# Chapter 9

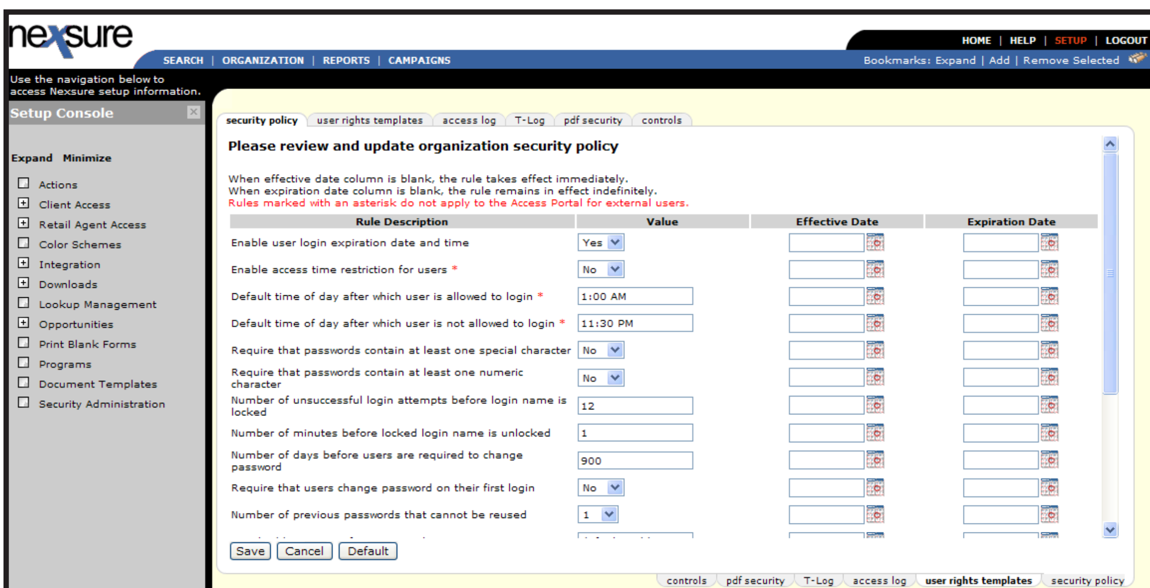
# Security

### IN THIS CHAPTER

- Security Policy
- Adding/Editing and Copying User Right Templates
- Security Resource Groups
- Security Permissions Definitions
- Security Rights Template Worksheets

## Security Policy

The Security Policy page is accessed by clicking **SETUP** on the **Utility** menu and clicking the **Security Administration** link. Any settings made here will affect the entire Organization's logins. Setting an effective and expiration date applies a specific time frame to the setting. If no dates are added, then the security is not bound by a specific time frame. After making all applicable changes, click the Save button at the bottom of the screen to keep the settings. Clicking the Cancel button will abort modifications and clicking the Default button will return the page settings to the Security Policy defaults.

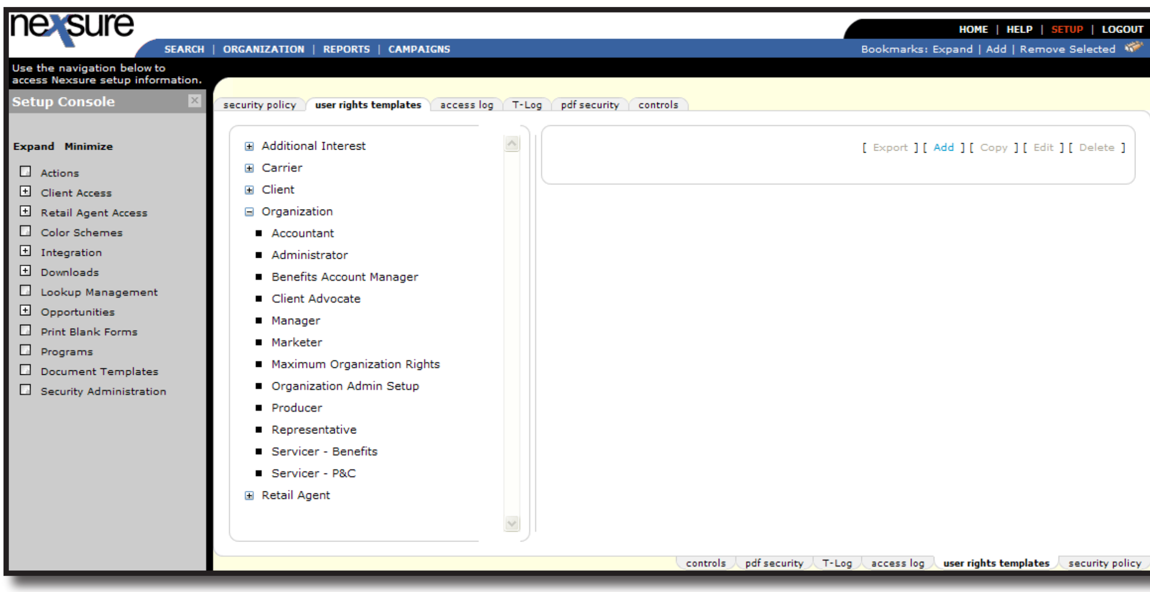


# Adding/Copying and Editing User Right Templates

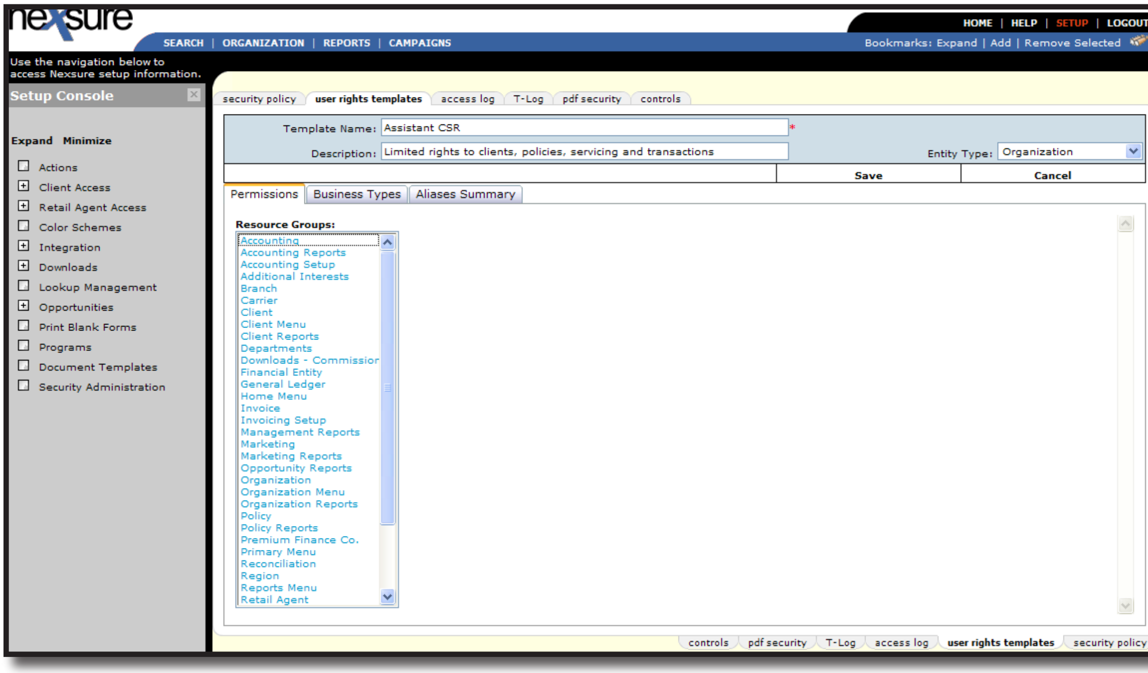
The User Rights Templates are added by each Organization to grant certain security rights to a group of employees who will share the same rights. To add a new Template, use the following steps:

## Adding User Rights Templates

After clicking **SETUP** on the **Utility** menu, click **Security Administration** on the Setup Console, and click the **user rights templates** tab. Select the **Entity Type** of Organization to allow security levels to be added, edited, copied or deleted for Employees security. In order for anyone to be granted any of these security levels, they must be added as an employee to either, Organization, Region, Territory or Branch with a login ID and password. See the chapter on employees for information on adding employees and login information.



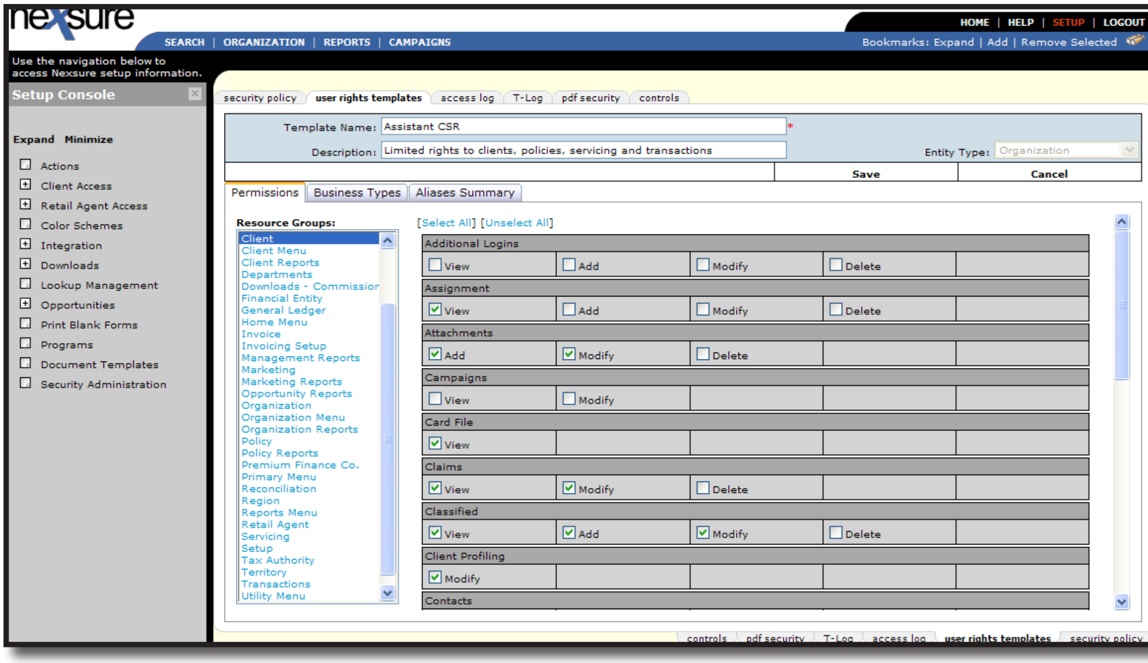

Click the **[Add]** link located on the upper right of the user rights templates screen. A blank user rights template displays.




Enter a **Template Name** so it will be easy to recognize when applying to the employee. A **Description** is entered to help identify who the template was intended for. This is especially important since it is likely you may have more than one staff member updating this area. Select the **Entity Type** where the template will be used. User rights templates can be created for Client, Retail Agent and Organization access. After entering this information, click the **Save** link in the navigation toolbar to add the new template. Click **OK** to confirm and continue. Click **Cancel** before saving to abort the new user rights template. The **Entity Type** cannot be changed once the user rights template is saved.

Next navigate through each **Resource Group** on the **Permissions** tab of the user rights template to select all rights to be granted users assigned to the template. Selecting a **Resource Group** displays permissions for all resources within that group. Grant user rights under the template by placing a check mark in the check box of the permission to be granted under each **Resource Group**. Users assigned to the template will not have rights to permissions displaying an empty check box.

Click the **[Select All]** link to select all permissions within the displayed **Resource Group**. Click the **[Unselect All]** link to remove rights to all permissions within a **Resource Group** of rights.

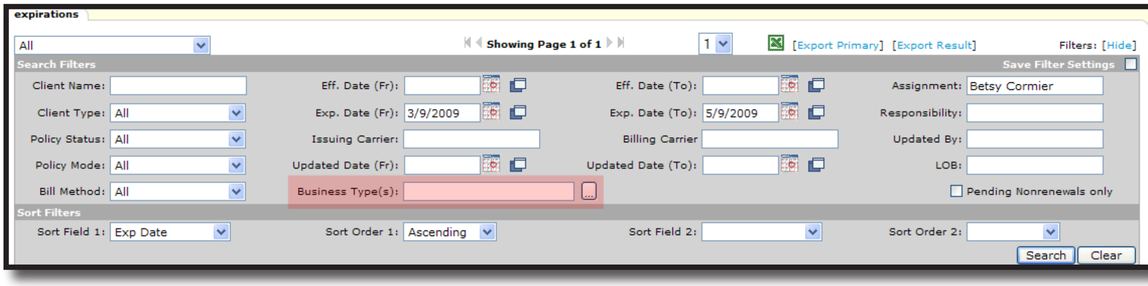


Selections made in a **Resource Group** are temporarily saved when navigating to the next **Resource Group**. Clicking **Save** on the navigation toolbar also saves changes to the user rights template. Make sure to click **Save** before navigating away from the user rights template.

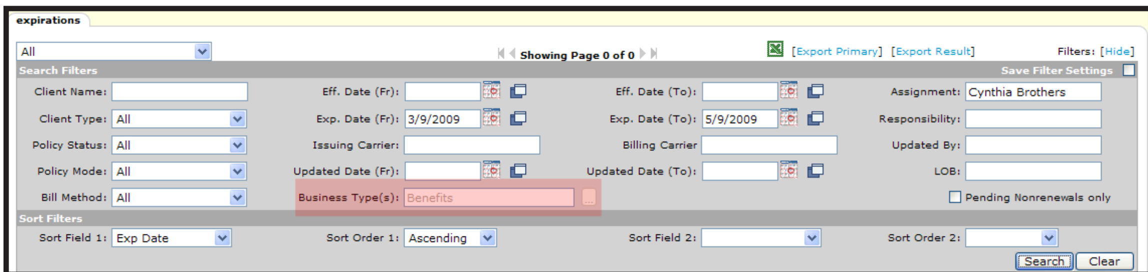
Continue until all **Resource Groups** are reviewed and all permissions are selected where rights are to be granted.

Select the user rights template's **Business Types** tab to limit **Business Types**. Associating the template to one or more **Business Types** allows you to define the lines of business users assigned to the template will be able to view or for the addition of lines of business for **Business Types** the user has not been provided access to. **Business Types** are the same **Type** options available when adding Lines of Business to Opportunities and Marketing records.

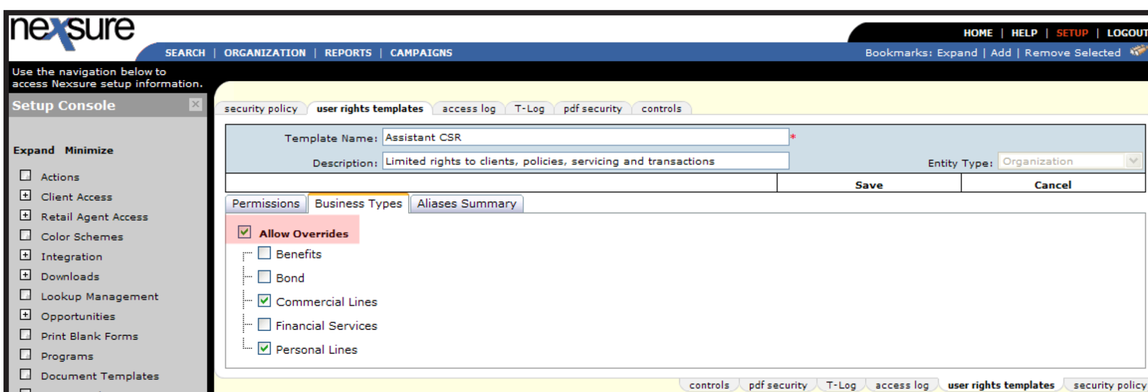
**The Business Types** association on a user rights template controls the Search Filter Business Types default on most **Home** and **Client** menu screens for its assigned users. As well as preventing the addition of new lines of business for restricted **Business Types** when the **Allow Overrides** check box is not selected, a user rights template with no **Business Types** selected allows users assigned to the template to see all lines of business by default.

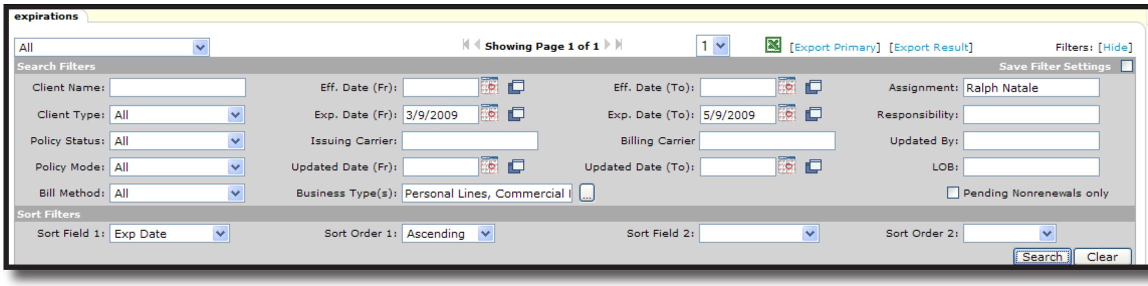


Search filter criteria for users assigned to a user rights template with specified **Business Types** will default with the template's **Business Types**. Users will not have the ability to change the **Business Types** search filter criteria if **Allow Overrides** is not selected on the user rights template's **Business Types** tab.

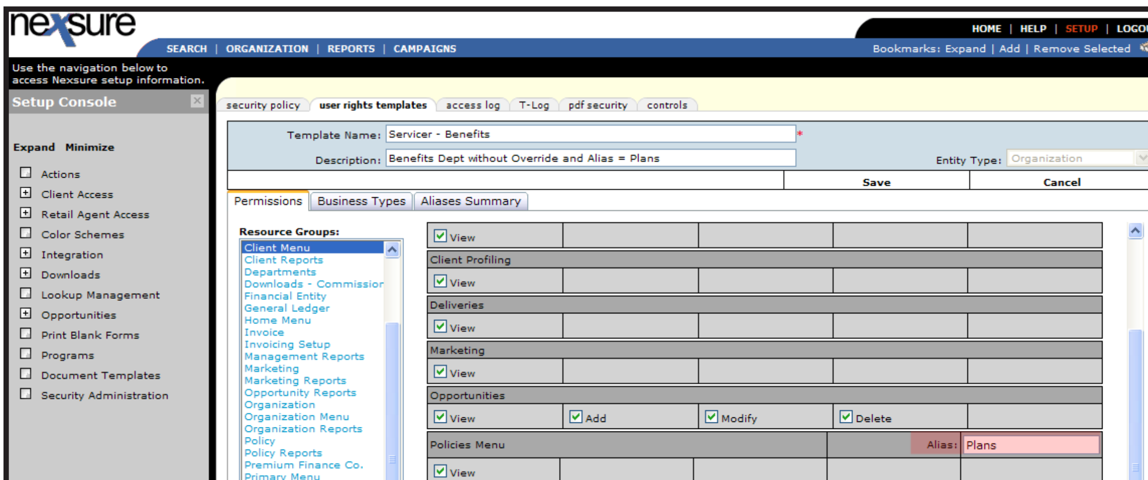


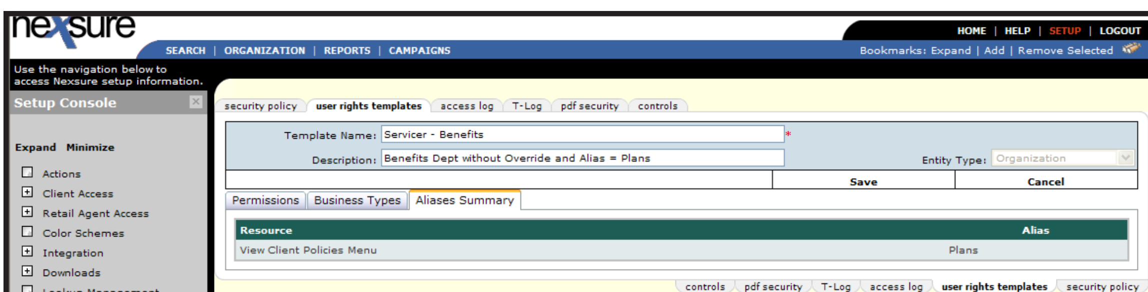
Select the template's **Allow Overrides** check box to allow assigned users the right to overwrite the **Business Type** criteria in **Search Filters** and add lines of business for restricted **Business Types**. **Allow Overrides** activates the **Business Types** field and ellipses in **Search Filters** and the **Business Types** when adding applications.





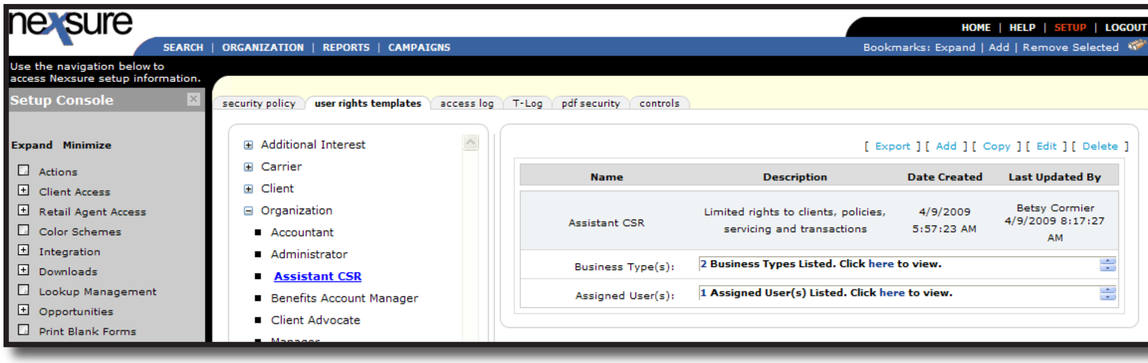

The **Aliases Summary** tab provides a summary view of an alias, if any, entered in the **Client Menu** resource group on the **Permissions** tab of the user rights template. The alias identified in the following illustration changes the **Client** menu > **POLICIES** link for its assigned users to display as **Plans**.



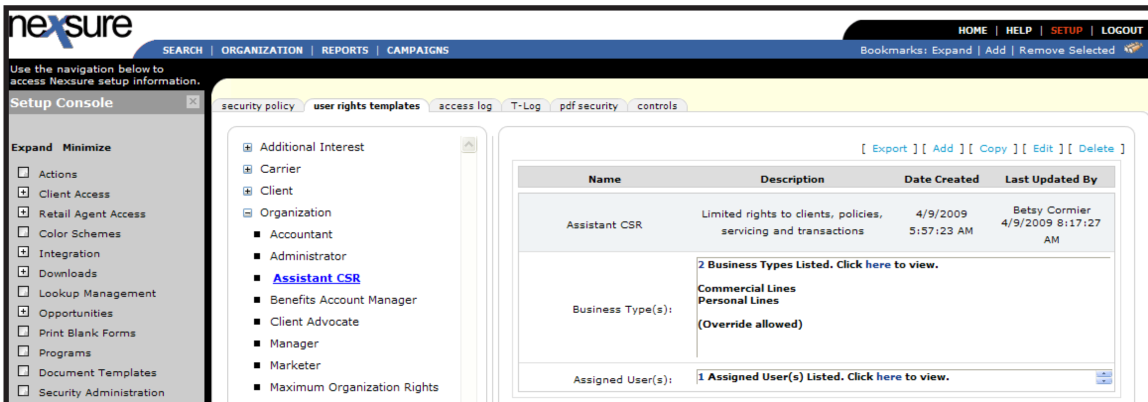




Remember to click **Save** on the navigation toolbar to save all changes made to the new user rights template. After saving, click **Cancel** to return to the **user rights templates** tab summary view. The new template is listed under its associated entity type of Organization, Client or Retail Agent.

