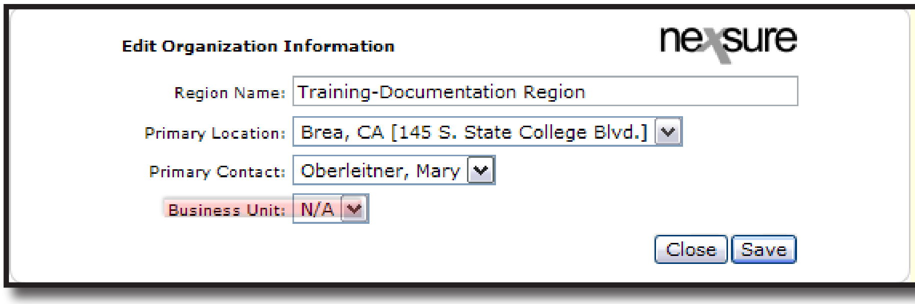
Location Types (Organization)

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



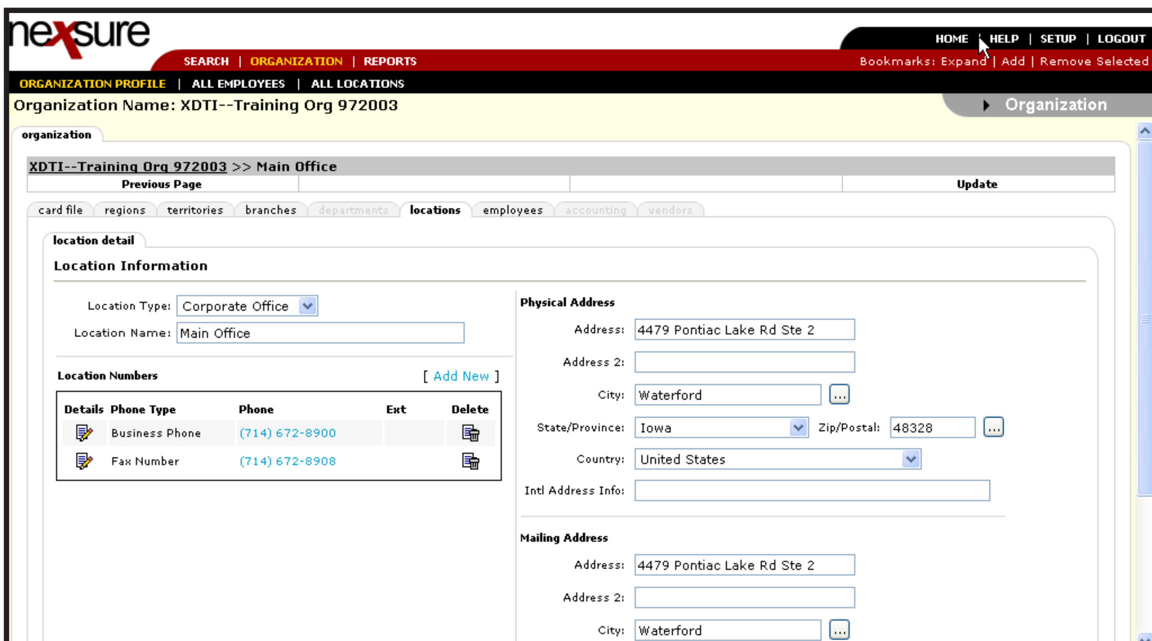
The **Business Unit** is located as follows:

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



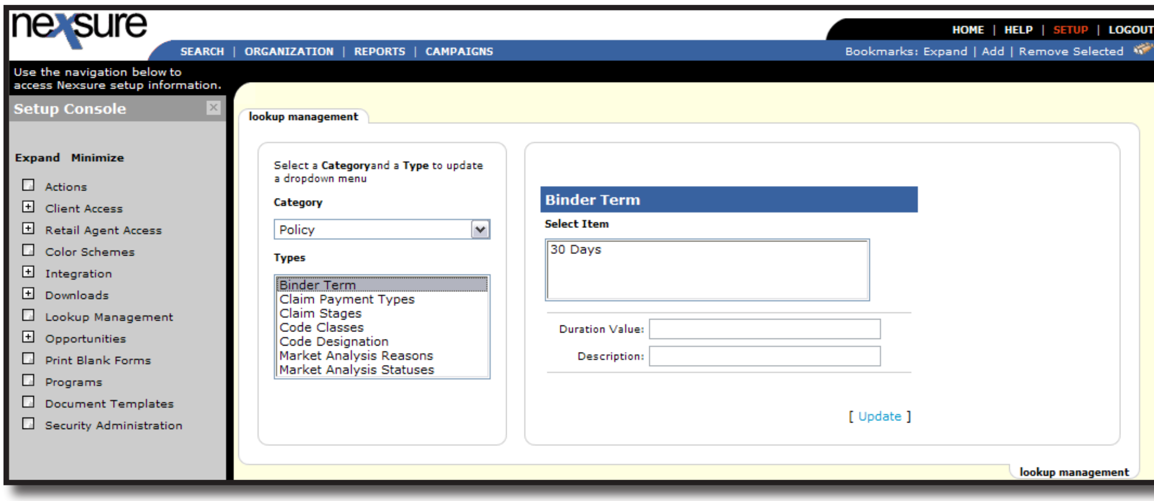
The Location Type (Organization) field is located as follows:

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



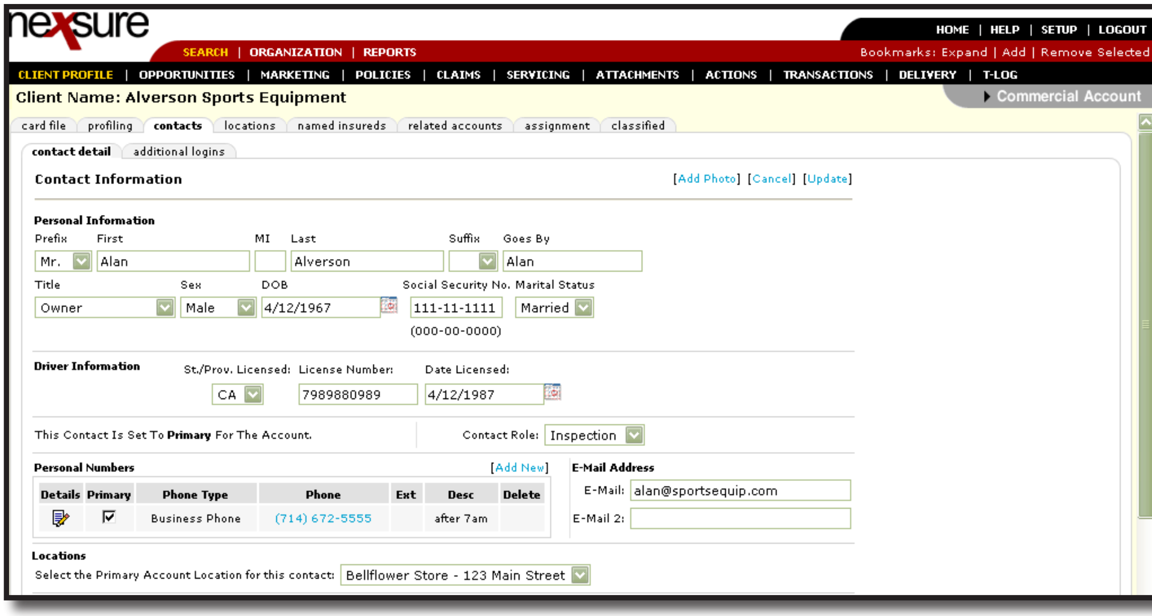
People Category

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

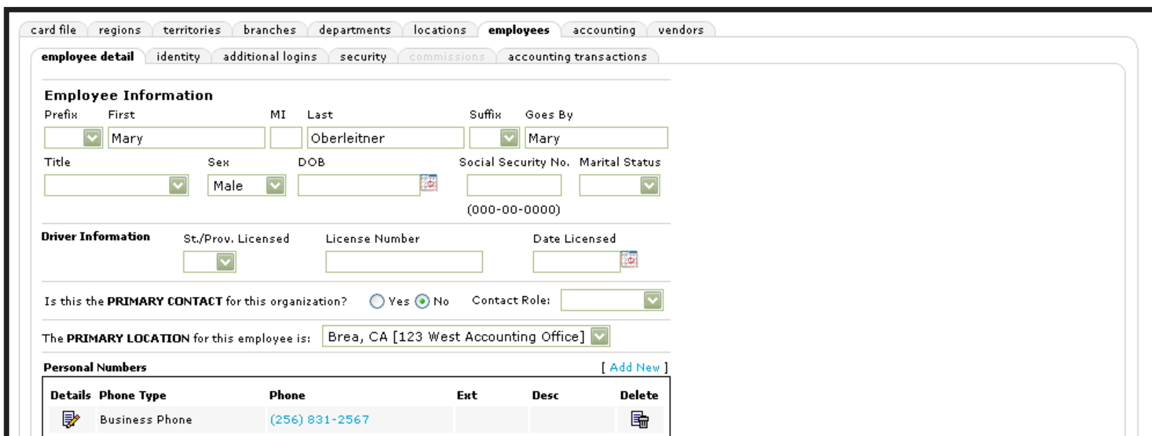


The following types are found on Employee and all Contact records:

