# Chapter 17

# **Attachments**

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#### IN THIS CHAPTER

- **x** Adding an Attachment
- **\*** Adding a Document with a Template
- \* Adding a Document without a Template
- \* Attaching Outlook Messages

# Adding an Attachment

Clicking on the **ATTACHMENTS** link at client level or the **attachments** tab from underwriting level provides the ability to add documents to either the client or policy. The type of attachments that may be added are PDF, MSWord, MSExcel, JPG, TIF, BMP, TXT, or GIF with a 25MB limit per attachment.

To add attachments begin by clicking on either the **ATTACHMENTS** link on the **Client** menu to add to the client or the **attachments** tab at underwriting level to add to the selected policy.

#### HOW To Add an Attachment at Client Level

nexsure				HOME   HELP   SETUR	P   LOGOUT
	SEARCH   ORGANIZATION   REPORTS			Bookmarks: Expand   Add   Remo	ove Selected
CLIENT PROFILE   OPPOR	RTUNITIES   MARKETING   POLICIES	CLAIMS   SERVICING	ATTACHMENTS   ACTIONS   TRANSACTION	ONS   DELIVERY   T-LOG	
Client Name: New Er	ngland Power Generator	L		► Commercia	al Account
	attachments				
Folder View	[ Add New ]		Showing Page 1 of 1	DMS ] Filters: [ Show ] [ Hide ] [ Add New ]	
New England Pov	Details Attachment Name	LOB/Policy # Cert #/Ref #	Category Description	Doc Type Status Created By Updated By Date Created Remove	

Click the ATTACHMENTS link on the Client menu. The attachments tab defaults to display all attachments for the client. If the Folder View is selected, only attachments in the selected folder will display. See section "HOW to Work with Client Level Attachment Folders" in this chapter.

**Note:** If an attachment is associated to any restricted policy, that attachment can only be accessed by staff members assigned to the restricted policy.

- Click the [Add New] link on the left or right side of the screen to display the Add New Attachment pop-up.
- Select the Add Attachment option. The dialog box expands to include additional criteria for adding the attachment.

CHAPTER 17

Nexsure Office Integration	ne sure
Add New Attachment	
Add Attachment     C Create Document with Template     C Create Document without Template     C Attach Outlook Messages     Add External Attachment	
Add File:	Clear
Policy: None	•
Note: Policy Number / billing Company / Pol Certificate: None Note: Cert # / Ref #	icy Type
Attachment Name:	
Attachment Description:	
Date: 02/19/2009	
Viewable by Portal User: 🗌 Client 🔲 Retail Agent 🔲	Carrier
OK	Cancel

- To search for the document to be attached, click on the Select button. Locate and select the document to be attached. Click Open in the Choose File dialog box to attach the document to the client.
- The Policy and Certificate boxes default to None. An attachment added at Client level may be associated to a specific Policy or Certificate by selecting the applicable Policy or Certificate from the drop-down box. To default to a Policy or Certificate, see "HOW to Add an Attachment at Policy Level" later in this chapter. Attachments added to a Policy or Certificate will be available from the Policy or Certificate's attachments tab.
- The Attachment Name should be a short name and the Attachment Description should include more details about the attachment to describe it.
- The date automatically defaults to the date the attachment is being added.
- Selecting the Client and/or Retail Agent check boxes will make the attachment available to contacts with rights to access attachments through the Client or Retail Agent Portal. For information on Portal Access, see "Retail Agent Access", Chapter 1, and "Client Access", Chapter 2, in the Portal Access Training Manual.
- Clicking the OK button will add the attachment to the selected client. Clicking Cancel will abort the attachment.

#### HOW To Add an Attachment at Policy Level

nexsu	ure									HOME	HELP   SETUP	LOGOUT
	SEARCH   OR	GANIZATION   REPORTS							в	Bookmarks: Expan	d   Add   Remo	ve Selected
CLIENT PROFI	LE   OPPORTUNITIES   N	ARKETING   POLICIES	CLAIMS   SERVIC	ING   ATTACHM	ENTS   ACTIONS	TRANSA	CTIONS   DELIVERY	T-LOG				
Client Nam	ne: New England Pow	er Generator									Commercial	Account
underwriting	policy info assignment	attachments actions	qualifications his	itory transactio	ns claims su	mmary of ins	urance classifieds					
[ Add New	1		1 Show	wing Page 0 of	o⊳N		[DMS] Filters: [Sh	now][Hide][	Add New ]			
Details	Attachment Name	LOB/Policy # Cert #/Ref #	Category D	escription	Doc Type	Status	Created By Updated By	Date Created	Remove			

Click the attachments tab at policy underwriting. Attachments that pertain to the policy display.
 Folder View is not available at policy level.

**Note:** If the policy is restricted, attachments can only be accessed by staff members assigned to the restricted policy.

- Click the [Add New] link on the left or right side of the screen to display the Add New Attachment dialog box.
- Select the Add Attachment option. The dialog box expands to include additional criteria for adding the attachment.

Nexsure Office Integration	ne sure
Add New Attachment	
Add Attachment     C Create Document with Template     C Create Document without Template     C Attach Outlook Messages     Add External Attachment	
Add File: Select	Clear
Note: Policy Number / billing Company / Pol	licy Type
Note: Cert # / Ref # Attachment Name:	
Description: Date: 02/19/2009	
Viewable by Portal User: Client Retail Agent	Carrier
<u> </u>	Cancer

- To search for the document to be attached, click the Select button. Locate and select the document to be attached. Click Open in the Choose File dialog box to attach the document to the client.
- The Policy selection defaults to the policy on the underwriting tab. A different policy may be selected. The Certificate field defaults to None. To attach a document to a certificate, click the attachments tab in the certificate.
- The Attachment Name should be a short name and the Attachment Description should include more details about the attachment to describe it.
- The date automatically defaults to the date the attachment is added.
- Selecting the Client and/or Retail Agent check boxes will make the attachment available to contacts with rights to access attachments through the Client or Retail Agent Portal. For information on Portal Access, see "Retail Agent Access", Chapter 1, and "Client Access", Chapter 2, in the Portal Access Training Manual.
- Clicking the OK button will add the attachment to the selected client. Clicking Cancel will abort the attachment.

#### HOW To Work With Client-Level Attachment Folders

Attachment folders are available to organize a high volume of client attachments. To view folders, click **ATTACHMENTS** link on the **Client** menu. When the client **attachments** tab is first displayed, all attachments for the selected client are shown. The **Folder View** panel is on the left of the attachment summary.

