Chapter 19

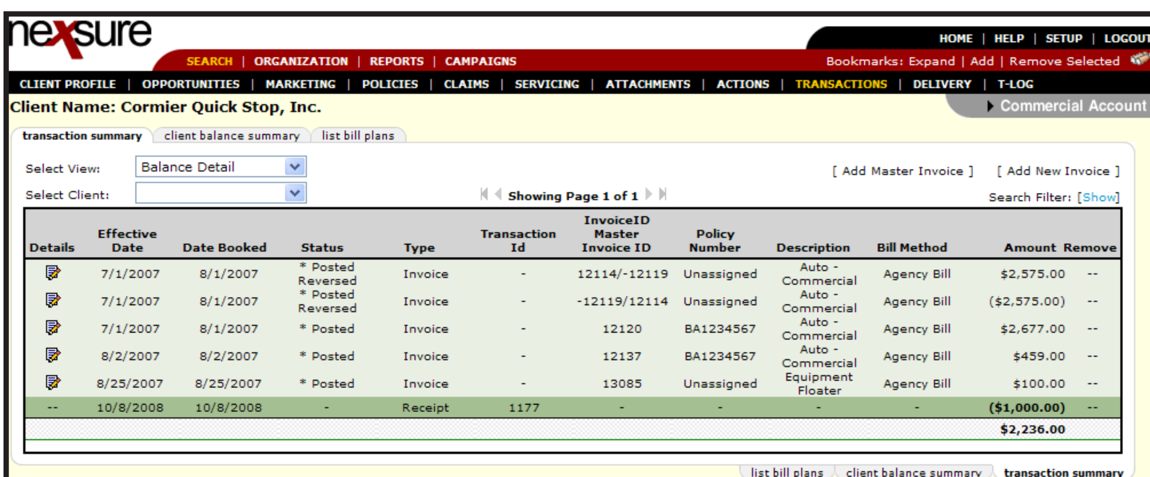
Miscellaneous

IN THIS CHAPTER

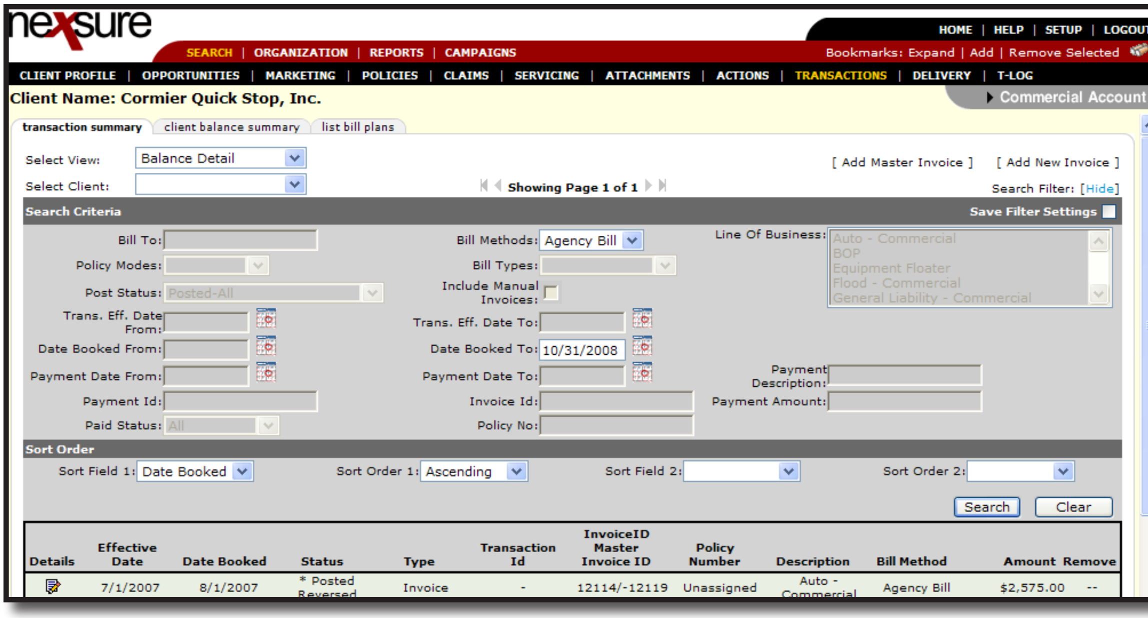
- Client Balance
- Checking Payable/Receivable Balances at the Client Level
- Delivery
- Bookmarks
- T-Log
- E-Services
- Setting User Preferences

Client Balance

To quickly see the client's balance, click the **TRANSACTIONS** link on the **Client** menu. By default, the **Detail Assigned** view on the transaction summary tab is displayed. This default setting may be changed by clicking on the user name found at the bottom of any Nexsure screen and clicking on the Nexsure Preferences tab (For more information see "Setting User Preferences" in this chapter). Click the **Select View** drop-down box and change the view to **Balance Detail** to show the client's balance up to the end of the current month.



Use the **[Show]** link to display the search filter options. Change the **Date Booked** date to a future date to include any future activity in the balance.

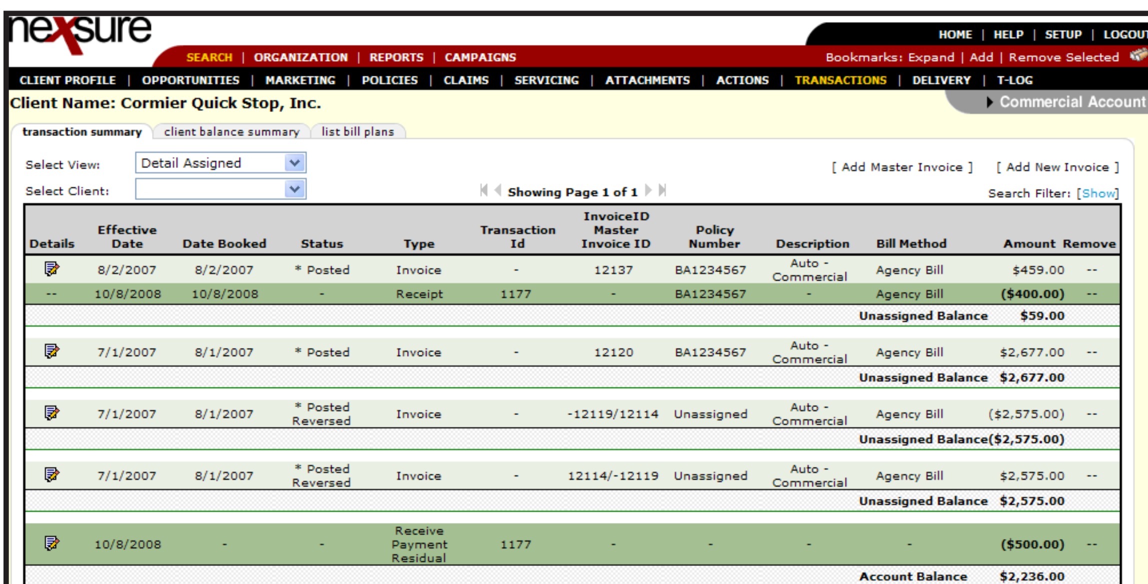


Checking Payable/Receivable Balances at the Client Level

Client balances for all policies can be accessed at the client level, which displays payable and receivable balances.

HOW to Access Client Payable and Receivable Amounts

- After accessing the appropriate client through **SEARCH**, click the **TRANSACTIONS** link on the **Client** menu.
- By default the **transaction summary** tab displays.
- The **Select View** drop-down box will default to **Detail Assigned** view.



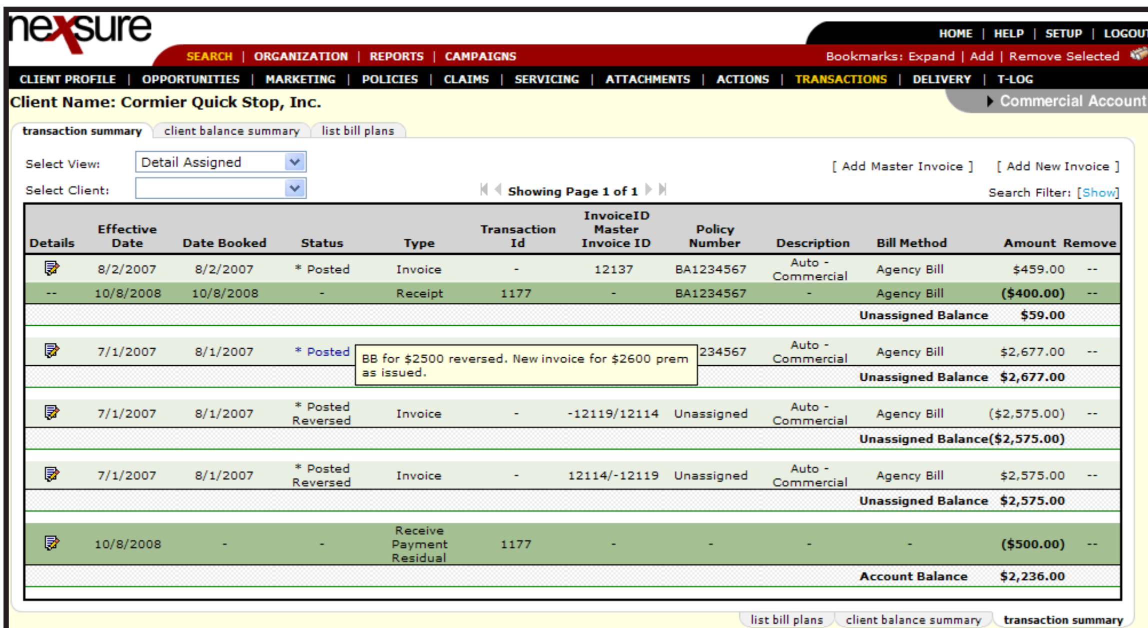
HOW and WHY Change the View

Changing the view on the **transaction summary** tab reveals both posted and unposted invoices, payable balances due and balances that have been received against an invoice as well as any payment advances or residuals on the client's account.

Note: Keep in mind when changing views on the transaction summary tab, the default values in the [Show] filter settings will always determine what is displayed.

Detail Assigned View

- In the **Select View** drop-down box, change the view to **Detail Assigned**. The Detail Assigned view displays the details for each invoice, both posted and unposted, along with any payments that have been received against that invoice for all policies for the client.



Details	Effective Date	Date Booked	Status	Type	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount	Remove
	8/2/2007	8/2/2007	* Posted	Invoice	-	12137	BA1234567	Auto - Commercial	Agency Bill	$459.00	--
--	10/8/2008	10/8/2008	-	Receipt	1177	-	BA1234567	-	Agency Bill	($400.00)	--
									Unassigned Balance	$59.00	
	7/1/2007	8/1/2007	* Posted				234567	Auto - Commercial	Agency Bill	$2,677.00	--
									Unassigned Balance	$2,677.00	
	7/1/2007	8/1/2007	* Posted Reversed	Invoice	-	-12119/12114	Unassigned	Auto - Commercial	Agency Bill	($2,575.00)	--
									Unassigned Balance	($2,575.00)	
	7/1/2007	8/1/2007	* Posted Reversed	Invoice	-	12114/-12119	Unassigned	Auto - Commercial	Agency Bill	$2,575.00	--
									Unassigned Balance	$2,575.00	
	10/8/2008	-	-	Receive Payment Residual	1177	-	-	-	-	($500.00)	--
									Account Balance	$2,236.00	

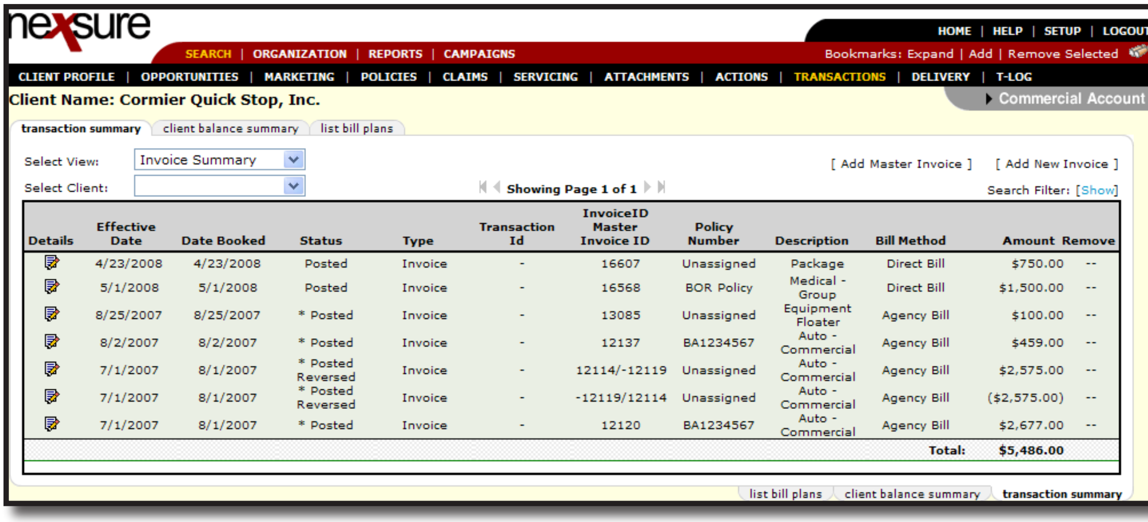
- Clicking the **Details** icon of a posted invoice displays the information for that invoice. A **Reverse** link is available in the navigation toolbar under the posted invoice header for reversal of incorrectly entered invoices.