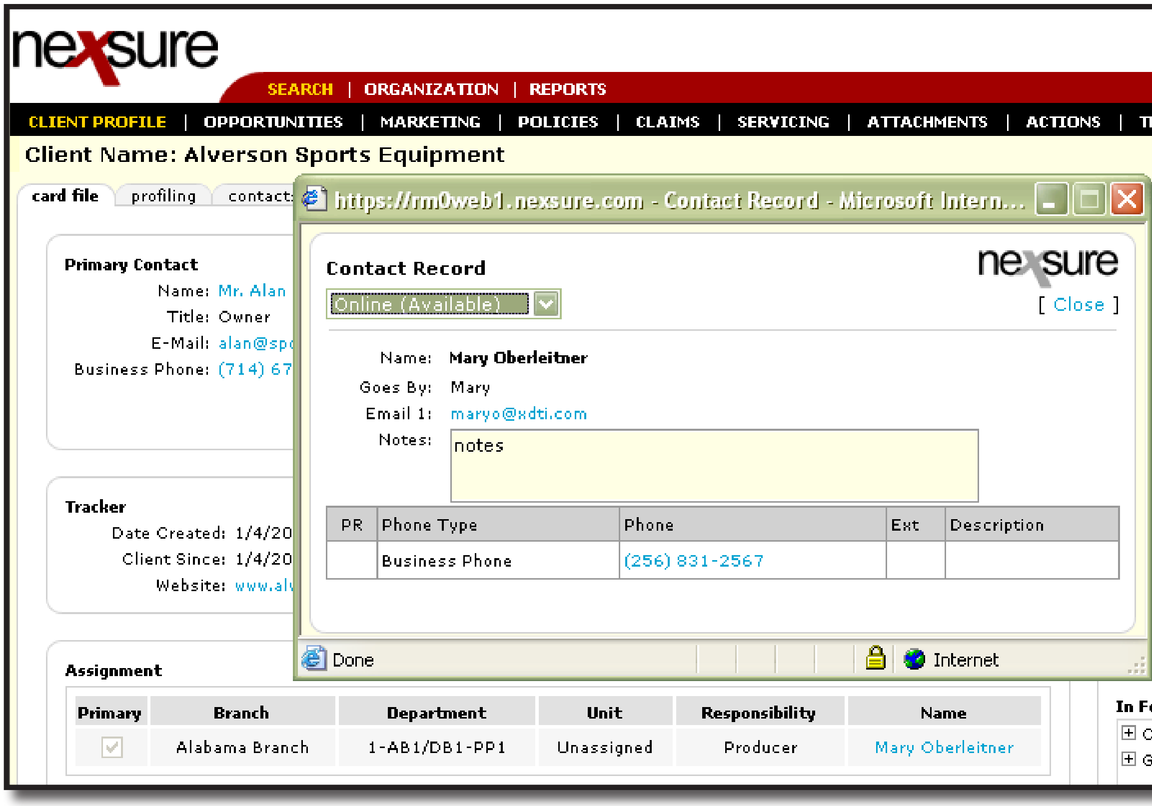
- Contact Roles
- Marital Status
- Name Prefixes
- Name Suffixes
- Responsibility
- Titles



Employee Information Screen



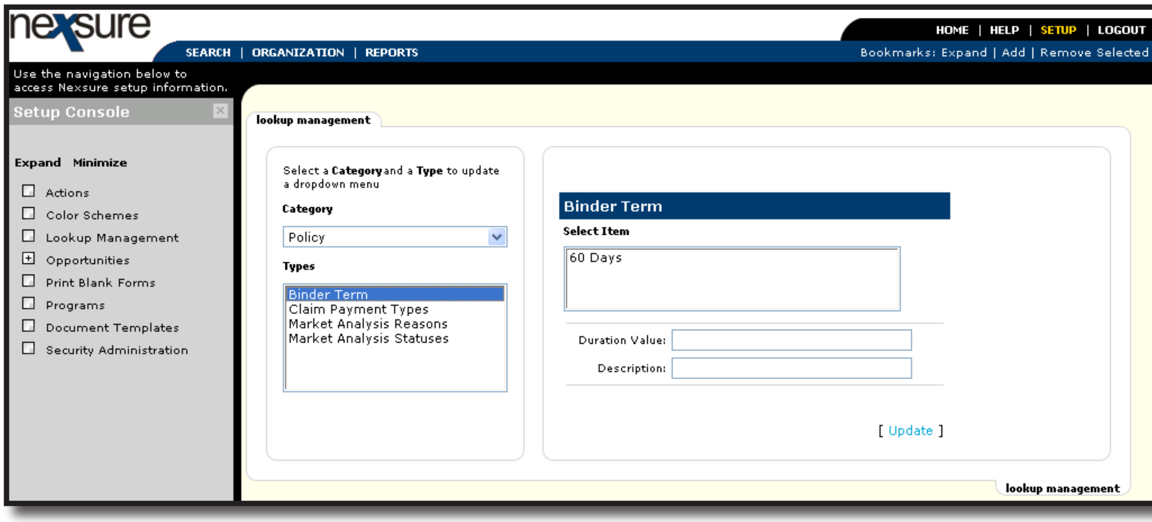
The type of People availability status is available for the user by clicking on a link for their name.