	SE/	ARCH	ORGANIZATION	REPORTS							Bookmarks: B	Expand   Ad	d   Remove Selected
CLIENT PROFILE   OPPO	RTUN	and D	MARKETING	POLICIES	CLAIMS   SERVICING	ATTACHMENTS   ACTIONS	TRANSACTIONS	DELIVERY   T-LO	G				mmercial Account
Cheffe Name. New E	at	tachme	nts	.01									Innerolal Account
Folder View	t	Add N	lew]			Showing Pag	ge 1 of 1 ▶ 🕅	t	DMS] I	Filters: [ Show ]	[ Hide ] [ /	Add New ]	
New England Pov		Details	Attachment Nan	ne	LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Updated By	Date Created	Remove	
Cancellat		<b>*</b>	Lease	X	General Liability - Commercial		2008 Lease agreen	nent MS Excel		Betsy Cormier Betsy Cormier	02/25/2008	<b>B</b>	
		<b>*</b>	test	W	Umbrella - Commercial Umbrella	Personal Lines Letters	test carrier	MS Word	Draft	Betsy Cormier Betsy Cormier	10/10/2007	<b>B</b>	
🕀 😡 Renewal:		<b>&gt;</b>	Veh Sched	W	Auto - Commercial Unassigned	Schedules	Veh Schedule for Bi	inder MS Word	Draft	Betsy Cormier Betsy Cormier	07/16/2007	<b>B</b>	
		<b>&gt;</b>	Letter to verify	VIN W	Auto - Commercial BA1234567	CL letters	Verify VIN Numbers	MS Word	Draft	Betsy Cormier Betsy Cormier	07/13/2007	<b>B</b>	
🔯 Underwri													
Word Do													attachments

Once a folder is selected, the Folder View check box is automatically selected indicating that only attachments for the selected folder are displayed. To return to the default view of all attachments, deselect the Folder View check box.

	SE	EARCH   (	ORGANIZATION	I   REPORT	S						Bookmarks: I	Expand   Ad	d   Remove Selected
CLIENT PROFILE   OPPO	RTU	INITIES	MARKETING	POLICIES	CLAIMS   SERVICING   ATT	ACHMENTS	ACTIONS   TRANSACTIONS	DELIVERY	T-LOG				
Client Name: New E	ng	land Po	wer Gener	ator								Cor	mmercial Account
	a	attachmen	ts										
Folder View		[ Add Ne	ew ]			ll <b>≤</b> sh	owing Page 1 of 1 🕨 🕅		[ DMS	] Filters: [ Show	][ Hide ] [	Add New ]	
New England Pose     Ormercial		Details	Attachment N	Name	LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Updated By	Date Created	Remove	
		•	Lease	X	General Liability - Commercial		2008 Lease agreement	MS Excel		Betsy Cormier Betsy Cormier	02/25/2008	<b>B</b>	
Claims													
🐼 2008													attachments
Spreadst													
Word Do													
Loss Runs		_	_	_		_		_	_	_	_	_	

The folder panel can be closed by clicking the collapse/expand button on the vertical scroll bar. This button acts as a toggle for the folder panel. The folder panel may be re-sized by placing your cursor on the vertical scroll bar until it turns into a double headed arrow. Drag the scroll bar to the left or right to re-size the panel.



By default, each client has a **client folder** containing all client attachments and a **Recycle Bin**. Up to 100 folders per organization can be added. Folders are cross-organizational. Any folders added for one client will show for all clients in the organization. Only staff members with security rights for addition, deletion, or modification of **folders** can respectively add, copy, delete or rename a folder. Rights to add a folder includes the rights to copy a folder. For information about adding and maintaining attachment folders, see "Attachment Folder Setup", in Chapter 10, Admin Training Manual.

Attachments are deleted by clicking the **Remove** icon. Deleted attachments are added to the

**Recycle Bin** in the **folder** panel. Once the attachment is in the **Recycle Bin**, the **Remove** icon can again be clicked and the attachment is removed from Nexsure. Security templates control the ability to delete attachments from Nexsure.

Attachments can be added to a folder or moved to another folder by clicking the document type icon on the **attachments** tab to the right of the **Attachment Name**. The **Update Attachment** dialog box is displayed. In the **Folder** area, select the folder to which the attachment is to be added or moved. The folder is highlighted. If a folder is selected in error, click the **Deselect** button. Click **OK** to add or move the attachment to the folder. Click **Cancel** to abort.

Nexsure Office Integration	ne sure
Update Attachment	
Attachment Name: Veh Sched Document Description Viewable by Portal User: Client Retail Agent Carrier Folder: Statewalter Word Documents Word Documents	X
Cancel	ок

#### **HOW To View an Added Attachment**

While on either the Client-level attachments or policy-level attachments, use the [Show] link to search for an attachment when there are more than just a few. The Search and Sort Filters will display by default if saved search criteria does not find any attachments. Once displayed, the Search Filters will remain open until closed by clicking the [Hide] link.

**Note**: **Search** and **Sort Filters** criteria can be customized and saved as a personal default view of attachments. For instructions, see "HOW to Customize Default Filter Settings for Attachments" later in this chapter.

Enter some information about the attachment and click the Search button to return search results.

(	attachments								
	[Add New]			М	Showing Page 1 of	1 🕨 1 💌		[DMS] Filters: [Hide]	[Add New ]
	Search Filters							Save Filter Settings Save	Reset
		Description:		Date Created From:	8	Date Created To:		Created By:	
		DocType: All	-	Policy No.:		Attachment Name:	]	Updated By:	
		Status: All	•	Issuing Carrier:		LOB:			
	Sort Orders								
		Sort Field 1: Date Crea	ated 💌	Sort Order 1: Deso	ending 💌	Sort Field 2: Date C	reated 💌	Sort Order 2: Descending 💌	
		Files Per Page: 10 💌						Search Restore	Clear

Click the **Details** icon of the attachment to view the document. If an attachment is associated with any restricted access policy, that attachment can only be accessed by people that are assigned to the restricted policy.

De	tails	Attachme	nt Name		LOB/Policy # Cert #/Ref #	Cate	gory Description		Doc T	ype S	Status	Created Updated	l By H By	Dat	e Created	Remove
Ę	<b>&gt;</b>	Schedule	×				2008 Certifi	ate Holder list	MS E	xcel		Betsy Co Betsy Co	rmier rmier	03/	12/2008	E.
	-									_	_	_	-	_		
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			- (2 - 4)					2610 [	Compatibili	tv Mo	del - N	licrosof	t Exo	el		
	3)							2020 [	companion	<i>cy</i> 1110			c Ento			
$ \geq$		Home	Insert	Page Layo	ut Formulas	Data F	Review View	Add-Ins	Acrobat							
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	*	V Form	at Painter										Forma	tting 😁	as Table *	Styles *
	(	Clipboard	G.		Font	6	Alignm	ient	G .	Nur	mber	G.			Styles	
		112	- (•	$f_{x}$												
	1	А	В		С	D	E	F	G	н	1	J	K	L	М	
1	Nex	sureRef	Туре		NameLine1	NameLine2	AddressLine1	AddressLine2	City	State	ZIP	Phone	Fax	EMail	LoanNo	Iss
2	133	6#2	Certificate H	older Sea	ars		1000 Elm St		Manchester	NH	03101					3/12/200
3	133	6#3	Certificate H	older St J	oseph Hospital		200 Kinsley St		Nashua	NH	03060					3/12/200
4	133	6#1	Loss Pavee	td I	Banknorth		191 Main Street		Nashua	NH	03060					3/12/200

# HOW to Modify the Added Attachment

• Click the icon to the right of the **Attachment Name** to modify the attachment.