Note: A posted invoice cannot be deleted or edited, it must be reversed and re-entered if incorrect.

- Clicking the **Details** icon of an unposted invoice displays the information for the unposted invoice. A **Post** link is available in the navigation toolbar under the invoice header and can be used if an invoice needs to be posted prior to the system posting date.
- An asterisk * next to the invoice **Status** identifies a saved **Internal Note**. Move the pointer over the asterisk to display the invoice message. The **Internal Note** may be edited at any time by clicking the **Details** icon of the invoice and editing the Invoice Header's Internal Note.

Invoice Summary View

- In the **Select View** drop-down box, change the view to **Invoice Summary**. Invoice Summary displays both posted and unposted invoices for all policies for the client.



Details	Effective Date	Date Booked	Status	Type	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount	Remove
	4/23/2008	4/23/2008	Posted	Invoice	-	16607	Unassigned	Package	Direct Bill	$750.00	--
	5/1/2008	5/1/2008	Posted	Invoice	-	16568	BOR Policy	Medical - Group	Direct Bill	$1,500.00	--
	8/25/2007	8/25/2007	* Posted	Invoice	-	13085	Unassigned	Equipment Floater	Agency Bill	$100.00	--
	8/2/2007	8/2/2007	* Posted	Invoice	-	12137	BA1234567	Auto - Commercial	Agency Bill	$459.00	--
	7/1/2007	8/1/2007	* Posted Reversed	Invoice	-	12114/-12119	Unassigned	Auto - Commercial	Agency Bill	$2,575.00	--
	7/1/2007	8/1/2007	* Posted Reversed	Invoice	-	-12119/12114	Unassigned	Auto - Commercial	Agency Bill	($2,575.00)	--
	7/1/2007	8/1/2007	* Posted	Invoice	-	12120	BA1234567	Auto - Commercial	Agency Bill	$2,677.00	--
									Total:	$5,486.00	

- Clicking the **Details** icon of a posted invoice displays the information for that invoice. A **Reverse** link is available in the navigation toolbar under the posted invoice header for reversal of incorrectly entered invoices.

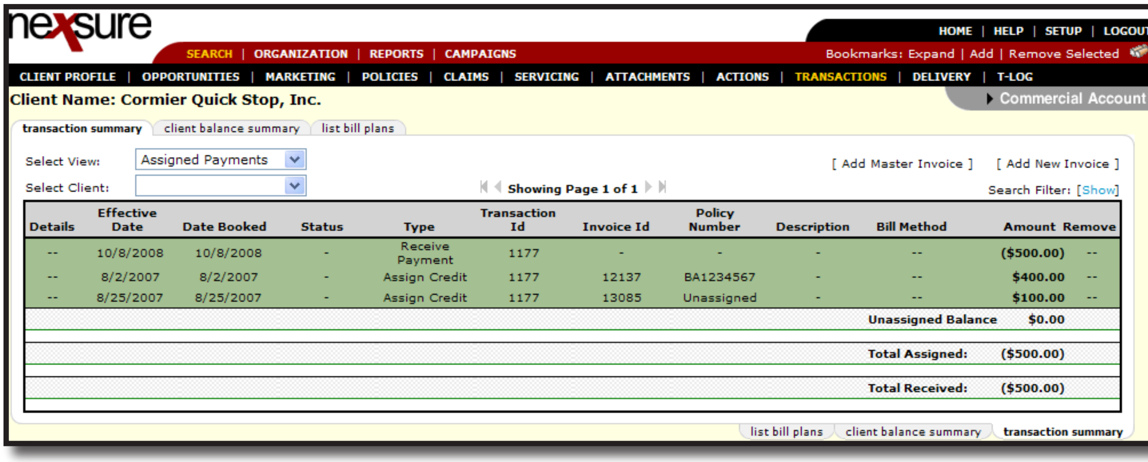
Note: A posted invoice cannot be deleted or edited, it must be reversed and re-entered if incorrect.

- Clicking the **Details** icon of an unposted invoice displays the information for the unposted invoice. A **Post** link is available in the navigation toolbar under the invoice header and can be used if an invoice needs to be posted prior to the system posting date.

- An asterisk * next to the invoice **Status** identifies a saved **Internal Note**. Move the pointer over the asterisk to display the invoice message. The **Internal Note** may be edited at any time by clicking the **Details** icon of the invoice and editing the Invoice Header's Internal Note.

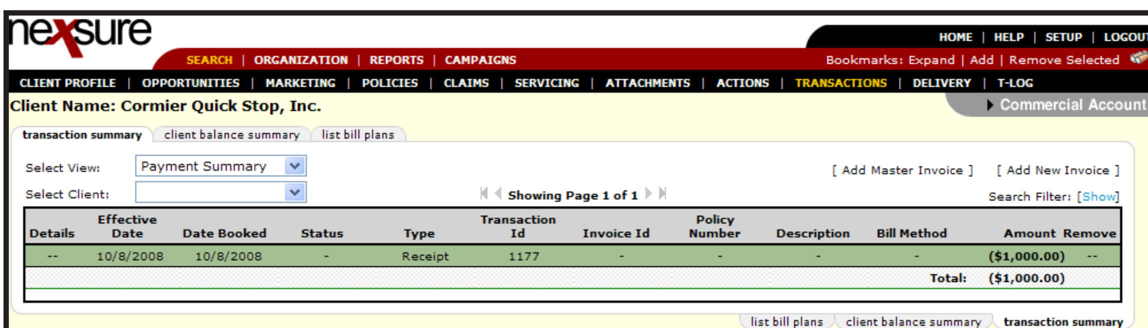
Assigned Payments View

- In the **Select View** drop-down box change the view to **Assigned Payments**. Assigned Payments displays all payments that have been received and assigned to the client.



Payment Summary View

- In the **Select View** drop-down box, change the view to **Payment Summary**. Payment Summary displays all payments that have been received along with a total of the amount received. The payments displayed can consist of payments applied to invoices, payment advances, residuals and money held on account.



Summary View

- In the **Select View** drop-down box, change the view to **Summary View**. Summary View displays all posted and unposted invoices along with any payments that have been received for all policies for the client.

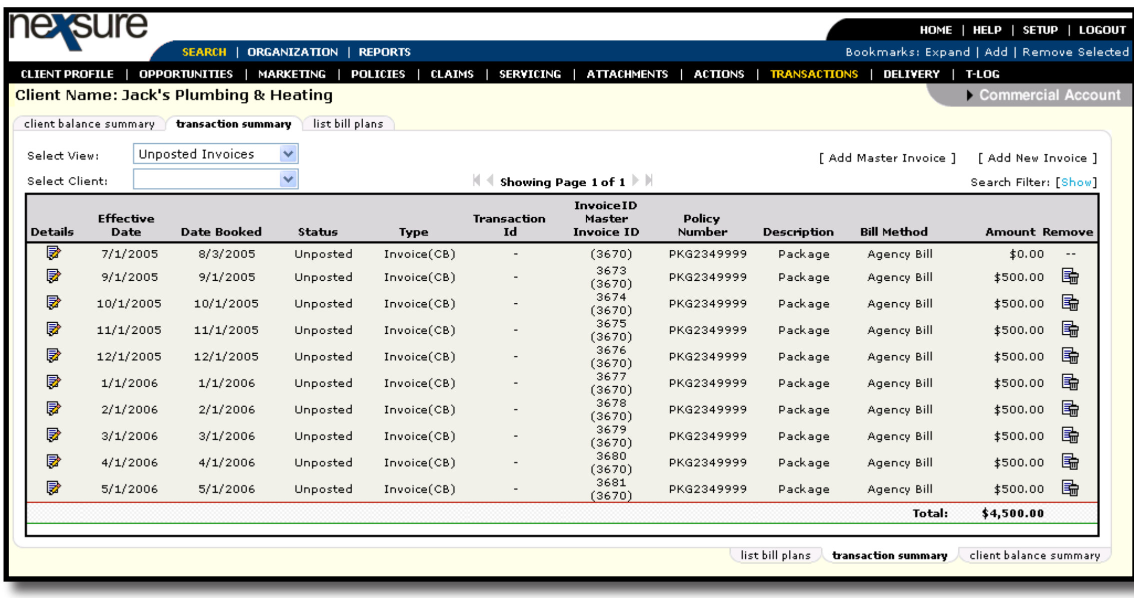
- Clicking the **Details** icon of an unposted invoice displays the information for the unposted invoice. A **Post** link is available in the navigation toolbar under the invoice header and can be used if an invoice needs to be posted prior to the system posting date.

Note: A posted invoice cannot be deleted or edited, it must be reversed and re-entered if incorrect.

- Clicking the **Details** icon of a posted invoice displays the information for that invoice. A **Reverse** link is available in the navigation toolbar under the posted invoice header for reversal of incorrectly entered invoices.

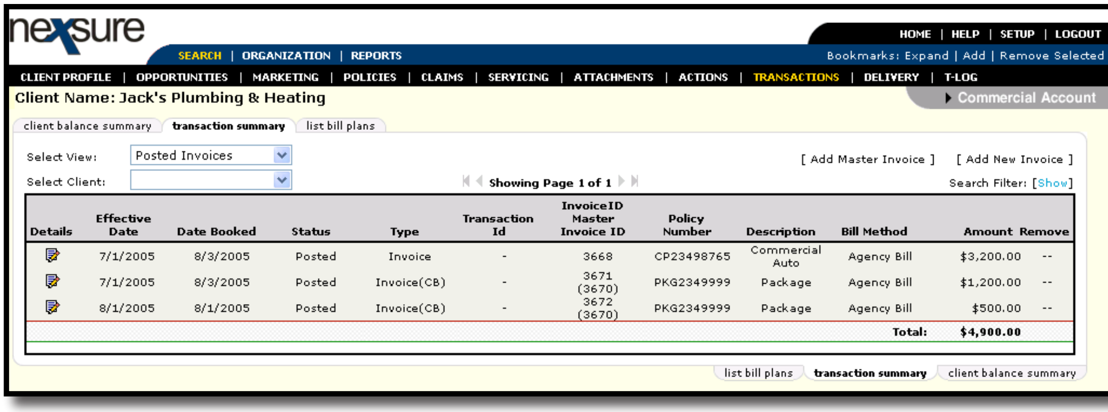
Unposted Invoices View

- In the **Select View** drop-down box, change the view to **Unposted Invoices**. All unposted invoices are displayed for all policies for the client.



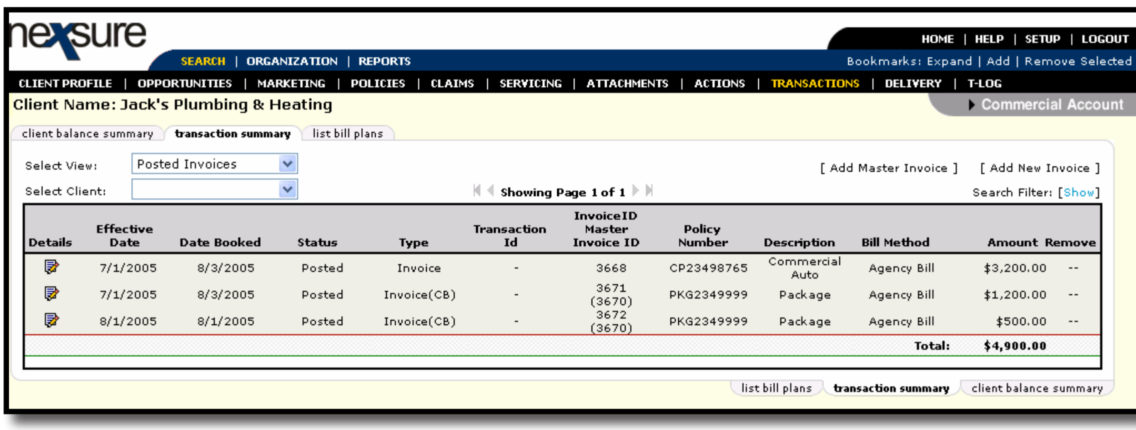
Details	Effective Date	Date Booked	Status	Type	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount	Remove
	7/1/2005	8/3/2005	Unposted	Invoice(CB)	-	(3670)	PKG2349999	Package	Agency Bill	$0.00	--
	9/1/2005	9/1/2005	Unposted	Invoice(CB)	-	3673 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	10/1/2005	10/1/2005	Unposted	Invoice(CB)	-	3674 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	11/1/2005	11/1/2005	Unposted	Invoice(CB)	-	3675 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	12/1/2005	12/1/2005	Unposted	Invoice(CB)	-	3676 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	1/1/2006	1/1/2006	Unposted	Invoice(CB)	-	3677 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	2/1/2006	2/1/2006	Unposted	Invoice(CB)	-	3678 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	3/1/2006	3/1/2006	Unposted	Invoice(CB)	-	3679 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	4/1/2006	4/1/2006	Unposted	Invoice(CB)	-	3680 (3670)	PKG2349999	Package	Agency Bill	$500.00	
	5/1/2006	5/1/2006	Unposted	Invoice(CB)	-	3681 (3670)	PKG2349999	Package	Agency Bill	$500.00	
									Total:	$4,500.00	

- Clicking the **Details** icon of an unposted invoice displays the information for the unposted invoice. A **Post** link is available in the navigation toolbar under the invoice header and can be used if an invoice needs to be posted prior to the system posting date.