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

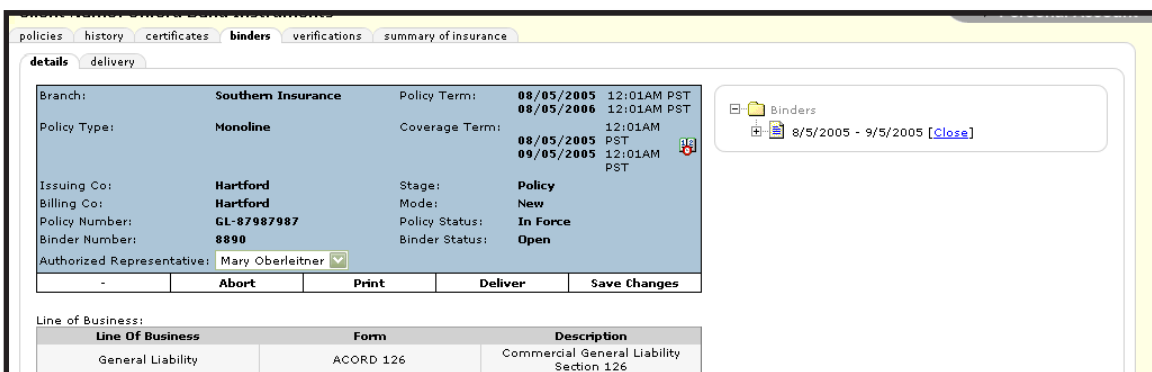
Policy Category

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



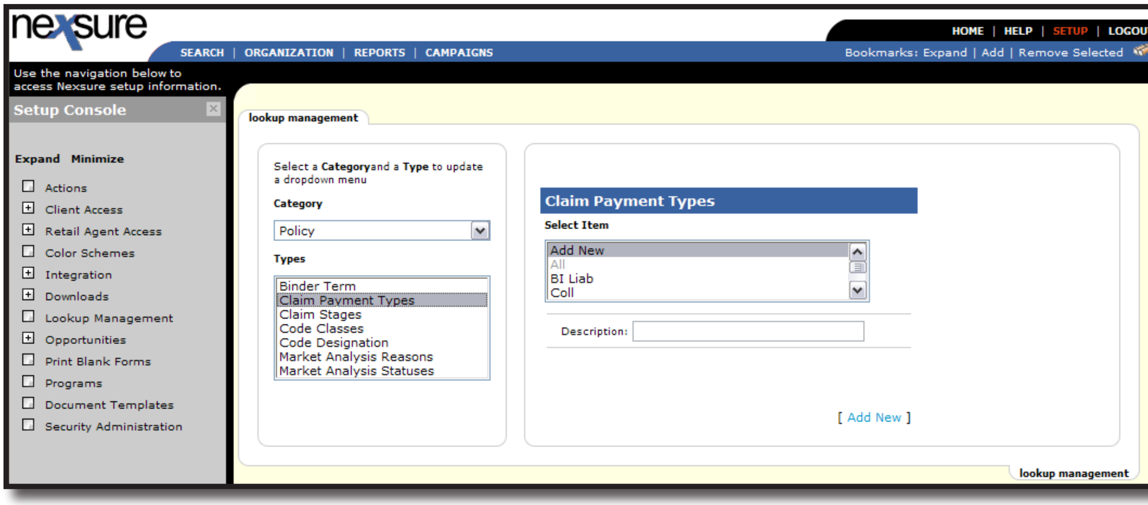
Binder Term

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

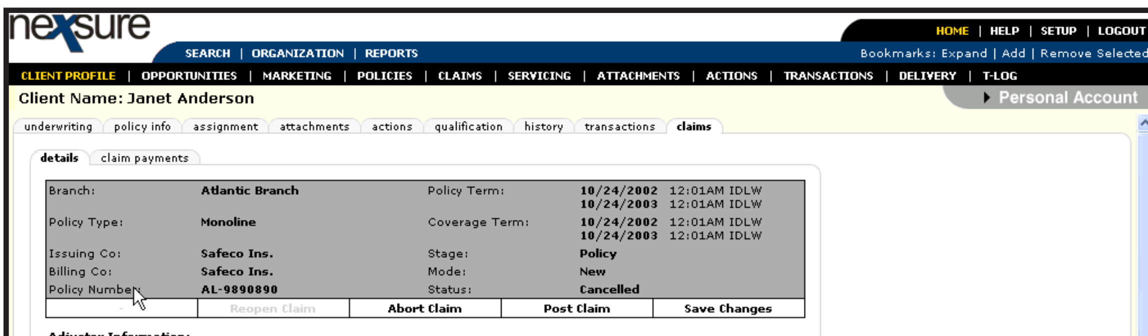


Claim Payment Types

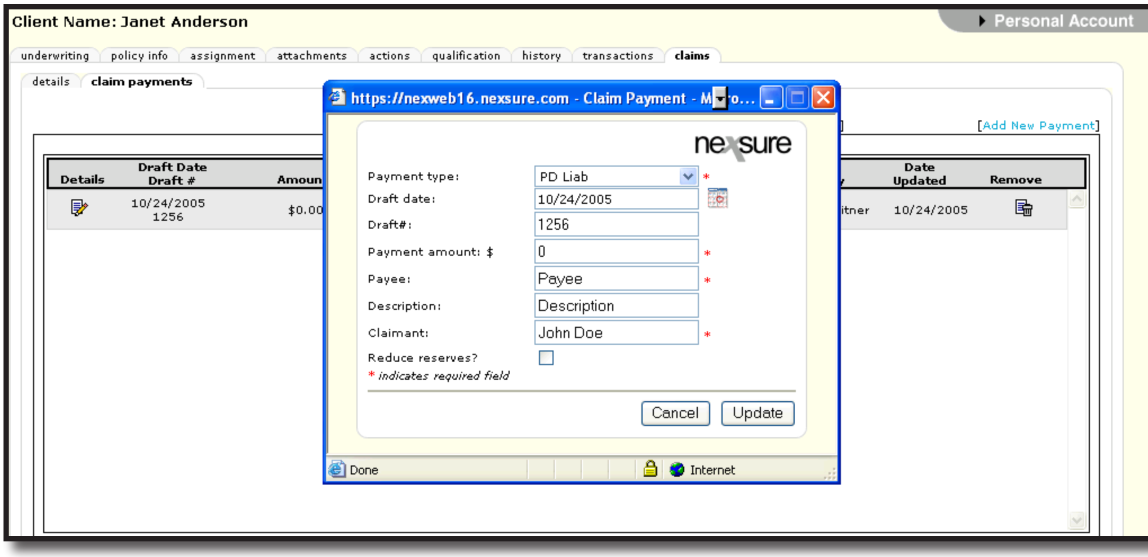
Claim Payment Types are added to identify the payments added on the **claims** tab under claim detail.



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

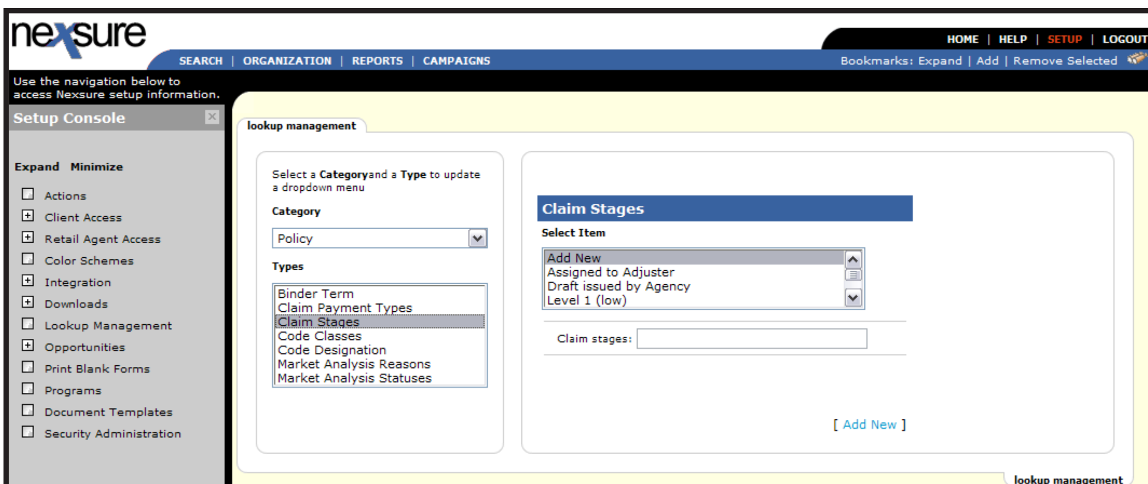


Adding a new payment allows the selection drop-down box for **Payment type**.

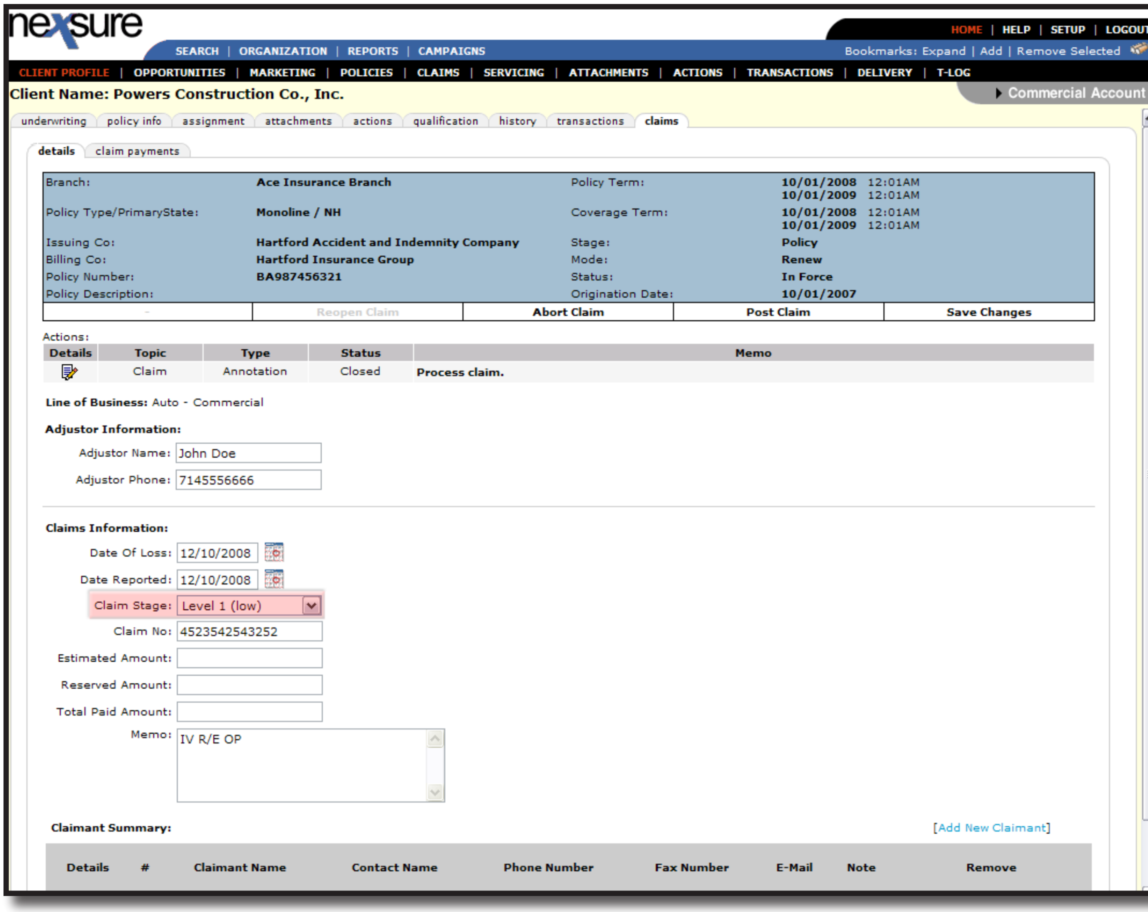


Claim Stages Types

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

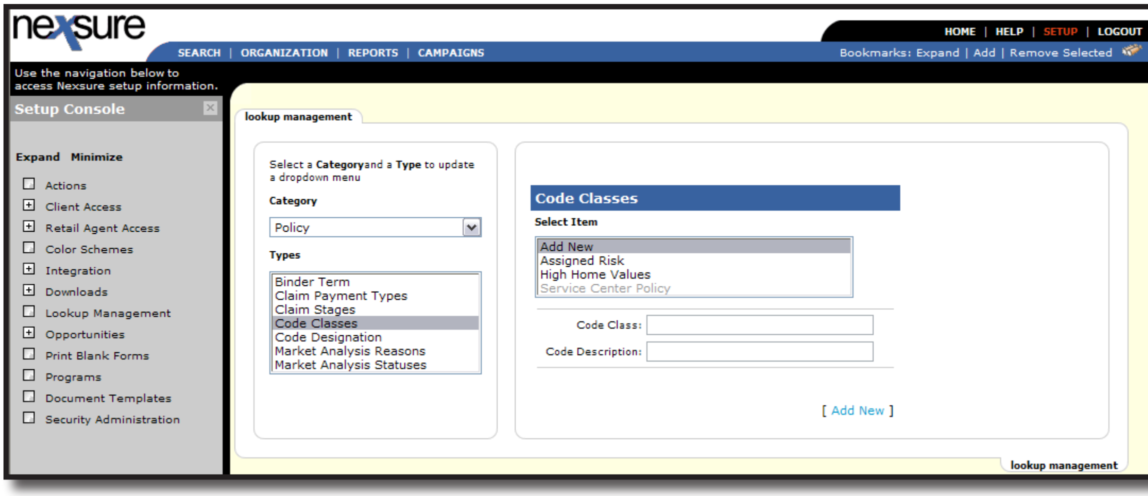


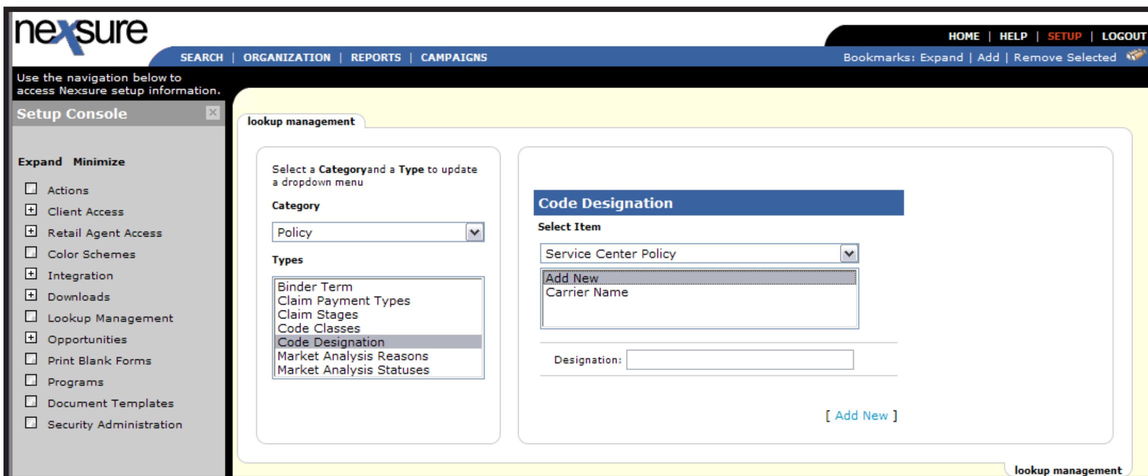
Access the **Claim Stage** on the claim **details** tab. The **Claim Stage** is located under the **Claims Information** Date Of Loss and Date Reported information.