( 1	ttachmen	ts									
	[Add New	1				Showing Page 1 of 1			[DMS]	Filters: [Show]	[Add New]
	Details	Attachment Name		LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Created	Updated By Updated	Remove
	<b>&gt;</b>	Quote	C			2008 Renewal Email with Quotes Attached	Outlook Msg		Betsy Cormier 10/08/2008	Betsy Cormier 10/08/2008	Ba a a a a a a a a a a a a a a a a a a
	<b>&gt;</b>	Quotes detached	W			2008 GL and WC Quotes from Carrier Name	MS Word		Betsy Cormier 10/08/2008	Betsy Cormier 10/08/2008	E:
	<b>&gt;</b>	Quotes detached	W			2008 GL and WC Quotes from Carrier Name	MS Word		Betsy Cormier 10/08/2008	Betsy Cormier 10/08/2008	E I
	<b>&gt;</b>	Quote	ø			2008 GL and WC Quotes from Carrier Name	HTML File		Betsy Cormier 10/08/2008	Betsy Cormier 10/08/2008	Ba l
		Loss Runs				2007 - 2008 Hartford Loss Runs	MS Excel		Betsy Cormier 10/08/2008	Betsy Cormier 10/08/2008	Bar I
	<b>&gt;</b>	Schedule	×			2008 Certificate Holder list	MS Excel		Betsy Cormier 03/12/2008	Betsy Cormier 03/12/2008	<b>B</b>
	<b>&gt;</b>	Veh Sched	W	Auto - Commercial Unassigned	Schedules	Veh Schedule for Binder	MS Word	Draft	Betsy Cormier 07/16/2007	Betsy Cormier 03/12/2008	Ba a
	<b>&gt;</b>	Letter to verify VIN	W	Auto - Commercial BA1234567	CL letters	Verify VIN Numbers	MS Word	Completed	Betsy Cormier 07/13/2007	Betsy Cormier 03/12/2008	
	4										Þ

- The Update Attachment dialog box displays. Make changes to the Attachment Name, Policy association, Document Description, Portal Access and/or Folder placement. The Deselect button is used to deselect the current Folder selection.
  - □ If an attachment is associated to a restricted access policy, the Attachment Name can only be modified by people that are assigned to the restricted policy.
  - Policy association cannot be changed on Outlook Messages, Documents created with or without a Template or attachments added to policies that have been changed.
- Click **OK** to save the changes. Click **Cancel** to abort changes to the attachment.

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#### Notes

# Adding a Document with a Template

### HOW to Merge a Document Template at Client/Policy Level

After searching for the client from SEARCH on the Primary menu, click the Details ricon beside the entity (Suspect, Prospect or Client). The client's card file is displayed.

ensu	Ire		PEDORTE			HOME   HELP   SETUP
ENT PROFIL		TIES   MARKETING	REPORTS	LAIMS   SERVICING	ATTACHMENTS   ACTIO	BOOKMARKS: Expand   Add   Remove
ent Name	e: The Hinge	Company				Commercial A
d file pro	filing contacts	locations named	insureds relate	d accounts assignme	ent classified	
Primary Co	<b>stact</b> Name: <u>Ms. Gloria</u> Title: Owner	Smith	Mailing Locati	<b>1 Address</b> on Type: Corporate Hea Address: <u>100 Western I</u>	idquarters Drive	Stick-e-note [Add New] 12/29/2004 4:49:07 PM PST Posted By: Mary Oberleitner
2nd Phon	e Line: <u>(708) 534</u>	- <u>2991</u>	Zi Fax	City: Brea p/Postal: 92821 Number: <u>(714) 320-98</u>	State/Province: CA	CA-7879798-01 No Certs
<b>Tracker</b> Date Clie Related A	Created: 2/25/20 nt Since: 2/25/20 ccounts: <u>1</u>	04 PST 04 PST	Alerts	Open Actions: <u>1</u>		
Assignmen	t					[Delete] [Edit]
Primary	Branch	Department	Unit	Responsibility	Name	< 1 of 1 ▶
	Marys Branch Marys Branch	4-AB1/DB1-PP3 1-AB1/DB1-PP1	Unassigned Unassigned	Producer Account Manager	<u>Joan Mason</u> Mary Oberleitner	In Force
	-		-	-		E Commercial Auto

- Document templates may either be added from the Client, Policy or Certificate level.
  - **D** To add from the client level, click the **ATTACHMENTS** link on the **Client** menu.
  - □ To add from policy level, click on **MARKETING** to access marketing or **POLICIES** to access policies. From the policy or marketing record, click the **attachments** tab.
  - To add from certificate level, click **POLICIES** on the **Client** menu and the **certificates** tab.
     From the certificate record, click the **attachments** tab.

In this example a proposal for marketing quotes will be shown.

• After clicking on the **MARKETING** link on the **Client** menu the marketing summary is displayed.

nexs	sure							HOME   HELP   S	ETUP   LOG
		SEARCH   ORGANIZATIO	DN   REPORTS				Bookm	arks: Expand   Add   R	emove Sele
	OFILE   OF	PORTUNITIES   MARKETING	POLICIES   C	LAIMS   SERV	ICING   ATTACHMENTS	ACTIONS   TR	ANSACTIONS   I	DELIVERY   T-LOG	
lient Na	nme: The	Hinge Company						► Comme	rcial Accou
narketing	history								
				Showing I	Page 1 of 2 ▶▶	1 🕶		Filt	ters: [ <mark>Show</mark> ]
Details	Assign	Line of Business Policy Number Policy Type	Stage Status	Mode	Updated By Updated Date	Estimated Premium	Policy Term	Issuing Carrier Billing Carrier	Remove
<b>&gt;</b>	2	CPP-980987866 Package	Marketing Pending	New	Mary Oberleitner 05/30/2005	\$25,500.00 D	09/20/2004 09/20/2005	Foremost Foremost	E.
		Crime				\$1,000.00			
		AR/Valuable Papers				\$0.00			
		Garage and Dealers				\$4,500.00			
		Commercial Property				\$1,200.00			
		Commercial Auto				\$7,500.00			
		Equipment Floater				\$3,300.00			
		Workers Compensation				\$0.00			
		Workers Compensation				\$5,000.00			
		Umbrella - Commercial				\$2,500.00			
		General Liability				\$500.00			
<b>&gt;</b>	2	Unassigned <b>Package</b>	Marketing Pending	New	Franco DiAddezio 05/20/2005	\$0.00 D	01/06/2005 01/06/2006	UnassignedUnass	<b>B</b>
		Commercial Auto				\$0.00			
		Crime				\$0.00			
		AR/Valuable Papers				\$0.00			
		Garage and Dealers				\$0.00			
		Umbrolla - Commonial				±0.00			

Click the **Details** icon of the quote to merge with the template and the underwriting screen will be displayed. Since the estimated premium is now included in the fields that can be merged with the template, make sure to enter the estimated premium on the policy info page.