Posted Invoices View

- In the **Select View** drop-down box, change the view to **Posted Invoices**. All posted and unposted invoices will be displayed for the client.

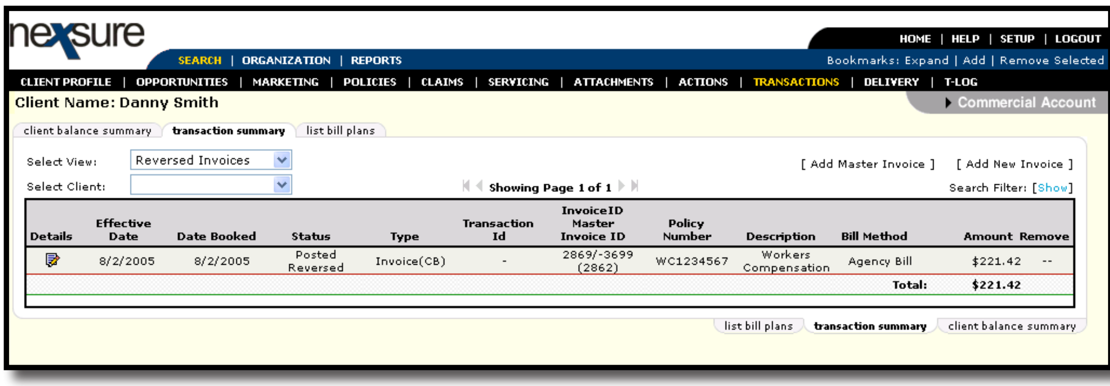


- Clicking the **Details** icon of a posted invoice displays the information for that invoice. A **Reverse** link is available in the navigation toolbar under the posted invoice header for reversal of incorrectly entered invoices.

Note: A posted invoice cannot be deleted or edited, it must be reversed and re-entered if incorrect.

Reversed Invoices View

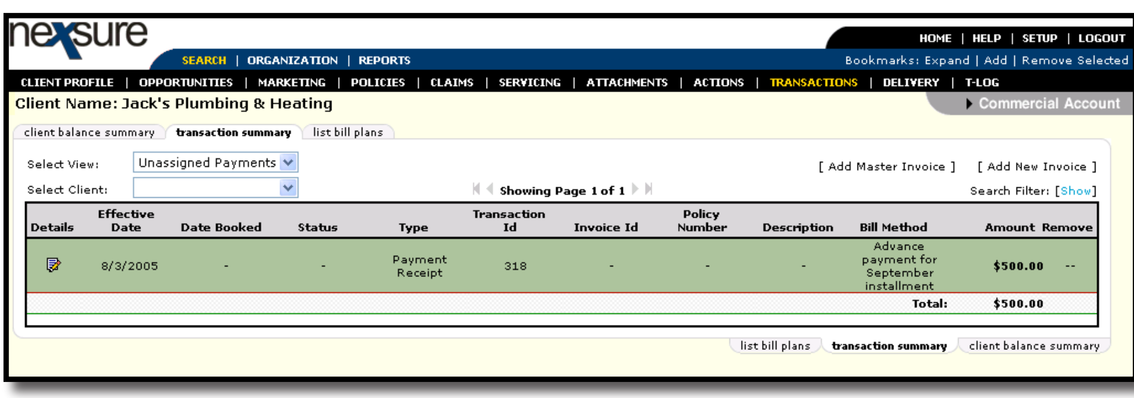
- In the **Select View** drop-down box, change the view to **Reversed Invoices**. All invoices that have been reversed will be displayed.



- The **Invoice ID/Master Invoice ID** will display the original invoice ID, the reversed invoice ID and, if the reversed invoice was an installment invoice, the master ID number below in parenthesis:
  - The number alone is the original invoice number.
  - A "**-**" displays in front of the invoice reversing the original invoice.
  - The master ID number displays below if the invoice was an installment invoice.

Unassigned Payments View

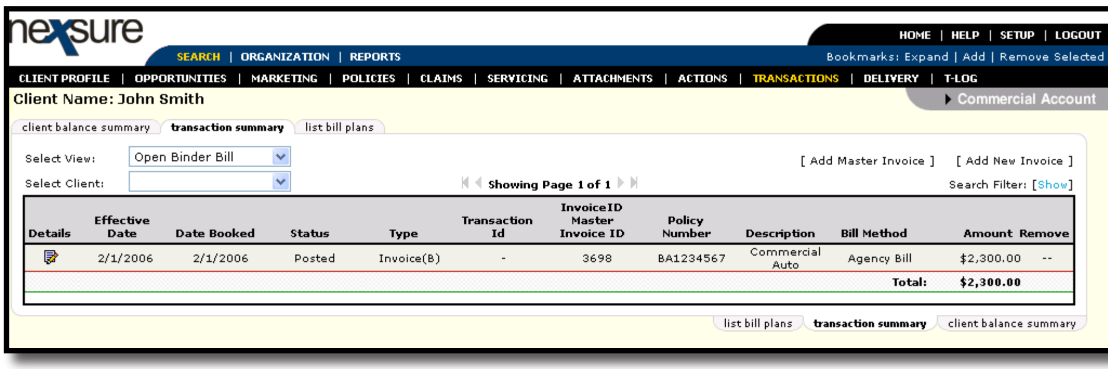
- In the **Select View** drop-down box, change the view to **Unassigned Payments**. Any payments that have been received and have not been applied to an invoice will be displayed.



Open Binder Bill View

- In the **Select View** drop-down box, change the view to **Open Binder Bill**. The summary view will display only open binder bill invoices. Binder bill invoicing is used to create an invoice for a new business policy or renewal in a bound status, before the policy and bill are received from the carrier. Binder bill invoicing hit the general ledger but will not appear on the agent's account current statement. When the policy is received from the carrier, the binder bill will be reversed and a regular invoice processed. Proceed to **Chapter 6 – Invoicing Binder Bill** for more information on binder bills.

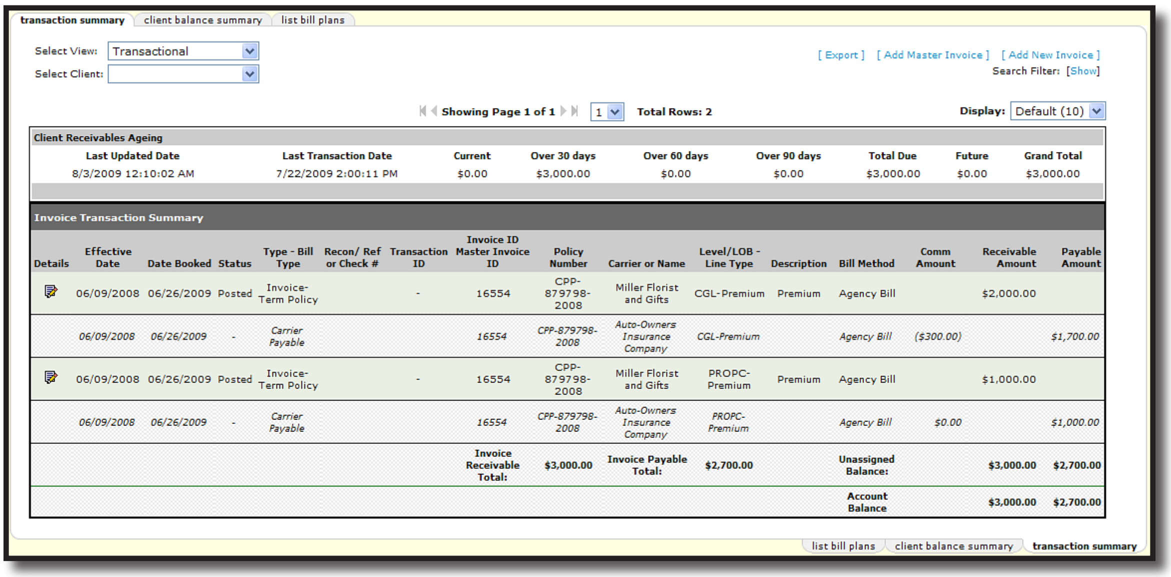
Note: Binder bill invoicing is only done on agent billed policies.



Transactional View

The **Client Receivables Aging** section is located at the top of the **transaction summary** tab. The detail of this view includes posted invoices as well as all offsetting entries. The offsetting entries are:

- Reconciliations
- Receive Payments
- Disbursements
- Reversals



Client Receivables Ageing

Last Updated Date	Last Transaction Date	Current	Over 30 days	Over 60 days	Over 90 days	Total Due	Future	Grand Total
8/3/2009 12:10:02 AM	7/22/2009 2:00:11 PM	$0.00	$3,000.00	$0.00	$0.00	$3,000.00	$0.00	$3,000.00

Invoice Transaction Summary

Details	Effective Date	Date Booked	Status	Type - Bill Type	Recon/ Ref or Check #	Transaction ID	Invoice ID Master Invoice ID	Policy Number	Carrier or Name	Level/LOB - Line Type	Description	Bill Method	Comm Amount	Receivable Amount	Payable Amount
	06/09/2008	06/26/2009	Posted	Invoice-Term Policy		-	16554	CPP-879798-2008	Miller Florist and Gifts	CGL-Premium	Premium	Agency Bill		$2,000.00	
	06/09/2008	*06/26/2009*	-	*Carrier Payable*			*16554*	*CPP-879798-2008*	*Auto-Owners Insurance Company*	*CGL-Premium*		*Agency Bill*	*($300.00)*		*$1,700.00*
	06/09/2008	06/26/2009	Posted	Invoice-Term Policy		-	16554	CPP-879798-2008	Miller Florist and Gifts	PROPC-Premium	Premium	Agency Bill		$1,000.00	
	06/09/2008	*06/26/2009*	-	*Carrier Payable*			*16554*	*CPP-879798-2008*	*Auto-Owners Insurance Company*	*PROPC-Premium*		*Agency Bill*	*$0.00*		*$1,000.00*
							Invoice Receivable Total:	**$3,000.00**	**Invoice Payable Total:**	**$2,700.00**		**Unassigned Balance:**		**$3,000.00**	**$2,700.00**
												Account Balance		**$3,000.00**	**$2,700.00**

Notes

Delivery

Nexsure Delivery provides a vehicle for outgoing communications by email or fax from the client or retail agent record. The Global Nexsure database of Location and Contact record email addresses and fax numbers is available to all users with rights to create deliveries. All client documentation is available for attachment to a client Delivery, eliminating the step of printing hard copies to manually fax or scan and attach to an external email system.

Once sent, Deliveries are permanently documented in Nexsure. Sent Deliveries cannot be altered, but they are available to re-send via either delivery method of fax or email.

The status of deliveries for the logged on user are quickly tracked from the **Home** menu > **DELIVERY** link. Delivery summaries display deliveries created by the logged on User unless security is granted to view deliveries created by all users. **Home** menu > **DELIVERY** provides access to all deliveries for all clients and retail agents. **Client** menu > **DELIVERY** provides access to deliveries for the selected client only. Delivery at policy underwriting provides access to deliveries for the selected policy only.

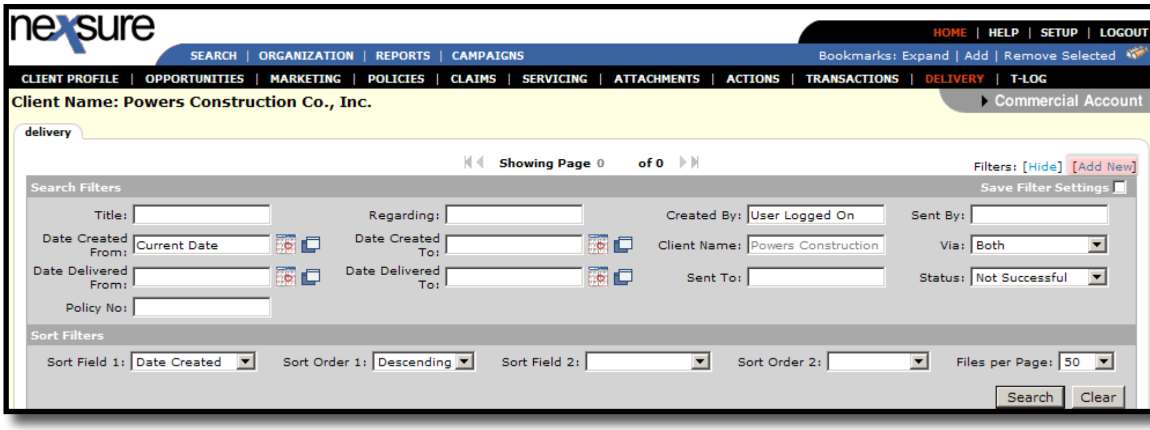
Note: Staff members must be assigned to a Restricted Access policy in order to access policy information for deliveries or to view deliveries that contain attachments associated to a Restricted Access policy.