Selecting a user rights template displays a summary view of the template name, description, date created and last updated. The associated **Business Type(s)** and **Assigned User(s)** are also displayed.




Click in the **Business Type(s)** or **Assigned User(s)** box to view details. Click anywhere outside the details box to collapse the detail view.

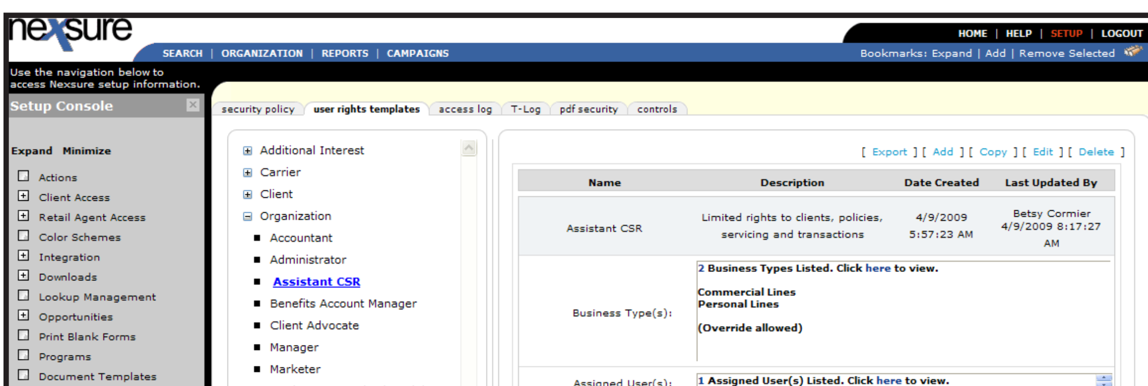



Selecting a user rights template activates links to **[Export]** **[Copy]** **[Edit]** or **[Delete]** the selected template.

After adding a new template access the employee **security** tab of each employee in the group of employees who will share the rights of the newly added template to add the template under their User Rights. For more information on adding security to employees, see "Organization Maintenance", Chapter 1 in this manual.

## Copying User Rights Templates

After adding a template, it may be copied to save time when other security templates need to be added. To use this feature, first select the **Entity Type** and then the **user rights template** to be copied.



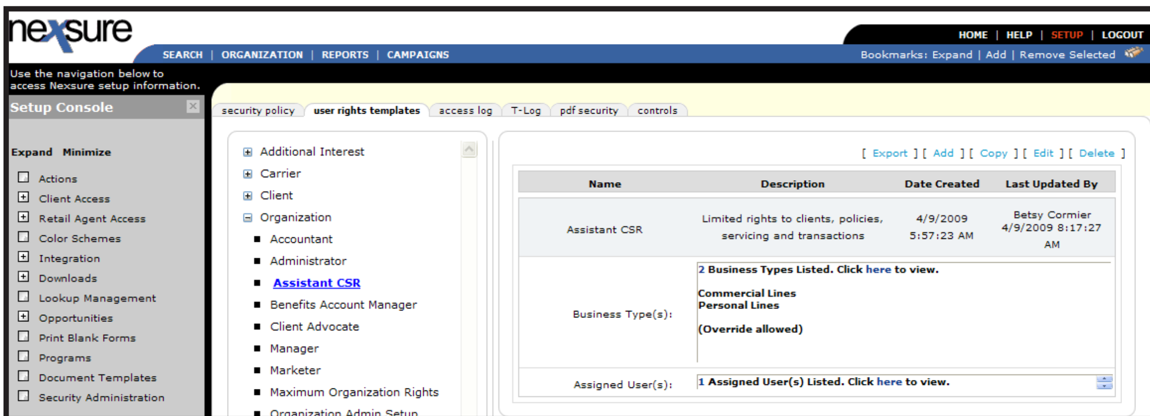
**Warning:** Changes to the **Organization** > **Administrator** template is not allowed.

The copied template displays in the **user rights templates** window. Enter the **Template Name** and a **Description** that will help identify the template to others setting up or modifying templates later. The **Entity Type** is copied and cannot be changed. Click **Save** to save the copied template. Click **Cancel** to abort the copied template prior to saving.

Edit the **Permissions** and **Business Types** of the copied template as necessary. For information on editing user rights templates, see the instructions that follow.

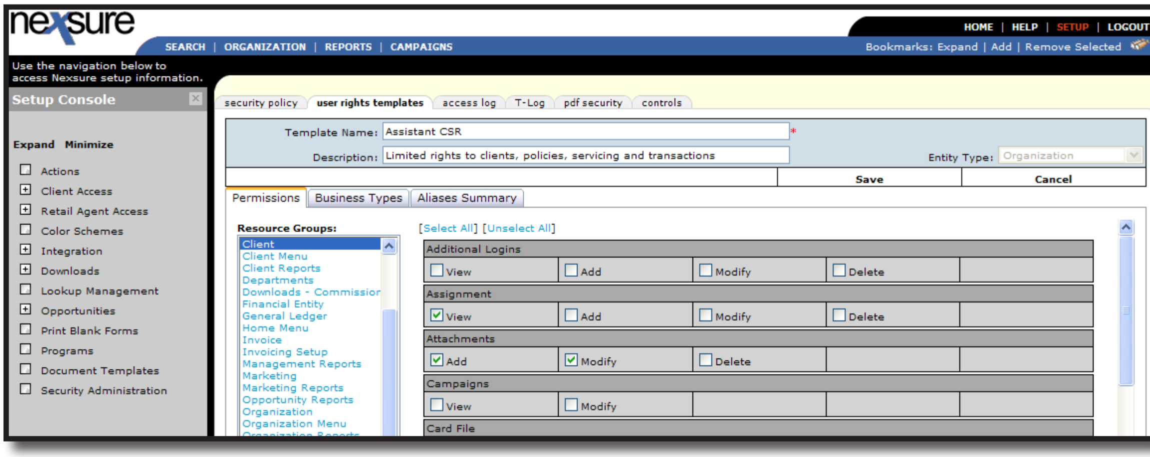
## Editing User Rights Templates

After adding a template, it may be edited to modify its permissions and associated **Business Types**. To use this feature, first select the **Entity Type** and the **user rights template** to edit from the list. Click the **[Edit]** link at the top right of the screen.




On the user rights templates screen, navigate through each **Resource Group** on the **Permissions** tab. Check all boxes within a **Resource Group** where security is to be granted and deselect those permissions where security is not to be granted. Use the **[Select All]** and **[Unselect All]** links to quickly make changes to permissions within a **Resource Group**.

Changes are temporarily saved as you navigate through the template. Be certain to click **Save** on the navigation toolbar before exiting the template. Clicking **Cancel** prior to saving will abort any changes made to the template and return you to the **user rights templates** summary screen. Continue until all sections are complete.



If the template being edited was already assigned to users, clicking **Save** on the navigation toolbar saves all changes made to the template and automatically updates the permissions for all users assigned to the template.

---

**Note:** If any of the users assigned to the security template being modified are logged in, the changes will not take place until they log out and back into Nexsure.

---

## Security Resource Groups

The **user rights templates Permissions** section is where security is assigned for a specific group of users. Click on **SETUP** on the **Utility** menu and click on **Security Administration** in the Setup Console and then click the **user rights templates** tab. Access **Permissions** by clicking **[Add]** to create a new user rights template, or select an existing template to copy or edit. **Permissions** are displayed within the applicable **Resource Group**. Below is a list of all **Resource Groups** available on the **Permissions** tab of a user rights template:


## Resource Group Permissions Definitions

To help determine what security rights to grant, below is a complete listing for each Resource Group and all permissions in each group. Use the list at any time when adding or modifying Security Templates.

## Accounting Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **accounting** tab. Any User granted access to the Accounting Resource Group would require security to be added at Organization level. Security permissions may be set for Accounting in the following areas:

### Accounting Summary

Assign user rights to view the Account Summary.

**View** – Placing a check in the **View** check box activates the **accounting** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Update Account Balances** link.


### Bank Account Reconciliation

The **bank reconciliation** tab is accessed after accessing the territory's **accounting** tab, the **bank accounts** tab and the **Details** icon of the bank account.

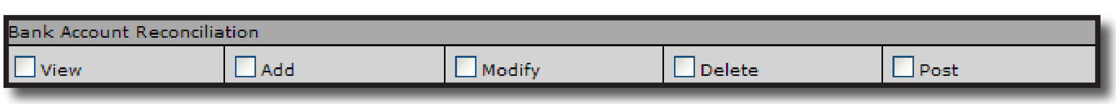
**View** - Placing a check in the **View** check box activates the **bank reconciliation** tab.

**Add** - Placing a check in the **Add** check box activates the **[Add New]** link on the **bank reconciliation** tab.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the bank reconciliation tab.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Bank Reconciliation Statements** summary screen and activates the **Abort** link on the navigation toolbar on the **bank reconciliation** tab.

**Post** - Placing a check mark in the **Post** check box activates the **Post** option in the navigation toolbar on the **bank reconciliation** tab.




### Bank Account Transactions

Click the **bank accounts** tab; click the **Details** icon of a Bank Account. Assign user right to view and/or modify Bank Account Transactions.

**View** – Placing a check in the **View** check box activates the **bank account transactions** tab.

**Export** – Placing a check in the **Export** check box activates the **Export** link.

**Modify** - Placing a check in the **Modify** check box activates the save options on the **Bank Account** screen.


## Bank Accounts

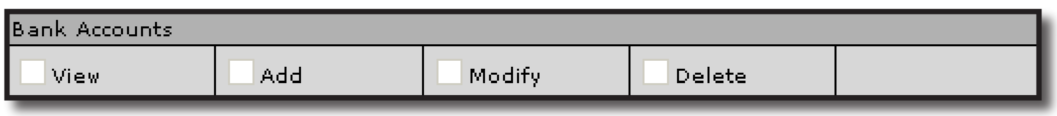
Click the **bank accounts** tab. Assign user rights to view, add, modify and/or delete Bank Accounts.

**View** - Placing a check in the **View** check box activates the **bank accounts** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon allowing the **Bank Account** details to be modified.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon allowing the removal of a Bank Account.




## Receipt Automation Lockbox T1

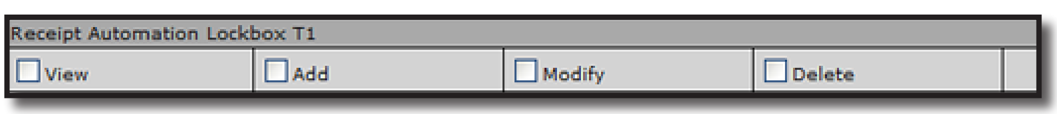
The **receipt automation lockbox T1** tab is found under: **ORGANIZATION > territories** tab **> Details** icon for the applicable territory **> accounting** tab **> bank accounts** tab **> Details** icon for the applicable bank account.

**View -** Placing a check in the **View** check box enables the **receipt automation lockbox T1** tab. Users without view rights will see a dimmed, inactive tab.

**Modify -** Placing a check in the **Modify** check box activates the **[Update]** link on the details of the Lockbox. Users without **Modify** rights will not be able to update changes to the record.

**Add -** Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the summary screen.

**Delete -** Placing a check in the **Delete** check box controls the ability to delete. Users without **Delete** rights will have the **Remove** icon disabled.




## Transactions

Click the **transactions** tab. Assign user rights to access the Transaction Information at Organization level.

**View** – Placing a check in the **View** check box activates the **transactions** tab.

| Transactions | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Accounting Reports Resource Group

To access, click the **REPORTS** link on the **Primary** menu and then the **Reports** link on the **Report** menu. By default the Report type of Accounting is displayed. Each Report Category under the Report Type of Accounting may be secured. The Categories are: **Accounts Payable**, **Accounts Receivable**, **General Ledger**, **Production**, **Profitability** and **Reconciliation**. Security permissions may be set for the Accounting Reports Resource Group in the following areas:

**View** – Placing a check in the **View** check box activates reports in each of the accounting report type categories to be viewed.

**Add** – Placing a check in the **Add** check box activates the addition of reports for each of the accounting report type categories.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon for each of the accounting report type categories.

| Accounts Payable | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| Accounts Receivable | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| General Ledger | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| Production | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| Profitability | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| Reconciliation | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

## Accounting Setup Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **accounting** tab, and then click on the **setup** tab. Any User granted access to the Accounting Setup Resource Group would require security to be added at Organization level. Security permissions may be set for the Accounting Setup in the following areas:

**Account Groups** - The **account groups** tab allows the accounting groups for reports to be viewed/added/modified/deleted and exported. The tab is accessed after accessing the **ORGANIZATION** link, **accounting** tab, **setup** tab, **account groups** tab. User rights may be assigned to view, add, modify and/or delete Account Groups.

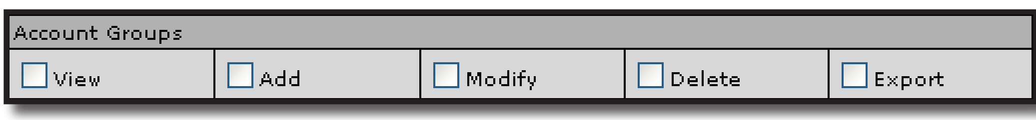
**View** – Placing a check in the **View** check box allows the Account Groups to be viewed.

**Add** – Placing a check in the **Add** check box allows the addition of a new Account Group.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link allowing the Account Group to be changed.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon allowing the Account Groups to be removed.

**Export** - Placing a check in the **Export** check box activates the **Export** link allowing the Account Groups to be exported.




### Account Types

The **account types** tab allows the accounting types for reports to be viewed/added/modified/deleted and exported. The tab is accessed after accessing the **ORGANIZATION** link, **accounting** tab, **setup** tab, **account types** tab. User rights may be assigned to view, add, modify and/or delete Account Types.

**View** – Placing a check in the **View** check box allows the Account Types to be viewed.

**Add** – Placing a check in the **Add** check box allows the addition of a new Account Type.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link allowing the Account Type to be changed.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon allowing the Account Types to be removed.

**Export** - Placing a check in the **Export** check box activates the **Export** link allowing the Account Types to be exported.

| Account Types | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |

## Accounting Periods

The **account periods** tab allows the accounting periods to be viewed, added and modified. The tab is accessed after accessing the **ORGANIZATION** link, **accounting** tab, **setup** tab, **accounting periods** tab. User rights may be assigned to view, add and/or modify the Accounting Periods.

**View** – Placing a check in the **View** check box activates the **accounting periods** tab and the **[Show]** link on the **Accounting Periods** screen.

**Add** – Placing a check in the **Add** check box activates the **Add Period** link on the **Accounting Periods Summary** page.

**Modify** – Placing a check in the **Modify** check box activates the **Close Period/Lock** and **Unlock Period** and **Update** links on the **Accounting Periods Detail** page.

| Accounting Periods | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

## Assign Books

Future Feature.

| Assign Books | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

## Posting Rules

The tab is accessed after clicking the **ORGANIZATION** link, **accounting** tab, **setup** tab, and the **posting rules** tab. The posting rules at this level refer to the Organization Default posting rules, which default to the Departments when they are added. Assign user rights to view and/or modify the Posting Rules.

**View** – Placing a check in the **View** check box activates the **posting rules** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link.

**Warning:** Do not update Posting rules if accounting has been in use. Contact Nexsure support for assistance.

| Posting Rules | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

## Additional Interests Resource Group

Click **SEARCH**, on the **Primary** menu, and select **Additional Interest** from the **Entity Drop-down** check box. Security permissions may be set for the **Additional Interests** Resource Group in the following areas:

### Contacts

To access the Additional Interests contacts, click the **Details** icon of the appropriate Additional Interest and click on the **contacts** tab. Assign user rights to view, add, modify and/or delete contacts for Additional Interests.

**View** – Placing a check in the **View** check box activates the **contacts** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **contacts** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the **Contacts Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Contact Summary** screen.

| Contacts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

### Search

Located on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import Additional Interests.

**View** – Placing a check in the **View** check box activates **Additional Interests** option in the **Entity Drop-down** check box.

**Add** – Placing a check in the **Add** check box activates the **Add New** link.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Additional Interests screens.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon.

**Import** - Placing a check in the **Import** check box activates the **Import** link.

| Search | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

## Branch Resource Group

The following Rights options are for Branches. To access the Branches, click the **ORGANIZATION** link, on the

**Primary** menu, then click the **branches** tab. Security permissions may be set for the **Branch Resource Group** in the following areas:

## Accounting

The **accounting** tab allows ability to view and modify Accounting options. The tab is accessed after accessing the **ORGANIZATION** link, **branches** tab and clicking on the **Details** icon of the branch.

**View** – Placing a check in the **View** check box provides the ability to view all **accounting** tabs at Branch level.

**Modify** – Placing a check in the **Modify** check box provides the ability to change Accounting options at Branch level.


## Commission

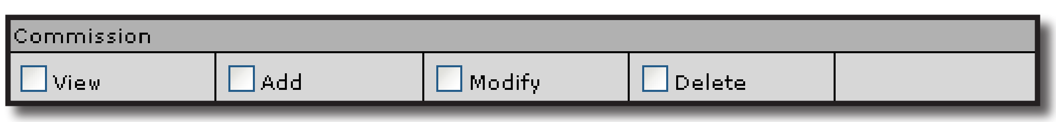
This refers to Employee Commission. From the **branches** > **card file** tab, click the **employees** tab, click the **Details** icon of the appropriate employee, and click the **Commission Information** link in the upper right corner. Assign user rights to view, add, modify and/or delete a Branch employee's Commission.

**View** – Placing a check in the **View** check box activates the **branch employee commission** tab to enable commission view.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar in the **Commission Detail** of the Employee.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Commission Summary** screen of the Employee.




## Employees

When the branch card file is displayed, click on the **employees** tab. Assign user rights to view, add, modify and/or delete Branch Employees.

**View** – Placing a check in the **View** check box activates the Branch **employees** tab to enable commission view.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the

**Employee Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Deactivate** icon on the **Employees Summary** screen.

| Employees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Identity

When the branch card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the **identity** tab. Add a Photo, Salutation or Signature to a Branch Employee's Identity.

**Allow Override** - Placing a check in the **Allow Override** box allows a staff member to access and modify other staff members' identity tabs at the Branch where they have access.

| Identity | | | | |
|---|---|---|---|---|
| ☐ Allow Override | | | | |

## Locations

When the branch card file is displayed, click on the **locations** tab. Assign user rights to view, add, modify and/or delete Branch locations.

**View** – Placing a check in the **View** check box activates the branch **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar on the **Branch Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Save** and **Activate** / **Inactivate** links on the navigation toolbar on the **Location Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Branch Location Summary** screen.

**Import** – Placing a check in the **Import** check box activates the **Import** link on the summary screen.

**Export** – Placing a check in the **Export** check box activates the **Export** link on the summary screen.

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| ☐ Export | | | | |

## Lockbox

When the branch card file is displayed, click on the **accounting** tab > **lockbox** tab. Assign user rights to view and/or modify **Branch Lockbox** detail.

**View** – Placing a check in the **View** check box activates the branch **lockbox** tab to enable the detail to be viewed.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the **Lockbox Detail** screen.


## Names

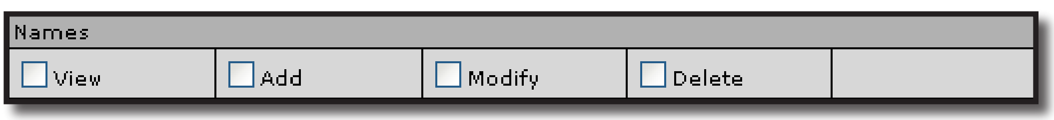
Assign user rights to view, add, modify and/or delete the Branch.

**View** – Placing a check in the **View** check box activates the **branches** tab to enable the Branches to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar on the **Branch Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Branch Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Branch Summary** screen.




## Security

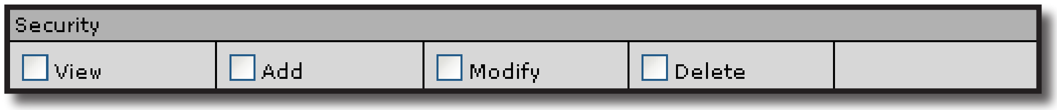
From the **branches** > **card file** tab, click the **employees** tab and then click the **security** tab. Assign user rights to view, add, modify and/or delete a Branch Employee's Security.

**View** – Placing a check in the **View** check box activates the **employees** > **security** tab to enable the Branches to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Click here to make this contact a user** link at the bottom of an employee detail screen to add new security.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the Branch Employee Security detail screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on **security** tab **User Accounts** portion of the screen.



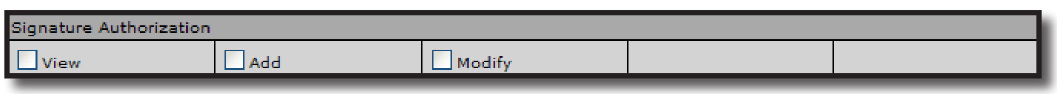

## Signature Authorization

Signature authorizations are accessed from the signature tab of the employee identity. When the branch card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the **identity** tab then the signature tab. **Permissions** are available to control access to the **signature authorization** tab as well as the control authorizations and private functions.

**View** - Placing a check in the **View** check box allows the **signature authorization** tab to be selected.

**Add** - Placing a check in the **Add** check box activates the **[control authorization]** link.

**Modify** - Placing a check in the **Modify** check box allows access to change the **Private** check box on the signature file as well as the **Update** option in the navigation toolbar on the **signature authorizations** tab. Staff members with modify rights will be able to add and remove authorized staff members and will also need **View** and **Add** rights.




## Carrier Resource Group

Click **SEARCH**, on the **Primary** menu, and select **Carrier** from the **Entity Drop-down** check box. Security permissions may be set for the **Carrier** Resource Group in the following areas:

### Commission

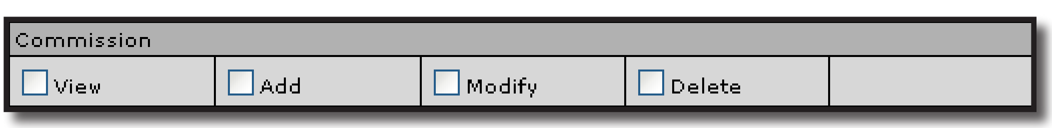
This refers to the Carrier Commission. Click on the **Details** icon of the appropriate Carrier and click the **commissions** tab. Assign user rights to view, add, modify and/or delete Commission for the Carrier.

**View** – Placing a check in the **View** check box activates the carrier **commissions** tab to enable the commissions to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Commission Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link located in the upper right of the **Commission Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Delete** link located in the upper right of the **Commission Detail** screen.



## Contacts

The Carrier contacts are accessed after clicking the **Details** icon of the Carrier and then selecting the **contacts** tab. Assign user rights to view, add, modify and/or delete Contacts for the Carrier.

**View** – Placing a check in the **View** check box activates the Carrier **contacts** tab to enable the contacts to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Contacts Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link located in the upper right of the **Contacts Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Delete** link located in the upper right of the **Contacts Detail** screen.

| Contacts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## eServices

**View** – Placing a check in the **View** check box activates the Carrier eServices.

| e-Services | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Entity Associations

Carrier entity associations are located in the territory of the branch(es) where the carrier will be used. From the **ORGANIZATION** link on the **Primary** menu, click the **territories** tab. Select the **Details** icon of the territory then the **entity associations** tab. The **carrier associations** tab is a sub-tab of the territory's **entity associations** tab. **Permissions** may be granted to view, add, modify and delete carrier entity associations.