		JRIUNITIES   MARK	ETING   PULICIES   CLAI	MS   SERVICING   ATT	ACHMENTS   ACTIONS   TRAM	NSACTIONS   DELIVERY   T-	LUG
nt Na	me: The Hi	inge Company				•	Commercial Acc
erwritinç	policy info	assignment att	achments actions qualif	ication history transa	ctions claims summary of i	nsurance	
ranch:		Marys Branch	Policy	Term: 09/20 09/21	//2004 12:01AM PST //2005 12:01AM PST	navigation instruction	
oncy ry	/pe;	Раскаде	Cover.	age rerm:		□ CPP-980987866	
ssuing · illing C· olicy Nu	Co: o: umber:	Foremost Foremost CPP-980987866	Stage Anttps://rm0web1.net	Marke sure.com - Edit Prem	um - Micro 💶 🗖 🔀	Miscellaneous Premium Fees	
	List	Print				Taxes	
-		<u> </u>	View / Edit Premium Screen Mode: Edit		ne sure	Commissions	
	AR/Valua	able Papers(1)				instruct	ion navigation
	Comme	ercial Auto(1)	Line Of Business:	Crime	_		
	Genera	ai Liability(1)	Estimated:	1,000.00			
	Contraction of Contraction	nme(1)	Annualized:	0.00			
	Garage	and Dealers(1)	Billed:	0.00			
	Commerc	tial Property(1)	Commission Type:	Branch & People 💊			
	Commerc	tial Property(2)	Taxable:	🔘 Yes 💿 No			
	Umbrella -	Commercial(1)					
-	Workers C	ompensation(1)			OK Cancel		
-			A Depe	A	Internet		

**Note:** Policy info fields that can be found in Office Integration Nexsure fields are: **Estimated Premium, Annualized Premium, Billed Premium**, and **Total Estimated Premium**.



• After completing all form and policy info fields, click the **attachments** tab to display the attachments summary view.

nexsure			HOME   HELP   SETUP   LOGOUT
SEARCH   OF	RGANIZATION   REPORTS		Bookmarks: Expand   Add   Remove Selecter
CLIENT PROFILE   OPPORTUNITIES	MARKETING   POLICIES   CLAIM	MS   SERVICING   ATTACHMENTS   A	CTIONS   TRANSACTIONS   DELIVERY   T-LOG
Client Name: The Hinge Compa	iny		Commercial Account
underwriting policy info assignment	attachments actions qualifi	ications history transactions claim	summary of insurance
[ Install ActiveX ]		Showing Page 0 of 0 🕨	[DMS] Filters: [ Show ] [ Hide ] [ Add New ]
Details Attachment Name	LOB/Policy # Cert #/Ref # Category	Description Document Type	Created By Date Created Remove Last Updated By Date Created Remove
	summary of insurance <b>claims</b>	transactions history qualifications	actions attachments assignment policy info underwriting

- To add a new document, click the [Add New] link located in the upper right corner of the screen to launch the Add New Attachment window.
- Click the Create Document with Template option to merge data with a template created in SETUP by the Nexsure Administrator.
- Enter an **Attachment Name** that identifies the document and then a brief **Document Description** to include more details about the attachment.

Nexsure Office Integration	ne sure
Add New Attachment	
C Add Attachment Create Document with Template Create Document without Templa Attach Outlook Messages Add External Attachment Attachment Name: New Business	ite
Document Description: Commercial Proposal	Carrier
Next >>	Cancel

• Click the **Next** button to display the document template search screen.

Nexsure Office Integration	ne sure
New Document	
Template Name: xdt Template Description: Document Type: MS Word Category: Proposal Business Type: Commercia	al Lines Search
Available Templates: XDTI Prop.	osal
	Cancel Next >>

- Use the drop-down boxes, Template Name and Template Description to help filter through the list of document templates that have been created.
- Click the **Search** button to search for the document. The available template matches are displayed in the Available Templates window.
- Select the template by clicking it once.
- Click **Next** to display the lines Policy Selection window.

Dolicy Selection									
Select criteria to defaul	Select criteria to default into the document.								
Named Instruct. Oxford Band Instruments [Drimons]									
Named Insured:	Named Insured: Oxford Band Instruments [Primary]								
Contact:	Jane Stark [Primary]								
Location:	589 Main Street, Oxford, AL 36203 [Primary]								
Assignment:	Mary Oberleitner, Signature Authorized								
Demographic:									
Line of Bus. Policy Numb	er   Stage   Issuing Carrier   Cvg Eff   Cvg Exp   Pol Eff   Pol E	xp   Change   Desc 🔥							
Auto -		*							
Commercial Auto -									
Commercial									
General									
Liability									
Commercial									
		×							
<		>							
Claim Selection									
Claim Status: Open	▼								
Loss Date   LOB	Claim Stage  Claim No  Status  Adjustor	Taken By  Report Date							
08/04/2009[General	Lil   Open   IM	ary Oberle 09/03/2009							
08/03/2009 Auto - 0	com Subrogation 22342 _Open_ Mike Hill_ Ma	ary Oberle(09/03/2009							
		OK Back Cancel							

- At the top of the screen, make sure to select if multiples exist, the following:
  - Named Insured
  - Contact
  - Location
  - Assignment
- At the bottom of the screen if the document being merged is for a claim, locate the claim and click to highlight one selection. Both a line of business and claim may be selected or separately as needed. By default the open claims are displayed. Change the status to closed or all as needed to locate the claim to be included.

It is important to make these selections because these are the choices that will be available in the XML tree for selection as well as what will merge into the document template if these fields were used.

- Clicking on the **OK** button will launch Microsoft Word and begin merging the data.
- Clicking the **Back** button will display the previous screen and clicking the **Cancel** button will abort the process.



Click the Nexsure Fields button to display the XML tree which contains the data from the form, client and policy header.

Note: Microsoft Office Word 2007 displays Ressure Fields and Ressure Save buttons under the Add-Ins tab.



 Click on the + to expand the tree, place the pointer where data is to be inserted from the client or policies, then click the data and drag it into the document.