Code Classes and Code Designations Types

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





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

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

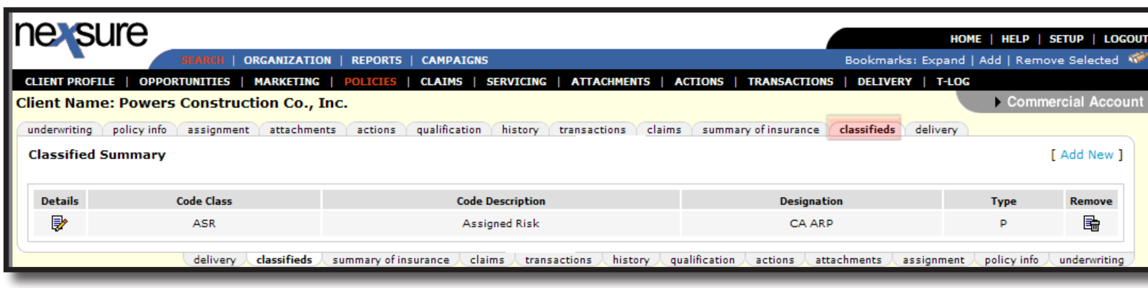
To add a new item, select the Class Code to add the Code Designations to; then, at the top of the select items list, click **Add New**. Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item. Click the **[Add New]** link below the field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

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

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

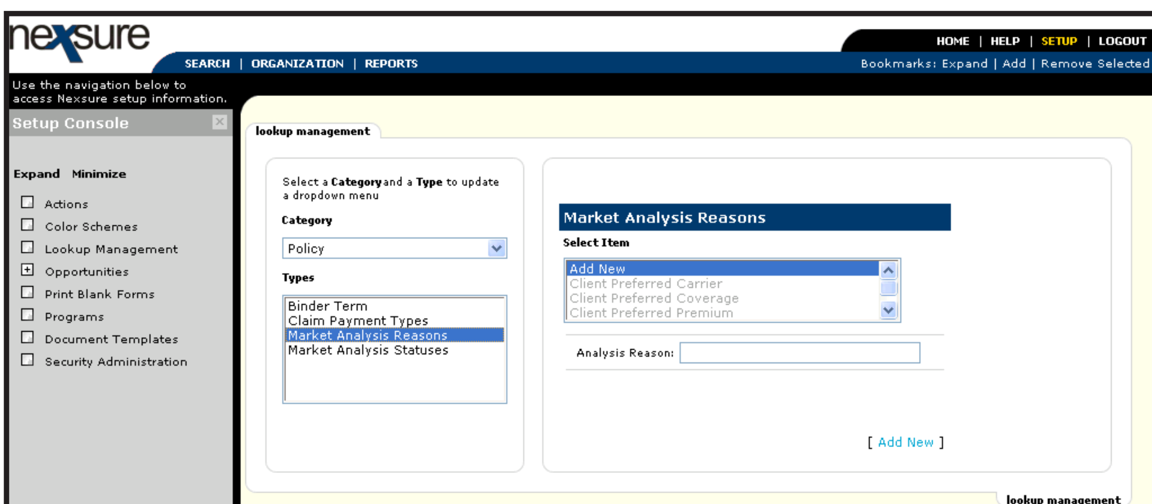
The Policy Code Classes and Code Designations Type fields are located as follows:

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

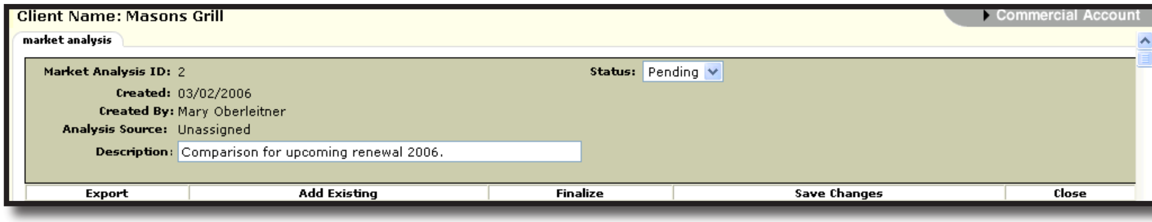


Market Analysis Reasons

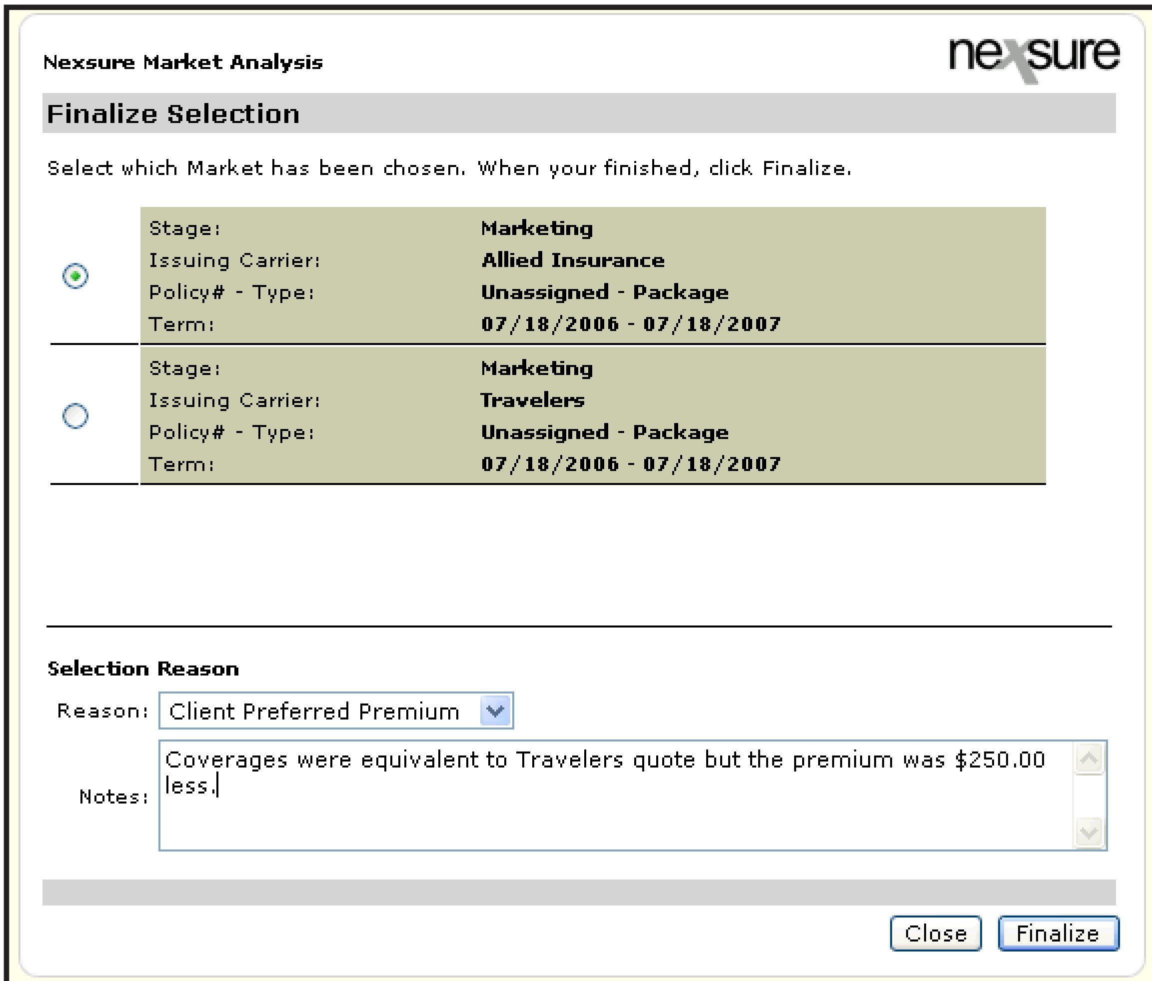
Market Analysis Reasons are used to identify why a particular market was selected.