**View** - Placing a check mark in the **View** check box enables the **carrier associations** tab for viewing.

**Add** - Placing a check mark in the **Add** check box displays the **[Add New]** link on the **carrier associations** tab.

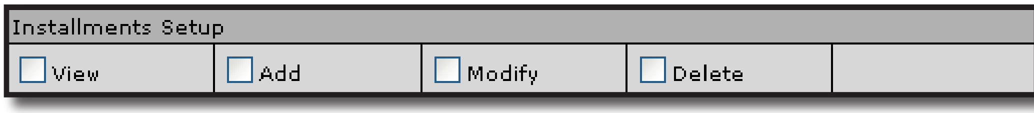
**Modify** - Placing a check mark in the **Modify** check box displays the **Details** icon.

**Delete** - Placing a check mark in the **Delete** check box displays the **Remove** icon.

| Entity Associations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Installment Setup

Future Feature




## Locations

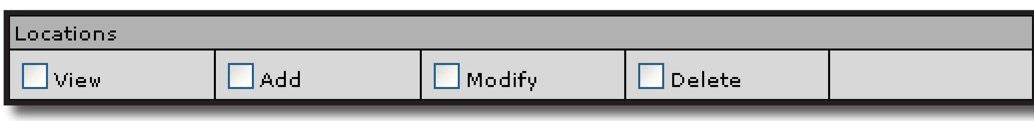
The **location** tab is found after clicking the **Details** icon of the appropriate Carrier. Assign user rights to view, add, modify and/or delete locations for the Carrier.

**View** - Placing a check in the **View** check box activates the Carrier **locations** tab to enable the locations to be viewed.

**Add** - Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Locations Summary** screen.

**Modify** - Placing a check in the **Modify** check box activates the **Update** link located in the upper right of the **Locations Detail** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon located in the **Locations Summary** screen.




## Names

The **carrier names** tab is found after clicking the **Details** icon of the appropriate Carrier. Assign user rights to view, add, modify and/or delete Names for the Carrier.

**View** - Placing a check in the **View** check box activates the **carrier names** tab to enable the names to be viewed.

**Add** - Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Names Summary** screen.

**Modify** - Placing a check in the **Modify** check box activates the **Update** link located in the upper right of the **Names Detail** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon located in the **Names Summary** screen.

## Search

Search is found on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import Carriers.

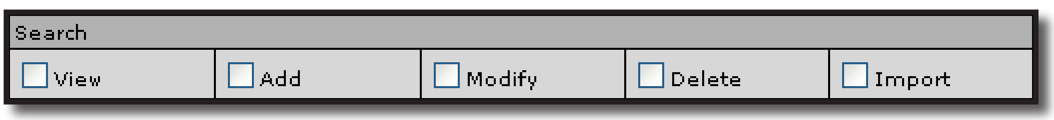
**View** - Placing a check in the **View** check box activates the display of **Carrier** in the **Entity Drop-down** check box.

**Add** - Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the Search screen.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon located on the Search screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon located in the Search screen.

**Import** - Placing a check in the **Import** check box allows users to Import Carrier information from another source by using the activated import link on the Search screen.




## Client Resource Group

From **SEARCH**, on the **Primary** menu, choose **Client** from the **Entity Drop-down** check box click the **Details** icon of the appropriate Client. Security permissions may be set for the Client Resource Group in the following areas:

### Additional Logins

Are located on the **Client Contact** record to grant Client Access to additional logins in Nexsure such as the Carriers Web site.

**View** – Placing a check in the **View** check box activates the **additional logins** tab after accessing the **Contacts Detail** screen.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Additional Logins Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Save** button located on the **Additional Logins** details.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Additional Logins Summary** screen.

## Assignment

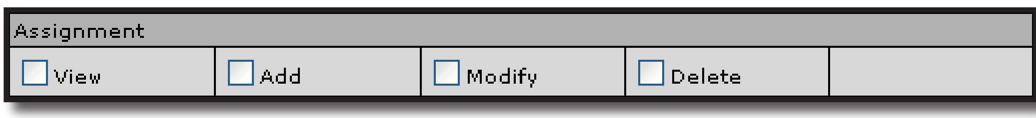
The **assignment** tab is found after clicking the**Details** icon of the appropriate Client. Assign user rights to view, add, modify and/or Delete the Assignment.

**View** – Placing a check in the **View** check box activates the **assignments** tab.

**Add** – Placing a check in the **Add** check box activates the **Add Assignment** and **Add Retail Agent** links.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon located on the **Assignment Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Assignment Summary** screen.




## Attachments

The **attachments** tab is found after clicking the **Details** icon of the appropriate Client's policy. Assign user rights to view, add, modify and/or delete documents and/or photographs.

**Note:** Security at **Policy** and **Client** menu for attachments also required to access attachments.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the Attachments screen at both client and policy levels.

**Modify** – Placing a check in the **Modify** check box activates both the **Details** icons located on the **Attachments Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Attachment Summary** screen.


## Campaigns

The **Campaigns** tab is found after clicking the **Details** icon of the appropriate client. The client's response to campaigns is recorded on the **campaigns** tab. Permissions must also be granted at **Client** menu for **View Client Profile** to access the **campaigns** tab. Assign permissions to view or modify campaigns.

**View** - Placing a check in the **View** check box to display the **campaigns** tab.

**Modify** - Placing a check in the **Modify** check box gives permission to record **Responses** and **Wins**.

| Campaigns | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

## Card File

Click the **Details** icon of the appropriate Client on the Search screen to display the Card file.

> **Note:** Security at **Client** menu for View Client Profile is also required for the Card File.

**View** – Placing a check in the **View** check box activates the **Details** icon on the **Client Entity Search** screen.

| Card File | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Claims

From the **Client** menu, click on the **claims** link. Assign user rights to view, modify and/or delete Claims for the Client.

> **Note:** Security at **Client** menu for Claims is also required for access.

**View** – Placing a check in the **View** check box activates the **Details** icon on the **Claims Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates **Save Changes** link on the Details screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Claim Summary** screen and the **Abort Claim** link on the **Claim Detail** screen.

| Claims | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | ☐ Delete | | |

## Classified

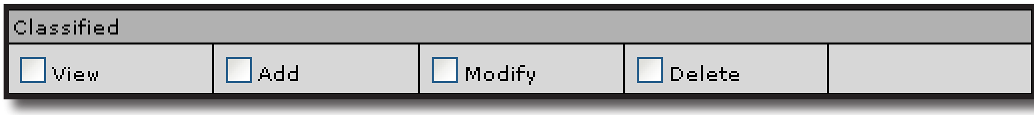
Click the **Details** icon for a Client to see the **classified** tab. Assign user rights to view, add, modify and/or delete Code Classes and Designations.

**View** – Placing a check in the **View** check box activates the **classifieds** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Classified Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon located on the **Classified Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Classified Summary** screen.




## Client Profiling

The **profile** tab can be accessed from Search by clicking the **Details** icon of a client and clicking the **profiling** tab. Assign user rights to modify the clients profile.

**Modify** – Placing a check in the **Modify** check box activates the [**Save**] link on the profile screen.


## Contacts

Contacts are accessed by clicking the **people** tab after clicking the **Details** icon of a Client. Assign user rights to view, contacts and export contacts to MS Outlook.

**View** – Placing a check in the **View** check box activates the **Contacts** view.

**Export** – Placing a check in the **Export** check box activates the **Outlook** icon, which allows the selected contact to be synchronized with the user's MS Outlook contacts.


## Deliveries

Client level deliveries are accessed from the **Client** menu **> DELIVERY** link after clicking the **Details** icon of a client. Assign user rights to add deliveries and the ability to restrict viewing of deliveries created by other users.

**Note:** Any deliveries that include attachments associated to a restricted policy will display only for those staff members who are assigned to the restricted policy.

**Add** - Placing a check mark in the **Add** check box activates the **Add New** link at the **Client** menu **> DELIVERY** level.

**Allow Override** - Placing a check mark in the **Allow Override** check box to allow a staff member to view anyone's deliveries on the **Client** menu **> DELIVERY** screen.

| Deliveries | | | | |
|---|---|---|---|---|
| ☐ Add | ☐ Allow Override | | | |

## Demographics

The **demographic data** tab is located under the **profiling** tab after clicking the **Details** icon of a client. Assign user rights to view demographics.

**View** - Placing a check mark in the **View** check box allows a user to access the **demographic data** tab.

| Demographics | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Drivers

The **Drivers** are accessed after clicking the **Details** icon of a client, **people** tab or **units at risk** tab. Assign user rights to view people with a designation of **Driver**.

**View** - Placing a check mark in the **View** check box activates **Drivers** in the **View** list on the **People Summary** screen and shows the drivers information section on the **people** tab detail as well as displaying on the **Units at Risk Summary** screen.

| Drivers | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Employees

The **Employees** are accessed after clicking the **Details** icon of a client, **people** tab or **units at risk** tab. Assign user rights to view people with a designation of **Employee**.

**View** - Placing a check mark in the **View** check box activates **Employees** in the **View** list on the **People Summary** screen and shows the employee information section on the **people** tab detail as well as displaying on the **Units at Risk Summary** screen.

| Employees | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Folders

Client level folders are accessed from the **Client** menu **> ATTACHMENTS** link after clicking the **Details** icon of a client. The folder view is displayed to the left of the **attachments** tab. Assign user rights to add, modify, and delete attachment folders.

**Add** - Placing a check mark in the **Add** check box activates the right click context tool **New Folder** option.

**Modify** - Placing a check mark in the **Modify** check box activates the right click context tool **Edit** option.

**Delete** - Placing a check mark in the **Delete** check box activates the right click context tool **Delete** option.


## Locations

The **locations** tab is accessed after clicking the **Details** icon of a client. Assign user rights to view, add, modify and/or delete locations.

**View** - Placing a check in the **View** check box activates the **locations** tab and **units at risk** tab.

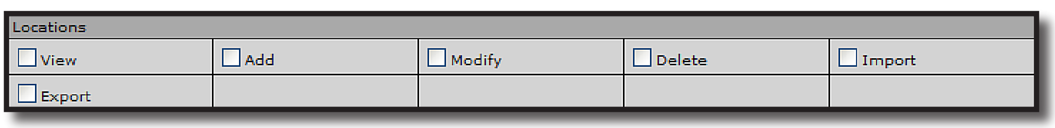
**Add** - Placing a check in the **Add** check box activates the **[Add New]** link on the **Locations Summary** screen **units at risk** tab and the **Copy** link on the detail screen.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon located on the **Locations Summary** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon located on the **Locations Summary** screen.

**Import** - Placing a check in the **Import** check box activates the **[Import]** link on the **Locations Summary** screen.

**Export** - Placing a check in the **Export** check box activates the **[Export]** link on the **Locations Summary** screen.




## Master Invoice

The ability to add installment invoices is controlled by Add under the Client Resource Group under the right of Master Invoice. Installments are added at either client or underwriting level by clicking the Transactions link on the client menu or the **Details** icon of the policy record from the policy summary screen and clicking the **[Add Master Invoice]**.

**Add** - Placing a check in the Add check box activates the **[Add Master Invoice]** link on the Transaction Summary screen.


## Named Insureds

The **named insureds** tab is accessed after clicking the **Details** icon of a client. Assign user rights to view, add, modify and/or delete Named Insured's.

**View** - Placing a check in the **View** check box activates the **named insureds** tab and **units at risk** tab.

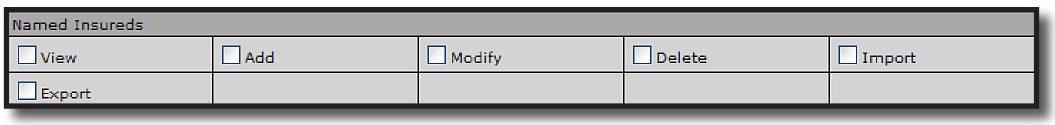
**Add** - Placing a check in the **Add** check box activates the **[Add New]** link on the Named Insureds summary screen and **units at risk** tab.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon located on the **Named Insureds Summary** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon located on the **Named Insureds Summary** screen.

**Import** - Placing a check in the **Import** check box activates the **[Import]** link on the **Named Insured Summary** screen.

**Export** - Placing a check in the **Export** check box activates the **[Export]** link on the **Named Insured Summary** screen.




## People

The **people** tab is accessed after clicking the **Details** icon of a client. Assign user rights to view, add, modify, delete, import and/or export.

**View** - Placing a check in the **View** check box activates the **people** tab.

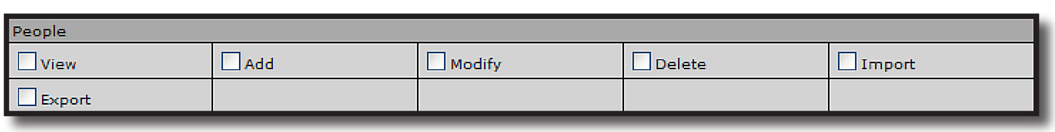
**Add** - Placing a check in the **Add** check box activates the **Add New** link on the summary screen and activates the **Add New** options on the **units at risk** tab for **Drivers** and **Employees**.

**Modify** - Placing a check in the **Modify** check box activates the **Save** and **Activate** / **Inactivate** links located on the details screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon located on the summary screen.

**Import** - Placing a check in the **Import** check box activates the **Import** link on the summary screen.

**Export** - Placing a check in the **Export** check box activates the **Export** link on the summary screen.




## Recycle Bin

The **Recycle Bin** is found in the folder view of **ATTACHMENTS** at the client level. Assign user rights to remove items from the **Recycle Bin**.

**Delete** - Placing a check mark in the **Delete** check box activates the **Remove** icon of attachments in the

**Recycle Bin**.

| Recycle Bin | | | | |
|---|---|---|---|---|
| ☐ Delete | | | | |

## Related Accounts

Click the **Details** icon of a client to access the **related accounts** tab. Assign user rights to view, add, modify and/or delete Related Accounts for the Client.

**View** – Placing a check in the View check box activates the **related accounts tab**.

**Add** – Placing a check in the Add check box activates the **[Add New]** link on the Related Accounts summary screen.

**Modify** – Placing a check in the Modify check box activates the **Details** icon located on the Related Accounts Summary screen.

**Delete** – Placing a check in the Delete check box activates the **Remove** icon located on the Related Accounts Summary screen.

| Related Accounts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Search

Click the **SEARCH** link located on the **Primary** menu to access the Search screen. Assign user rights to view, add, modify, delete and/or import Clients.

**View** – Placing a check in the **View** check box activates the display of **Client** in the **Entity Drop-down** check box.

**Add** – Placing a check in the **Add** check box activates the **[Add New]** link on the upper right of the Search screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Search screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon in the Search screen.

**Import** - Placing a check in the **Import** check box allows users to import client information from another source by using the activated import link on the Search screen.

| Search | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

### Security

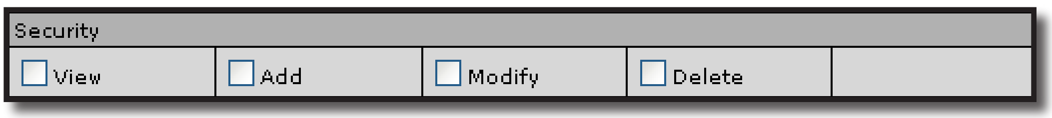
To access the **security** tab, click the **Details** icon of a client, then click the **contacts** tab and the **Details** icon of a Contact on the summary screen. Scroll to the bottom of the screen to add Security to find the following line: **Click here to make this contact a user**. Clicking this link activates a **security** tab for the selected contact. Assign user rights to view, add, modify and/or delete security for you Client contacts in Nexsure.

**View** – Placing a check in the **View** check box activates the **security** tab link on the **Contact** screen.

**Add** – Placing a check in the **Add** check box activates the **Click here to make this contact a user** link on the **Client Contacts Detail** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Save** button located on the **security** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **security** tab.




**Note:** It is not recommended to add Client Contact Access to Nexsure without first adding an appropriate Client Contact Security Template.

## Stick-E-Notes

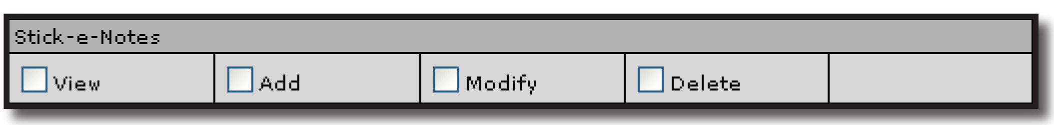
Are located on the Client's card file, the **card file** tab is found after clicking the **Details** icon of the appropriate Client or Client Profile link if already on the client record. Assign user rights to view, add, modify, and/or delete Stick-E-Notes for a Client.

**View** – Placing a check in the **View** check box activates the display of the Stick-E-Notes.

**Add** – Placing a check in the **Add** check box activates the **[Add New]** link on the Stick-E-Notes.

**Modify** – Placing a check in the **Modify** check box activates the **Edit** link located on the Stick-E-Notes.

**Delete** – Placing a check in the **Delete** check box activates the **Delete** link located on the Stick-E-Notes.




### Summary of Insurance

Click the **Details** icon of a client to access the **summary of insurance** tab. Assign user rights to view or export a summary of the client's policies. Restricted policy(ies) will not display if the user is not assigned to the policy(ies).

**View** - Placing a check mark in the **View** check box activates the **summary of insurance** tab.

**Export** - Placing a check mark in the **Export** check box activates the **Export** links which allow the user to export the summary of insurance to Excel or Word.


### Transactions

Access Transactions after clicking the **Details** icon of a client and clicking the **Transactions** link on the **Client** menu and then the **transactions summary** tab. A **transactions** tab is also located at Policy Underwriting level. Assign user rights to add, modify and/or delete transactions.

> **Note:** To access the Transactions at this level, view rights must also be granted under the **Resource Group** of **Client** menu.

**Add** – Placing a check in the **Add** check box activates the **Add Master Invoice**/**Add New Invoice** links on the **Transaction Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Transaction Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Transactions Summary** screen and the **Abort** link on the Transactions detail.

**Post** – Placing a check in the **Post** check box activates the **Post** link on Client Invoices.

**Post Locked** – Placing a check in the **Post Locked** check box activates the ability to Post the invoice to a locked period.


## Units at Risk

**View** – Placing a check in the **View** check box for **Units at Risk** activates the **units at risk** tab.


## Vehicles

The **vehicles** tab is accessed after clicking the **Details** icon of a client and the **units at risk** tab. Assign user rights to view, add, copy, modify, delete, import and/or export vehicles.

**View** – Placing a check in the **View** check box activates the **vehicles** tab. Make sure to also grant **View** rights to **units at risk** tab.

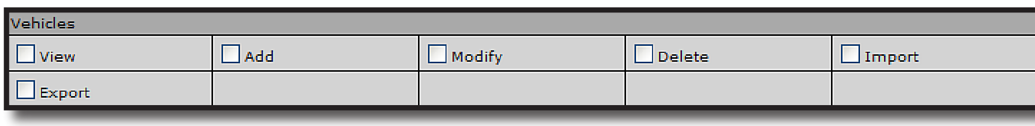
**Add** – Placing a check in the **Add** check box activates the **[Add New]** link on the summary screen, the copy link on the **Vehicles Details** screen as well as activates the **[Add New]** link on the **units at risk** tab for **Commercial** and **Personal** vehicles.

**Modify** – Placing a check in the **Modify** check box activates the **Save** and **[Activate]** / **[Inactivate]** links located on the **Vehicle Details** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Vehicle Summary** screen.

**Import** - Placing a check in the **Import** check box activates the **[Import]** link on the **Vehicle Summary** screen.

**Export** - Placing a check in the **Export** check box activates the **[Export]** link on the **Vehicle Summary** screen.




## Client Menu Resource Group

From **SEARCH**, on the **Primary** menu, select **Client** from the **Entity Drop-down** check box. Click the **Details** icon of a client to display the **Client** menu. Security permissions may be set for the **Client** menu Resource Group in the following areas:

**Actions** - Assign user rights to view, add, modify and/or assign Actions on the **Client** menu.

**View** – Placing a check in the **View** check box activates the **Actions** link on the **Client** menu.

**Add** – Placing a check in the **Add** check box activates the **[Add New]** link on the **Actions Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon located on the **Actions Summary** screen.

**Assign** – Placing a check in the **Assign** check box allows actions to be assigned to other user’s.

## Attachments

Assign user rights to view Attachments on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **Attachments** link on the **Client** menu.


## Claims

Assign user rights to view Claims on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **Claims** link on the **Client** menu.


## Client Profiling

Assign user rights to view Client's Profile on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **Client Profile** link on the **Client** menu.


## Deliveries

Assign user rights to view Deliveries on the **Client** menu.

**View** - Placing a check in the View check box activates the Deliveries link on the **Client** menu.


## Marketing

Assign user rights to view Marketing on the **Client** menu.

**View** - Placing a check in the View check box activates the **MARKETING** link on the **Client** menu.

## Opportunities

Assign user rights to view, add, modify and/or delete Opportunities on the **Client** menu.

**View** - Placing a check in the View check box activates the Opportunities link on the **Client** menu.

**Add** – Placing a check in the Add check box activates the **Add New** link on the Opportunities Summary screen.

**Modify** – Placing a check in the Modify check box activates the **Details** icon on the Opportunities Summary screen.

**Delete** – Placing a check in the Delete check box activates the **Remove** icon on the Opportunities Summary screen.

| Opportunities | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Policies Menu

Assign user rights to view Policies on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **Policies** link on the **Client** menu.

**Alias** - Enter an alias to display in place of **POLICIES** on the **Policies** link on the **Client** menu.

| Policies Menu | | | Alias: | |
|---|---|---|---|---|
| ☐ View | | | | |

## Servicing

Assign user rights to view Servicing on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **Servicing** link on the **Client** menu.

| Servicing | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## T-Log

Assign user rights to view the T-Log on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **T-Log** link on the **Client** menu.

| T-Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Transactions

Assign user rights to view Transactions on the **Client** menu.

**View** - Placing a check in the **View** check box activates the **Transactions** link on the **Client** menu.

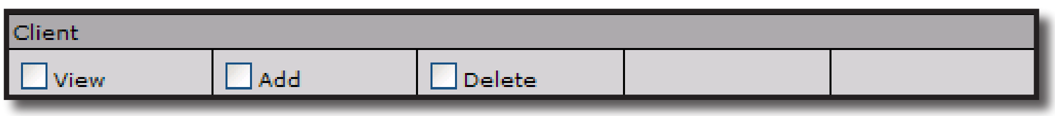

## Client Reports Resource Group

After clicking **REPORTS** on the **Primary** menu, click the **Reports** link to access Reports. Granting security to Client Reports provides access to reports under the Report Type of Client/Contacts.

**View** - Placing a check in the **View** check box displays the Report Type Client/Contacts for selection and provides access to reports available in the Client/Contacts category.

**Add** - Placing a check in the **Add** check box activates the **New Report Criteria** link on the report summary tab.

**Delete** - Placing a check mark in the **Delete** check box activates the **Remove** icon in the **report summary** tab.




**Note:** To access the Reports at this level, View rights must also be granted for Reports under the Resource Group of **Primary** menu.

## Departments Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **departments** tab. Security permissions may be set for the Department Resource Group in the following areas:

Department Summary: Assign user rights to view, add, modify and/or delete departments.

**View** - Placing a check in the **View** check box activates the **departments** tab on the Branch.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Department Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Department Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Department Summary** screen.

## Downloads - Commission Resource Group

Commission Downloads are processed through the **INTERFACE** link on the **HOME** menu. Security permissions may be set to secure processing of commission downloads.

### Invoice

**View** - Placing a check mark in the **View** check box activates the **View Invoices** link in the navigation toolbar of the **interface details** screen.