짤 XDTI - Microsoft Word					
Eile Edit View Insert Format	Tools Table <u>W</u> indow	Help Adobe PDF	Acrobat <u>⊂</u> omments	XML Tree	Type a
· L Garamond Bod; - Garamond	• 12 • <b>P</b> • <b>U</b>			⊡ D Client ▲	
Rexsure Fields	RepeatBegin 🗾 RepeatEr	nd HideEnd 🗾	/alidate ि Paste 🕻	⊕-L¹ ClientContact ⊕-L¹ ClientLocation ⊕-L¹ ClientAssignment	7
-			- · · ·	Auto - Commercial     Policy No.	
· ·	mad Incircadi 🦷 🤇	Cormier Quick St	ion Inc	BA1234567	
	arrier: S blicy Term: 0	Safeco BA123456	57 57 (01/2009		
-	acy renn. 🛛	,,, 01, 2000 - 07,	01,2007	Policy ID	

- Make any other modifications necessary. The document may be printed normally by clicking the Printer icon (or click File from the menu and select Print).
- To save the document to the client account, click the Ressure Save button. Below are the Ressure Save options:
  - Selecting **Draft** allows additional editing of the document to be done at a later time.
  - Selecting Complete saves the document and no further edits to the document can be made. The document will be opened in an Internet Explorer window the next time it is accessed.
  - □ Check the **Save and Return to Document** box to save changes and return you to the document you are editing. Click **OK** to complete the process.
  - Save As Local File box allows you to name and save a copy of the document outside of Nexsure. Click the Folder button to identify where the document is to be saved. Click OK to complete the process.
  - **D** To abort the save process and go back to the document, select the **Back** button.
  - □ To abort the document entirely, click the **Cancel** button and on the next pop-up, click the **OK** button and the document will not be kept.

Save Nexsure Document						
Save Document As						
Traft						
C Complete						
Option Save and Return to Document.						
Save As Local File						
🗢 Back 🏼 🖉 OK 🔀 Cancel						

## HOW to Add a Document to a Client When a Template Doesn't Exist

If a document template meeting the necessary requirements doesn't exist, perform the following steps to create a document without a template:

• Select Create Document without Template.

Nexsure Office Integration	ne sure
Add New Attachment	
C Add Attachment C Create Document with Template C Create Document without Templat C Attach Outlook Messages Attach Outlook Messages Add External Attachment Attachment Name: Drivers Info Document Description: Request updated drivers list Document Type: Microsoft Word Viewable by Portal User Microsoft Word Agent	te
Next >>	Cancel

- Enter an **Attachment Name** and a **Document Description**.
- Choose the **Document Type**: Microsoft Word or Microsoft Excel.
- Click the **Next** button to continue.

Policy Selection								
Select Policy Stage:								
To display policies in specific stages, click the box next to the stage to select. Select all that apply.								
Opportunities	Marketing		Policies	History	Search			
Line of Bus. Policy Number	Stage   Issuing C	arrier   Cvg Ef	f   Cvg Exp   Pol Ef	f   Pol Exp   Change	Desc			
Auto - Commercial								
General Liability								
Property - Commercial								
					~			
<								
Claim Selection								
Claim Status: Open 💌								
Loss Date   LOB	Claim Stage	Claim No	Status  Adjus	tor   Taken By	Report Date			
08/04/2009 General Li  08/03/2009 Auto - Com	Subrogation   22	342	_Open_   _Open_ Mike H:	Mary Oberle ill_ Mary Oberle	109/03/2009 109/03/2009			
				ОК	Back Cancel			

- When adding the attachment at the Client level as in this example, notice that the policy number is not listed by default and that the select policy screen has a slightly different header. This header is used to search for policies the letter may be for. By default all of the policies are displayed.
  - **D** To filter and select only those policies in force, click the **Policies** option and click **Search**.
  - **D** To filter for only in force and history policies, click **Policies** and **History** and click **Search**.
  - **D** To filter the list to display marketing policies, select the **Marketing** option.
  - **D** To add history, click the **History** option and click **Search**.
  - **D** To include opportunities, click the **Opportunities** option.
- After filtering the list use the drop-down boxes and select all policies to be included in the document. Here you may select more than one policy by choosing multiple lines of business.
- At the bottom of the screen if the document being merged is for a claim, locate the claim and click to highlight one selection. Select the line of business if needed. By default the open claims are displayed. Change the Claim Status to Closed or all as needed to locate the claim to be included.
- Click the **OK** button to launch the Microsoft Word or Excel document.
- Once the document is launched, begin typing the document.
- Click the Resource Fields button to access the data fields found on the client and selected policies. Coverage information for restricted access policies is available only if the person logged on is assigned to the restricted policy.

- Place the cursor in the document where the field should be dropped.
- Click the field and drag it to the document and then let go of the mouse button to drop the field to the document.

🖄 XDTI - Micros	oft Word	_ 7	×					
Eile Edit View	Insert Format Iools Table Window Help Adobe PDF Acrobat Comments Type a question Type a question Type a question Type a question of the type a question of type a question of the type a question of type a qu	ion for help 🛛 💂	×					
i 🗋 💕 🗔 🖪	🗋 🗃 🛃 👌 🛃 🗶 🖤 🎎   X 🗈 🖎 🏈 🔊 • 🔍 - 😣 🛃 🎟 📾 🏭 🐼 🗊 🖬 🗤 🖓 🖓 🖛 🖓							
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L	•••••		~					
	Cormier Quick Stop, Inc.							

- After completing the document, print the document as it would normally be done in the Microsoft product.
- To save the document to the client account, click the Revealed Newsure Save button.
  - Selecting **Draft** allows additional editing of the document to be done at a later time.
  - Selecting Complete saves the document and no further edits to the document can be made. The document will be opened in an Internet Explorer window the next time it is accessed.
  - □ Check the **Save and Return to Document** box to save changes and return you to the document you are editing. Click **OK** to complete the process.
  - Save As Local File box allows you to name and save a copy of the document outside of Nexsure. Click the Folder button to identify where the document is to be saved. Click OK to complete the process.
  - **D** To abort the save process and go back to the document, select the **Back** button.
  - □ To abort the document entirely, click the **Cancel** button and on the next pop-up, click the **OK** button and the document will not be kept.

Save Nexsure Document							
Save Document As							
• Draft							
C Complete							
Option							
Save As Local File							
🗢 Back 🎅 OK 📸 Cancel							

# HOW to View a Merged Template or Document Without a Template After Adding

While on either the Client level attachments or underwriting attachments, use the **[Show]** link to search for an attachment when there are more than just a few. Enter some information about the attachment and click the **Search** button to return search results. The **Search** and **Sort Filters** will display by default if saved search criteria does not find any attachments. Once displayed, the **Search Filters** will remain open until closed by clicking the **[Hide]** link.