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

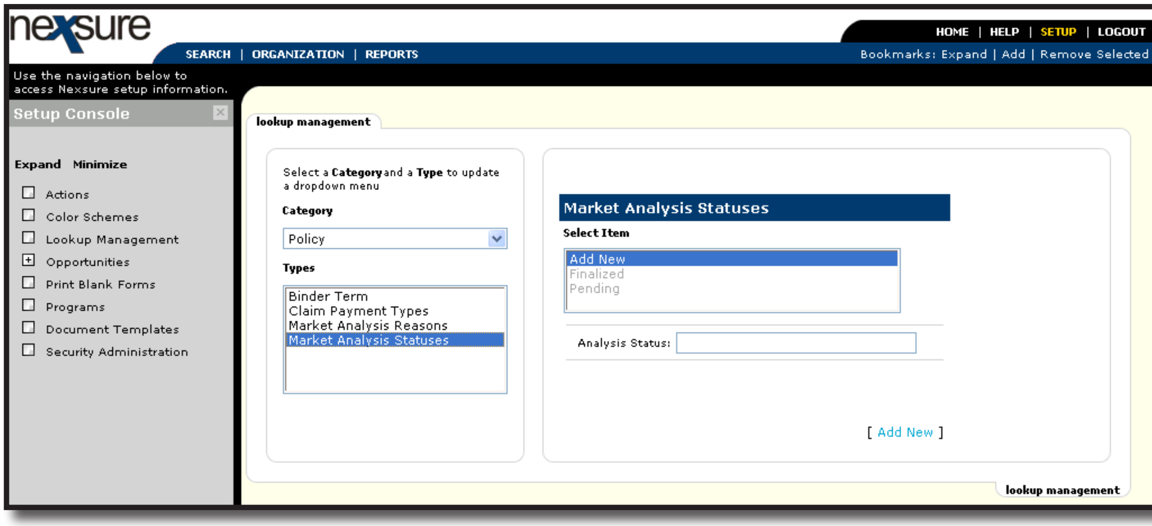


The **Reason** drop-down box is found on the bottom of the **Finalize Selection** screen.

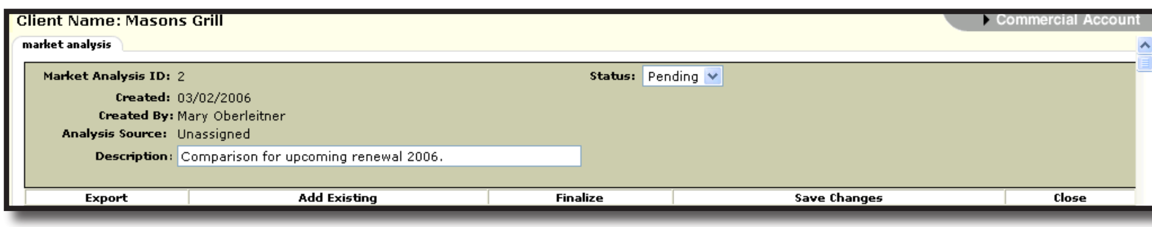


Market Analysis Statuses

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



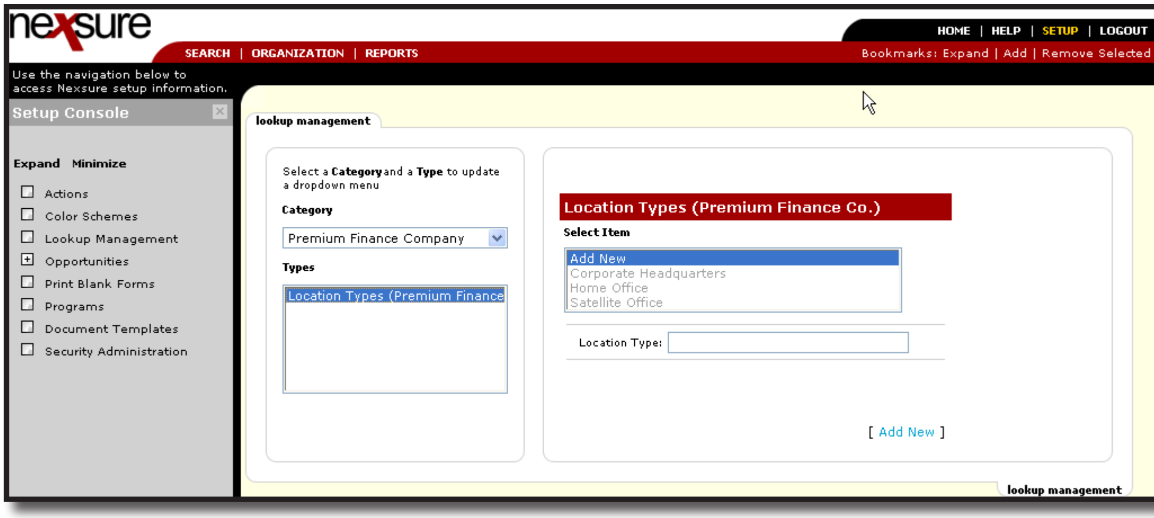
To use the statuses, an analysis must have been added. Click the **Details** icon of the market analysis to edit the status.



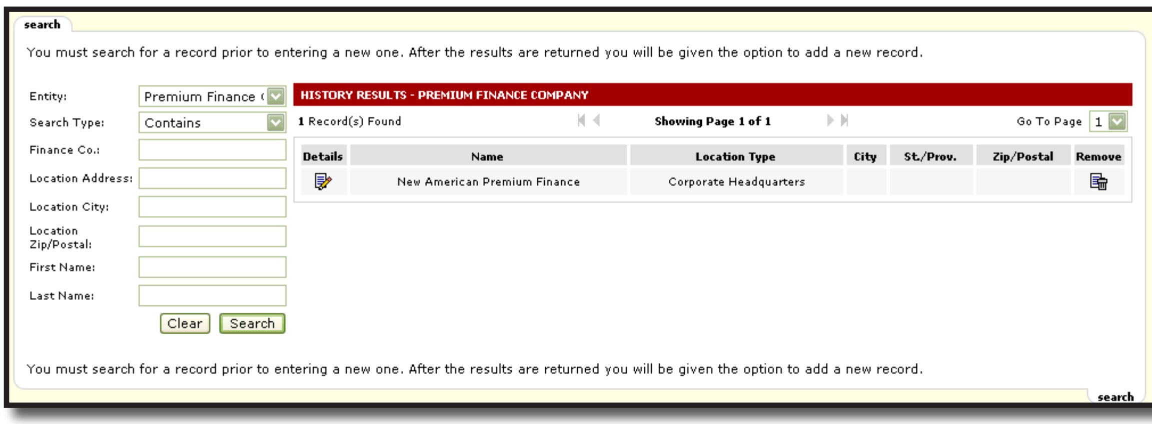
Premium Finance Company Category

Location Types (Premium Finance)

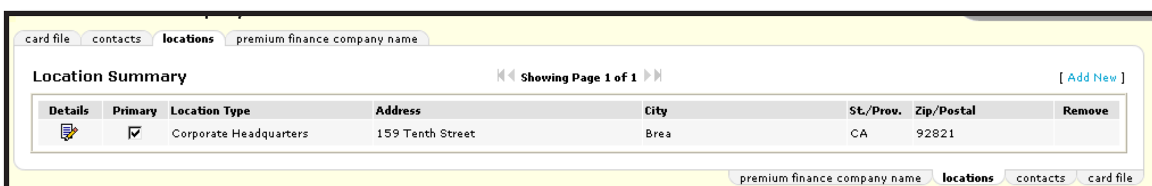
Using the Category drop-down box select Premium Finance Company. The category of Premium Finance Company can be found at Search level of Nexsure. The Location Types (Premium Finance) identifies the location type for any location at all levels in the Premium Finance Company to help identify each location.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



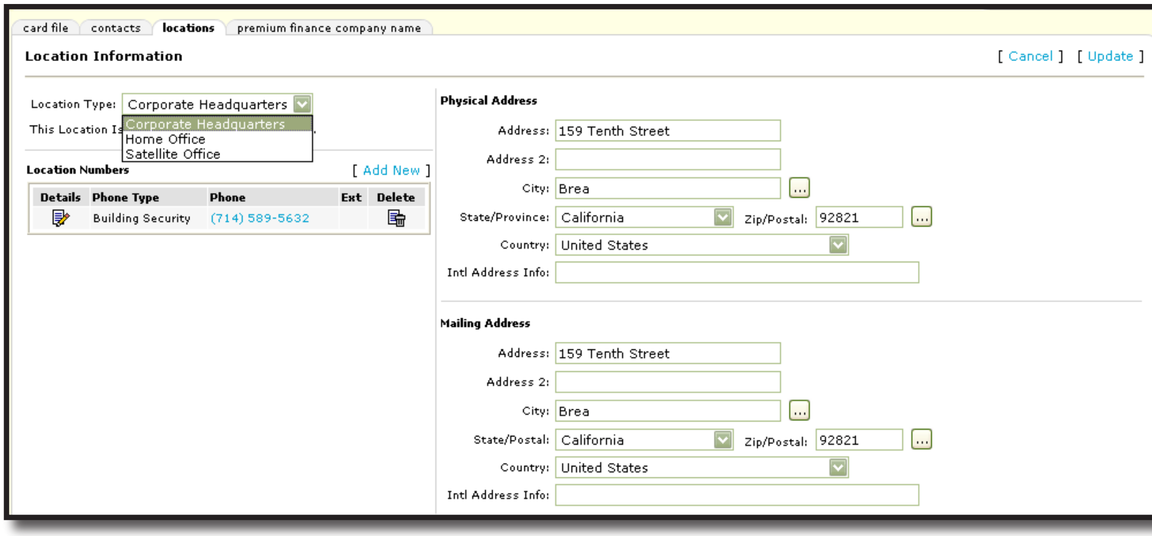
At Search level, search for a Premium Finance Company, click the **Details** icon to display the card file.