New deliveries are created from the client or retail agent record. Client deliveries can be created from the **Client** menu > **DELIVERY** link, marketing and policy underwriting **delivery** tab, posted binders and invoices and issued certificates. Deliveries created from the **Client** menu > **DELIVERY** link provides access to applications and forms of all policies, certificates, binders, verifications and other attachments without limitation to a specific policy, certificate or binder.

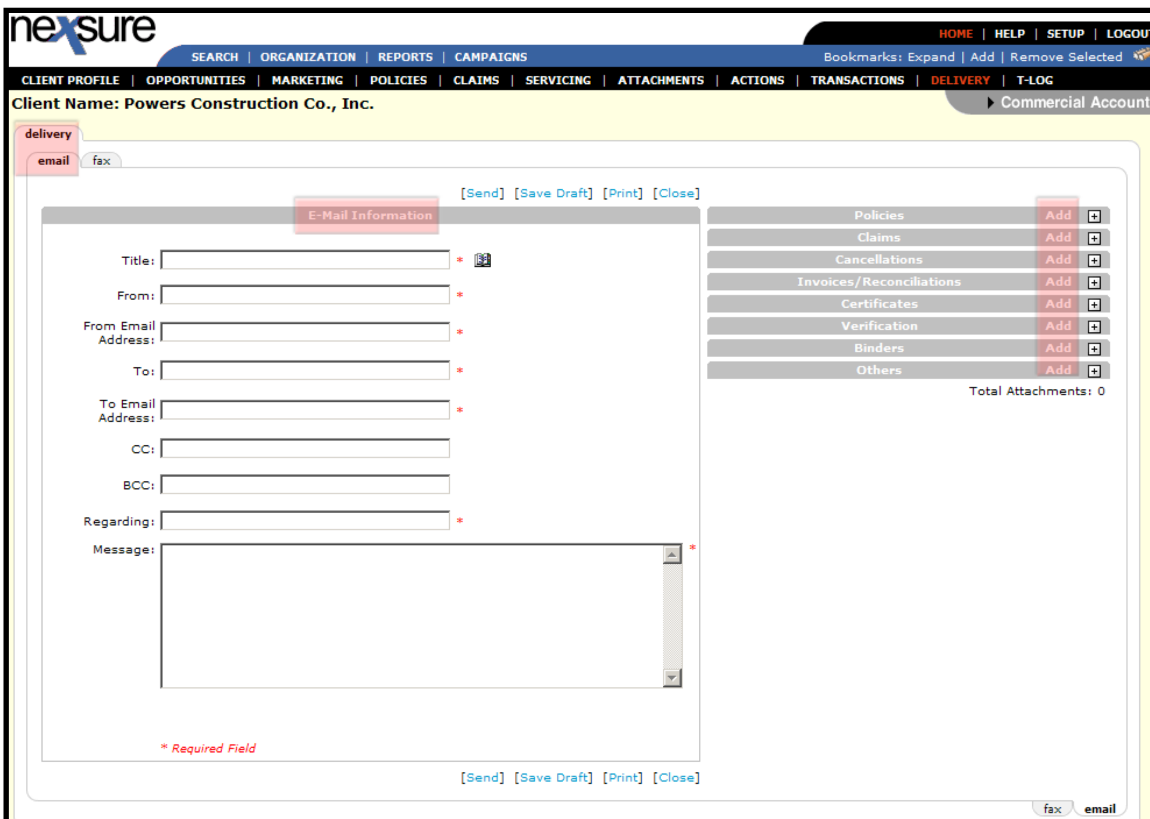
- For specific information on delivering policy applications and forms, see Chapter 5, “Marketing” and Chapter 7, “Endorsements”.
- For specific information on delivering posted invoices, see Chapter 6, “Policy”.
- For specific information on delivering posted binders, see Chapter 8, “Binders”.
- For specific information on delivering issued certificates, see Chapter 9, “Nexsure Certificates”.
- For specific information on delivering issued verifications, see Chapter 10, “Auto ID Cards”.

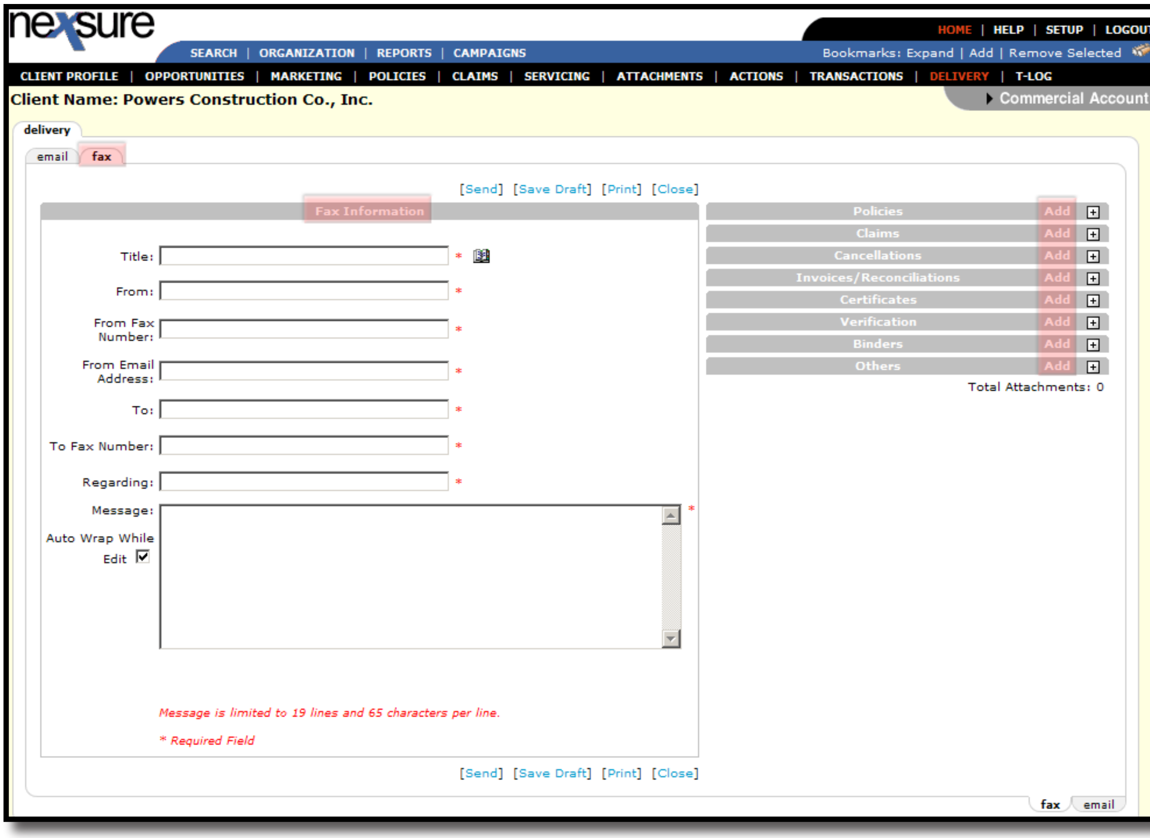
HOW to Add a New Delivery from the Client Level

- On the Client menu, click the DELIVERY link. The delivery summary is displayed. Saved filter settings will determine what is displayed on the summary. If this is the first delivery for the Client, no records will be found.



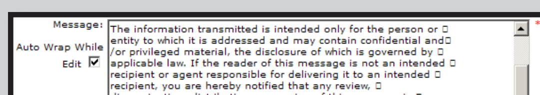
- Click the **[Add New]** link.
- The **delivery** > **email** tab is displayed by default. To send a fax delivery, click the **fax** tab.
- The **email** and **fax** tabs are divided into two sections. E-Mail Information and fax Information contain sender and recipient information, a title, subject and message text box. Attachments of documents are added to the delivery using the **Add** links on the gray bars to the right of the Information section. All required fields are indicated by a red * asterisk under the Information section.



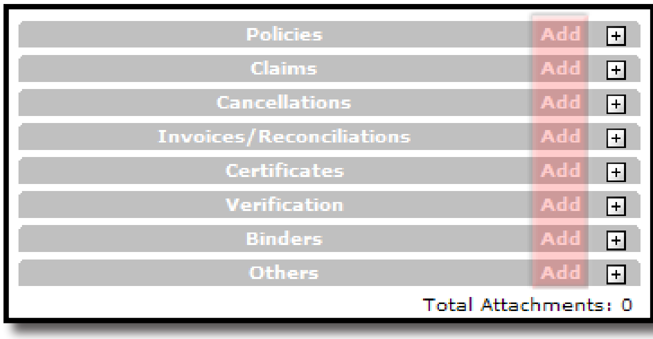


- Enter delivery information manually or use the address book icon to access and pre-fill location and contact record names, email addresses and fax numbers. For information on using the address book, see "HOW to Use the Delivery Address Book" later in this chapter.

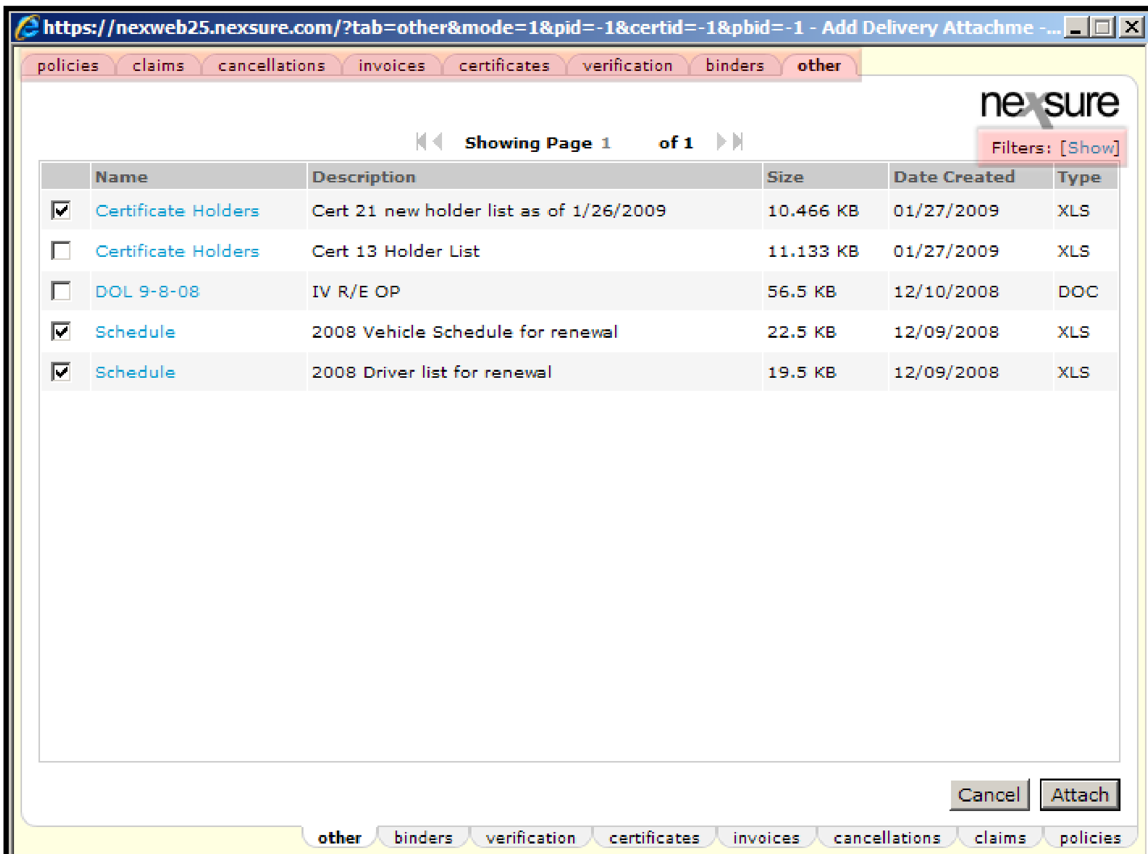
E-Mail Information Field	Fax Information Field	Description
Title	Title	Title is used as an internal note and does not print on the delivered email or fax. Title displays on the delivery summary and can be used to search for deliveries.
From	From	The logged on User's name will default from their employee record. This is the name the recipient sees. Edit if necessary. The name of the User who created the delivery is saved with delivery details separately from the name entered here.
N/A	From Fax Number	Enter your return Fax Number for the recipient's information. Fax numbers do not default from employee contact records.

E-Mail Information Field	Fax Information Field	Description
From E-mail Address	From E-mail Address	The logged on User's first email address saved in their employee record will default as the sender's return email address. Edit if necessary. Delivery status or failure notifications from the Nexsure server will be delivered to the inbox of the email address entered here.
To	To	Enter the name of the recipient(s) who will receive the email or fax. Separate multiple names with a semicolon.
To E-mail Address	To Fax Number	Enter recipient(s) Email address(es) for an email delivery or Fax Number(s) for delivery via fax. Multiple email addresses or fax numbers may be entered separated by a semicolon.
CC:	N/A	Enter the email address(es) of recipients to receive a copy of the email delivery. Separate multiple email addresses with a semicolon.
BCC:	N/A	Enter the email address(es) of recipients to receive a blind copy of the email delivery. Separate multiple email addresses with semicolon. Recipient addresses in the BCC field will be blind to all other recipients. BCC recipients are displayed in delivery history.
Regarding	Regarding	Enter the delivery subject, as would be shown on the fax cover page or in the subject line of an email. The Regarding line displays on the recipients' email or fax. The Regarding line displays on the delivery summary and can be used to search for deliveries.
Message	Message	Enter a message for your delivery. A closing for Nexsure Deliveries can be saved to the employee record to default in the Message section of delivery information. The closing salutation can be saved to display the sender's name, company name, phone number, confidentiality statement, etc. For information on how to add a default closing for Deliveries, see "HOW to Add an Employee Salutation" in "Employee Record Maintenance", Chapter 2, *Admin Training Manual*.
N/A	Auto Wrap While Edit ☑	Email delivery Messages are unlimited text fields. Fax delivery Messages are limited to 19 lines and 65 characters per line. The Auto Wrap While Edit option will display text as it will be displayed on the delivered fax. 