**Note: Search** and **Sort Filters** criteria can be customized and saved as a personal default view of attachments. For instructions, see "HOW to Customize Default Filter Settings for Attachments" later in this chapter.

attachments				
[Add New]		Showing Page 1 of	1 0 1	[DMS] Filters: [Hide] [Add New]
Search Filters				Save Filter Settings Save Reset
	Description:	Created From:	Date Created To:	Created By:
	DocType: All	Policy No.:	Attachment Name:	Updated By:
	Status: All	Issuing Carrier:	LOB:	
Sort Orders				
	Sort Field 1: Date Created 🔻	Sort Order 1: Descending 💌	Sort Field 2: Date Created	Sort Order 2: Descending
	Files Per Page: 10 🔻			Search Restore Clear

Click the **Details** icon of the attachment to view the document. If an attachment is associated with any restricted access policy, the attachment can only be viewed by people that are assigned to the restricted policy.

ſ	attachments											
	[ Install /	ActiveX ]		I (Showing Page 1 of 1 ) I [DMS] Filters: [Show][Hide]						Add New ]		
	Details Attachment Name		LOB/Policy # Cert #/Ref #	Category	Description	Document Type	Status	Created By Last Updated By	Date Created	Remove		
	<b>&gt;</b>	proposal 👿	Commercial Auto CPP-000098	Policy Letters	Commercial	Microsoft Word	Completed	Mary Oberleitner Mary Oberleitner	06/08/2005	En l		



Click the icon to the right of the Attachment Name to modify the attachment.

Nexsure Office Integration	ne sure
Update Attachment	
Attachment Letter to verify VIN Name: Policy: N/A Document Verify VIN Numbers Description: Viewable by Portal User: Client Retail Agent Carrier Folder: Folder: Correspondence Loss Runs	¥
Cancel	ок

- The Update Attachment dialog box displays. Make changes to the Attachment Name, Document Description, Portal Access and/or Folder placement. The Deselect button is used to deselect the current Folder selection.
  - □ If an attachment is associated to a restricted access policy, the Attachment Name can only be modified by people that are assigned to the restricted policy.
  - Delicy association cannot be changed Documents created with or without a Template.
- Click **OK** to save the changes. Click **Cancel** to abort changes to the attachment.

#### HOW to View a Draft Document

Documents on the **attachments** tab can be checked out by a staff member for editing if the Nexsure document is saved in draft form. The check-out process enables multiple staff members to be aware that a document is being edited. The initial staff member that checks out the document can make changes and save the document. If a second staff member accesses the same document while the first staff member is still editing the document, the second staff member will get a read-only copy of the document.

On the attachments tab, click the Details icon next to the draft document to check it out. The document will be available for editing. Other staff members that try to access the

same document will see a **Checked Out** icon in the place of the **Details** icon on the **attachments** summary. The name of the staff member that has checked out the document is displayed in the **Updated by** column. The staff member's name is a hyperlink. Click the hyperlink to display the staff member's contact information.

attachmer	its									
[ Add N	ew ]			Showing Page 1 of 1			S] Fil	ters: [ Show ]	[Hide][A	dd New]
Details	Attachment Name		LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Updated By	Date Created	Remove
<b>&gt;</b>	Summary	W	General Liability - Commercial		Pkg summary 2008	MS Word	Draft	Betsy Cormier Betsy Cormier	02/29/2008	Ē.
<b>&gt;</b>	Cormier Quick Stop Auto Schedu	×	Auto - Commercial BA1234567		2007 Updated Vehicle Schedule	MS Excel		Betsy Cormier Betsy Cormier	10/03/2007	E:
<b>*</b>	Cormier, Betsy	٢	Auto - Commercial BA1234567		2007 Updated Vehicle Schedule	HTML File		Betsy Cormier Betsy Cormier	10/03/2007	E.
( <u>@</u> )	Proposal	W	Auto - Commercial BA1234567	Proposal	2007 Auto Proposal	MS Word	Draft	Betsy Cormier Betsy Cormier	10/02/2007	E:
<b>*</b>	Proposal	W	Equipment Floater Binder123456	Proposal	2007 Equipment Proposal	MS Word	Draft	Betsy Cormier Betsy Cormier	10/02/2007	<b>B</b>
<b>&gt;</b>	Certs	×			Certs for 2007 Master	MS Excel		Betsy Cormier Betsy Cormier	08/02/2007	<b>B</b>
<b>&gt;</b>	Vehicles	X	Auto - Commercial Unassigned		Vehicle schedule from client	MS Excel		Betsy Cormier Betsy Cormier	08/01/2007	E.

- The document can still be viewed by a second staff member in a read-only copy.
- The document remains checked out until the initial staff member clicks the Close [X] icon in the document, selects I Nexsure Save and exits the document or selects I Nexsure Save > Cancel > OK to exit the document without saving changes.

**Important:** The following prompt is displayed if all office integration documents are not closed at the time of log out. To avoid any loss of data, close all office integration documents before logging out of Nexsure.



# HOW to View and Update Multiple Microsoft Office Documents Simultaneously

Multiple documents may be merged, viewed and edited for the same or different clients in Nexsure at the same time. Microsoft Office documents created outside of Nexsure can be open for editing at the same time Nexsure Office Integration documents are open. The Windows Task Bar holds all open documents. This illustration displays the task bar with a Nexsure Word Office Integration document and a document maintained outside of Nexsure open simultaneously and accessible from the Windows Task Bar. Click the Task Bar button to access and complete Office documents.

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Menu	Commands		_				Custor	n Toolbars							
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			Policy Term:			03/1	2/2008-03	/12/2009	)						
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In the next illustration, a document created with a Template is open for the client Cormier Quick Stop. The open Nexsure Word document is minimized to display the Nexsure client. From **Search** a second client, New England Power Generator, is accessed and a new document is created through the newly accessed client's attachments.

Both Office Integration (Nexsure Word Office Integration) documents are open for editing and completion. Access Cormier Quick Stop's or New England Power Generator's documents from the Windows Task Bar for editing and saving.

#### CHAPTER 17

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		Na	Named Insured:         Cormier Quick Stop, Inc.           Policy Number:         BA12345676						fo	or				
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# **Attaching Outlook Messages**

If attaching an e-mail, make sure to save its attachments separately from the e-mail especially if an attachment is a schedule to be imported to the application later.

After accessing the client file, click the **ATTACHMENTS** link on the **Client** menu or **attachments** tab from underwriting level.

nexsure							HOME	HELP   SETU	IP   LOGOUT
	SEARCH	ORGANIZATION   RE	PORTS	CAMPAIGNS		Bookmarks:	Expand   Add	l   Remove S	elected 💞
CLIENT PROFILE   OPPOR	TUNITIES	MARKETING   POL	ICIES	CLAIMS   SERVICING	ATTACHMENT	S   ACTIONS   TRANSACTIONS	DELIVERY	T-LOG	
Client Name: New Eng	gland Po	wer Generator						Commerci	al Account
	attachme	nts							
Folder View	[ Add Ne	ew ]			M	Showing Page 1 of 1 ▶ ■		[DMS]	Filters: [ Sho
New England Power	Details	Attachment Name		LOB/Policy # Cert #/Ref #	Category	Description	Doc Type	Status	Created By Created
Benefits		Loss Runs	M			2007 - 2008 Hartford Loss Runs	MS Excel		Betsy Cormi 10/08/2008
	<b>*</b>	Schedule	$\mathbb{Z}$			2008 Certificate Holder list	MS Excel		Betsy Cormi 03/12/2008
Commercial		Veh Sched	W	Auto - Commercial Unassigned	Schedules	Veh Schedule for Binder	MS Word	Draft	Betsy Cormi 07/16/2007
······································		Letter to verify VIN	W	Auto - Commercial BA1234567	CL letters	Verify VIN Numbers	MS Word	Completed	Betsy Cormi 07/13/2007

Click the [Add New] link to display the Add Attachment pop-up. Click the Attach Outlook Messages option and click the Next button to allow Nexsure access to your e-mail.