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



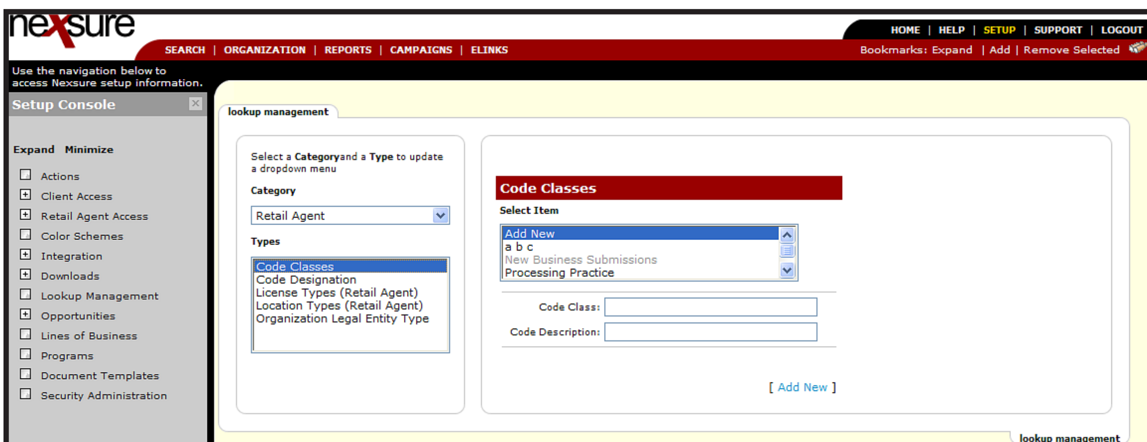
Click the **Details** icon to display the location detail page and the location type is located on the upper left of the page.



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.



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

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

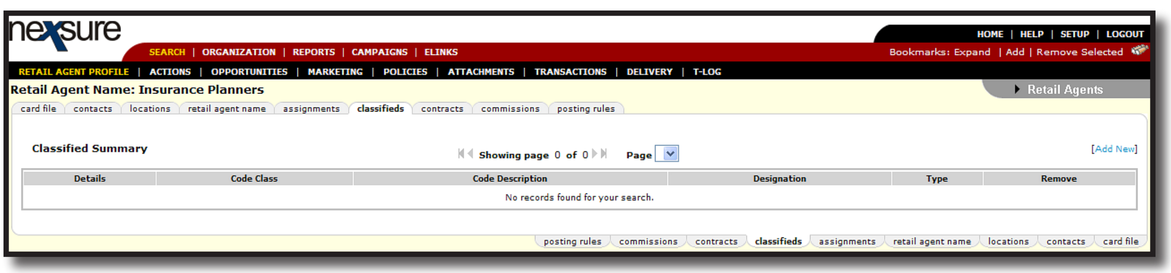
To add a new item, select the Class Code to add the Code Designations to; then, at the top of the select items list, click **Add New**. Below the list is an empty field with a label beside it of the type selected, click in the field and enter the new item. Click the **[Add New]** link below the field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

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

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

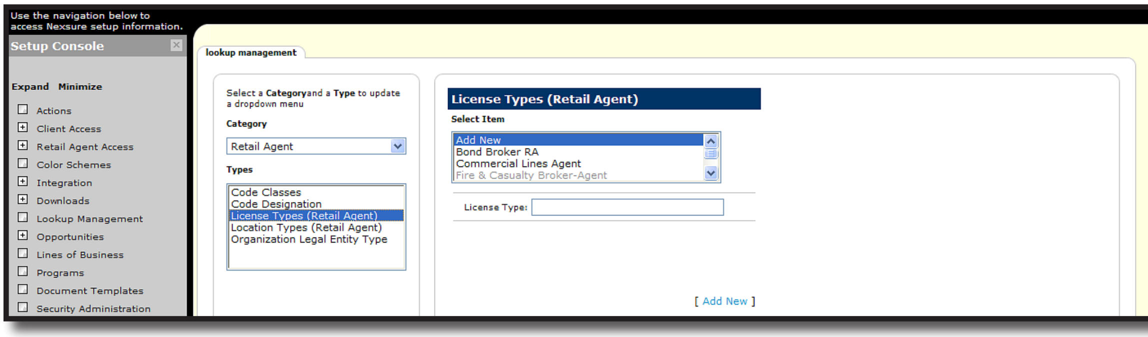
Retail Agent Code Classes and Code Designations Type fields are located as follows:

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

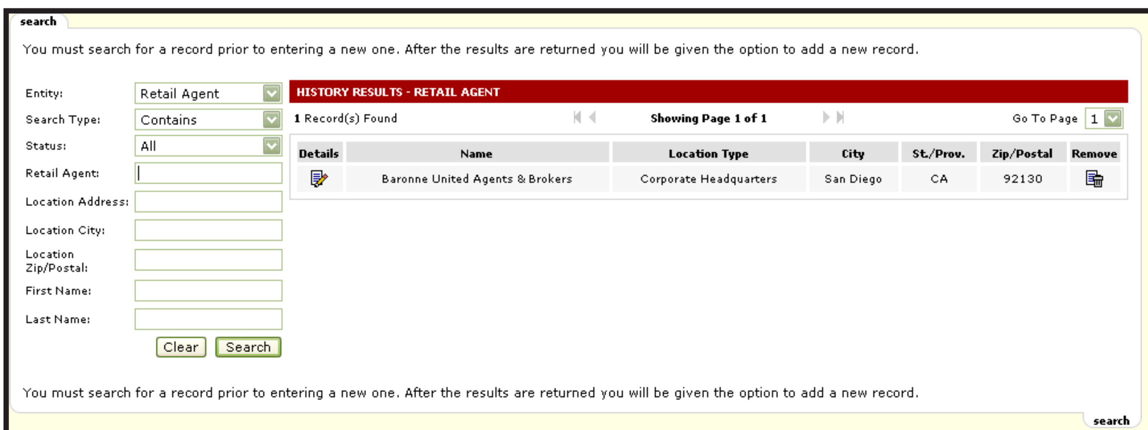


Using the **Category** drop-down box select Retail Agent. The category of License Types (Retail Agents) identifies the types of licenses that exist. The category of Retail Agent can be found at Search level of Nexsure. The Location Types (Retail Agent) identifies the location type for any location at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

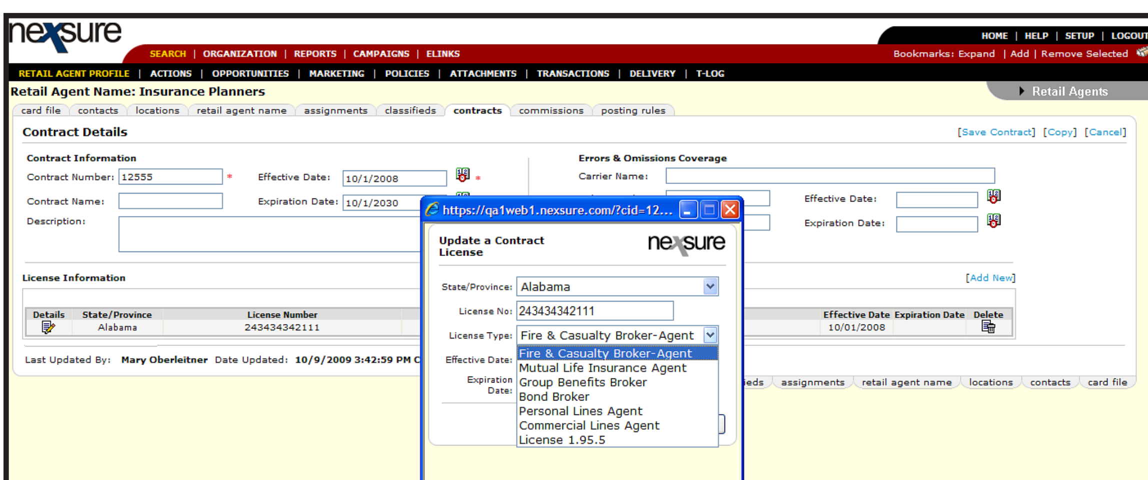
Select **Retail Agent** from the **Category** list and select **License Types** in the **Types** box. The **License Types** can be found on the Retail Agent by locating at Search level in Nexsure. **License Types** are used to identify the agreement between the Retail Agent and Org. Any item that is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



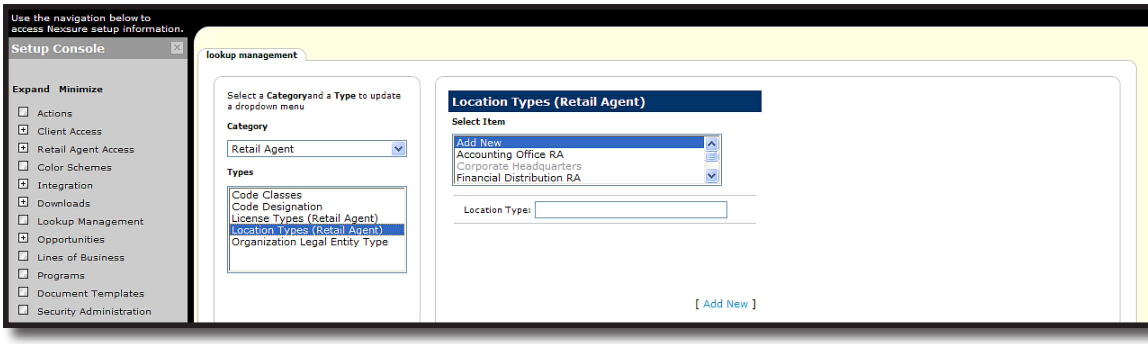
At Search level, search for a Retail Agent; click the **Details** icon to display the card file.