- Client documents can be attached to the email or fax delivery. Attachments are not required for a successful delivery. To add an attachment, click the **Add** link to the right of the type of attachment on the right side of the delivery email/fax screen.



- The **Add Delivery Attachment** pop-up displays with the tab for the type of attachment selected displayed.

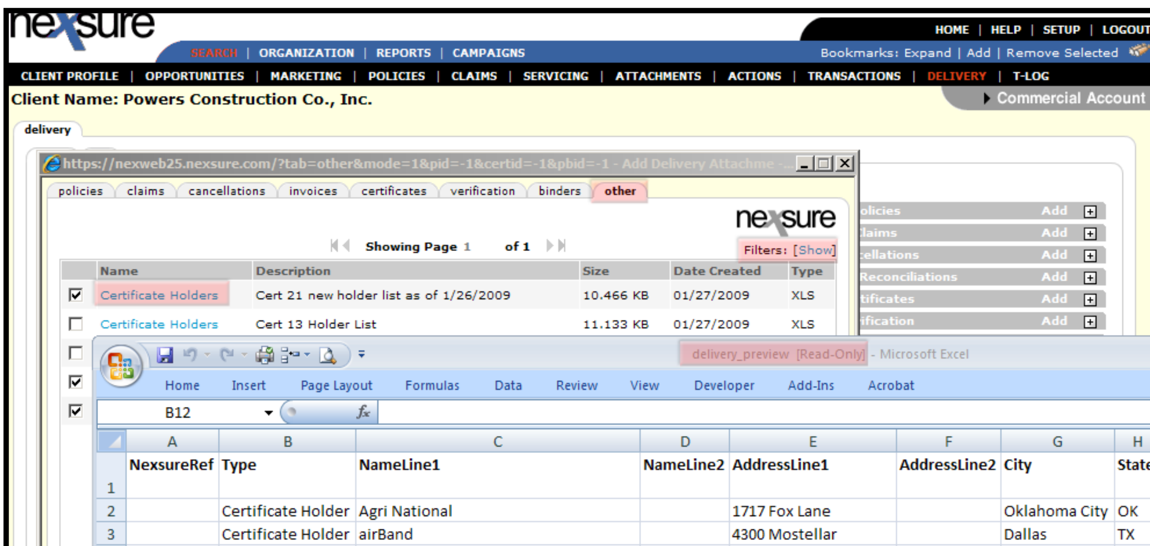


- If a needed attachment is not displayed or the list is long, click the Filter **[Show]** link to search for the specific item.

Attachment Tab	Description
Policies	Click the Filter [Show] link to search for Policy Type or Policy Status other than In Force. Select the appropriate policy and click the Next button to display the policy's forms.

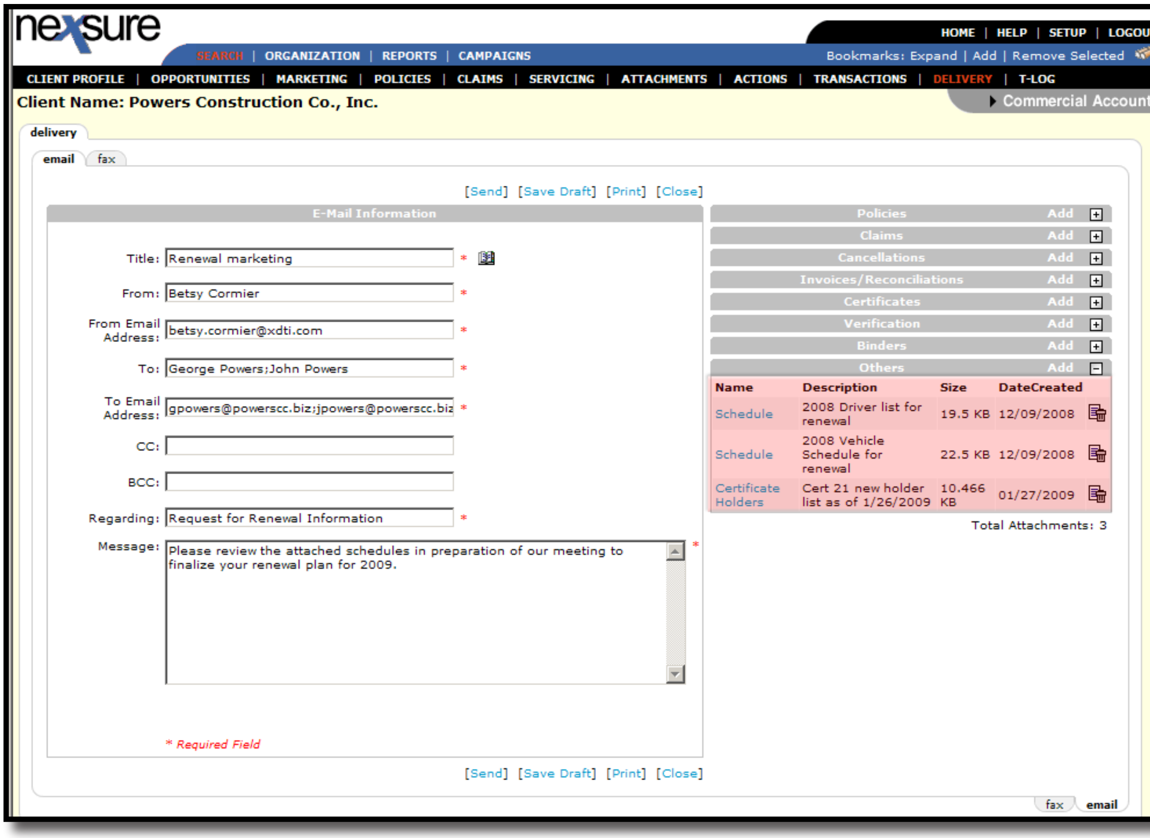
Attachment Tab	Description
Claims	Open claims display by default. Click the Filter [Show] link to search for closed claims or other criteria.
Cancellations	All policies with a pending cancellation status display by default. Click the Filter [Show] link to search for cancelled policies or other criteria.
Invoice	All posted invoices excluding reversals display by default. Click the Filter [Show] link to search by other invoice statuses or other criteria. Select the invoice and click the Next button to display the invoice format (select non-Deluxe option to include Branch name and address) and invoice ID selection.
Certificates	All issued holders display by default. Click the Filter [Show] link to search holders using search criteria.
Verifications	All issued Auto IDs display by default. Click the Filter [Show] link to search for a specific Auto ID using search criteria.
Binders	All posted open and closed Binders display by default. Click the Filter [Show] link to search binders using other search criteria.
Other	All client attachments display by default. Click the Filter [Show] link to search for client attachments by file type or other criteria.

- Preview an attachment before adding it to the delivery. To preview an attachment, locate the attachment on one of the available tabs. Click the blue text hyperlink to preview the document.



- Select the item or items to be attached on the displayed attachments tab. Click on other attachment tabs to continue selecting items for delivery. When all items are selected click the **Attach** button in the **Add Delivery Attachment** pop-up.

- All attached items are listed under the appropriate attachment category on the right side of the delivery **email** or **fax** screen. Click the blue text hyperlink of an attachment name to preview prior to delivery. Attachments may be removed until the delivery is sent.



- When the **E-Mail Information/Fax Information** and any attachments are complete and ready to be delivered, click the **[Send]** link. Click **[Save Draft]** to save the email/fax to send at a later time. Clicking **[Cancel]** will abort the email/fax without saving any information.

Note: Once a draft has been saved or a delivery has been sent, it cannot be deleted.

After the delivery has been sent it will be available on the **Client** menu > **DELIVERY** link. While the delivery is processing, or unsuccessful, it will display by default on the **Client** menu > **DELIVERY** or **Home** menu > **DELIVERY** summary screens.

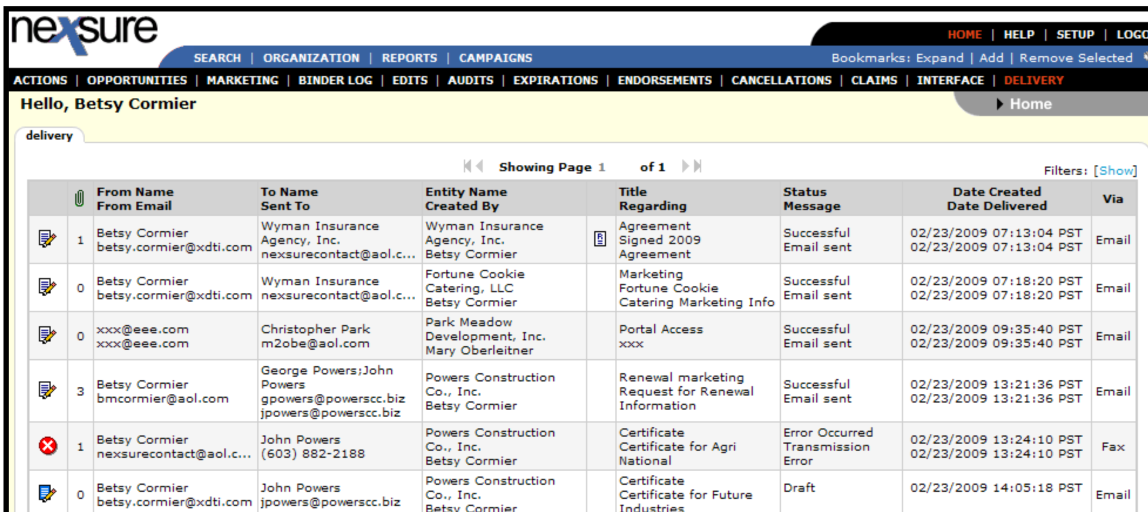
HOW to Use the Delivery Summary Screen

- Click the **DELIVERY** link on the **Home** menu or **Client** menu. The defaults in the **[Show]** filters will determine what displays in the summary view when clicking the **DELIVERY** link.
- The Delivery Summary View screen displays with the status of each e-mail or fax delivery.

Delivery Summary	Description
Details Icon	Click to display delivery information and print delivery details.
Paper Clip Icon	Displays the number of attachments, if any, that accompanied the delivery.
From Name/From Email	Name and email address of the person who sent the delivery as saved in the From and From Email Address of the delivery.
To Name/Sent to	Recipient(s) Name and the Email Address or Fax Number of the recipient as saved in the To fields of the delivery.
Entity Name/Created By	Name of the Client or Retail Agent associated to the delivery. Retail Agent delivery is identified by a Retail Agent icon to the right of the Entity Name. Created By identifies the User who created the delivery.
Title/Regarding	Title and Regarding line of the delivery as entered by the User.
Status Message	Deliveries with a status of Not Successful display by default. Statuses include: Successful, Not Successful, Processing, Processing Forms, Pending, Draft, Cancelled, Error Occurred. If the status appears as Not Successful, or Error Occurred, click the Details icon and click the [Re-Send] link. For information on re-sending deliveries, see "HOW to Re-Send a Delivery" later in this chapter.
Date Created/Date Delivered	Each delivery is date stamped with the date created and delivered. Times are shown as delivered from the Pacific Time Zone.
Via	Identifies whether delivery was sent as an email or a fax.