Nexsure Office Integration	ne sure
Add New Attachment	
<ul> <li>○ Add Attachment</li> <li>○ Create Document with Template</li> <li>○ Create Document without Template</li> <li>● Attach Outlook Messages</li> <li>● Add External Attachment</li> <li>Viewable by Portal User: □ Client □ Retail Agent</li> </ul>	te
ОК	Cancel

The first time you attach an Outlook message, a Tip pop-up is displayed providing the steps to complete the addition of the attachment. If this tip is not desired again, click the check box beside **Do not show this message next time**. Click **OK** to close the tip.

Tip									
	Outlook will be launched or you'll be redirected to Outlook if it's already open.								
	Select Outlook messages and run the menu "Save As Nexsure Attachment" to post messages								
	Run the menu "Synchronize with Nexsure Action" to synchronize Outlook with Nexsure action items.								
	Please empty "Deleted Items" folder to synchronize items properly.								
	Click on OK to continue.								
	Do not show this message next time.								
	ок								

Nexsure opens Outlook if it is not already open. The Nexsure toolbar is added to Outlook with the **Nexsure Save** button active. In Outlook, select to highlight the message to be attached.

🖾 Inbox - Microsoft Outlook		_ = ×						
<sup>i</sup> <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>G</u> o <u>T</u> ools <u>A</u> ctions	<u>H</u> elp Adobe <u>P</u> DF	Type a question for help						
🗄 🖻 <u>N</u> ew 👻 🎒 🎦 🗙 🖓 Reply 🖓 Rep	oly to All 🙈 For <u>w</u> ard   🔡 🍸   📑 Send/Re <u>c</u>	eive 👻 🔯 Search address books 🔹 🎯 🖕 🤅 🎆 🛼 🛃 🖕						
Nexsure Save 🖉 Nexsure Actions 🕮	Vexsure Contacts 🕄 About 🖕							
Mail «	🔄 Inbox	New England Power Generator Quote						
Favorite Folders	Search Inbox 🔎 👻 📚	Cormier, Betsy [Betsy.Cormier@xdti.com]						
<b>Inbox (1)</b>	Click here to enable Instant Search	Sent: Wed 10/8/2008 12:41 PM						
Unread Mail     Sent Items	Arranged By: Date Newest on top	Marcana 2008 CL Banawal Quarta dage (10 KB)						
Mail Folders	- Today	Message 2008 St Kellewal Quote.docx (10 KB)						
All Mail Items	Cormier, Betsy 12:44 PM							
□ 201 Personal Folders	New England Power Genera 🖉 🔍 🦄	Quotes attached.						
Deleted Items	🖃 Last Week	Company Underwriter						
Deafter [4]								

Click 🔚 Nexsure Save from the Nexsure Toolbar in Outlook.

The **Outlook Attachment** dialog box displays to enter the **Name** and **Description** of the attachment in Nexsure. Nexsure prompts the sender's name in the **Name** box and the email's subject line as the **Description**. Files attached to an Outlook message may be detached and saved separately from email's message. If the **Detach attachments and post them separately** check box is not checked, the message with its attachments are saved together. If checked, the **Outlook Attachment** dialog box refreshes to display fields to enter a different **Name** and **Description** for the attachments from the message itself.

Outlook Attachment 🛛 🔀									
E-Mail message Change desired message name and description if default naming convention is not desired.									
Name Quote									
Description 2008 GL and WC Quotes from Carrier Name									
E-mail attachments									
If you want to use this Outlook message for fax delivery system later, you need to check the option.									
Use name and description entered above for attachments posted separately.									
Enter desired attachment name and description if default naming convention is not desired.									
Name Quotes detached									
Description 2008 GL and WC Quotes from Carrier Name									
OK Cancel									

All attachments posted separately from the message will be saved to the client's **attachments** with the **Name** and **Description** entered in the optional fields. If desired, the default **Name** and **Description** may be used to save the email message and separate attachments by checking the **Use name and description entered above for attachments posted separately** check box. When checked, the optional **Name** and **Description** fields for naming attachments are unavailable for editing.

Outlook Attachment
E-Mail message Change desired message name and description if default naming convention is not desired.
Name Quote
Description 2008 GL and WC Quotes from Carrier Name
If you want to use this Outlook message for fax delivery system later, you need to check the option.           If         Use name and description entered above for attachments posted separately.           Enter desired attachment page and description in the pag
Enter desired attachment name and description if default naming convention is not desired.
Description
OK Cancel

The attachments summary view displays the e-mail message and its attachments separately if they are detached and saved separately. The e-mail message is saved as a **Doc Type** html file. Change any attachment's Name and Description by clicking the icon to the right of the **Attachment Name**. Only people assigned to a restricted access policy may modify an attachment name and description if it is associated to a restricted access policy.

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		SE	ARCH   ORGANIZATION	REPORTS   CAMP	AIGNS	Bookm	arks: Expand	Add   Re	move Selecte	ed 🖤
CL	IENT PRO	DFILE   OPPORTU	ITIES   MARKETING	POLICIES   CLAIM	S   SERVICING   ATTACHMENTS   ACTIONS	TRANSACTIO	DNS   DELIVER	Y   T-LO	G	
Cli	ent Na	me: New Engla	nd Power Genera	tor				Cor	nmercial Ac	count
(	attachme	nts								
	[ Add N	ew ]			Showing Page 1 of 1	[ D	MS ] Filters: [	Show ][	[Hide] [/	Add New
	Details	Attachment Name	LOB/Policy Cert #/Re	/ # f # Category	Description	Doc Type	Status Crea	ated By eated	Updated By Updated	Remov
		Quotes detached	W		2008 GL and WC Quotes from Carrier Name	MS Word	Betsy 10/0	Cormier 8 8/2008	Betsy Cormie 10/08/2008	ſ 📑
	<b>*</b>	Quotes detached	W		2008 GL and WC Quotes from Carrier Name	MS Word	Betsy 10/0	Cormier 8 8/2008	Betsy Cormie 10/08/2008	ſ 🖶
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When the Outlook e-mail message is saved without detaching any attachments, the attachment summary view displays the e-mail message with an **Outlook** (1) icon and a **Doc Type** of Outlook Msg.