**Add** - Placing a check mark in the **Add** check box activates the **Create Invoices** link in the navigation toolbar of the **interface details** screen.

**Delete** - Placing a check mark in the **Delete** check box activates the **Delete** link for invoices on the **Commission Download** screen.


### Reconciliation

**Add** - Placing a check mark in the **Add** check box activates the **Create Reconciliation** link on the **Commission Download** screen.

**Post** - Placing a check mark in the **Post** check box activates the **Create / Post Reconciliation** link on the **Commission Download** screen.

**Note**: To activate the **Create / Post Reconciliation** link, both **Add** and **Post** permissions must be selected.


## Financial Entity Resource Group

Click **SEARCH**, on the **Primary** menu, and select **Financial Entity** from the **Entity Drop-down** check box. Security permissions may be set for Financial Entities Resource Group in the following areas:

### Contacts

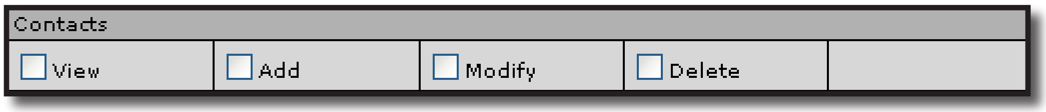
Click the **Details** icon of the appropriate Financial Entity and click on the **contacts** tab. Assign user rights to view, add, modify and/or delete contacts for a Financial Entity.

**View** - Placing a check in the **View** check box activates the **contacts** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Contacts Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Contacts Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Contacts Summary** screen.




## Locations

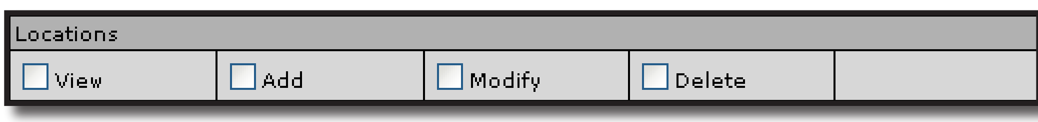
Click the **Details** icon of the appropriate Financial Entity and click on the **locations** tab. Assign user rights to view, add, modify and/or delete locations for a Financial Entity.

**View** - Placing a check in the **View** check box activates the **locations** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Locations Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Locations Summary** screen.




## Search

Search is located on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import a Financial Entity.

**View** – Placing a check in the **View** check box activates the display of Financial Entity in the **Entity Drop-down** check box.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the upper right of the Search screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Search screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon in the Search screen.

**Import** - Placing a check in the **Import** check box allows users to Import Financial Entity information from another source by using the activated import link on the Search screen.

## General Ledger Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **accounting** tab, and then click on the **general ledger** tab. Security permissions may be set for the General Ledger Resource Group in the following areas:

**Balance Sheet** – After accessing the **general ledger** tab, click on the **balance sheet** tab. Assign user rights to view and/or export the Balance Sheet.

**View** – Placing a check in the **View** check box activates the **balance sheet** tab after accessing General Ledger.

**Export** – Placing a check in the **Export** check box activates the export link on the **Balance Sheet Summary** screen.

| Balance Sheet | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Export | | | |

### Chart of Accounts

After accessing the **general ledger** tab, click on the **chart of accounts** tab. Assign user rights to view, add, modify and/or delete the Chart of Accounts.

**View** – Placing a check in the **View** check box activates the **chart of accounts** tab after accessing General Ledger.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Chart of Accounts Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Chart of Accounts Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon in the **Chart of Accounts Summary** screen.

**Export** – Placing a check in the **Export** check box activates the export link on the **Chart of Accounts Summary** screen.

**Allow Override** – Placing a check in the **Allow Override** check box activates security to post to a General Ledger account that has been identified as an account that is locked and cannot be posted to.

| Chart of Accounts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Allow Override | | | | |

### Income Statement

After accessing the **general ledger** tab, click on the **income statement** tab. Assign user rights to view and/or export an Income Statement.

**View** – Placing a check in the **View** check box activates the **income statement** tab after accessing **general ledger** tab.

**Export** – Placing a check in the **Export** check box activates the export link on the **Income Statement Summary** screen.

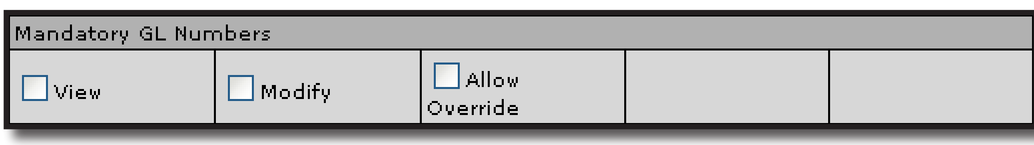

## Mandatory GL Numbers

After accessing the **general ledger** tab, click on the **mandatory general ledger numbers** tab. Assign user rights to view and/or modify the Mandatory General Ledger Numbers.

**View** – Placing a check in the **View** check box activates the **mandatory general ledger numbers** tab after accessing **general ledger** tab.

**Modify** – Placing a check in the **Modify** check box activates the screen to allow reassignment of these GL numbers. **WARNING: Prior to modifying, contact Nexsure support. Modification of these accounts can cause serious accounting issues.**

**Allow Override** – Placing a check in the **Allow Override** check box activates security to post to a Mandatory General Ledger account that is locked disallowing postings.

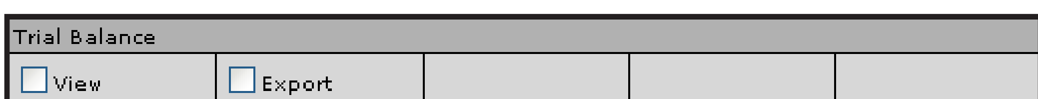



## Trial Balance

After accessing the **general ledger** tab, click on the **trial balance** tab. Assign user rights to view and/or export the Trial Balance.

**View** – Placing a check in the **View** check box activates the **trial balance** tab after accessing **general ledger** tab.

**Export** – Placing a check in the **Export** check box activates the export link on the **Trial Balance Summary** screen.



## Home Menu Resource Group

The **Home** menu is automatically displayed after logging into Nexsure. It can also be accessed at any time by clicking the **HOME** link on the **Utility** menu. Security permissions may be set for the **Home** menu Resource Group in the following areas:

### Actions

Assign user rights to view, add, modify and/or assign all actions. Actions are diaries used to follow-up on tasks that cannot be tracked on the other Home screens.

**Note:** Actions that are associated with restricted policies will only display for those staff members who are assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **ACTIONS** link on the **Home** menu.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Home Actions Summary** screen for the addition of Personal Actions.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon located on the **Home Actions Summary** screen.

**Assign** – Placing a check in the **Assign** check box allows Actions to be assigned to other User's.

| Actions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Assign | |

### Audit

Assign user rights to view all pending Audits.

**Note:** Audits on restricted policies will only display for staff members assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **AUDITS** link on the **Home** menu.

| Audit | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Binder Log

Assign user rights to view all open Binders, Bound and Future policies.

**Note:** Any bound policy that is restricted will only be available to staff members assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **BINDER LOG** link on the **Home** menu.


## Cancellation

Assign user rights to view all pending Cancellations.

**Note:** Pending cancellation for a policy that is restricted will display only for staff members assigned to the policy.

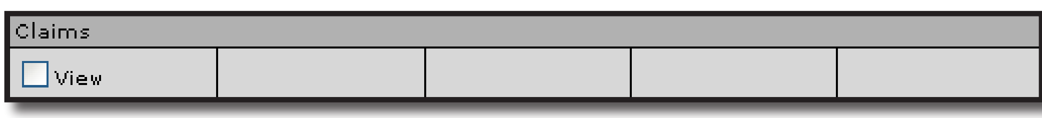
**View** – Placing a check in the **View** check box activates the **CANCELLATIONS** link on the **Home** menu.


## Claims

Assign user rights to view all pending Claims.

**Note:** Claims on a restricted policy will display only for staff members assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **CLAIMS** link on the **Home** menu.




## Deliveries

Assign user rights to see all Deliveries.

Note: The staff member must be assigned to a restricted policy to view the details of a delivery with attachments associated to the restricted policy.

**View** - Placing a check in the **View** check box activates the **DELIVERY** link on the **Home** menu.

**Allow Override** - Placing a check in the **Allow Override** check box allows a user to view anyone's deliveries on the **Home > DELIVERY** screen.

## Downloads

The **downloads** tab is found on the Home Menu after clicking Interface link.

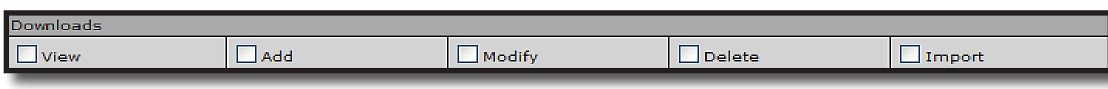
**View -** Placing a check in the **View** check box activates the **downloads** tab. Users without view rights will have the tab dimmed and not be able to access it. Interface **View** rights must be enabled under the Home menu Resource Group in order to gain access to the **downloads** tab.

**Add -** Placing a check in the **Add** check box controls the ability to process downloads.

**Modify -** Placing a check in the **Modify** check box enables setup on the Exchange Manager. Users without modify rights will have Exchange Manager disabled.

**Delete -** Placing a check in the **Delete** check box enables the **Remove** icon, **Remove** link and **Reject** link. Users without delete rights will have these disabled.

**Import -** Placing a check in the **Import** check box enables the **[Import Files]** link. Users without import rights will have the **[Import Files]** link disabled.




## Edit

Assign user rights to view all pending Edits.

> **Note:** Pending Edits to a restricted policy will display only for staff members assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **EDIT** link on the **Home** menu.


## Endorsement

Assign user rights to view all open Endorsements.

> **Note:** Endorsements to a restricted policy will display only for staff members assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **ENDORSEMENTS** link on the **Home** menu.

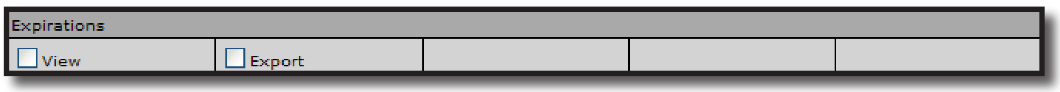
## Expirations

Assign user rights to view all in force policies.

> **Note:** Restricted policies will only display for staff members assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **EXPIRATIONS** link on the **Home** menu.

**Export** - Placing a check in the **Export** check box activates the **[Export Primary]** and **[Export Results]** links on the expirations screen from **HOME** > **EXPIRATIONS**.




## Interface

Assign user rights to view, add, modify, delete and/or import downloads using Interface.

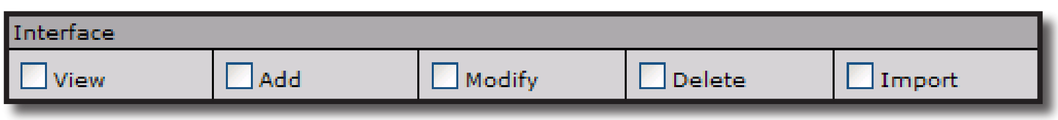
**View** – Placing a check in the **View** check box activates the **INTERFACE** link on the **Home** menu.

**Add** – Allows the addition of a download.

**Modify** – Placing a check in the **Modify** check box will allow access to **Setup**, **Move file after import** and **Initial Import** boxes through the **Import Files** link on the **interface** tab.

**Delete** - Allows the Removal of a download.

**Import** - Allows users to Import information from another source.




## Lockbox

The **lockbox** tab is found on the **Home** menu by clicking the **Interface** link.

**View -** Placing a check in the **View** check box controls access to the **lockbox** tab. Users without view rights will have this tab dimmed and not be able to access it.

**Modify -** Placing a check in the **Modify** check box controls the user's ability to select the **Details** icon on the lockbox summary screen. Users without **Modify** rights will have the **Details** icon disabled.

**Delete -** Placing a check in the **Delete** check box controls the ability to delete. Users without delete rights will have the **Remove** icon disabled.

**Post -** Placing a check in the **Post** check box enables the **Post** link. User without post rights will have the link disabled.

**Post Locked -** Placing a check in the **Post Locked** box enables the ability to post to a closed period. Users without rights to post locked will be prompted to modify the date booked to an open period.


## Marketing

Assign user rights to view all policies in Marketing.

> **Note:** Restricted marketing policies display only for staff members assigned to the marketing policy.

**View** – Placing a check in the **View** check box activates the **MARKETING** link on the **Home** menu.


## Opportunities

Assign user rights to view all pending Opportunities.

> **Note:** Opportunities that are restricted display only for staff members assigned to the restricted opportunity.

**View** – Placing a check in the **View** check box activates the **OPPORTUNITIES** link on the **Home** menu.


## Rating

The **rating** tab is found on the **Home** menu after clicking **Interface** link.

**View -** Placing a check in the **View** check box activates the **rating** tab. Users without **View** rights will have tab dimmed and not be able to access it. Interface **View** rights must be enabled under the **Home** menu Resource Group in order to gain access to the **rating** tab.

**Add -** Placing a check in the **Add** check box enables the **Bridge** link and **Accept** link. These links will not be active for users without **Add** security.

**Modify -** Placing a check in the **Modify** check box enables the **Details**  icon. Users without **Modify** rights will not have an active **Details** icon.

**Delete -** Placing a check in the **Delete** check box enables the **Remove** icon, **Remove** button and **Reject** button. Users without delete rights will have these disabled.

| Rating | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Invoice Resource Group

Access by clicking on either the **TRANSACTIONS** link on the **Client** menu and clicking on **Transactions Summary** or **Policy Underwriting** and clicking on the **transactions** tab. Security permissions may be set for the Invoice Resource Groups in the following areas:

### Agency Commissions

Agency commissions on un-posted invoices may be secured to enable View/Add/Modify and/or Delete.

**View** – Placing a check in the **View** check box allows the Agency commissions to be viewed on the invoices.

**Add** – Placing a check in the **Add** check box activates the **Add New Agency Commission** link on the un-posted invoices.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon allowing Agency Commissions to be changed on the un-posted invoice.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon allowing Agency Commissions to be deleted on the un-posted invoice.

| Agency Commissions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

### Date Booked

The invoice **Date Booked** is found by clicking the **TRANSACTIONS** link on the Client menu, clicking the **[Add New Invoice]** link, selecting policy, selecting **[Edit Invoice Header]** link.

**Modify** - Placing a check in the **Modify** check box controls the ability to view and edit the **Date Booked** on the invoice header.

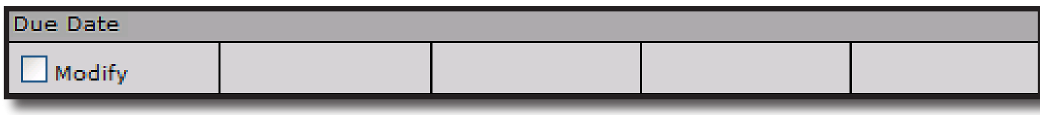
| Date Booked | | | | |
|---|---|---|---|---|
| ☐ Modify | | | | |

## Due Date

The invoice **Due Date** is found by clicking the **TRANSACTIONS** link on the **Client** menu, clicking the **[Add New Invoice]** link, selecting policy, selecting **[Edit Invoice Header]** link.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to modify the **Due Date**. Users without modify rights will not have an active **Due Date** field or **Calendar** icon.

> **Note**: Date displayed is based on department default for **Days until past due** and this date is determined by the effective date or date booked whichever is later.




## Fees

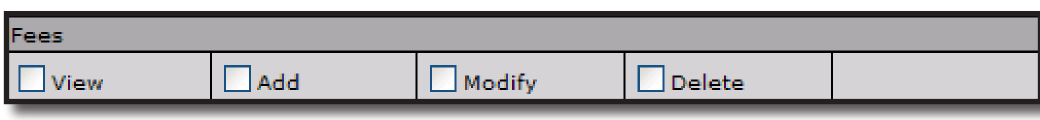
Fees may be secured to enable **View**/**Add**/**Modify** and/or **Delete** when invoicing.

**View** - Placing a check in the **View** check box allows Fees to be viewed on invoices.

**Add** - Placing a check in the **Add** check box activates the **Add New Fee** link on the un-posted invoice.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon allowing fees to be changed on the un-posted invoice.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon allowing fees to be deleted from the un-posted invoice.




## Invoice Detail

Invoices may be secured to enable **View** and/or **Add** on the transaction summary.

**View** - Placing a check in the **View** check box activates the **Details** icon to view a posted or un-posted invoice.

**Add** - Placing a check in the **Add** check box activates the **Add New Invoice** and **Add Master Invoice** links on the client and policy level transactions summary.


## Invoice Posting

Secures the Posting of Invoices.

**View** – Placing a check in the **View** check box allows the Invoice Posting details to be accessed on the Quick

Navigation links of the invoice.

**Add** – Not active at this time.


## Manual Bill

Invoice Bill Type of Manual Bill may be secured.

**Add** – Placing a check in the **Add** check box activates **Manual Bill** in the **Bill type Drop-down** box on the un-posted invoices header.


## Other Commissions

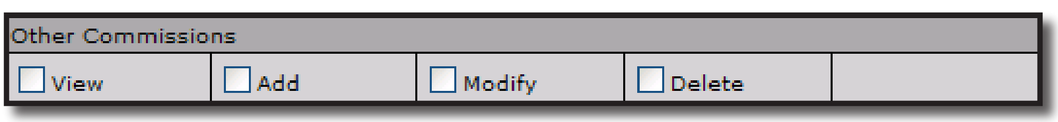
Other commissions may be secured to enable View/Add/Modify and/or Delete.

**View** - Placing a check in the **View** check box allows the Other commissions to be viewed on invoices.

**Add** - Placing a check in the **Add** check box activates the **Add New Other Commission** link on the un-posted invoice.

**Modify** - Placing a check in the **Modify** check box activates the **Details**  icon allowing the Other commissions to be changed on the un-posted invoice.

**Delete** - Placing a check in the **Delete** check box activates the **Remove**  icon allowing Other commissions to be deleted on the un-posted invoice.




## Payables

Secures the **payables** tab of all posted or un-posted Invoices.

**View** – Placing a check in the **View** check box allows the **payables** tab on the invoice to be accessed for viewing.

## Premium

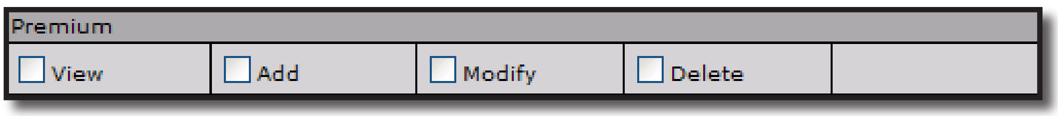
Assign user rights to View, Add, Modify and/or Delete Premiums on an invoice.

**View** - Placing a check in the **View** check box allows the Premium to be viewed.

**Add** - Placing a check in the **Add** check box activates the **Add New Premium** link allowing the addition of a Premium on an un-posted invoice.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon allowing the Premiums on an unposted invoice to be changed.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon allowing the Premiums on an un-posted invoice to be deleted.




## Prior to Effective Date

The invoice **Due Date** is found by clicking the **TRANSACTIONS** link on the Client menu, clicking the **[Add New Invoice]** link, selecting policy, selecting **[Edit Invoice Header]** link.

**Modify** - Pacing a check in the **Modify** check box grants the ability to change the invoice due date prior to the effective date. However, in order for this security to be fully functional also provide **Modify** rights for **Due Date**.


## Taxes

Assign user rights to **View**, **Add**, **Modify** and/or **Delete Taxes** on an invoice.

**View** - Placing a check in the **View** check box allows Taxes to be viewed.

**Add** - Placing a check in the **Add** check box activates the **Add New Tax** link allowing the addition of a Tax on an un-posted invoice.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon allowing the Taxes on an un-posted invoice to be changed.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon allowing the Taxes on an un-posted invoice to be deleted.

| Taxes | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

### Third Party Commisions

The **Third Party Commissions** is found on the **invoice** tab which is accessed by clicking the **TRANSACTIONS** link on the **Client** menu, clicking the **[Add New Invoice]** link, selecting policy.

**View** - Placing a check in the **View** check box activates the **Third Party Commissions** link and displays the third party commission detail. Users without **View** rights will not have access to the link or see third party commissions.

**Add** - Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without add rights will not see the **[Add New Third Party Commission]** link on the invoice.

**Modify** - Placing a check in the **Modify** check box enables the **Details** icon providing the user ability to update the invoice. Users without **Modify** rights will not be able to select the **Details** icon.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete a third party commission. Users without **Delete** rights will have the **Remove** icon disabled.

| Third Party Commissions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Invoicing Setup Resource Group

On the **Primary** menu, click the **ORGANIZATION** link, the **accounting** tab and then **invoicing setup** to access. Security permissions may be set for Invoicing Setup Resource Groups in the following areas:

### Fees

The setting up of fees may be secured to enable View/Add and/or Modify.

**View** – Placing a check in the **View** check box activates the **fees** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the Fees summary screen.

**Modify** – Placing a check in the **Modify** check box activates the save options on the fee details screen.

| Fees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

### Invoice

Invoice defaults are found in Nexsure under **ORGANIZATION > accounting > invoicing setup > invoice**

**defaults** and may be secured to enable the **View** and/or **Modify** options.

**View** – Placing a check in the **View** check box activates the **invoice defaults** tab.

**Modify** – Placing a check in the **Modify** check box activates the Update link on the **Invoice** default screen.


## Receive Payments

The **Receive Payments** defaults may be secured to enable **View** and/or **Modify**.

**View** – Placing a check in the **View** check box activates the **receive payments** tab.

**Modify** – Placing a check in the **Modify** check box activates the Update link **Receive Payments** screen.

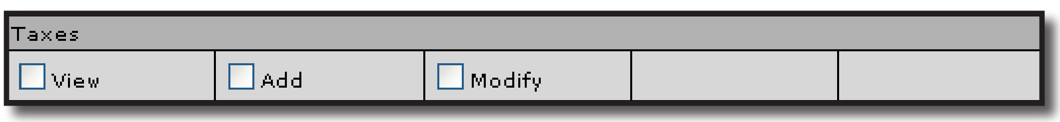

## Taxes

The setting up of **Taxes** may be secured to enable **View**, **Add** and/or **Modify**.

**View** – Placing a check in the **View** check box activates the **taxes** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the Taxes summary screen.

**Modify** – Placing a check in the **Modify** check box activates the save options on the Tax details screen.




# Management Reports Resource Group

## Management

After clicking **REPORTS** on the **Primary** menu, click the **Reports** link to access reports. Granting security to Management Reports provides access to the Report Type Management.

**View** - Placing a check in the **View** check box displays the Report Type Management for selection and provides access to reports available in the Management category.

**Add** - Placing a check in the **Add** check box activates the **New Report Criteria** link on the **report summary** tab.

**Delete** - Placing a check mark in the **Delete** check box activates the **Remove** icon in the **report summary** tab.


> **Note:** To access the reports as this level, **View** rights must also be granted for reports under the Resource Groups of the **Primary** menu.

## Marketing Resource Group

Marketing is on the **Home** and **Client** menus. Clicking **MARKETING** on the **Home** menu displays all marketing policies. To access **MARKETING** on the **Client** menu click **SEARCH**, on the **Primary** menu, choose **Client** from the **Entity Drop-down** check box and click the **Details** icon of the appropriate client. Security permissions may be set for the Marketing Resource Groups in the following areas:

### Assignment

To access click the **Details** icon of a client with a marketing application. Click the **MARKETING** link on the **Client** menu, then the **Details** icon of a marketing submission and then the **assignment** tab. Assign user rights to view and/or modify the assignment.