- The Details column displays an icon to determine the status of a delivery:

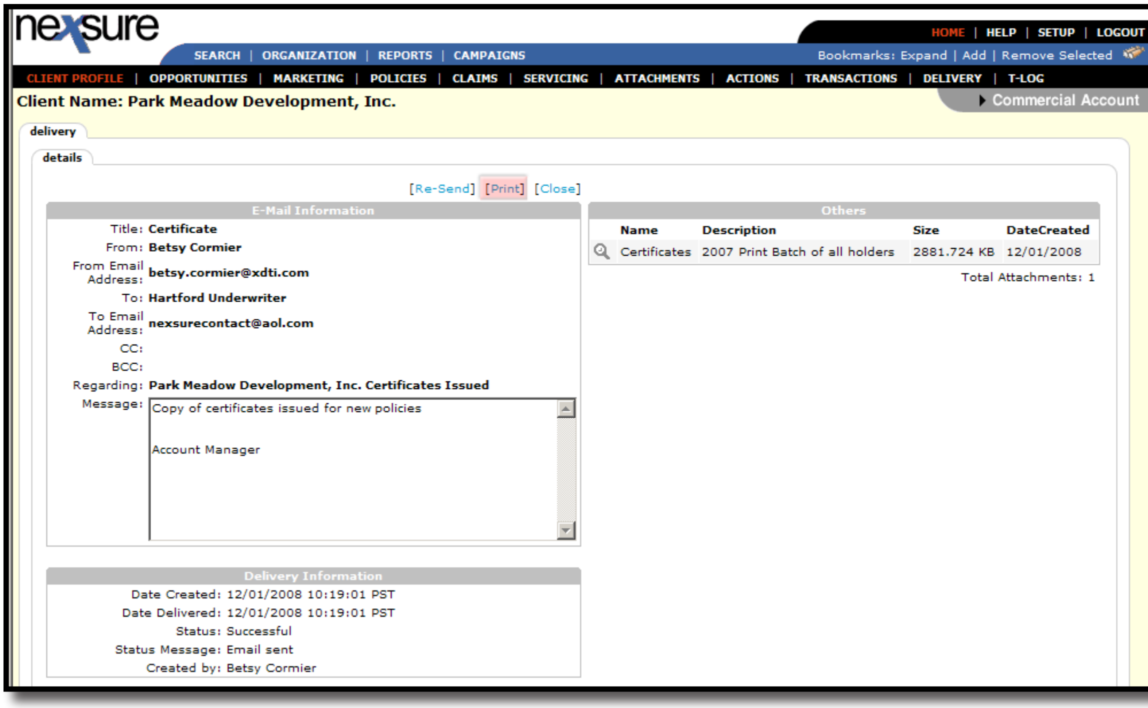
Method	Icon	Status	Status Message	Successful
Email / Fax		Draft	---	No
Email / Fax		Processing Forms	Rendering PDF	No
Email / Fax		Pending	---	No
Fax		Processing	Picked up	No
Fax		Processing	Sending...	No
Fax		Processing	Phone line problem	No
Email / Fax		Successful	Completed	Yes
Fax		Error Occurred	Line busy	No
Fax		Error Occurred	Human answered	No
Fax		Error Occurred	Transmission error	No
Fax		Error Occurred	Bad Conversion	No


nexsure
HOME | HELP | SETUP | LOGO
SEARCH | ORGANIZATION | REPORTS | CAMPAIGNS   Bookmarks: Expand | Add | Remove Selected
ACTIONS | OPPORTUNITIES | MARKETING | BINDER LOG | EDITS | AUDITS | EXPIRATIONS | ENDORSEMENTS | CANCELLATIONS | CLAIMS | INTERFACE | DELIVERY
Hello, Betsy Cormier   Home
delivery
Showing Page 1 of 1   Filters: [Show]

		From Name From Email	To Name Sent To	Entity Name Created By		Title Regarding	Status Message	Date Created Date Delivered	Via
	1	Betsy Cormier betsy.cormier@xdti.com	Wyman Insurance Agency, Inc. nexsurecontact@aol.c...	Wyman Insurance Agency, Inc. Betsy Cormier		Agreement Signed 2009 Agreement	Successful Email sent	02/23/2009 07:13:04 PST 02/23/2009 07:13:04 PST	Email
	0	Betsy Cormier betsy.cormier@xdti.com	Wyman Insurance nexsurecontact@aol.c...	Fortune Cookie Catering, LLC Betsy Cormier		Marketing Fortune Cookie Catering Marketing Info	Successful Email sent	02/23/2009 07:18:20 PST 02/23/2009 07:18:20 PST	Email
	0	xxx@eee.com xxx@eee.com	Christopher Park m2obe@aol.com	Park Meadow Development, Inc. Mary Oberleitner		Portal Access xxx	Successful Email sent	02/23/2009 09:35:40 PST 02/23/2009 09:35:40 PST	Email
	3	Betsy Cormier bmcormier@aol.com	George Powers;John Powers gpowers@powerscc.biz jpowers@powerscc.biz	Powers Construction Co., Inc. Betsy Cormier		Renewal marketing Request for Renewal Information	Successful Email sent	02/23/2009 13:21:36 PST 02/23/2009 13:21:36 PST	Email
	1	Betsy Cormier nexsurecontact@aol.c...	John Powers (603) 882-2188	Powers Construction Co., Inc. Betsy Cormier		Certificate Certificate for Agri National	Error Occurred Transmission Error	02/23/2009 13:24:10 PST 02/23/2009 13:24:10 PST	Fax
	0	Betsy Cormier betsy.cormier@xdti.com	John Powers jpowers@powerscc.biz	Powers Construction Co., Inc. Betsy Cormier		Certificate Certificate for Future Industries	Draft	02/23/2009 14:05:18 PST	Email

- Clicking the **Details** icon will display the delivery details.

Note: The person logged in must be assigned to a restricted access policy to view delivery details that include attachments of policies, cancellations, claims or other attachments associated to a restricted access policy.



- Click the delivery details **[Print]** link to print a copy of the delivery.

Note: All delivery date and times reflect the Pacific Time Zone of the Nexsure server.

- All attachments included in the delivery display on the right side of the delivery **details** screen and are summarized on the **Delivery Details** print view. To view or print the attachments, click the **Magnifying Glass** icon next to the attachment on the delivery **details** screen.

- Click the **Close** link to close the delivery.

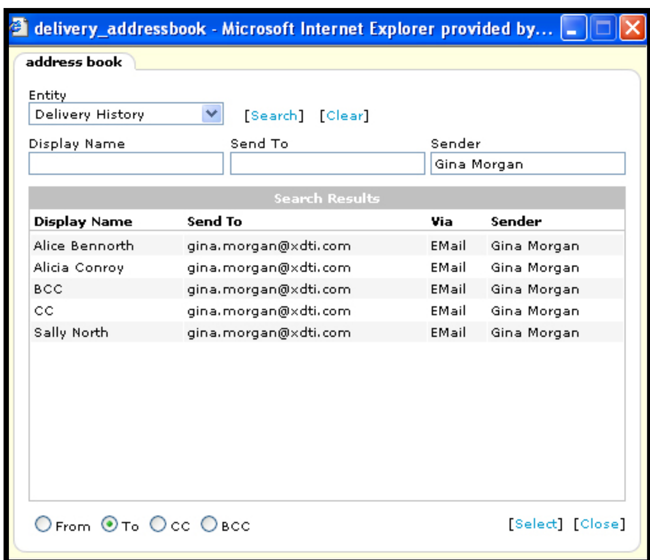
What a Successful E-mail Means

When preparing an e-mail to be sent, Nexsure generates the e-mail and submits it to the Exchange server to be sent. A "Successful" message is displayed when the submission is completed successfully. Since the e-mail has not been delivered to the recipient at this point, Nexsure verifies that the e-mail was successfully submitted to the Exchange server, but it cannot determine whether the e-mail address is valid or not. E-mail validity cannot be determined until the message is delivered and notification is received by the Exchange server. Since it is the Exchange server, not Nexsure that receives this return message, the notification of an undeliverable address is sent from the server to the "From" address in the original e-mail. This message originates in the the Exchange server that sent the message on Nexsure's behalf as returned to the e-mail address specified in the "From" field on the e-mail delivery.

HOW to Use the Delivery Address Book

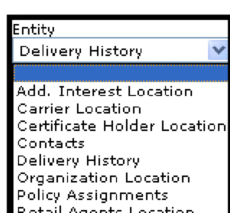
The Delivery Address Book can be used to search and select email addresses and business fax numbers found on entity location and all contact records. To use the Delivery Address Book perform the following:

- On the **fax** or **email** tab, click the **Address Book** icon. The **address book** tab is displayed. By default the **address book** tab will display the **Delivery History**.



Note: Previous emails sent to **CC** and **BCC** recipients are shown in the **Delivery History** with the **CC** or **BCC** notation in the **Display Name** column.

- In the **Entity** list, select an entity type to search for a recipient. Respective search options will be displayed for each entity. The **Entity** list allows a search of the following entity types:

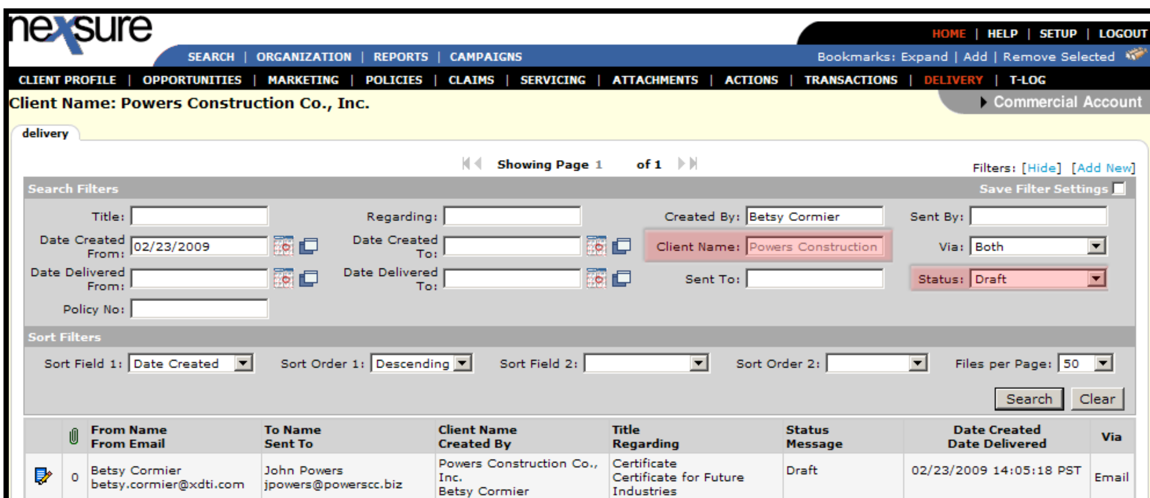


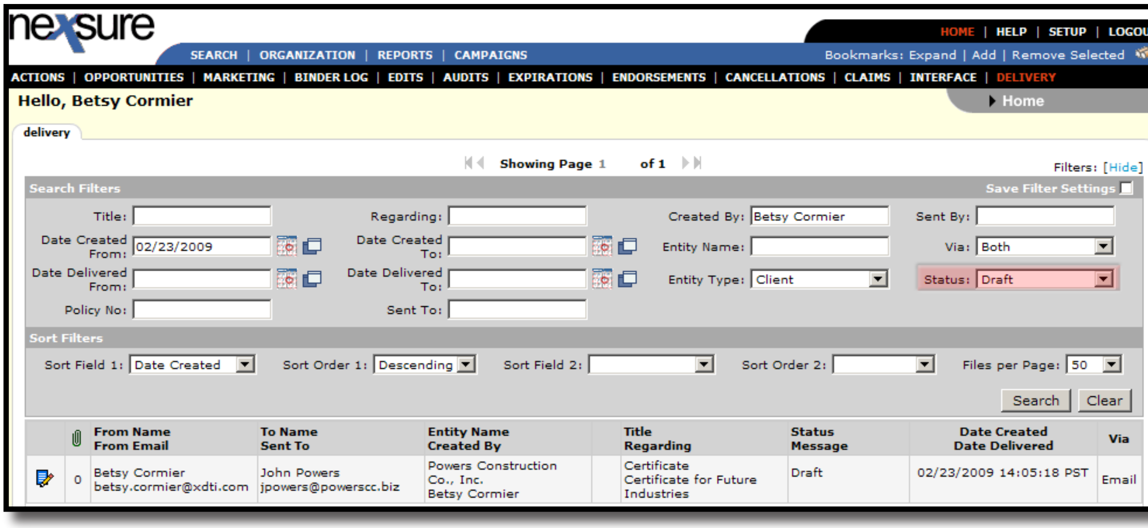
- Enter search criteria in the available search boxes. Search for **Contacts** assumes you are searching the client's contacts. To search contact records for a carrier, click the **[Clear]** link to clear the search fields. Enter the carrier's name in the **Client** search field and the word "Carrier" in the **Entity** field.
- Click **Search**. The search results are displayed in the **Search Results** area.
- Select the recipient's name on the line that displays the desired delivery method, via fax or email. Multiple recipients may be selected at one time from search results by selecting each Display Name with the appropriate delivery method. When all recipients to appear in a delivery option are selected, click to select the **From**, **To**, **CC** or **BCC** delivery option for the selected recipients. Fax delivery will not offer a **CC** or **BCC** option.
- Click **[Select]**. The selected recipient's name and email address for email deliveries or fax number for fax deliveries is added to the field selected. If multiple recipients were selected for a field, their email addresses or fax numbers are separated by a semi-colon (;).
- The **address book** stays open until all searches and selection of recipients is complete. Once all recipients have been added to the **fax** or **email** tab, click **[Close]**. The **address book** tab is closed.

To Send a Saved Draft

Once a draft of the email or fax has been saved, the draft can be accessed and sent at a later time.

- Navigate to the saved draft by clicking **SEARCH > Details** icon of the appropriate client **> Client** menu **> DELIVERY** or by clicking the **DELIVERY** link on the **Home** menu.
- The **delivery** tab is displayed. Click the **[Show]** link and search for deliveries with a **Status** of **Draft**.





- The draft is identified by a blue **Details** icon and **Draft** in the **Status** column. Click on the blue **Details** icon. The saved email or fax draft is displayed.

Note: The number of attachments, if any, is not shown in the attachment column of the **delivery** tab. The attachments are available but will not show a count until the email or fax has been sent.

- Make any necessary updates to the draft and click **[Send]**.