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			SEARCH	ORGANIZATION	REPORTS   CAM	PAIGNS			Bookn	narks: Ex	pand   Add   R	emove Selecte	ed 🐨
C	LIENT	PROFILE	OPPORTUNITIES	MARKETING	POLICIES   CLAI	IMS   SERVICING	ATTACHMENTS	ACTIONS	TRANSACTI	ONS   D	ELIVERY   T-LO	G	
CI	ient	Name: N	lew England P	ower Generat	or						► Co	mmercial Ac	count
1	attac	hments											
	[ Ade	d New ]				K Showing	Page 1 of 1 🕨 🕅		[[	DMS] Fil	ters: [ Show ]	[Hide] [A	Add New
	Det	tails Attach	ment Name	LOB/Policy = Cert #/Ref =	# # Category	Description		C	Doc Type	Status	Created By Created	Updated By Updated	Remov
	5	👂 Quote	C			2008 Renewal Em	ail with Quotes Atta	ached Ou	itlook Msg		Betsy Cormier 10/08/2008	Betsy Cormie 10/08/2008	ſ 🖷

Click the **Details** icon of the Outlook Message. The e-mail message opens in Outlook.

6	- 9 U A	⇒ ₹ Ne	ew Englar	nd Power Generat	or Quote - Message	(HTML)	_ 🗆 X
	Message De	veloper Adobe PDF					۲
		XPX		🗞 😵 Safe Lists 🗸	📕 🌪 🛞	街 Find	
Reply	Reply Forward	Delete Move to Crea	te Other	Block 🖂 Not Junk	Categorize Follow Mark as	Related -	
	to All Respond	Folder * Ru Actions	e Actions *	Junk E-mail	Options	Find	
From:	Cormier, Betsy	[Betsy.Cormier@xdti.com]					Sent: Wed 10/8/2008 12:41 PM
Cc:	To: Demo Cc:						
Subject:	New England I	Power Generator Quote					
🖂 Mess	age 🕴 🐏 2008 GL R	enewal Quote.docx 🛛 🖷	2008 WC Rene	wal Quote.docx			
Quotes attached. Company Underwriter						-	

#### HOW to Modify the Attached Outlook Message

Click the icon to the right of the Attachment Name to modify the attachment.

Nexsure Office Integration	ne sure
Update Attachment	
Attachment Name: Policy: M/A Document Description: Viewable by Portal User: Client Retail Agent Carrier Folder: Folder: Commercial Correspondence Loss Runs	Y
Cancel	ок

- The Update Attachment dialog box displays. Make changes to the Attachment Name, Document Description, Portal Access and/or Folder placement. The Deselect button is used to deselect the current Folder selection.
  - □ If an attachment is associated to a restricted access policy, the **Attachment Name** can only be modified by people that are assigned to the restricted policy.
  - Delicy association cannot be changed on Outlook messages.
- Click **OK** to save the changes. Click **Cancel** to abort changes to the attachment.

#### HOW to Customize Default Filter Settings for Attachments

The summary view of attachments displayed at **Client** menu > **ATTACHMENTS**, policy and certificate attachments can be customized by each user. Customizing default search filter settings is done separately at each level where attachments are viewed: **Client** menu > **ATTACHMENTS**, policy attachments and certificate attachments. The steps to save a personal default view of attachments are the same at each level.

The User's currently displayed **Search** and **Sort** filter criteria may be saved as a personal default view of attachments by clicking the Filter Settings **Save** button. The next time attachments at that level is selected by the User, the items returned will be filtered by default to display attachments that meet the saved search criteria. Exercise caution when saving **Search** and **Sort** filter settings with a date range entered as returned Actions will be restricted to that date range. Use the **Date Variable** icon to enter a variable number of days to set a continuous date range as the search criteria. Enter + or – and the number of days up to three digits in the **Date Variable** pop-up to establish date criteria before (-) or after (+) the current date before clicking **Save**.

attachments				
[Add New]		Showing	Page 1 of 1 🕅 1 💌	[DMS] Filters: [Hide] [Add New]
Search Filters				Save Filter Settings Save Reset
	Description:	Created From:	Date Created	Created By:
	DocType: All	Policy No.:	Attachment Name:	Updated By:
	Status: All	Issuing Carrier:	LOB:	
Sort Orders				
	Sort Field 1: Date Created -	Sort Order 1: Descending 💌	Sort Field 2: Date Created	Sort Order 2: Descending
	Files Per Page: 10 🔻			Search Restore Clear

A user's saved filter settings will not be altered by subsequent searches for specific attachments. The saved settings will remain as saved and will not be altered by those future searches. Clicking the **Restore** button located between **Search** and **Clear** will return the search filter criteria to the saved personal default settings. Use the **Restore** button if you want to view attachments by the saved default settings before leaving the screen.

attachments				
[Add New]		K Showing	gPage 1 of 1 🕅 1 💌	[DMS] Filters: [Hide] [Add New]
Search Filter				Save Filter Settings Save Reset
	Description:	Date Bill Created From:	Date Created	Created By:
	DocType: All	Policy No.:	Attachment Name:	Updated By:
	Status: All	Issuing Carrier:	LOB:	
Sort Orders				
	Sort Field 1: Date Created	Sort Order 1: Descending 💌	Sort Field 2: Date Created	Sort Order 2: Descending
	Files Per Page: 50 💌			Search Restore Clear

When search filters are saved, the **Reset** button is activated. Reset is used to restore the default filter settings to the Nexsure default at that level. Reset removes any previously saved search filter criteria. The next time attachments at that level is selected by the user, the items returned will be filtered by the Nexsure default. Search filters that display an inactive **Reset** button do not have any saved filter settings.

attachments				
[Add New ]		li	owing Page 1 of 1 🕨 1 💌	[DMS] Filters: [Hide] [Add New]
Search Filters				Save Filter Settings Save Reset
	Description:	Created From:	Date Created	Created By:
	DocType: All	Policy No.:	Attachment Name:	Updated By:
	Status: All	Issuing Carrier:	LOB:	
Sort Orders				
	Sort Field 1: Date Created	Sort Order 1: Descending	Sort Field 2: Date Created	Sort Order 2: Descending
	Files Per Page: 50 💌			Search Restore Clear
Sort Orders	Sort Field 1: Date Created  Files Per Page: 50	Carrier: <sup>1</sup> Sort Order 1: Descending	Sort Field 2: Date Created	Sort Order 2: Descending 💌 Search Restore Clear

Filter Settings Buttons	Description
Save	Clicking Save stores the current search criteria as the user's personal default view of attachments at that level.
Restore	Clicking Restore returns the search results to the saved search criteria after performing a search using different search criteria.
Reset	Clicking Reset restores the Nexsure Default view of attachments at that level and removes any saved search criteria.



#### Notes