> **Note:** Details of a restricted marketing policy can only be accessed by people assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **assignment** tab at **MARKETING** > **underwriting** level.

**Modify** - Placing a check in the **Modify** check box activates the **Save Changes** link on the **MARKETING** > **underwriting** screen.


### Attachments

To access click the **Details** icon of a client with a marketing application. Click the **MARKETING** link on the **Client** menu, then the **Details** icon of a marketing submission and then the **attachments** tab. Assign user rights to view, add, modify and/or delete attachments for a marketing application.

> **Note:** Details of a restricted marketing policy can only be accessed by people assigned to the restricted policy.

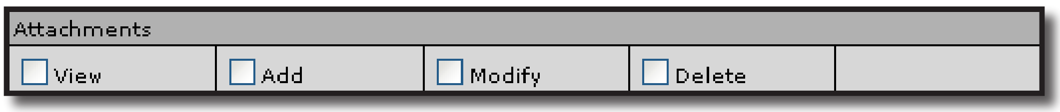
**View** – Placing a check in the **View** check box activates the **attachments** tab at **MARKETING** > **underwriting** level.

**Add** – Placing a check in the **Add** check box activates the Add New link on the **Attachments Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Attachments Summary** screen.

> **Note:** Attachments associated to a restricted policy can only be accessed by people assigned to the restricted policy.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Attachments Summary** screen.




## Coverage Template

Access to the **Coverage Templates** are found by clicking **MARKETING** link on the **Client** menu, click the **Details** icon to open the **underwriting** screen. The **[Templates]** link is only available in marketing by opening the application on the **navigatio**n tab on the **underwriting** screen. Assign security settings to allow the viewing, adding and removal of templates.

> **Note:** Details of a restricted marketing policy can only be accessed by people assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **[Templates]** link at **MARKETING** > **underwriting** level.

**Add** – Placing a check in the **Add** check box activates the **Add New** link to add new coverage templates.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon to allow removal of coverage templates.


## Deliveries

To access, click the **Details** icon of a client with a marketing record. Click the **MARKETING** link on the **Client** menu, then the details of a marketing record and then the delivery tab. Assign user rights to view deliveries.

**View** - Placing a check in the **View** check box activates the **deliveries** tab of the marketing record.

## History

To access, click the **Details** icon of a client with a marketing application. Click the **MARKETING** link on the **Client** menu, then the **Details** icon of a marketing record and then the **history** tab. Assign user rights to view and/or delete History for a Client.

**Note:** Details of a restricted marketing record can only be accessed by people assigned to the restricted policy.

**View** – Placing a check in the **View** check box activates the **history** tab at **MARKETING** > **underwriting** level.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **History Summary** screen.

| History | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Delete | | | |

## Market Analysis

To access, click the **Details** icon of a client with a marketing application. Click the **MARKETING** link on the **Client** menu, then the **marketing** tab. Assign user rights to view, modify, delete and/or export a **Market Analysis**.

**Note:** Details of a restricted marketing policy can only be accessed by people assigned to the restricted policy.

**View** - Placing a check in the **View** check box activates the marketing tab at **MARKETING** level.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the **Market Analysis Summary** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Market Analysis Summary** screen.

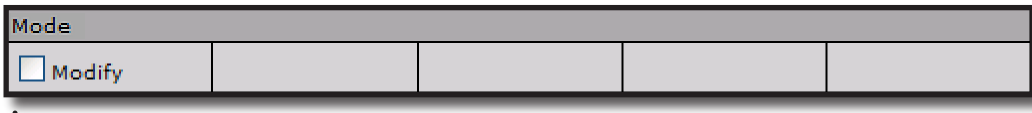
**Export** - Placing a check in the **Export** check box activates the **Export** link on the navigation toolbar of a Market Analysis.

| Market Analysis | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | ☐ Delete | ☐ Export | |

## Mode

When a marketing record has a **Mode** of **New**, the **Mode** may be changed to **New on Exisiting**.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to change the marketing mode on marketing records with a mode of New. Users without modify rights will not have the ability to change the **Marketing** mode.




## Policies

To access click the **Details** icon of a client with a marketing application. Click the **MARKETING** link on the **Client** menu, then the **Details** icon of a marketing submission. Assign user rights to view, add, modify, delete and/or in force a marketing policy for a client.

**Note:** Details of a restricted marketing policy can only be accessed by people assigned to the restricted policy.

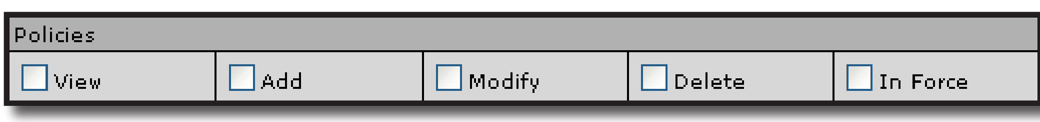
**View** – Placing a check in the **View** check box activates the **Details** icon on the **Marketing Summary** screen.

**Add** – Placing a check in the **Add** check box activates the **Add Application** link on the **MARKETING** > **underwriting** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Save Changes** link on the **MARKETING** > **underwriting** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the Marketing Summary screen.

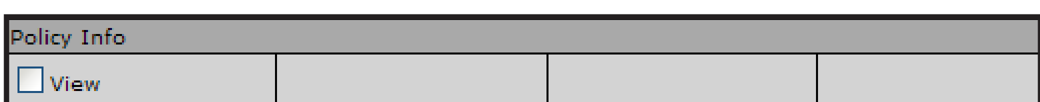
**In force** – Placing a check in the **In Force** check box activates the **In Force** link on the **MARKETING** > **underwriting** navigation toolbar.




## Policy Info

To access, click the **Details** icon of a client with a marketing record. Click the **MARKETING** link on the **Client** menu, the **Details** icon of a marketing submission, then the **policy info** tab. Assign user rights to view **policy info**.

**View** - Placing a check in the **View** check box activates the **policy info** tab of a marketing record.



### Rating

To access click the **Details** icon of a client with a marketing application. Click the **MARKETING** link on the **Client** menu, then the **Details** icon of a marketing submission, then click the **Import** link found in the navigation toolbar under the policy header. Assign user rights to import and/or export rates from other rating programs.

> **Note:** Details of a restricted marketing policy can only be accessed by people assigned to the restricted policy.

**Import** – Placing a check in the **Import** check box allows rates to be imported into Marketing from another source by activating the **Import** link.

**Export** - Placing a check in the **Export** check box allows rates from Marketing to be exported.


## Marketing Reports Resource Group

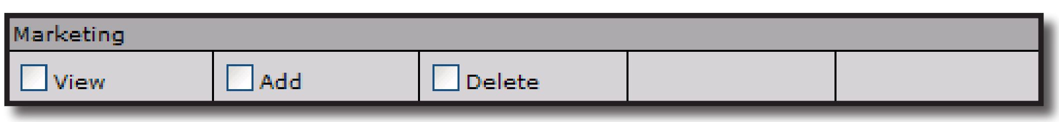
### Marketing

After clicking **REPORTS** on the **Primary** menu, click the **Reports** link to access reports. Granting security to Marketing Reports provides access to the Report Type Marketing.

**View** - Placing a check in the **View** check box displays the Report Type Marketing for selection and provides access to reports available in the Marketing category.

**Add** - Placing a check in the **Add** check box activates the **New Report Criteria** link on the **report summary** tab.

**Delete** - Placing a check mark in the **Delete** check box activates the **Remove** icon in the **report summary** tab.




> **Note:** To access the Reports as this level, View rights must also be granted for Reports under the Resource Group of **Primary** menu.

## Opportunity Reports Resource Group

### Opportunities

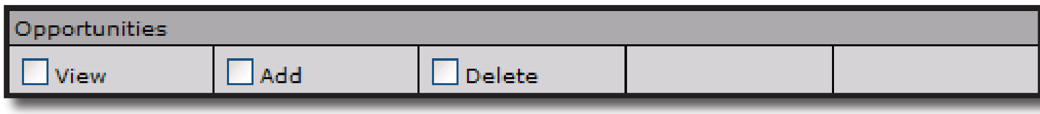
After clicking **REPORTS** on the **Primary** menu, click the **Reports** link to access reports. Granting security to

Opportunity Reports provides access to the Report Type Opportunities.

**View** - Placing a check in the **View** check box displays the Report Type Opportunities for selection and provides access to reports available in the Opportunities category.

**Add** - Placing a check in the **Add** check box activates the **New Report Criteria** link on the **report summary** tab.

**Delete** - Placing a check mark in the **Delete** check box activates the **Remove** icon in the **report summary** tab.




**Note:** To access the reports as this level, View rights must also be granted for reports under the Resource Group of **Primary** menu.

## Organization Resource Group

Access Organization by clicking the **ORGANIZATION** link on the **Primary** menu. Security permissions may be set for the Organization Resource Group in the following areas:

### Card File

Assign user rights to modify the Organization **Card File**.

**Modify** - Placing a check in the **Modify** check box allows the Organization **Card File** to be changed.


### Employees

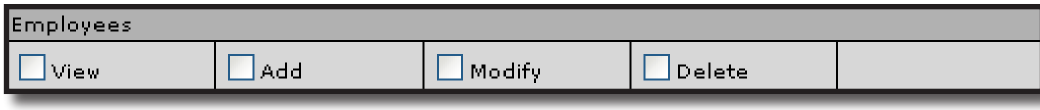
From the **ORGANIZATION** > **card file** tab, click the **employees** tab. Assign user rights to view, add, modify and/or delete organization employees.

**View** – Placing a check in the **View** check box activates the Organization **employees** tab.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the **Employee Summary** screen.

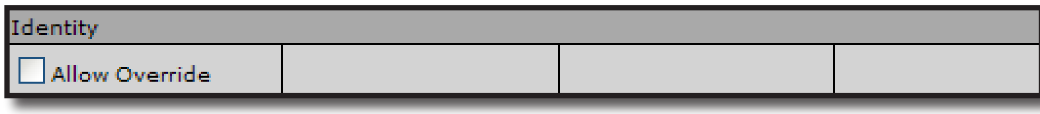
**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Employee Summary** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Deactivate** icon on the **Employee Summary** screen.




## Identity

**Allow Override**- Placing a check in the **Allow** box allows a staff member to access and modify other staff member's **identity** tabs at the organization level if they have access.




## Locations

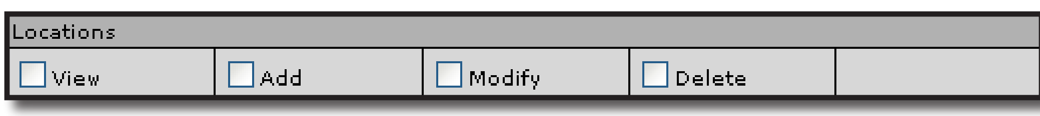
From the **ORGANIZATION** > **card file** tab, click the **locations** tab. Assign user rights to view, add, modify and/or delete an Organization's location.

**View** – Placing a check in the **View** check box activates the Organization **locations** tab.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the **Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Locations Summary** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Locations Summary** screen.




## Security

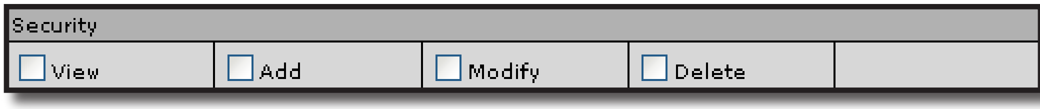
From the **ORGANIZATION** > **card file** tab, click the **employees** tab, then the Security tab. Assign user rights to view, add, modify and/or delete an Organization's Employees Security.

**View** – Placing a check in the **View** check box activates the **Employee Security** tab.

**Add** – Placing a check in the **Add** check box activates the **Click here to make this contact a user** link at the bottom of an employee detail screen to add new security.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Employee Security** detail screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on **security** tab **User Accounts** portion of the screen.



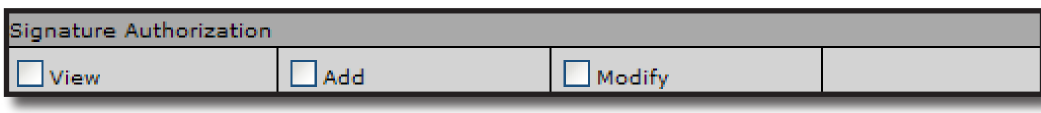

### Signature Authorization

Signature authorizations are accessed from the signature tab of the employee identity. When the Organization card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the **identity** tab then the **signature** tab. Permissions are available to control access to the **signature authorization** tab as well as the control authorizations and Private functions.

**View** - Placing a check in the **View** check box allows the **signature authorization** tab to be selected.

**Add** - Placing a check in the **Add** check box activates the **[control authorization]** link.

**Modify** - Placing a check in the **Modify** check box allows access to change the **Private** check box on the signature file as well as the **Update** option in the navigation toolbar on the **signature authorizations** tab. Staff members with modify rights will be able to add and remove authorized staff members and will also need **View** and **Add** rights.




## Organization Menu Resource Group

The **Organization** menu is displayed after clicking on **ORGANIZATION** link located on the **Primary** menu. Security permissions may be set for the **Organization** menu Resource Groups in the following areas:

### All Employees

Assign user rights to view and/or modify the Organization's employees.

**View** – Placing a check in the **View** check box activates the **All Employees** link to enable viewing all employees logged into the Organization.

**Modify** – Placing a check in the **Modify** check box activates the employee **Details** icon at the Organization level.


### All Locations

Assign user rights to view all the Organizations Locations.

**View** – Placing a check in the **View** check box activates the **locations** tab for the Organization.


## Organization Reports Resource Group

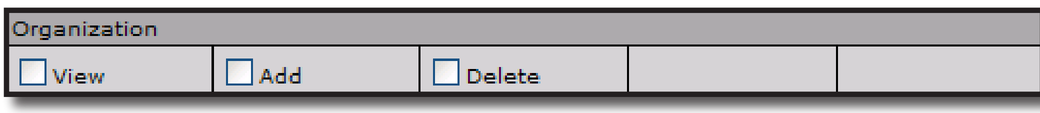
### Organization

After clicking **REPORTS** on the **Primary** menu, click the **Reports** link to access reports. Granting security to Organization Reports provides access to the Report Type Organization.

**View** - Placing a check in the **View** check box displays the Report Type Organization for selection and provides access to reports available in the Organization category.

**Add** - Placing a check in the **Add** check box activates the **New Report Criteria** link on the **report summary** tab.

**Delete** - Placing a check mark in the Delete check box activates the Remove Icon in the **report summary** tab.




**Note:** To access the Reports as this level, View rights must also be granted for Reports under the Resource Group of **Primary** menu.

## Policy Resource Group

From **SEARCH**, on the **Primary** menu, choose **Client** from the **Entity Drop-down** check box. Click the **Details** icon of the client and click **POLICIES** on the **Client** menu (third menu). Available policies for the Client display. Click the **Details** icon of the appropriate policy.

**Note:** Details of a restricted policy can only be accessed by people assigned to the restricted policy.

Security permissions may be set for the Policy Resource Groups in the following areas:

### Assignment

Assign user rights to view and/or modify the Assignment for a client.

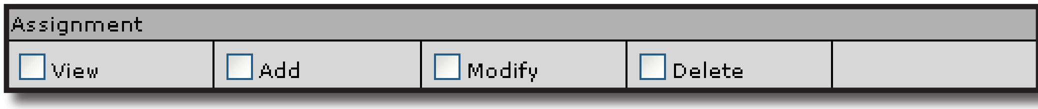
**View** – Placing a check in the **View** check box activates the **assignments** tab.

**Add** – Placing a check in the **Add** check box activates the **Add Assignment** and **Add Retail Agent** links.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon located on the **Assignment Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located on the **Assignment**

**Summary** screen.




## Attachments

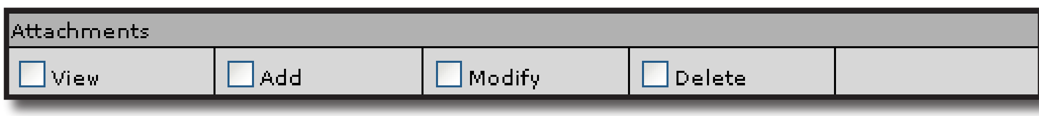
Assign user rights to view, add, modify and/or delete documents and/or photographs at Policy Underwriting level.

**View** – Placing a check in the **View** check box activates the Attachments tab at Policy Underwriting level.

**Add** – Placing a check in the **Add** check box activates the Add New link on the **Attachments Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Attachments Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Attachments Summary** screen.



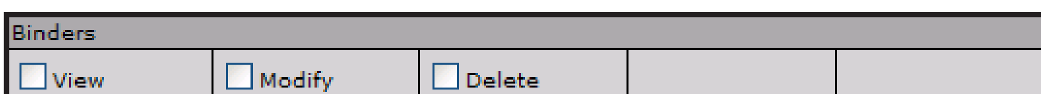

## Binders

After accessing the **POLICIES** link on the **Client** menu, click the **binders** tab to view binders.

**View** - Placing a check in the **View** check box activates the **binder** tab.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the binder summary screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on un-posted binders.




## Certificate Holder

After accessing the **POLICIES** link, click the **certificates** tab, select a certificate by clicking the **Details** icon to bring up the certificate and click the **certificate holder** tab.

**View** – Placing a check in the **View** check box activates the **certificate holder** tab.

**Add** – Placing a check in the **Add** check box activates the **Certificate Holder Selections** to add new holders.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **certificate holder**

tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **certificate holder** tab.

| Certificate Holder | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Certificates

After accessing the **POLICIES** link, click the **certificates** tab; select a certificate by clicking the **Details** icon to bring up the certificate. Assign user rights to view, add, modify and/or delete certificates.

**View** - Placing a check in the **View** check box activates the **certificates** tab at **Client** menu > **POLICIES** level.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the **certificate** tab in the **Coverage Summary** section of an un-posted certificate.

**Modify** - Placing a check in the **Modify** check box activates the **Save Changes** link on the navigation toolbar of an un-posted certificate.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Certificates Summary** screen and **Coverage Summary** section of an un-posted certificate.

| Certificates | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Classified

After accessing the **POLICIES** link on the **Client** menu, click the **Details** icon of a policy. Click the policy's **classifieds** tab, click the **classifieds** tab. Assign user rights to access policy level classifieds.

**View** - Placing a check in the **View** check box activates the **classifieds** tab at policy level.

| Classified | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## History

After accessing the **POLICIES** link on the **Client** menu, click the **history** tab link or also access history from the **Policy Underwriting** screen. Assign user rights to view and/or delete client history.

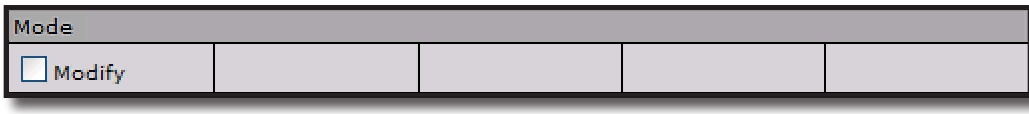
**View** – Placing a check in the **View** check box activates the **history** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **History Summary** screen.


## Mode

After selecting the policy to renew, if the policy has a **Mode** of **New**, the mode may be changed on the line of business selection screen or on the future policies underwriting screen.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to change the policy mode on policy renewals with a **Mode** of **New**. Users without modify rights will not have the ability to change the policy mode.




## Policies

After accessing the **POLICIES** link on the **Client** menu, the **Policies Summary** screen is displayed. Assign user rights to view, add, delete and/or in force policies.

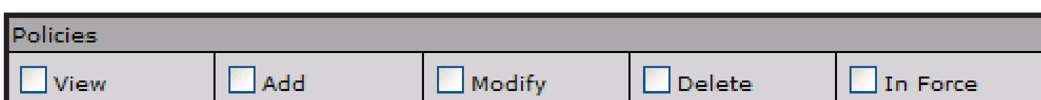
**View** – Placing a check in the **View** check box activates the **Details** icon on the **Policies Summary** screen.

**Add** – Placing a check in the **Add** check box activates the **Add Application** link on the policy's **underwriting** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Save Changes** link on the policy's **underwriting** navigation toolbar.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Policies Summary** screen.

**In force** – Placing a check in the **In Force** check box activates the **In Force** link on the policy's **underwriting** navigation toolbar.




## Policy Info

After accessing the Policy Underwriting screen, click the **policy info** tab. Assign user rights to view and modify the premium information for policies.

**View** – Placing a check in the **View** check box activates the **policy info** tab at Policy Underwriting level.

## Policy Info Agency Commission

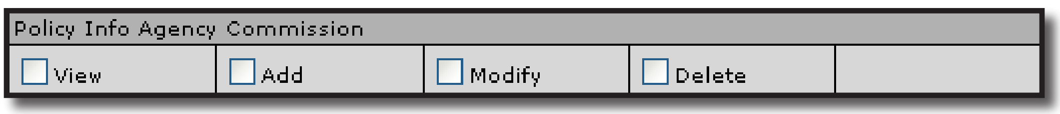
After accessing the Policy Underwriting screen, click the **policy info** tab. Assign user rights to view, add, modify and/or delete the policy's Agency Commission.

**View** – Placing a check in the **View** check box activates the Policy Info Agency Commission detail on the **policy info** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Agency Commission** link on the **policy info** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon for the Agency Commission on the **policy info** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon for the Agency Commission on the **policy info** tab.




## Policy Info Fees

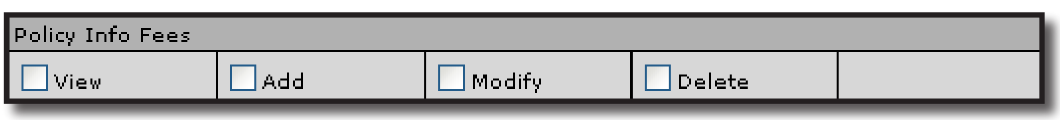
After accessing the Policy Underwriting screen, click the **policy info** tab. Assign user rights to view, add, modify and/or Delete the policy's Policy Fees.

**View** – Placing a check in the **View** check box activates the Policy Info Policy Fees detail on the **policy info** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Fee** link on the **policy info** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon for the Policy Fees on the **policy info** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon for the Policy Fees on the **policy info** tab.




## Policy Info Other Commission

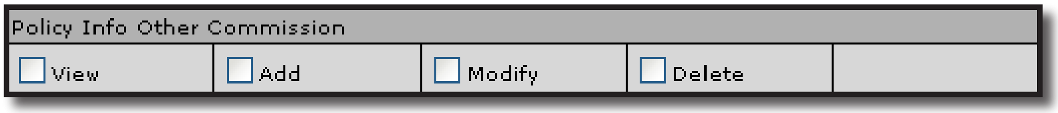
After accessing the Policy Underwriting screen, click the **policy info** tab. Assign user rights to view, add, modify and/or Delete the policy's Other Commission.

**View** – Placing a check in the **View** check box activates the Policy Info Other Commission detail on the **policy info** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Other Commission** link on the **policy info** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon for the Other Commission on the **policy info** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon for the Other Commission on the **policy info** tab.




## Policy Info Premium

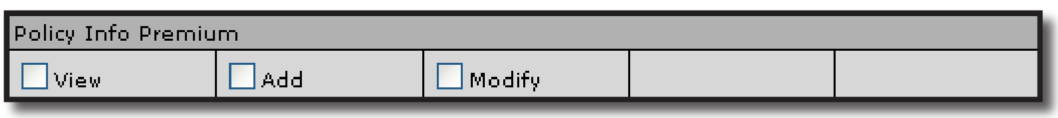
After accessing the Policy Underwriting screen, click the **policy info** tab. Assign user rights to view, add, modify and/or Delete the policy's Premium.