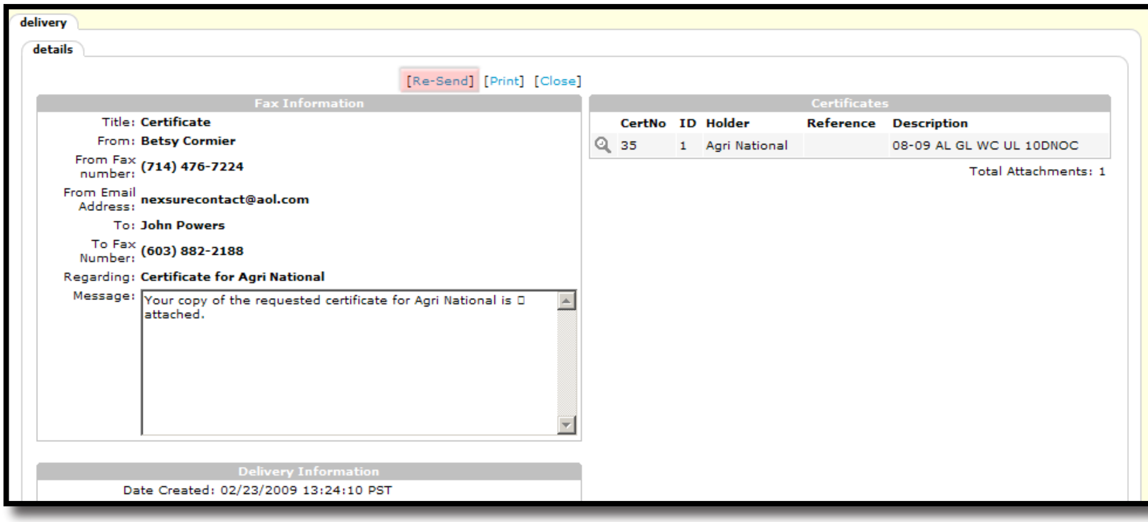
Important: If **[Cancel]** is clicked at this point, the email or fax will be cancelled and cannot again be accessed to send. To return to the delivery tab again without sending the draft, click **[Save Draft]** to save updates or click **[Close]** to return to the delivery tab without saving changes.

HOW to Re-Send a Delivery

Deliveries that have been sent successfully and sent deliveries that have failed can be re-sent. In this illustration a fax that was delivered to the incorrect fax number has failed. Re-send may also be used to re-deliver an email by fax, or re-deliver a fax by email without having to create the new delivery from scratch.

- Click the **Details** icon of the delivery to be re-sent.

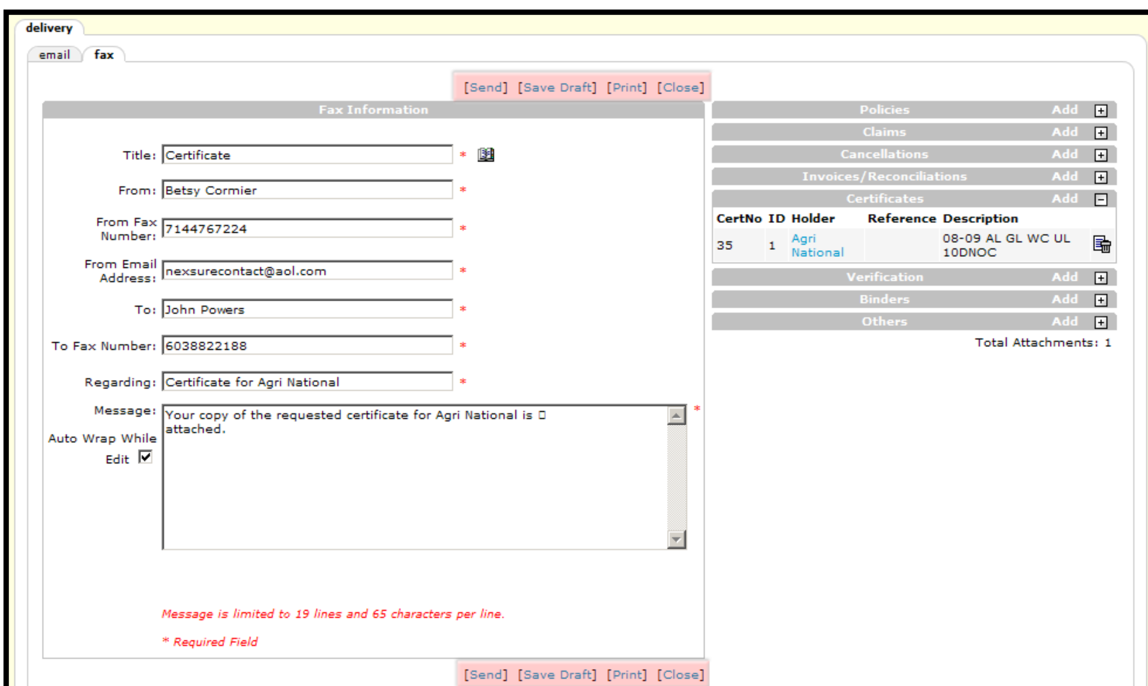
- The **delivery details** tab displays. Click the **[Re-Send]** link.



- Re-send creates a new delivery based on the content of the original delivery. The new delivery may be edited to correct delivery information, to change the delivery method by clicking on the alternate tab for fax or email, or change attachments.

Note: Re-send is not a forwarding of the original email or fax. Delivery creates a PDF rendering of attachments that are saved with the original delivery. Re-sending a delivery that includes attachments such as marketing applications will attach current versions of those applications.

- When the new delivery is ready to be sent, click the **[Send]** link. Clicking **[Save Draft]** will save the new delivery as a draft, **[Print]** will print the **E-Mail Information**, **[Close]** aborts the new delivery.



Bookmarks

Using bookmarks creates an easy way to 'hold' a place in Nexsure when interrupted or when the need to access a different screen in Nexsure arises. The user may easily return to the same screen without losing data that has been entered and saved. The **Bookmarks** link is located on the right side of the **Primary** menu.

Note: Before adding a bookmark, click **Save Changes** or the **Update** link to save your data.

HOW to Add a Bookmark

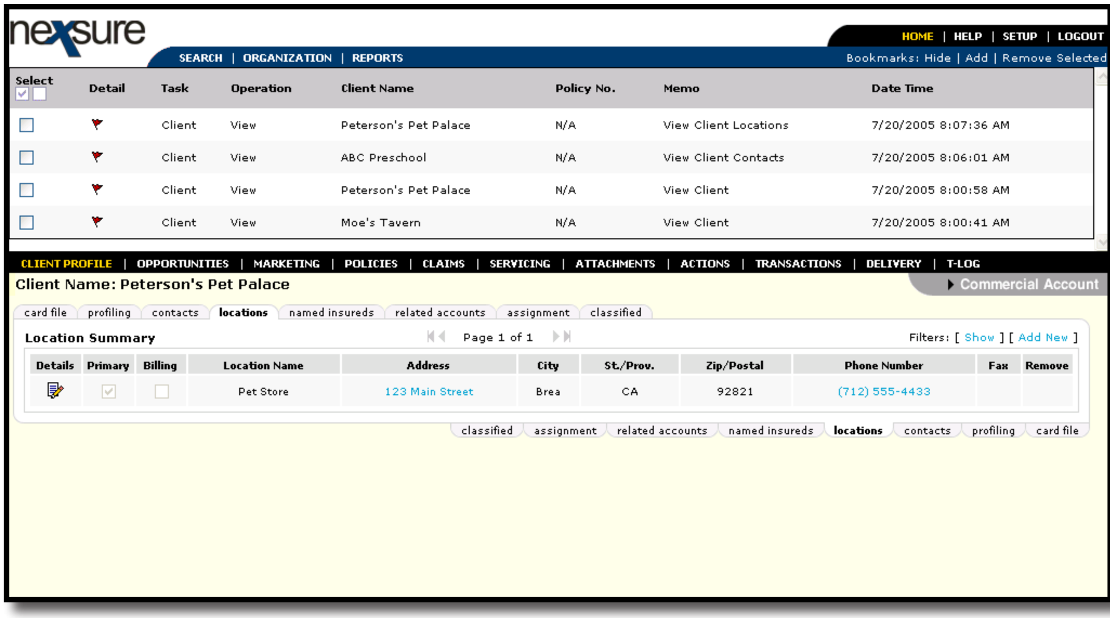
- Click the **Save Changes** link or **Update** link to save any changes that you may be making.
- Click the **Add** link to the right of bookmarks located in the **Primary** menu to bookmark your page.
- The item bookmarked will now be available when clicking the **Expand** link to the right of Bookmarks located in the **Primary** menu.
- Proceed to **HOW to Access a Bookmark** section in this chapter.

Note: You can have an unlimited number of bookmarks.

HOW to Access a Bookmark

- When you are ready to return to an item that has been bookmarked, click the **Expand** link to the right of bookmarks located in the **Primary** menu.
- The current Nexsure screen will drop-down and display all items currently bookmarked in the top section of the Nexsure window, while the current place is retained in the lower portion of the Nexsure window.

Note: When the **Expand** link is clicked, the expand option changes to **Hide**. After accessing the appropriate bookmark, click the **Hide** link to bring the Nexsure screen back into full screen mode.



- Click the **Flag** icon under the detail returns to the place that was bookmarked in the lower portion of the Nexsure window.
- Click the **Hide** link to the right of Bookmarks located in the **Primary Menu** to go back to a full Nexsure window.
- Proceed to **HOW to Remove a Bookmark** section in this chapter when a bookmark is no longer needed.

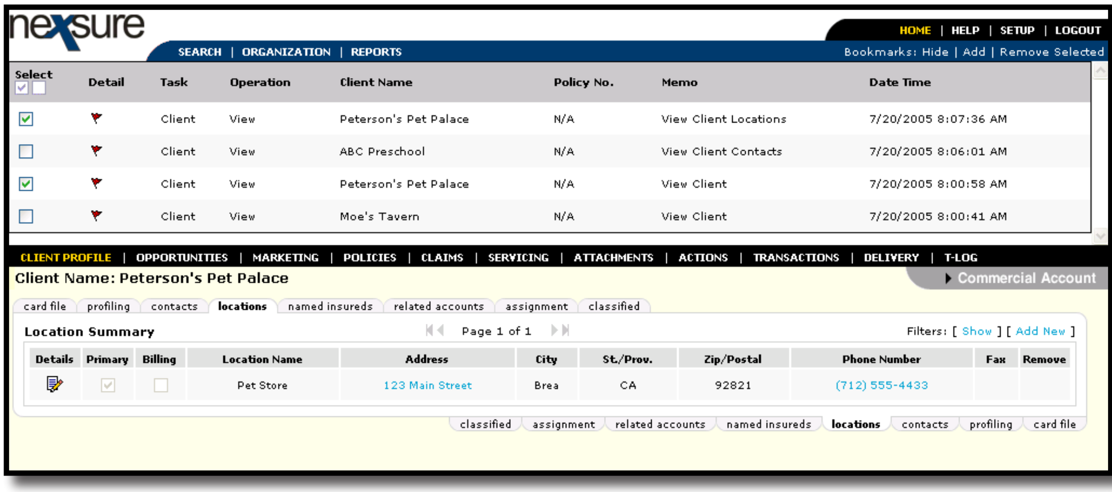
Note: Bookmarks will return the user to a policy that was bookmarked but is unable to bring the user back to the exact page of an application.

HOW to Remove a Bookmark

- When a bookmark is no longer needed it can be removed from the list of bookmarks. Click the **Expand** link to the right of Bookmarks located in the **Primary menu.**
- The current Nexsure screen will drop-down and display all items currently Bookmarked in the top section of the Nexsure window, while the current place is retained in the lower portion of the Nexsure window.
- Click the check box in the **Select** column of any bookmarks that are no longer needed.

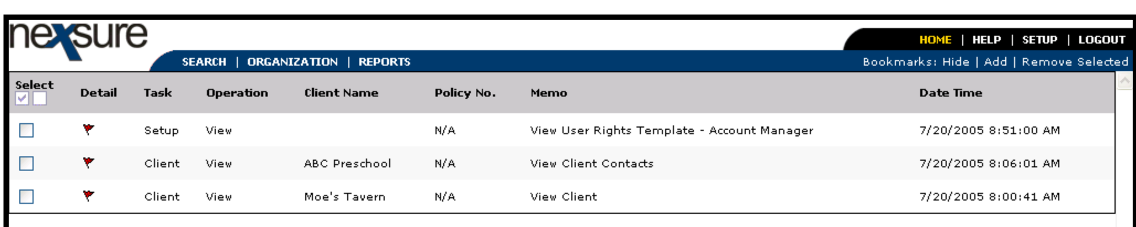
Note: Multiple bookmarks may be selected at the same time for removal.

- Click the **Remove Selected** link to the right of Bookmarks located in the **Primary menu**.
- All bookmarks selected will be removed from the **Bookmarks** link.