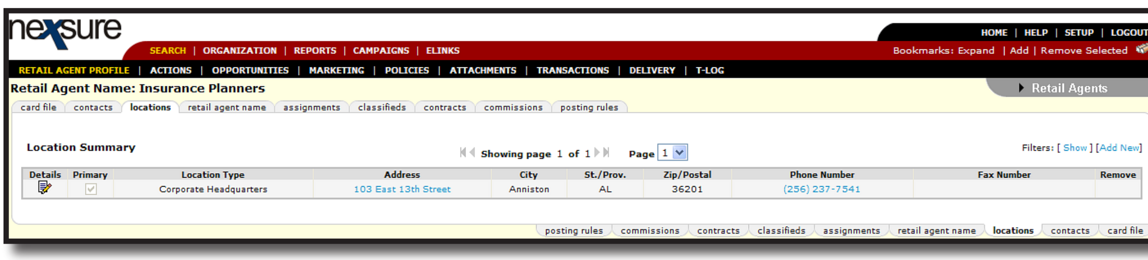
The License type is found on the Retail Agents Contract Tab. Click the **Details** icon of the contract to display the contract details. The License Type is assigned to each License added to the contract.



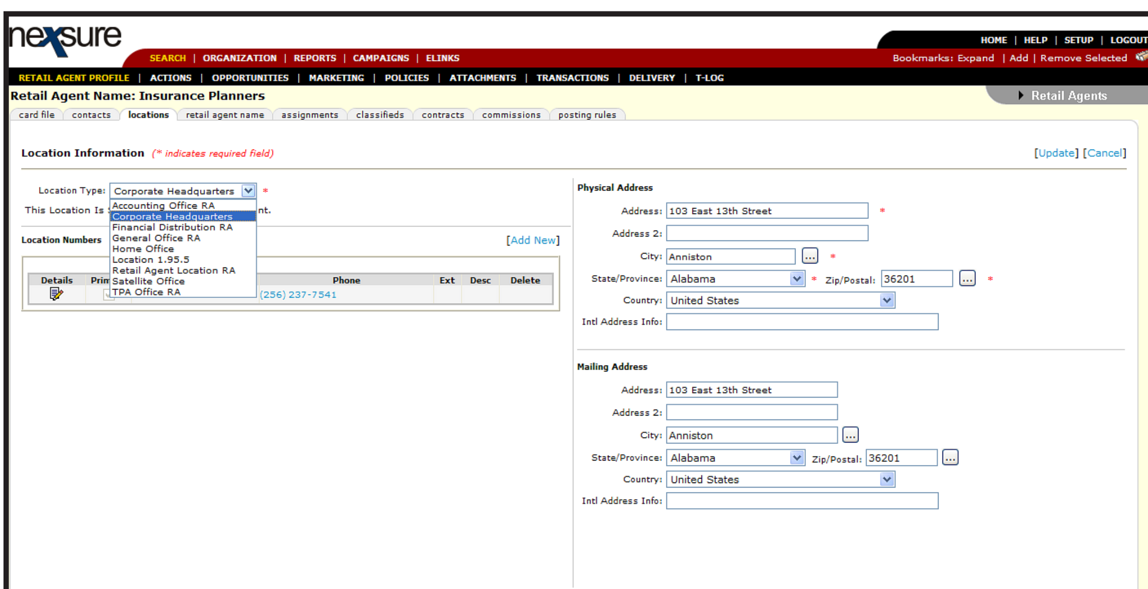
Select **Retail Agent** from the **Category** list and select **Location Types** in the **Types** box. The **License Types** can be found on the Retail Agent by locating at Search level in Nexsure. The **Location Types** identify the Retail Agent location. This is a required field that must be added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



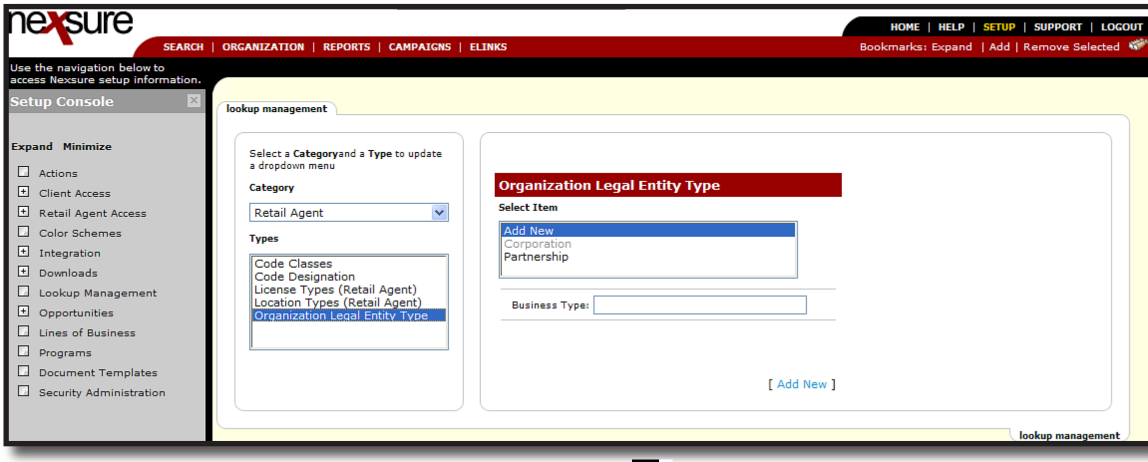
Click the **locations** tab to display the location summary page.



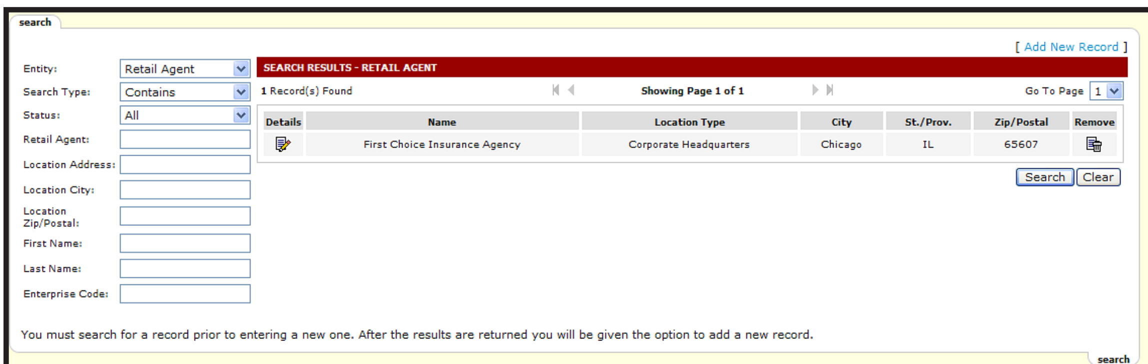
Click the **Details**  icon to display the location detail page and the location type is located on the upper left of the page.



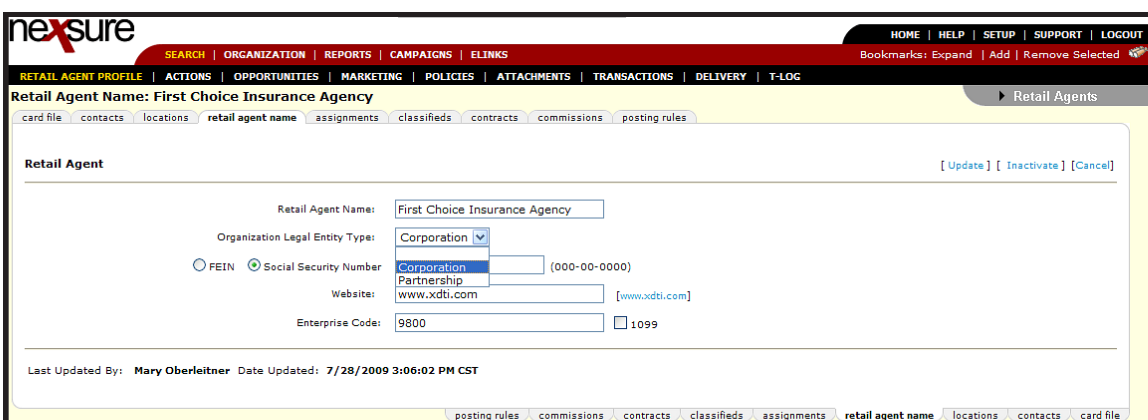
Select **Retail Agent** from the **Category** list. Select **Organization Legal Entity Type** from the **Types** box. This field can be found on the Retail Agent by locating at Search level in Nexsure. The **Organization Legal Entity Type (Retail Agent)** identifies the **Legal Entity Type** for Retail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



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



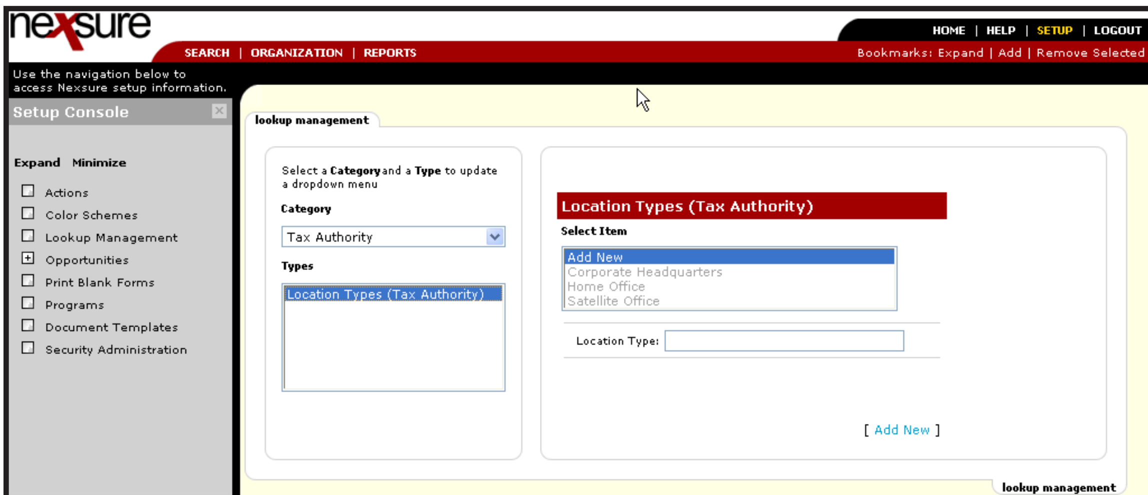
The **Organization Legal Entity Type** is found on the **retail agent name** tab.