**View** – Placing a check in the **View** check box activates the Policy Info Premium detail on the **policy info** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Premium** link on the **policy info** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon for the Premium on the **policy info** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon for the Premium on the **policy info** tab.




## Policy Info Taxes

After accessing the **Policy Underwriting** screen, click the **policy info** tab. Assign user rights to view, add, modify and/or delete the policy's Taxes.

**View** – Placing a check in the **View** check box activates the Policy Info Taxes detail on the **policy info** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Taxes** link on the **policy info** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon for the Taxes on the **policy info** tab.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon for the Taxes on the **policy info** tab.

## Policy Info Third Party Commisions

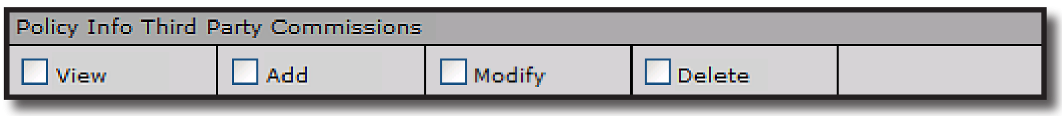
The **Third Party Commissions** is found on the Policy Info screen which is accessed by clicking the **Details** icon on the policy and then the **policy info** tab.

**View** – Placing a check in the **View** check box activates the **Third Party Commissions** link and displays the third party commission detail. Users without **View** rights will not have access to the link or see third party commissions.

**Add** – Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New Third Party Commission]** link on the Policy Info screen and invoice.

**Modify** – Placing a check in the **Modify** check box enables the **Details** icon providing the user's ability to update the Policy Info screen. Users without **Modify** rights will not be able to select the **Details** icon.

**Delete** – Placing a check in the **Delete** check box controls the ability to delete a third party commission. Users without **Delete** rights will have the **Remove** icon disabled.




## Policy Info Totals

After accessing the Policy Underwriting screen, click the **policy info** tab. Assign user rights to view the Policy Info Totals.

**View** – Placing a check in the **View** check box activates the Policy Info Totals detail on the **policy info** tab.


## Qualifications

After accessing a client, click the **OPPORTUNITIES** link on the **Client** menu to display the **Summary** screen, clicking the **Details** icon of an opportunity brings up the **qualification** detail. Assign user rights to view, add, modify and/or delete the qualifications for a Client.

**View** – Placing a check in the **View** check box activates the **Details** icon on the **Opportunities Summary** screen.

**Add** - Placing a check in the **Add** check box activates the **Add New** contacts link on the **qualifications** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Save Changes** link on the **qualifications** tab.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Qualifications** screen for contacts.

| Qualifications | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Rating

Click the **Import** link found in the navigation toolbar, under the policy header. Assign user rights to import and/or export Rates from other rating programs.

**Import** – Allows Rates to be imported into a policy from another source.

**Export** - Allows Rates at Policy level to be exported.

| Rating | | | | |
|---|---|---|---|---|
| ☐ Import | ☐ Export | | | |

## Transactions

The **transactions** tab is found after clicking the **Details** icon of a client's policy on the **Policies** link located on the **Client** menu. Assign user rights to view, add, modify and/or delete transactions.

**View** – Placing a check in the **View** check box activates the **transactions** tab at Policy Underwriting level.

**Add** – Placing a check in the **Add** check box activates the **Add New Invoice** and **Add New Master Invoice** links on the **transactions** tab.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Transaction Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Transactions Summary** screen and the **Abort** link on the Transactions detail.

**Post** - Placing a check in the **Post** check box activates the **Post Now** link on an invoice.

**Post Locked** - Placing a check in the **Post** check box allows invoices to post to a locked accounting period.

| Transactions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Post |
| ☐ Post Locked | | | | |

# Policy Reports Resource Group

## Policies

After clicking **REPORTS** on the **Primary** menu, click the **Reports** link to access reports. Granting security to Policy Reports provides access to the Report Type Policies.

**View** - Placing a check in the **View** check box displays the Report Type **Policies** for selection and provides access to reports available in the Policies category.

**Add** - Placing a check in the **Add** check box activates the **New Report Criteria** link on the **report summary** tab.

**Delete** - Placing a check mark in the **Delete** check box activates the **Remove** icon in the **report summary** tab.


**Note:** To access the Reports as this level, View rights must also be granted for Reports under the Resource Group of the **Primary** menu.

# Premium Finance Co Resource Group

Click **SEARCH**, on the **Primary** menu, and select **Premium Finance Company** from the **Entity Drop-down** check box. Security permissions may be set for a Premium Finance Company Resource Groups in the following areas:

## Contacts

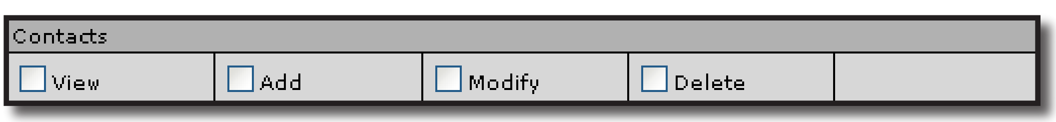
The **contacts** tab is found after clicking the **Details** icon of a Premium Finance Company. Assign user rights to view, add, modify and/or delete contacts for the Premium Finance Company.

**View** – Placing a check in the **View** check box activates the **contacts** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **contacts** Tab.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the **Contacts** detail screen.

**Delete** – Placing a check in the **View** check box activates the **Remove** icon on the **Contact Summary** screen.




## Locations

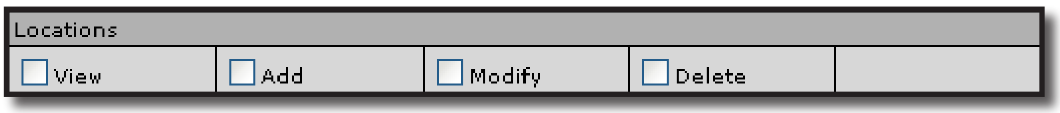
The **locations** tab is found after clicking the **Details** icon of the appropriate Premium Finance Company. Assign user rights to view, add, modify and/or delete locations for the Premium Finance Company.

**View** – Placing a check in the **View** check box activates the Premium Finance Company **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link located in the upper right of the **Locations Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located in the **Locations Summary** screen.




## Search

Search is found on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import Premium Finance Companies.

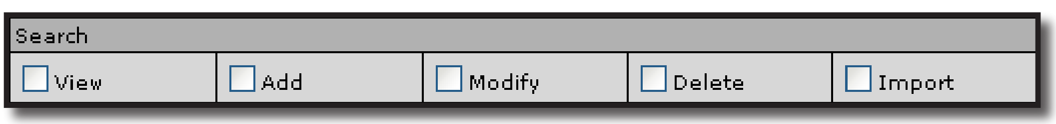
**View** - Placing a check in the **View** check box activates the display of Premium Finance Company in the Entity drop-down check box.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the upper right of the Search screen.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the Search screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon in the Search screen.

**Import** - Placing a check in the **Import** check box allows the user to import Premium Finance Companies from another source.




## Primary Menu Resource Group

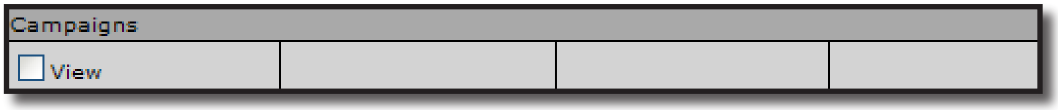
The **Primary** menu is the middle menu. Security permissions may be set for the **Primary** menu Resource Groups in the following areas:

**View** – Placing a check mark in the **View** check box activates the **ORGANIZATION** link on the **Primary** menu.

## Campaigns

Assign user rights to access **Campaign Management**.

**View** - Placing a check mark in the **View** check box activates the **CAMPAIGNS** link on the **Primary** menu and displays the **campaigns** tab.




## eLinks

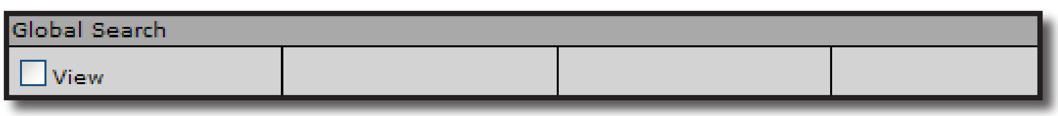
Assign user rights to access **eLinks**. The **eLinks** link is found on the **Primary** menu which is accessed by clicking **eLinks** (or **Alias** name entered in security).

**View** - Placing a check mark in the **View** check box activates the **eLinks** link on the **Primary** menu. Users without **View** rights will not have the link available.


## Global Search

Assign user rights to access global client search function.

**View** - Placing a check mark in the **View** check box activates the **Global Search** icon on the **Primary** menu.




## Organization

Assign user rights to access the **organization** tab.

## Reports

Assign user rights to access the reports menu.

**View** – Placing a check mark in the **View** check box activates the **REPORTS** link on the **Primary** menu.

### Search

Assign user rights to access entity search.

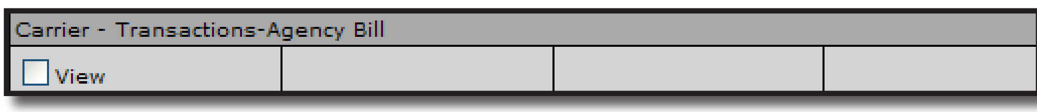
**View** – Placing a check mark in the **View** check box activates the **SEARCH** link on the **Primary** menu.


## Reconciliation Resource Group

The **reconciliation** tab is found in the territory's **accounting** > **transactions** tab. Access the territory from **ORGANIZATION** on the **Primary** menu. Security permissions may be set to secure access to transactions when processing reconciliations.

### Carrier - Transactions-Agency Bill

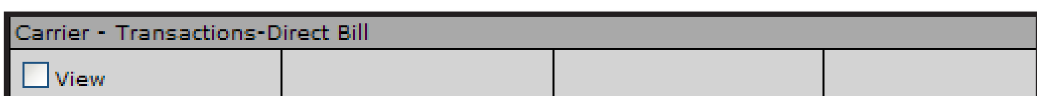
**View** - Placing a check in the **View** check box activates the **Transactions - Agency Bill** link in the **Quick Navigation** panel of a Carrier Reconciliation.




**Note:** To grant access to modify un-posted invoices for fees, taxes, agency commissions, premiums, and other commissions, make sure to grant user access to the Resource Group of Invoice for these areas.

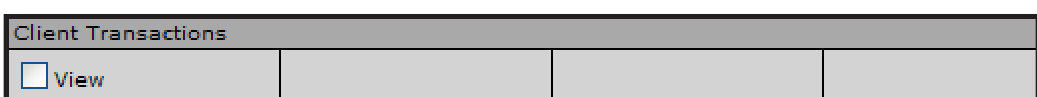
### Carrier - Transactions-Direct Bill

**View** - Placing a check in the **View** check box activates the **Transactions - Direct Bill**, **Statement Entry** and **Unposted Invoices** links in the **Quick Navigation** panel of a Carrier Reconciliation.



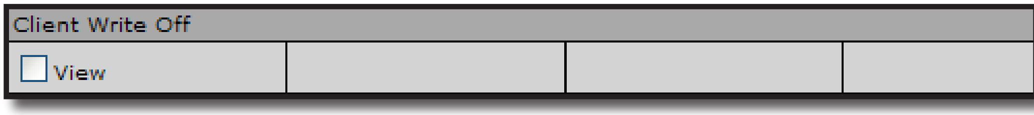

### Client Transactions

**View** - Placing a check in the **View** check box activates the **Transaction Activity** link in the **Quick Navigation** panel of a Client Reconciliation.



## Client Write Off

View - Placing a check in the **View** check box activates the **Balance Write Off** link in the **Quick Navigation** panel of a Client Reconciliation.




**Note**: Staff members must have View rights for both **Client Transactions** (Transaction Activity) and **Client Write Off** (Balance Write Off) to be able to view the **Association Summary** screen on the **reconciliation** tab.

## Region Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **regions** tab. Click the **Details** icon of a region. Security permissions may be set for the Region Resource Groups in the following areas:

### Accounting

The **accounting** tab allows ability to view and modify accounting options. After accessing the **ORGANIZATION** link, click the **regions** tab and click on the **Details** icon of the region.

**View** – Placing a check in the **View** check box activates the **accounting** tab at Region level.


### Employees

From the Region **card file** tab, click the **employees** tab. Assign user rights to view, add, modify and/or delete Region Employees.

**View** – Placing a check in the **View** check box activates the Region **employees** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Employee Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Deactivate** icon on the **Employees Summary** screen.

## Identity

When the region's card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the **identity** tab. Add a Photo, Salutation or Signature to a Branch Employee's Identity.

**Allow Override** - Placing a check in the **Allow Override** check box allows a staff member to access and modify other staff member's **identity** tabs at the Region where they have access.


## Locations

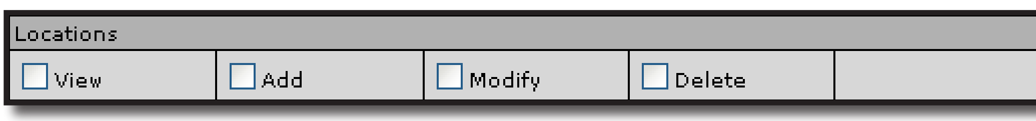
From the Region **card file** tab, click the **locations** tab. Assign user rights to view, add, modify and/or delete Region locations.

**View** – Placing a check in the **View** check box activates the Region **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar on the **Region Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Location Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Region Locations Summary** screen.




## Names

Assign user rights to view, add, modify and/or delete Regions.

**View** – Placing a check in the **View** check box activates the **region** tab to enable the Regions to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar on the **Region Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Region Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Region Summary** screen.

## Security

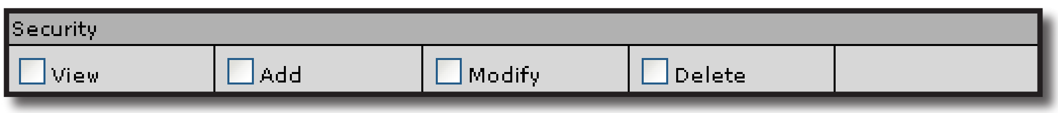
From the Region **card file** tab, click the **employees** tab and click the **security** tab. Assign user rights to view, add, modify and/or delete a Region's Employees Security.

**View** – Placing a check in the **View** check box activates the **employee security** tab to enable the employee's security to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Click here to make this contact a user** link at the bottom of an **Employee Detail** screen to add new security.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Region Employee Security Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on **security** tab **User Accounts** portion of the screen.



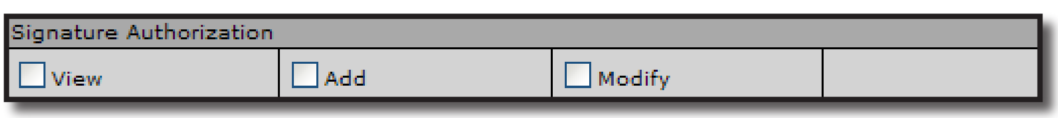

## Signature Authorizations

Signature authorizations are accessed from the **signature** tab of the employee identity. When the Region card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the identity tab then the **signature** tab. Permissions are available to control access to the **signature authorization** tab as well as the control authorizations and Private functions.

**View** - Placing a check in the **View** check box allows the **signature authorization** tab to be selected.

**Add** - Placing a check in the **Add** check box activates the **[control authorization]** link.

**Modify** - Placing a check in the **Modify** check box allows access to change the **Private** check box on the signature file as well as the **Update** option in the navigation toolbar on the **signature authorizations** tab. Staff members with modify rights will be able to add and remove authorized staff members and will also need **View** and **Add** rights.




## Reports Menu Resource Group

From **REPORTS**, on the **Primary** menu, click the **Global Activity** link. Security permissions may be set for the Global Activity in the following areas:

**View** – Placing a check in the **View** check box activates the **Global Activity** link on the **Reports** menu allowing all report activity to be viewed.

**Allow Override** - Placing a check in the **Allow Override** check box allows the user to view reports generated by other users.


## Retail Agent Resource Group

Click **Search**, on the **Primary** menu, and select **Retail Agent** from the **Entity Drop-down** check box. Security permissions may be set for the Retail Agent Resource Groups in the following areas:

### Assignments

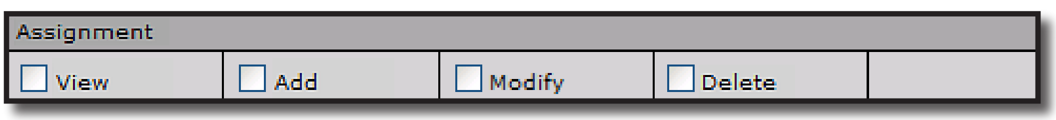
The **assignment** tab is found after clicking the **Details** icon of a Retail Agent to display the card file.

**View** - Placing a check in the **View** check box controls access to the **retail agent assignment** tab. Users without **View** rights will have this tab dimmed and not be able to access it.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to select save after selecting the **Details** icon from the retail agent assignment summary. Users without **Modify** rights will have the **Save** link dimmed.

**Add** - Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the assignment summary screen.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete a non-primary retail agent assignment. Users without **Delete** rights will have the **Remove** icon disabled.




### Attachments

The **attachments** tab is found after clicking the agent **ATTACHMENTS** link on the **Retail Agent** menu.

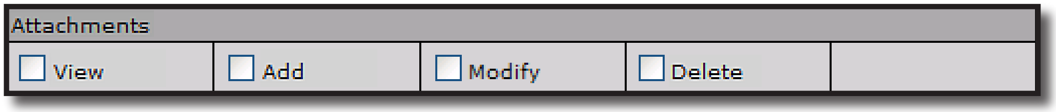
**View** - Placing a check in the **View** check box controls access to the retail agent **Attachments** menu. Users without **View** rights will not see this menu item in the menu bar.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to select **OK** from within the document type icon pop-up screen. Users without **Modify** rights will not be able to save changes in the attachment information pop-up.

**Add** - Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the attachment summary screen.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete an attachment. Users without

**Delete** rights will have the **Remove** icon disabled.




## Classified

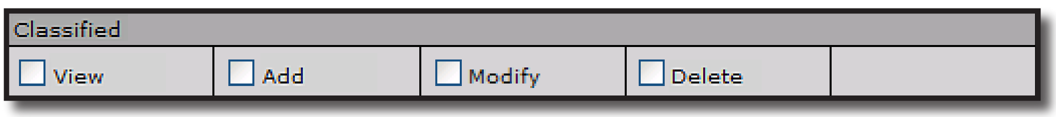
The **classified** tab is found after clicking the **Details** icon of a Retail Agent to display the card file.

**View** - Placing a check in the **View** check box controls access to the **retail agent classifieds** tab. Users without **View** rights will have this tab dimmed and not be able to access it.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to select **Update** from within the classified detail. Users without **Modify** rights will not see the **Update** link.

**Add** - Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the classified summary screen.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete a classified. Users without **Delete** rights will have the **Remove** icon disabled.




## Commission

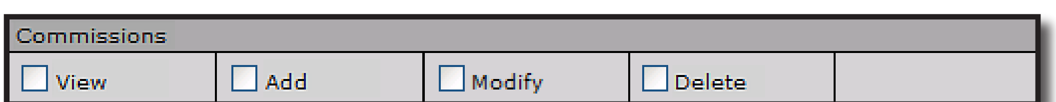
The **commissions** tab is found after clicking the **Details** icon of a **Retail Agent** to display the card file.

**View** - Placing a check in the **View** check box controls access to the r**etail agent commissions** tab. Users without **View** rights will have this tab dimmed and not be able to access it.

**Add** - Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the commission summary screen.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to select **Update** from within the commission detail. Users without **Modify** rights will not see the **Update** link.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete a commission. Users without **Delete** rights will have the **Remove** icon disabled.




## Contracts

The **contacts** tab is found after clicking the **Details** icon a Retail Agent to display the card file.

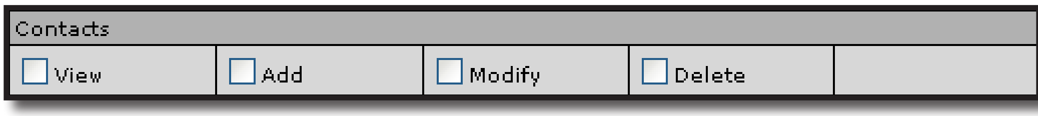
**View** - Placing a check in the **View** check box controls access to the retail agent **contracts** tab. Users without

**View** rights will have this tab dimmed and not be able to access it.

**Add** - Placing a check in the **Add** check box controls the user's access to the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the contracts summary screen.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to select **Update** from within the contract detail. Users without **Modify** rights will not see the update link.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete a contract. Users without **Delete** rights will have the **Remove** icon disabled.



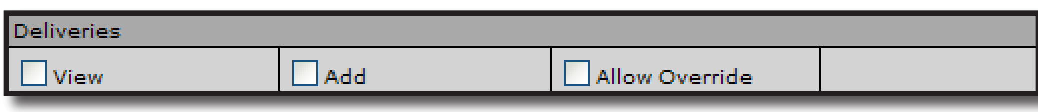

## Deliveries

The **delivery** tab is found after accessing **DELIVERY** on the **Retail Agent** menu.

**View** - Placing a check in the **View** check box activates the **DELIVERY** link on the **Retail Agent** menu.

**Add** - Placing a check in the **Add** check box activates the **[Add New]** link on the **delivery** tab from the **Retail Agent** menu.

**Allow Override** - Placing a check in the **Allow Override** check box allows the staff member to view all deliveries associated to the retail agent. If this permission is not selected, the staff member will only be able to view deliveries created by themselves.




## Locations

The **locations** tab is found after clicking the **Details** icon of the appropriate Retail Agent. Assign user rights to view, add, modify and/or delete locations for the Retail Agent.

**View** – Placing a check in the **View** check box activates the **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link located in the upper right of the **Locations Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located in the **Locations Summary** screen.

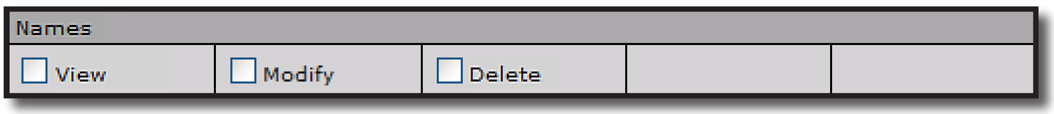
## Names

The **retail agent name** tab is found after clicking the **Details** icon of the appropriate Retail Agent to display the card file.

**View** - Placing a check in the **View** check box controls access to the retail agent **name** tab. Users without **View** rights will have this tab dimmed and not be able to access it.

**Modify** - Placing a check in the **Modify** check box controls the user's ability to select **Update** from within the retail agent name detail. Users without **Modify** rights will not see the **Update** link.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete a retail agent. Users without **Delete** rights will have the **Remove** icon disabled.

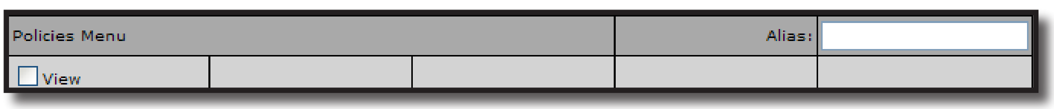



## Policies Menu

The **policies** tab is found after clicking the **POLICIES** link on the **Retail Agent** menu.

**View** - Placing a check in the **View** check box activates the **POLICIES** link on the **Retail Agent** menu.

**Alias** - Enter an alias to display in place of **POLICIES** on the **Retail Agent** menu.



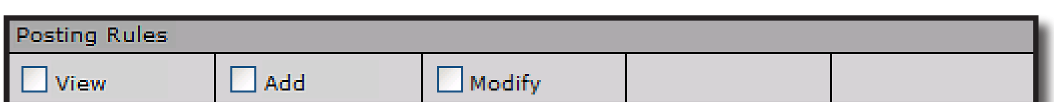

## Posting Rules

The **posting rules** tab is found after clicking the **Details** icon of the appropriate Retail Agent to display the card file.

**View** - Placing a check in the **View** check box controls access to the retail agent **posting rules** tab. Users without **View** rights will have this tab dimmed and not be able to access it.

**Add** - Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the Posting Rules summary screen.

**Modify** - placing a check in the **Modify** check box controls the user's ability to select the **Active** check box on non-global posting rules from within the Posting Rules detail. Users without **Modify** rights will not have the active checkbox.



## Search

Search is found on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import Retail Agents.

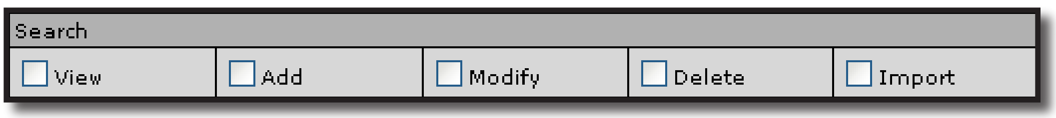
**View** – Placing a check in the **View** check box activates the display of Retail Agent in the **Entity Drop-down** check box.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the upper right of the Search screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Search screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon in the Search screen.

**Import** - Placing a check in the **Import** check box allows users to Import Retail Agent information from another source.




## Security

To access the **security** tab, click the **Details** icon of the retail agent, then the **contacts** tab and the **Details** icon of a contact on the summary screen. The **security** tab is active when the contact has been made a user and assigned Retail Agent Access.

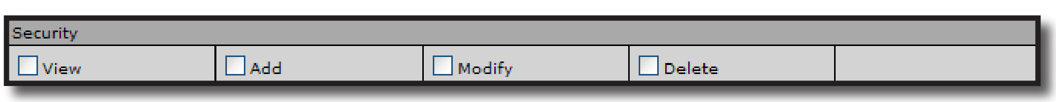
**View** - Placing a check in the **View** check box activates the **security** tab under the retail agent contact.

**Add** - Placing a check in the **Add** check box activates the **Click here to make this contact a user** link on the **retail agent contact details** screen.

**Modify** - Placing a check in the **Modify** check box activates the **[Update]** link on the **retail agent contact security** tab.

**Delete** - Placing a check in the **Delete** check box activates the **[Delete]** link on the **retail agent contact security** tab.

**Note**: For complete information on **Retail Agent** security see the *Retail Agent Access Training Manual*.




## Transactions

The **Transactions** link is found after clicking the **Details** icon of a Retail Agent to display the card file.

**View** - placing a check in the **View** check box controls displays the **Transactions** link on the **Retail Agent** menu. Users without **View** rights will not see this link.


## Servicing Resource Group

From **SEARCH**, on the **Primary** menu, select **Client** from the **Entity Drop-down** check box and click the **Details** icon of the appropriate client. Servicing is found on the **Client** menu. Security permissions may be set for the Servicing Resource Groups in the following areas:

### Audit

Assign user rights to add Audits to a client policy.

**Add** - Placing a check in the in the **Add** check box activates the **Audit** option on the **Servicing** screen.


### Binders

Assign user rights to add Binders to a client policy.

**Add** - Placing a check in the **Add** check box activates the **Binder** option on the **Servicing** screen.


### Cancellation

Assign user rights to add Cancellations on a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Cancellation** option on the **Servicing** screen.


### Certificates

Assign user rights to add Certificates on a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Certificate(s) - New** option on the **Servicing** screen.

| Certificates | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Certificates Now

Assign user rights to add Certificates VIA Certificates Now.

**Add** – Placing a check in the **Add** check box allows the addition of a Certificate VIA Certificates Now to a Client's policy.

| Certificates Now | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Certificates-Renew

Assign user rights to renew certificates.

**Add** - Placing a check in the **Add** check box activates the **Certificate(s) - Renew** option on the **Servicing** screen.

| Certificates-Renew | | | |
|---|---|---|---|
| ☐ Add | | | |

## Claims

Assign user rights to add Claims to a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Claims** option on the **Servicing** screen.

| Claims | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Edit

Assign user rights to Edit a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Edit** option on the **Servicing** screen.

| Edit | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Endorsement

Assign user rights to endorse a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Endorsement** option on the **Servicing** screen.

| Endorsement | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Market Analysis

Assign user rights to create a Market Analysis.

**Add** - Placing a check in the **Add** check box activates the **Market Analysis** option on the **Servicing** screen.

| Market Analysis | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Marketing

Assign user rights to add a Marketing policy to a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Marketing** option on the **Servicing** screen.

**Modify -** Placing a check in the **Modify** check box activates access to the refresh assignments check box on the servicing screen when **Market Existing** is selected. If a user selects this box on the servicing screen it will create the marketing policy with both the selected policies assignments as well as the primary client assignment (the client primary assignment becomes policy primary assignment). If the user does not access to the box then the marketing record is created by copying the selected policies assignment to the marketing record.

| Marketing | | | | |
|---|---|---|---|---|
| ☐ Add | ☐ Modify | | | |

## Quote

Future Development

| Quote | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Renew

Assign user rights to renew a client's policy.

**Add** - Placing a check in the **Add** check box activates the **Renew** option on the **Servicing** screen.

| Renew | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Verification

Assign user rights to add Auto ID cards.

**Add** - Placing a check in the **Add** check box activates the **Verification** option on the **Servicing** screen.


## Setup Resource Group

**SETUP** is on the **Utility** menu. Security permissions may be set for the Setup Resource Groups in the following areas:

### Access Log

The Access Log is accessed by clicking the **SETUP** link on the **Utility** menu, Security Administration and then the **access log** tab. This screen shows login activity for the organization.

**View** - Placing a check in the **View** check box activates the display of login activity.


### Actions

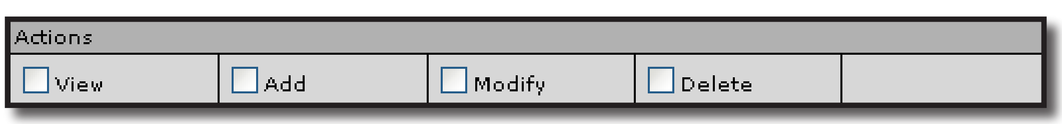
Clicking the **Actions** link on the Setup Console displays Action setup. Assign user rights to view, add, modify and/or delete information found in the drop-down check boxes for **Topics** and **Types** when creating an Action.

**View** – Placing a check in the **View** check box activates the display of the **Actions Setup** screens.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Actions Setup** screens.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Actions Setup** screens.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Actions Setup** screens.



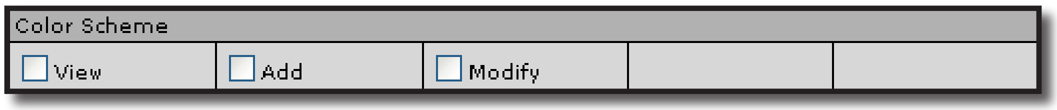

### Color Scheme

Click **Color Scheme** in the Setup Console. Assign user rights to view, add and/or modify colors and logos in Nexsure.

**View** – Placing a check in the **View** check box activates Color Scheme view.

**Add** – Placing a check in the **Add** check box allows the addition of a Color Scheme in Setup.

**Modify** – Placing a check in the **Modify** check box allows Color Schemes in Nexsure to be changed.




## Controls

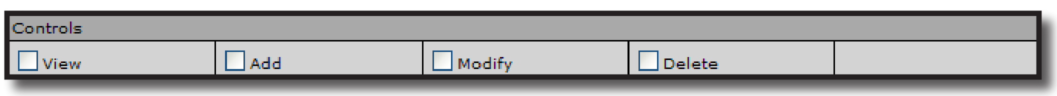
The **controls** tab is accessed by clicking **SETUP** on the **Utility** menu, **Security Administration** in the Setup Console, then the **controls** tab. Controls are used to establish accounts receivable write-off limits.

**View** - Placing a check in the **View** check box activates the **controls** tab. View rights also enables the **Details** icon for each control that has been added.

**Add** - Placing a check in the **Add** check box activates the **[Add New]** link on the controls tab.

**Modify** - Placing a check in the **Modify** check box permits changes to existing controls.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **controls** tab.




## Document Templates

Clicking the **Document Templates** link on the Setup Console displays **Document Templates Summary** screen. Assign user rights to view, add, modify and/or delete Documents in Nexsure.

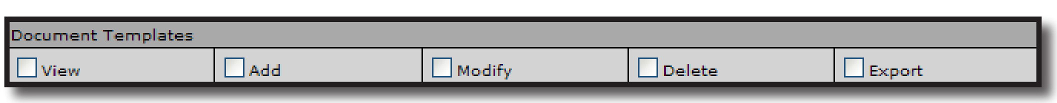
**View** – Placing a check in the **View** check box activates the display of the **Document Templates Summary** screen.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Document Templates Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Document Templates Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Document Templates Summary** screen.

**Export** - Placing a check in the **Export** check box activates the **[Export]** and **[Import]** links on the **Templates** tab.



## eLinks Setup

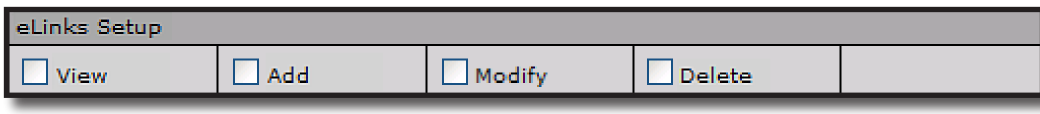
The **eLinks Setup** link is found under integration on the **Setup** screen which is accessed by clicking the **SETUP** link on the **Utility** menu, the **Integration** link on the **Setup Console** and then **eLinks**.

**View** - Placing a check in the **View** check box activates the **eLinks Setup** link. Users without **View** rights will not have access to the link.

**Add** - Placing a check in the **Add** check box activates the **[Add New]** link. Users without **Add** rights will not see the **[Add New]** link on the **eLink Setup** screen.

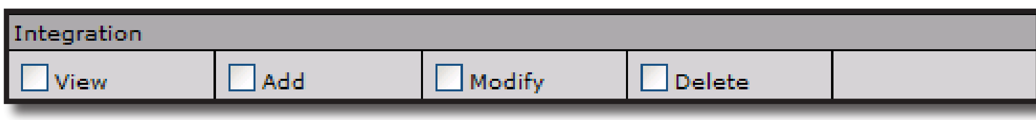
**Modify** - Placing a check in the **Modify** check box activates the **Details** icon providing the user's ability to update the eLinks detail. Users without **Modify** rights will not be able to select the **Details** icon.

**Delete** - Placing a check in the **Delete** check box controls the ability to delete **eLinks Setup**. Users without **Delete** rights will have the **Remove** icon disabled.




## Integration

Future Development




## IVANS

Expand Downloads on the Setup Console and click the **IVANS** link. Assign user rights to secure setup of IVANS for download.

**View** - Placing a check in the **View** check box activates the display of the Ivans Summary screen.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the Ivans Summary screen.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the Ivans Summary screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the Ivans Summary screen.

## Lockbox Setup

The lockbox setup is found under **Setup** on the **Setup Console** under the **Integration** link.

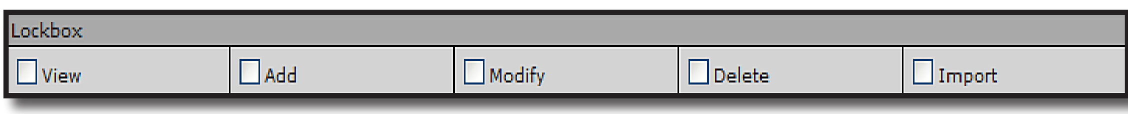
**View -** Placing a check in the **View** check box activates the **file log** and **notification** tabs. Users without view rights will have tabs dimmed and not be able to access them.

**Add -** Placing a check in the **Add** check box controls the **[Add New]** link on the **notification** tab. Users without add rights will not have access to the **[Add New]** link.

**Modify -** placing a check in the modify checkbox controls the user's ability to select the details icon and access to the cancel and save buttons. Users without modify rights will have the details icon disabled.

**Delete -** Placing a check in the **Delete** check box controls the ability to delete. Users without delete rights will have the **Remove** icon disabled.

**Import -** Placing a check in the **Import** check box enables the **[Import File]** link on the file log. Users without import rights will have the **[Import File]** link disabled.




## Lookup Management

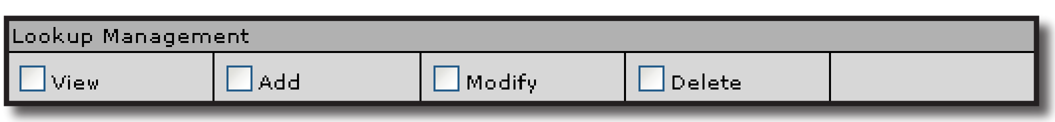
On the Setup Console, click the **Lookup Management** link to display the **Lookup Management Setup** screen. Assign user rights to view, add, modify and/or delete information found in drop-down check boxes through out Nexsure.

**View** – Placing a check in the **View** check box activates the display of the **Lookup Management Summary** screen.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Lookup Management** items.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the **Lookup Management** items.

**Delete** – Placing a check in the **Delete** check box activates the **Delete** link on the **Lookup Management** items.



## Opportunities

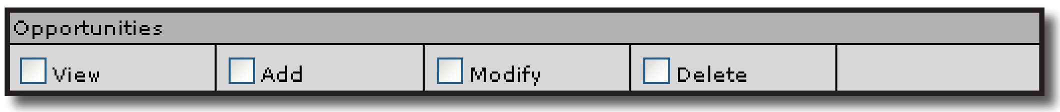
Click **Opportunities** in the Setup Console; this expands to a tree view. Assign user rights to view, add, modify and/or delete the various areas within the Opportunities section.

**View** – Placing a check in the **View** check box activates the display of the **Opportunities Setup** screens.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Opportunities Setup** screens.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Opportunities Setup** screens.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Opportunities Setup** screens.




## PDF Security

Click Security Administration on the Setup Console to access the **pdf security** tab. Assign user rights to view and/or modify PDF security.

**View** - Placing a check in the **View** check box activates the **pdf security** tab and access to the **PDF Entity Type** link to the history of password administration.

**Modify** - Placing a check in the **Modify** check box permits modification of PDF entity items including adding new types.


## Lines of Business

Click **Lines of Business** in the Setup Console. Assign user rights to view blank forms and change the **Summary of Insurance** disclaimer.

**View** – Placing a check in the **View** check box activates the printing of blank forms and access to the **summary of insurance** tab to modify the disclaimer that prints on the bottom of the personal and commercial summary of insurance at client and policy levels.

## Programs

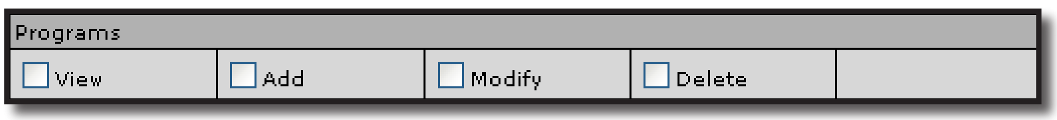
Click **Programs** in the Setup Console. Assign user rights to view, add, modify and/or delete programs used in Opportunities.

**View** – Placing a check in the **View** check box activates the display of the **Programs Setup** screens.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Programs Setup** screens.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon the **Programs Setup** screens.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Programs Setup** screens.




## Rating

On the Setup Console, expand Downloads and click the **Rating Vendors** link. Assign user rights to secure setup of Rating Vendors.

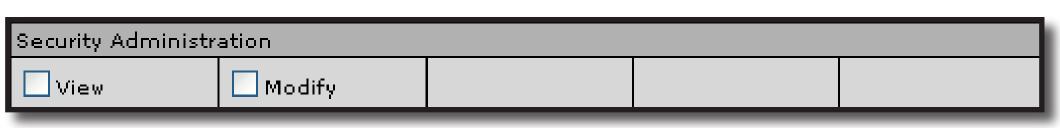
**View** - Placing a check in the **View** check box will grant full access to setup of Rating Vendors.


## Security Administration

Click **Security Administration** in the Setup Console to access the **Security** screens. Assign user rights to view and/or modify global rights.

**View** - Placing a check in the **View** check box activates the display of the **Security Administration** screens.

**Modify** - Placing a check in the **Modify** check box activates the **Save** button on the **Security Administration** screens.




## T-Log

Click **Security Administration** in the Setup Console to access the Security screens to find the **T-Log** tab. The **T-Log** tab keeps track of users movements in Nexsure. Assign user rights to view this global screen.

**View** – Placing a check in the **View** check box activates the display of the **Global T-Log** screen.

| T-Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Upload/Download

Expand Download on the Setup Console and click the **Download Defaults** link. Assign user rights for full access to download defaults.

**View** - Placing a check in the **View** check box will display the Download Defaults screen and provide full access to set up download defaults.

| Upload/Download | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### User Rights Templates

Click on **User Rights Templates** link in Setup Console. Assign user rights to view, add, modify and/or delete rights assigned to users.

**View** – Placing a check in the **View** check box activates the display of the **User Rights Templates Setup** screens.

**Add** – Placing a check in the **Add** check box activates the **Add** link on the **User Rights Templates Setup** screens.

**Modify** – Placing a check in the **Modify** check box activates the **Edit** link on the **User Rights Templates Setup** screens.

**Delete** – Placing a check in the **Delete** check box activates the **Delete** link on the **User Rights Templates Setup** screens.

| User Rights Templates | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Tax Authority Resource Group

Click **SEARCH**, on the **Primary** menu, and select **Tax Authority** from the **Entity Drop-down** check box. Security permissions may be set for the Tax Authority Resource Groups in the following areas:

### Contacts

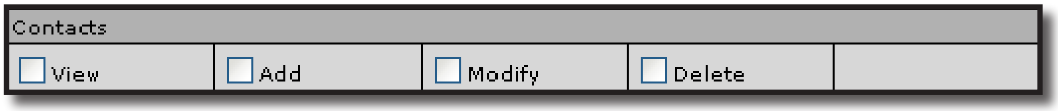
The **contacts** tab is found after clicking the **Details** icon of the appropriate Tax Authority. Assign user rights to view, add, modify and/or delete contacts for a Tax Authority.

**View** – Placing a check in the **View** check box activates the display of the **contacts** tab for the Tax Authority.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the Contacts Summary screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Contacts screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the Contacts screen.




## Locations

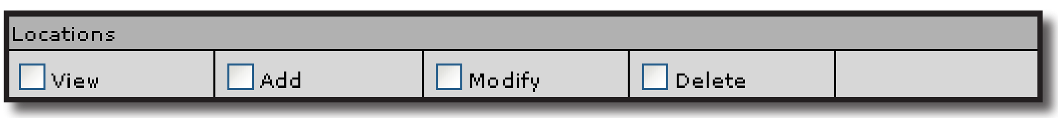
The **locations** tab is found after clicking the **Details** icon of the appropriate Tax Authority. Assign user rights to view, add, modify and/or delete locations for a Tax Authority.

**View** – Placing a check in the **View** check box activates the **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Locations Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located in the **Locations Summary** screen.




## Search

Search is found on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import a Tax Authority.

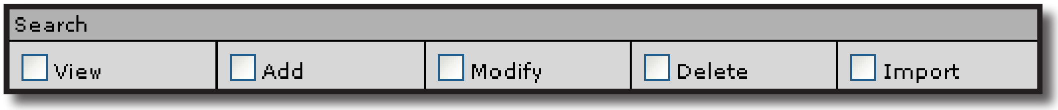
**View** – Placing a check in the **View** check box activates the display of **Tax Authority** in the **Entity Drop-down** check box.

**Add** – Placing a check in the **Add** check box activates the **Add New Record** link on the upper right of the **Search** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Search** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon in the **Search** screen.

**Import** - Placing a check in the **Import** check box allows users to Import Tax Authority information from another source.




## States

The **states** tab is found after clicking the **Details** icon of the appropriate Tax Authority. Assign user rights to view, add and/or delete States for a Tax Authority.

**View** - Placing a check in the **View** check box activates the **states** tab for a Tax Authority.

**Add** - Placing a check in the **Add** check box activates the **Add State/Province** link on the **states** tab.

**Delete** - Placing a check in the **Delete** check box activates the **Delete All States/Provinces** link.


## Terms

The **terms** tab is found after clicking the **Details** icon of the appropriate Tax Authority. Assign user rights to view and/or modify Terms for a Tax Authority.

**View** – Placing a check in the **View** check box activates the **terms** tab for a Tax Authority.

**Modify** – Placing a check in the **Modify** check box allows fields for a Tax Authority Term to be changed.


## Territory Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **territori**es tab. Click the **Details** icon of the appropriate Territory. Security permissions may be set for the Territory Resource Groups in the following areas:

**Accounting** - The **accounting** tab allows ability to view and modify Accounting options.

**View** – Placing a check in the **View** check box activates the **accounting** tab at Territory level.

## Employees

From the **territories** > **card file** tab, click the **employees** tab. Assign user rights to view, add, modify and/or delete territory employees.

**View** – Placing a check in the **View** check box activates the Territory **employees** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Employees summary screen.

**Delete** – Placing a check in the **Delete** check box activates the **Deactivate** icon on the Employees summary screen.

| Employees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Identity

When the territory's card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the **identity** tab. Add a Photo, Salutation or Signature to a Territory Employee's Identity.

**Allow Override** - Placing a check in the **Allow Override** check box allows a staff member to access and modify other staff members' identity tabs at the Territory where they have access.

| Identity | | | | |
|---|---|---|---|---|
| ☐ Allow Override | | | | |

## Locations

From the **territories** > **card file** tab, click the **locations** tab. Assign user rights to view, add, modify and/or delete Territory locations.

**View** – Placing a check in the **View** check box activates the Territory **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar on the **Territory Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon **of locations on the Territory Locations Summary screen**.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Territory Locations Summary** screen.

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Names

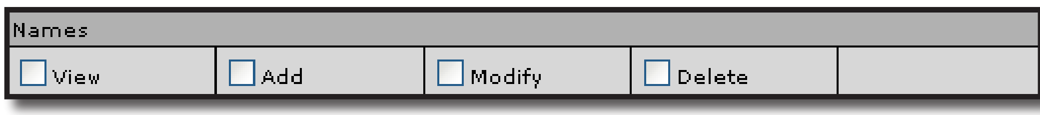
Assign user rights to view, add, modify and/or delete Territories.

**View** – Placing a check in the **View** check box activates the **territories** tab to enable the Territories to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the navigation toolbar on the **Territory Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Territory Summary screen and the **Edit** link on the navigation toolbar of the Territory card file.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Territory Summary** screen.




## Security

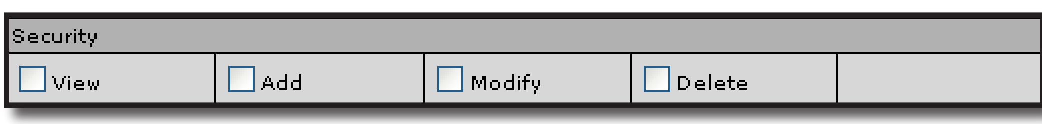
From the **territories** > **card file** tab, click the **employees** tab and click the **security** tab. Assign user rights to view, add, modify and/or delete a Territory's Employees Security.

**View** – Placing a check in the **View** check box activates the **employees security** tab to enable the territories to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Click here to make this contact a user** link at the bottom of an employee detail screen to add new security.