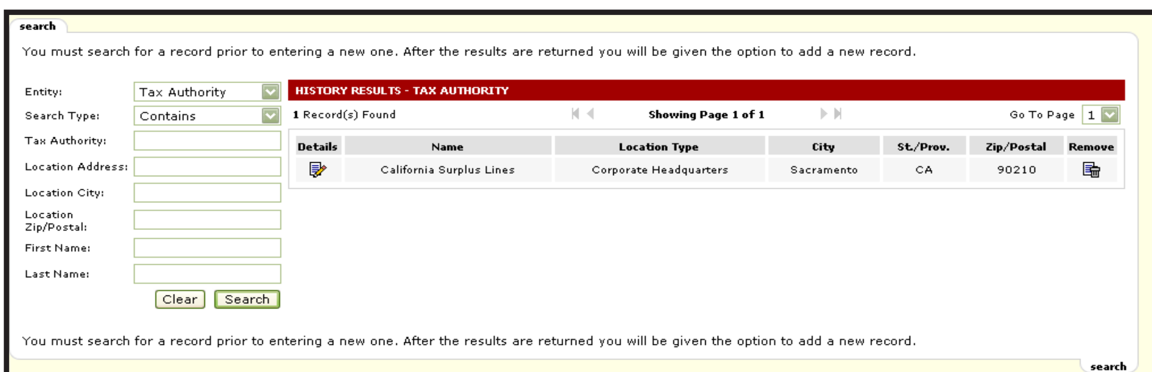
Tax Authority Category

Location Types (Tax Authority)

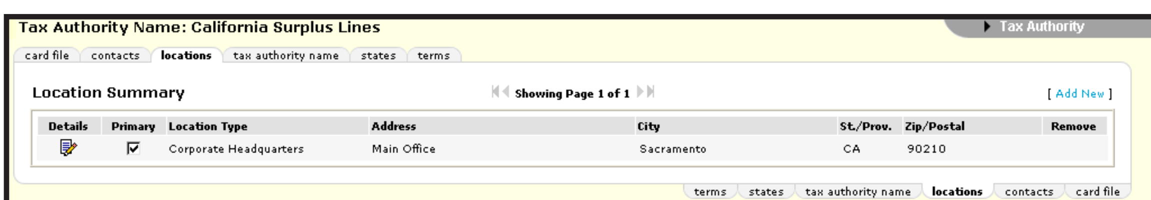
Using the Category drop-down box select Tax Authority. The category of Tax Authority can be found at Search level of Nexsure. The Location Types (Tax Authority) identifies the location type for any location at all levels in the Tax Authority to help identify each location. Any item that is gray is one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



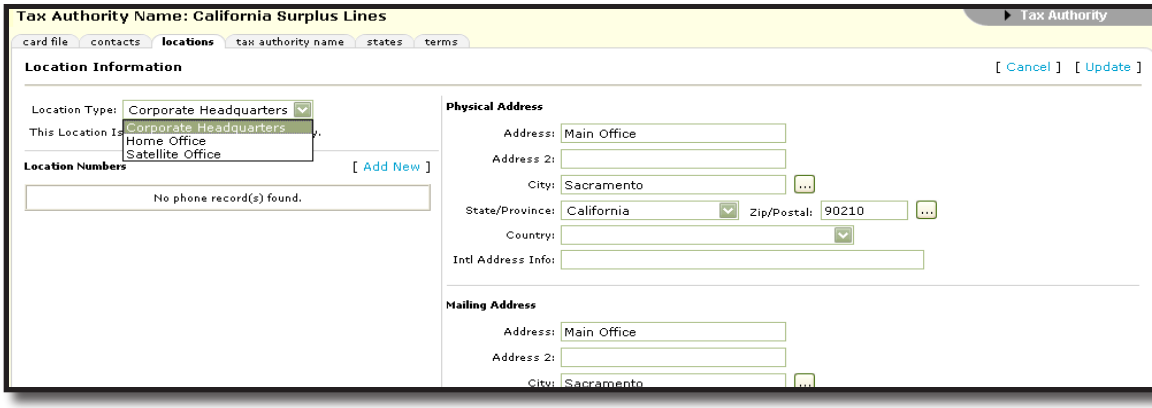
At Search level, search for a **Tax Authority**; click the **Details** icon to display the card file.



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

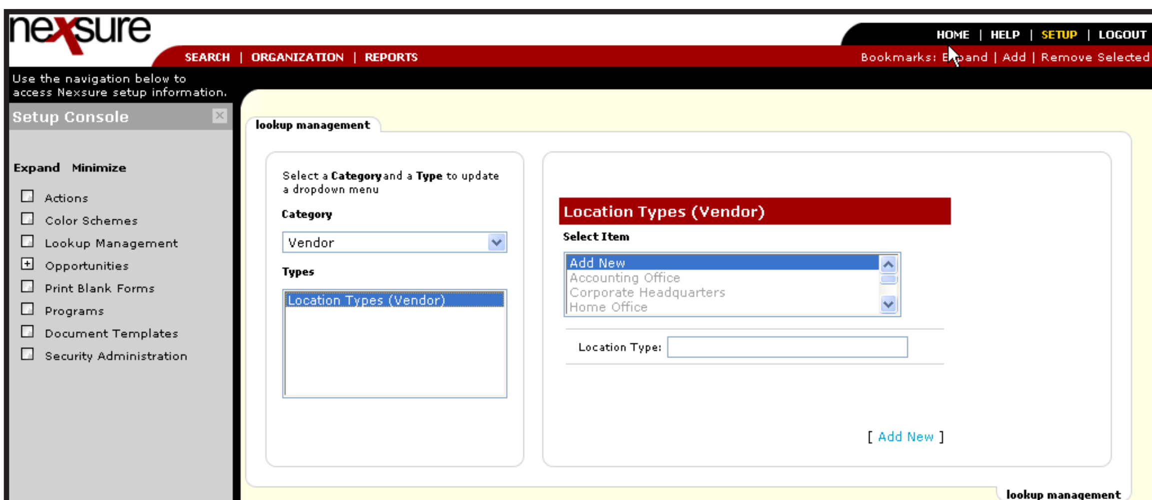


Click the **Details** icon to display the location detail page and the location type is located on the upper left of the page.

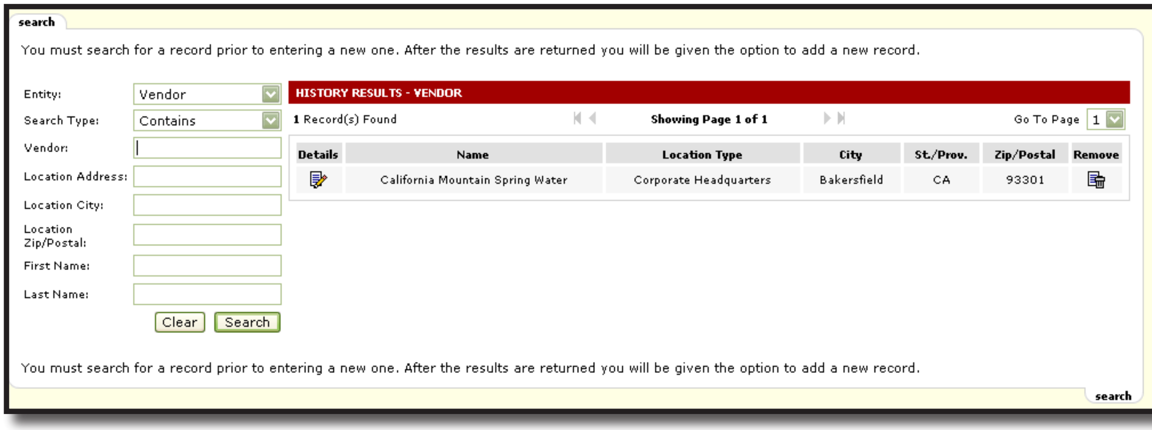


Vendor Category
Location Types (Vendor)

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.

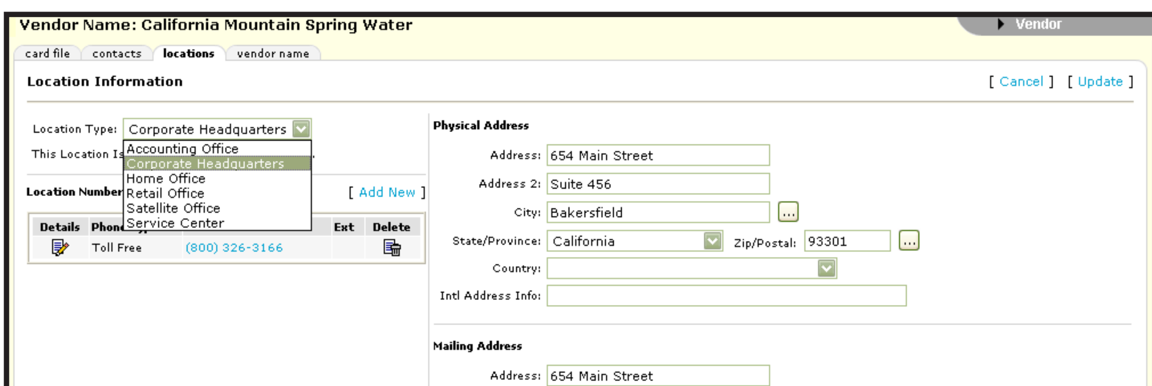


At Search level, search for a Vendor, click the **Details** icon to display the card file.



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

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



Notes