**Modify** – Placing a check in the **Modify** check box activates the **Update** link on the navigation toolbar on the **Territory Employee Security Detail** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on **security** tab **User Accounts** portion of the screen.




## Signature Authorization

Signature authorizations are accessed from the **signature** tab of the employee identity. When the Territory card file is displayed, click on the **employees** tab. Click the **Details** icon of an employee to view the **identity** tab then the **signature** tab. Permissions are available to control access to the **signature authorization** tab as well as the control authorizations and Private functions.

**View** - Placing a check in the **View** check box allows the **signature authorization** tab to be selected.

**Add** - Placing a check in the **Add** check box activates the **[control authorization]** link.

**Modify** - Placing a check in the **Modify** check box allows access to change the **Private** check box on the signature file as well as the **Update** option in the navigation toolbar on the **signature authorizations** tab.

Staff members with modify rights will be able to add and remove authorized staff members and will also need **View** and **Add** rights.

| Signature Authorization | | | |
|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | |

## Transactions Resource Group

From **ORGANIZATION**, on the **Primary** menu, click the **accounting** tab, and then click the **transactions** tab. Security permissions may be set for the Transactions Resource Groups in the following areas:

### Accounts Payable

Click the **accounts payable** tab. Assign user rights to view, add, modify, delete, export, post and/or post locked an Account Payable.

**View** – Placing a check in the **View** check box activates the **accounts payable** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** links on the **Accounts Payable Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Save** link on the navigation toolbar on the **Accounts Payable Detail** screen for un-posted items and activates the **Details** icon on the Accounts Payable Summary.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Accounts Payable Summary** screen and the **Abort** link on the navigation toolbar on the **Accounts Payable Detail** screen.

**Export** – Placing a check in the **Export** check box activates the **Export** link on the accounts payable summary screen.

**Post** – Placing a check in the **Post** check box activates the **Post** link on Accounts Payable.

**Post Locked** – Placing a check in the **Post Locked** check box activates the ability to post the Accounts Payable to a locked period.

| Accounts Payable | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Post | ☐ Post Locked | | | |

### Deposits

Click the **deposits** tab. Assign user rights to view a Deposit.

**View** – Placing a check in the **View** check box activates the **deposits** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Deposit** link on the **Deposits Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Post** and **Save** links on the navigation toolbar on the **Deposits Detail** screen for un-posted items and activates the **Details** icon on the deposits summary.

**Export** - Placing a check in the **Export** check box activates the **Export** link on the deposit summary screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Deposits Summary** screen and the **Abort** link on the navigation toolbar on the **Deposits Detail** screen.

**Post** – Placing a check in the **Post** check box activates the **Post** link on Deposits.

**Post Locked** – Placing a check in the **Post Locked** check box activates the ability to post the Deposits to a locked period.

| Deposits | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Post | ☐ Post Locked | | | |

## Disbursements

Click the **disbursements** tab. Assign user rights to view, add, modify and/or delete a Disbursement.

**View** – Placing a check in the **View** check box activates the **disbursements** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New Disbursement** link on the **Disbursements Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Post** and **Save** links on the navigation toolbar on the **Disbursements Detail** screen for un-posted items and activates the **Details** icon on the disbursements summary.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Disbursements Summary** screen and the **Abort** link on the navigation toolbar on the **Disbursements Detail** screen.

**Export** - Not active at this time.

**Post** – Placing a check in the **Post** check box activates the **Post** link on Disbursements.

**Post Locked** – Placing a check in the **Post Locked** check box activates the ability to post the Disbursements to a locked period.

**Allow Override** – Placing a check in the **Allow Override** check box allows security to post to an account that is otherwise blocked.

**Print** - Placing a check in the **Print** check box activates the **Print** link on the navigation toolbar of a posted disbursement.

**Re-print** - Placing a check in the **Re-print** check box allows a posted disbursement check to be re-printed after check was previously printed.

**Zero Entry** - Placing a check in the **Zero Entry** check box allows security to post a zero disbursement used to clear client balances in lieu of a Client Reconciliation.

| Disbursements | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Post | ☐ Post Locked | ☐ Allow Override | ☐ Print | ☐ Re-print |
| ☐ Zero Entry | | | | |

## Journal Entry

Click the **journal entry** tab. Assign user rights to view, add, modify and/or delete a Journal Entry.

**View** – Placing a check in the **View** check box activates the **journal entries** tab.

**Add** – Placing a check in the **Add** check box activates the **Add New** link on the **Journal Entries Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Post** and **Save** links on the navigation toolbar on the **Journal Entries Detail** screen for un-posted items and the **Details** icon on the **Journal Entries Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon on the **Journal Entries Summary** screen and the **Abort** link on the navigation toolbar on the **Journal Entries Detail** screen.

**Export** - Not active at this time.

**Post** – Placing a check in the **Post** check box activates the **Post** link on Journal Entry.

**Post Locked** – Placing a check in the **Post Locked** check box activates the ability to post the Journal Entry to a locked period.

| Journal Entry | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Post | ☐ Post Locked | | | |

## Payments

Not Active

| Payments | | | | |
|---|---|---|---|---|
| ☐ Add | ☐ Modify | ☐ Post | ☐ Post Locked | |

## Receive Payment

Click the **receive payments** tab. Assign user rights to view, add, modify and/or delete Payments Received.

**View** - Placing a check in the **View** check box activates the **receive payments** tab.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the **Receive Payments Summary** screen.

**Modify** - Placing a check in the **Modify** check box activates the **Post** and **Save** links on the navigation toolbar on the **Receive Payments Detail** screen for un-posted items and activates the **Details** icon on the receive payments summary screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Receive Payments Summary** screen and the **Abort** link on the navigation toolbar on the **Receive Payments Detail** screen.

**Export** - Not active at this time.

**Post** - Placing a check in the **Post** check box activates the **Post** link on Receive Payment.

**Post Locked** - Placing a check in the **Post Locked** check box activates the ability to post the Receive Payment to a locked period.

**Zero Entry** - Placing a check in the **Zero Entry** check box allows security to post a zero receive payment to clear Client balances in lieu of a Client Reconciliation.

| Receive Payment | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Post | ☐ Post Locked | ☐ Zero Entry | | |

## Reconciliation

Click the **reconciliation** tab. Assign user rights to view, add, modify and/or delete Reconciliation.

**View** - Placing a check in the **View** check box activates the **reconciliation** tab.

**Add** - Placing a check in the **Add** check box activates the **Add New Reconciliation** link on the Reconciliation Summary screen.

**Modify** - Placing a check in the **Modify** check box activates the **Post** and **Save** links on the navigation toolbar on the Reconciliation detail screen for un-posted items and activates the **Details** icon on the reconciliation summary.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Reconciliation Summary** screen and the **Abort** link on the navigation toolbar on the **Reconciliation Detail** screen.

**Export** - Not active at this time.

**Post** - Placing a check in the **Post** check box activates the **Post** link on Reconciliation.

**Post Locked** - Placing a check in the **Post Locked** check box activates the ability to post the Reconciliation to a locked period.

| Reconciliation | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Post | ☐ Post Locked | | | |

### Transactions

Assign user rights to view the **Transaction Summary**.

**View** - Placing a check in the **View** check box activates the **transactions** tab.

| Transactions | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Utility Menu Resource Group

The **Utility** menu is the top menu. Security permissions may be set for the **Utility** menu Resource Groups in the following areas:

### Help

Assign user rights to view Help on the **Utility** menu.

**View** - Placing a check in the **View** check box activates the Help link on the **Utility** menu.

| Help | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Home

Assign user rights to view Home on the **Utility** menu.

**View** - Placing a check in the **View** check box activates the Home link on the **Utility** menu.

| Home | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Logout

Assign user rights to view Logout on the **Utility** menu.

**View** - Placing a check in the **View** check box activates the Logout link on the **Utility** menu.

| Logout | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Setup

Assign user rights to view Setup on the **Utility** menu.

**View** - Not in use at this time.

| Setup | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

### Support

Assign user rights to view Support on the **Utility** menu.

**View** - Not in use at this time.

| Support | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Vendor Resource Group

Click **SEARCH** on the **Primary** menu, and select **Vendor** from the **Entity Drop-down** check box. Security permissions may be set for the Vendor Resource Groups in the following areas:

### Accounting Summary

Vendor detail and accounting **transactions** tabs are viewed after clicking the **Details** icon of a vendor on the **vendors** tab in the Territory. The Territory is accessed through **ORGANIZATION** on the **Primary** menu. Assign user rights to add, modify and/or delete a Vendors Accounting Summary.

**View** - Placing a check in the **View** check box activates the **vendors** tab to enable a view of the list.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the **Vendor Summary** screen.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the **Vendor Summary** screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the **Vendor Summary** screen.

| Accounting Summary | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

### Contacts

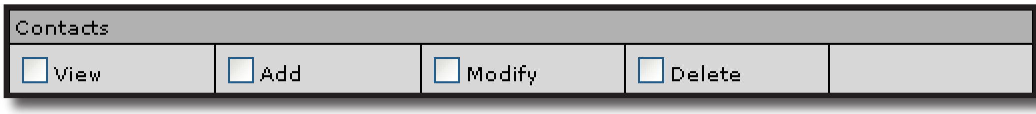
Click **SEARCH** on the **Primary** menu, and select **Vendor** from the **Entity Drop-down** check box. The **contacts** tab is found after clicking the **Details** icon of the appropriate Vendor. Assign user rights to view, add, modify and/or delete contacts for a Vendor.

**View** - Placing a check in the **View** check box activates the **contacts** tab.

**Add** - Placing a check in the **Add** check box activates the **Add New** link on the **Contacts Summary** screen.

**Modify** - Placing a check in the **Modify** check box activates the **Details** icon on the Contacts screen.

**Delete** - Placing a check in the **Delete** check box activates the **Remove** icon on the Contacts screen.




## Locations

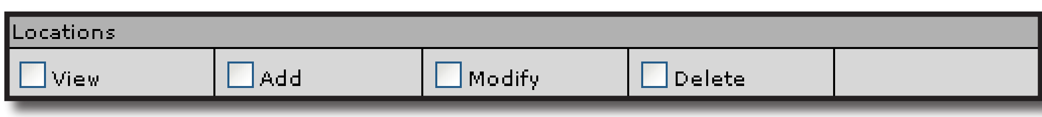
Click **SEARCH** on the **Primary** menu, and select **Vendor** from the **Entity Drop-down** check box. The **locations** tab is found after clicking the **Details** icon of the appropriate Vendor. Assign user rights to view, add, modify and/or delete locations for a Vendor.

**View** – Placing a check in the **View** check box activates the **locations** tab to enable the locations to be viewed.

**Add** – Placing a check in the **Add** check box activates the **Add New** link located in the upper right of the **Locations Summary** screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the **Locations Summary** screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon located in the **Locations Summary** screen.




## Search

**SEARCH** is found on the **Primary** menu. Assign user rights to view, add, modify, delete and/or import a Vendor.

**View** – Placing a check in the **View** check box activates the display of vendors in the **Entity Drop-down** check box.

**Add** – Placing a check in the **Add** check box activates the **Add New Record** link on the upper right of the Search screen.

**Modify** – Placing a check in the **Modify** check box activates the **Details** icon on the Search screen.

**Delete** – Placing a check in the **Delete** check box activates the **Remove** icon in the Search screen.

**Import** - Placing a check in the **Import** check box allows users to Import information from another source.

| Search | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

## Security Rights Template Worksheets

To use the worksheet, print the below pages and mark the check boxes where security is to be granted for each set of security rights. After completing the worksheets, complete the template in Nexsure following the instructions on adding user rights templates. Maintain the completed worksheets for your records.

**Template Name:** ______________________________

**Date:** ______________________________

**Created By:** ______________________________

### Accounting

| Accounting Summary | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

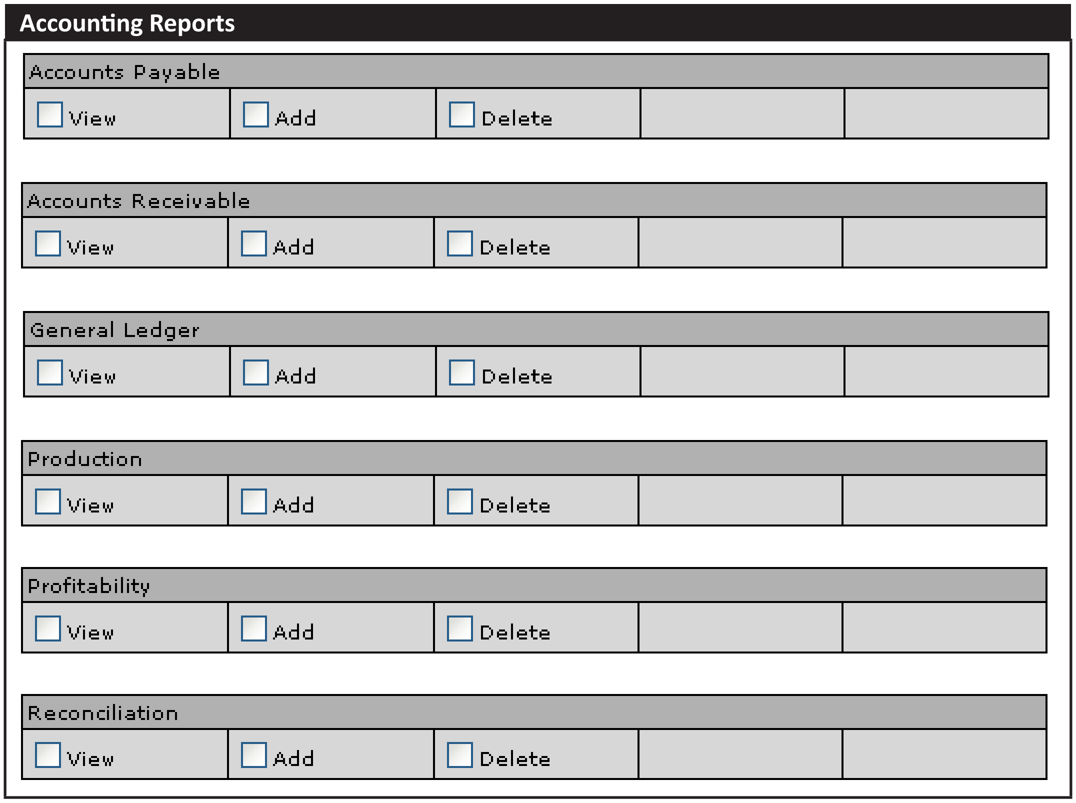
| Bank Account Reconciliation | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Post |

| Bank Account Transactions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | ☐ Export | | |

| Bank Accounts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Receipt Automation Lockbox T1 | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Transactions | | | | |
|---|---|---|---|---|
| ☐ View | | | | |


Accounting Reports
Accounts Payable
View
Add
Delete
Accounts Receivable
View
Add
Delete
General Ledger
View
Add
Delete
Production
View
Add
Delete
Profitability
View
Add
Delete
Reconciliation
View
Add
Delete

## Accounting Setup

| Account Groups | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |

| Account Types | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |

| Accounting Periods | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

| Assign Books | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Posting Rules | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

## Additional Interests

| Contacts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Search | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

**Branch**

| Accounting | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Commission | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Employees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Identity | | | | |
|---|---|---|---|---|
| ☐ Allow Override | | | | |

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Lockbox | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Names | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Security | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Signature Authorization | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

## Carrier

| | | | | |
|---|---|---|---|---|
| **Commission** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Contacts** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **e-Services** | | | | |
| ☐ View | | | | |
| **Installments Setup** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Locations** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Names** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Search** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

## Client

| | | | | |
|---|---|---|---|---|
| **Additional Logins** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Assignment** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Attachments** | | | | |
| ☐ Add | ☐ Modify | ☐ Delete | | |
| **Campaigns** | | | | |
| ☐ View | ☐ Modify | | | |
| **Card File** | | | | |
| ☐ View | | | | |
| **Claims** | | | | |
| ☐ View | ☐ Modify | ☐ Delete | | |
| **Classified** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Client Profiling** | | | | |
| ☐ Modify | | | | |

**Client**

| | | | | |
|---|---|---|---|---|
| **Contacts** | | | | |
| ☐ View | ☐ Export | | | |
| **Deliveries** | | | | |
| ☐ Add | ☐ Allow Override | | | |
| **Demographics** | | | | |
| ☐ View | | | | |
| **Drivers** | | | | |
| ☐ View | | | | |
| **Employees** | | | | |
| ☐ View | | | | |
| **Folders** | | | | |
| ☐ Add | ☐ Modify | ☐ Delete | | |
| **Locations** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| ☐ Export | | | | |
| **Master Invoice** | | | | |
| ☐ Add | | | | |
| **Named Insureds** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| ☐ Export | | | | |
| **People** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| ☐ Export | | | | |
| **Recycle Bin** | | | | |
| ☐ Delete | | | | |
| **Related Accounts** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Search** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| **Security** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Stick-e-Notes** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Summary of Insurance** | | | | |
| ☐ View | ☐ Export | | | |
| **Transactions** | | | | |
| ☐ Add | ☐ Modify | ☐ Delete | ☐ Post | ☐ Post Locked |

## Client

| Units at Risk | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Vehicles | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| ☐ Export | | | | |

## Client Menu

| Actions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Assign | |

| Attachments | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Claims | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Client Profiling | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Deliveries | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Marketing | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Opportunities | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Policies Menu | | | Alias: | |
|---|---|---|---|---|
| ☐ View | | | | |

| Servicing | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| T-Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Transactions | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Client Reports

| Client | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

## Departments

| Department Summary | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Downloads - Commission

| Invoice | | | |
|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | |
| **Reconciliation** | | | |
| ☐ Add | ☐ Post | | |

## Financial Entity

| Contacts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Locations** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Search** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

## General Ledger

| Balance Sheet | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Export | | | |
| **Chart of Accounts** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Export |
| ☐ Allow Override | | | | |
| **Income Statement** | | | | |
| ☐ View | ☐ Export | | | |
| **Mandatory GL Numbers** | | | | |
| ☐ View | ☐ Modify | ☐ Allow Override | | |
| **Trial Balance** | | | | |
| ☐ View | ☐ Export | | | |

## Home Menu

| Actions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Assign | |

| Audit | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Binder Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Cancellation | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Claims | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Deliveries | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Allow Override | | | |

| Downloads | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

| Edit | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Endorsement | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Expirations | | | |
|---|---|---|---|
| ☐ View | ☐ Export | | |

| Interface | | | |
|---|---|---|---|
| ☐ View | | | |

| Lockbox | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | ☐ Delete | ☐ Post | ☐ Post Locked |

| Marketing | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Opportunities | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Rating | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Invoice

| Agency Commissions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Date Booked** | | | | |
| ☐ Modify | | | | |
| **Due Date** | | | | |
| ☐ Modify | | | | |
| **Fees** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Invoice Detail** | | | | |
| ☐ View | ☐ Add | | | |
| **Invoice Posting** | | | | |
| ☐ View | ☐ Add | | | |
| **Manual Bill** | | | | |
| ☐ Add | | | | |
| **Other Commissions** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Payables** | | | | |
| ☐ View | | | | |
| **Premium** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Prior to effective date** | | | | |
| ☐ Modify | | | | |
| **Taxes** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Third Party Commissions** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

**Invoicing Setup**

| Fees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

| Invoice | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Receive Payments | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Taxes | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

**Management Reports**

| Management | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

## Marketing

| Assignment | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Attachments | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Coverage Templates | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| Deliveries | | | |
|---|---|---|---|
| ☐ View | | | |

| History | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Delete | | | |

| Market Analysis | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | ☐ Delete | ☐ Export | |

| Mode | | | | |
|---|---|---|---|---|
| ☐ Modify | | | | |

| Policies | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ In Force |

| Policy Info | | | |
|---|---|---|---|
| ☐ View | | | |

| Rating | | | | |
|---|---|---|---|---|
| ☐ Import | ☐ Export | | | |

## Marketing Reports

| Marketing | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

## Opportunity Reports

| Opportunities | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

## Organization

| Card File | | | | |
|---|---|---|---|---|
| ☐ Modify | | | | |

| Employees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Identity | | | | |
|---|---|---|---|---|
| ☐ Allow Override | | | | |

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Security | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Signature Authorization | | | |
|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | |

## Organization Menu

| All Employees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| All Locations | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Organization Reports

| Organization | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

**Policy**

| | | | | | |
|---|---|---|---|---|---|
| Assignment | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Attachments | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Binders | ☐ View | ☐ Modify | ☐ Delete | | |
| Certificate Holder | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Certificates | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Classified | ☐ View | | | | |
| Deliveries | ☐ View | | | | |
| History | ☐ View | ☐ Delete | | | |
| Mode | ☐ Modify | | | | |
| Policies | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ In Force |
| Policy Info | ☐ View | | | | |
| Policy Info Agency Commission | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Policy Info Fees | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Policy Info Other Commission | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| Policy Info Premium | ☐ View | ☐ Add | ☐ Modify | | |
| Policy Info Taxes | ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

**Policy**

| Policy Info Third Party Commissions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Policy Info Totals | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Qualifications | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Rating | | | | |
|---|---|---|---|---|
| ☐ Import | ☐ Export | | | |

| Transactions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Post |
| ☐ Post Locked | | | | |

**Policy Reports**

| Policies | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

**Premium Finance Co**

| Contacts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Search | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

**Primary Menu**

| Campaigns | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| eLinks | | | | Alias: |
|---|---|---|---|---|
| ☐ View | | | | |

| Global Search | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Organization | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Reports | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Search | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Reconciliation

| Carrier - Transactions-Agency Bill | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Carrier - Transactions-Direct Bill | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Client Transactions | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Client Write Off | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Region

| Accounting | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Employees | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Identity | | | | |
|---|---|---|---|---|
| ☐ Allow Override | | | | |

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Names | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Security | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Signature Authorization | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

**Reports Menu**

| Global Activity | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Allow Override | | | |

| T-Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

**Retail Agent**

| | | | | |
|---|---|---|---|---|
| **Assignment** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Attachments** | | | | |
| ☐ Delete | | | | |
| **Classified** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Commission** | | | | |
| ☐ View | | | | |
| **Contacts** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Contracts** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Deliveries** | | | | |
| ☐ View | ☐ Add | ☐ Allow Override | | |
| **Locations** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Names** | | | | |
| ☐ View | ☐ Modify | ☐ Delete | | |
| **Policies Menu** | | | Alias: | |
| ☐ View | | | | |
| **Posting Rules** | | | | |
| ☐ View | ☐ Add | ☐ Modify | | |
| **Search** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |
| **Security** | | | | |
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |
| **Transactions** | | | | |
| ☐ View | | | | |

## Servicing

| Audit | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Binders | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Cancellation | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Certificates | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Certificates Now | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Certificates-Renew | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Claims | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Edit | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Endorsement | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Market Analysis | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Marketing | | | | |
|---|---|---|---|---|
| ☐ Add | ☐ Modify | | | |

| Quote | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Renew | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

| Verification | | | | |
|---|---|---|---|---|
| ☐ Add | | | | |

## Setup

| Access Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Actions | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Color Scheme | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | | |

| Controls | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Document Templates | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| eLinks Setup | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Integration | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| IVANS | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Lines of Business | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Lockbox | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

| Lookup Management | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Opportunities | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| PDF Security | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| Programs | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Rating | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

## Setup

| Security Administration | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |

| T-Log | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| Upload/Download | | | | |
|---|---|---|---|---|
| ☐ View | | | | |

| User Rights Templates | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

## Tax Authority

| Contacts | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Locations | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | |

| Search | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Modify | ☐ Delete | ☐ Import |

| States | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Add | ☐ Delete | | |

| Terms | | | | |
|---|---|---|---|---|
| ☐ View | ☐ Modify | | | |