HOW to Use the Bookmark Summary Screen

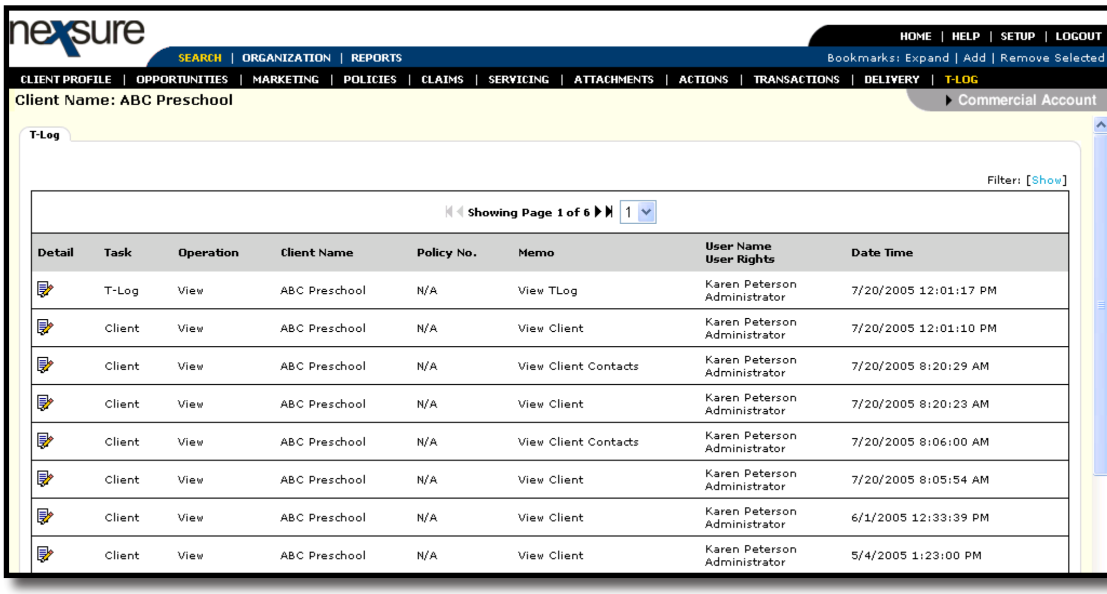
- Clicking the check box in the **Select** column of a bookmark and clicking the **Remove Selected** link to the right of Bookmarks located in the **Primary menu** will remove that bookmark from the bookmark summary view.
- Clicking the **Flag** icon in the **Detail** column will return the user to the place that was bookmarked in the lower portion of the Nexsure window.
- The **Task** column displays where the user was in Nexsure when the **Add** bookmark link was clicked
- The **Operation** column displays what the user was doing when the **Add** bookmark link was clicked.
- The **Client Name** column will display a clients name if the user was accessing a client when the **Add** bookmark link was clicked.
- The **Policy No**. column will display a policy number if the user was accessing a policy when the **Add** bookmark link was clicked.
- The **Memo** column displays a brief memo of what the user was doing when the **Add** bookmark link was clicked.
- The **Date Time** column displays the Date and Time the bookmark was created.



Notes

T-Log

The T-Log (Task Log) records and generates a time stamped list of all activity on clients as well as all activity conducted on the agent's Nexsure site by their employees. The T-Log may be accessed in two separate places, the **T-LOG** link on the **Client menu**, which displays all activity being accessed on the client, or the **T-Log** tab under **SETUP > Security Administration,** which displays all activity conducted on the agent's Nexsure site by their employees.



Note: Access to the T-Log may not be given to all employees in the agency.

HOW to Access the T-LOG Link on the Client Menu

- After accessing the appropriate client through **SEARCH**, click the **T-LOG** link on the **Client** menu.
- All activity on the client will be displayed in a summary view.

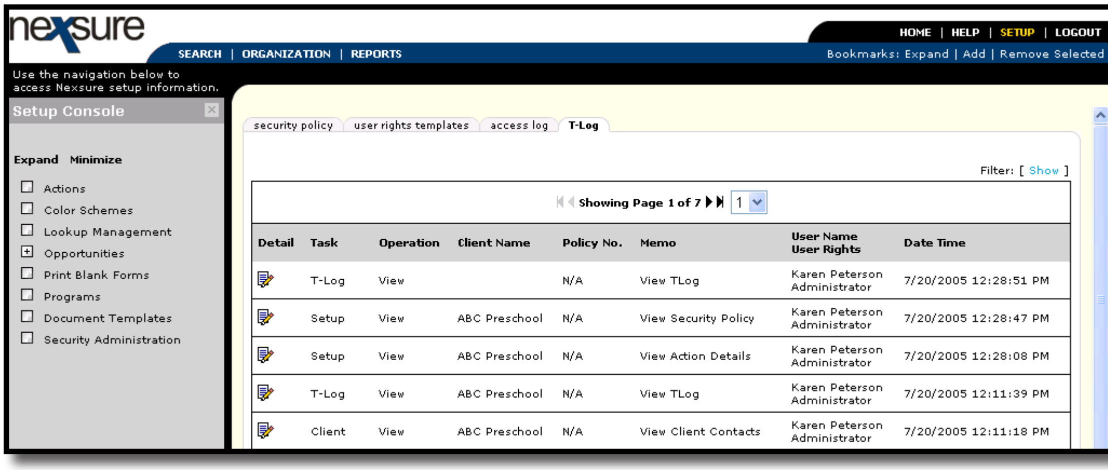
Note: The defaults in the [Show] filters will determine what is displayed in the summary view when clicking the T-Log link on the Client menu.

Clicking the **Details** icon of an item in the T-Log will jump to that place in history.

Note: Information that is accessed by clicking the **Details** icon, while it can be changed, cannot be saved and has no effect on the rest of the system. The T-Log is intended for viewing purposes only.

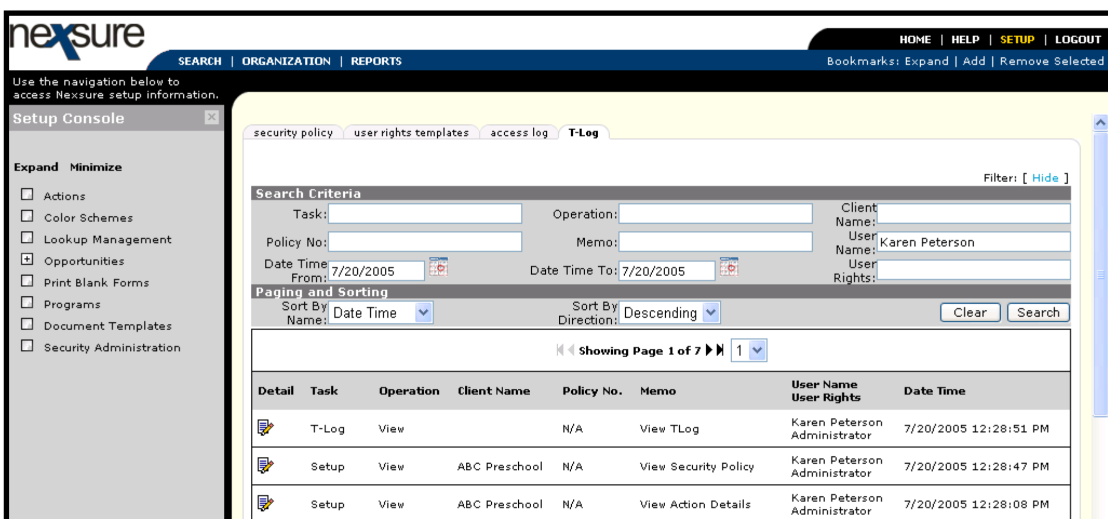
HOW to Access the T-Log Tab under SETUP > Security Administration

- Click the **SETUP** link on the **Utility** menu.
- Click the **Security Administration** link in the **Setup Console**.
- Click the **T-Log** tab.
- All activity for the user will be displayed in a summary view.



Note: The defaults in the [**Show**] filters will determine what is displayed in the summary view when clicking the T-Log tab in setup.

- Click the **[Show]** filter to display the search criteria, it will default to today's date and to the User signed in.
- Change the search criteria and click the **Search** button to initiate a new search.



- Clicking the **Details** icon of an item in the T-Log will jump to that place in history.

Note: Information that is accessed by clicking the **Details** icon, while it can be changed, cannot be saved and has no effect on the rest of the system. The T-Log is intended for viewing purposes only.

HOW to Use the T-Log Summary Screen

- Clicking the **Details** icon of an item in the T-Log will jump to that place in history.
- The **Task** column displays where the user has been in Nexsure.
- The **Operation** column displays what the user was doing relating to the task shown.
- The **Client Name** column will display a clients name if the task and operation shown were concerning a client.
- The **Policy No**. column will display a policy number, if a clients name is displayed, and the task and operation were concerning a clients policy.
- The **Memo** column displays a brief memo of what the user was doing.
- The **User Name User Rights** displays the name of the user and the security template they were signed in with at the time
- The **Date Time** column displays the Date and Time the T-Log was accessed.

Notes

eServices

The eServices option in Nexsure provides users real-time inquiry capabilities within a carrier's (or other third-party such as a MGA) secured Web site. This eliminates the need for the agency to log out of Nexsure or open another browser window to access the carrier's site. Users will have access to the very latest information directly from the carrier's Web site – the same information the Underwriters see. Nexsure eServices can includes direct links such things as:

- Billing Inquiry
- Policy Inquiry
- Claims Inquiry
- Policy Documents

Automated login is also considered an eService option. With automated login, another browser window is launched and the user is automatically logged into the carrier's secured site and transfer is control to the carrier's agent home page. From that point, the user can then navigate manually through the carrier site. Keep in mind that the active policy number from Nexsure is automatically copied to your PC clipboard when a carrier page is launched through Nexsure eServices. Therefore, when that policy number is needed, the user can just right mouse click on the policy number field in the carrier Web site and paste that policy number from the PC clipboard. There is no need to re-type that policy number.

The carrier information accessed through eServices will vary by carrier. Each employee of the agency, who has login rights to a carrier's site, must have their login information entered in Nexsure to access eServices. In rare situations, where an employee may have more than one login to a carrier's site, both should be entered in Nexsure. When an employee, with more than one login to a carrier's Web site, activates eServices they will be prompted to select which login they would like to use upon entering the carrier's site.

Note: As of release of this document, there is a known issue which enables only the first password for use by eServices. That issue is currently being corrected. Any additional passwords entered will be preserved and available once the issue is corrected.

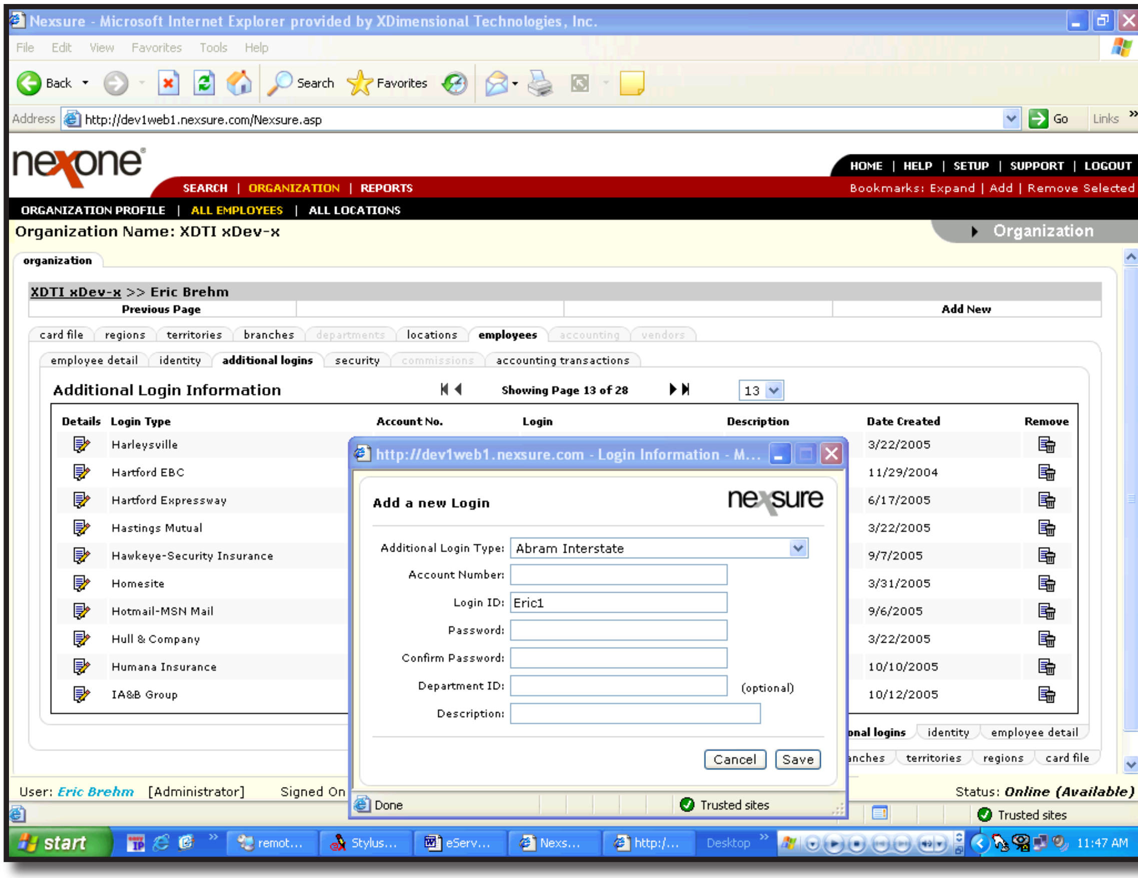
Note: The eService option is only available for in force business. It is not available for Opportunities or Marketing quotes.

HOW to Setup Additional Logins

- Click the **Organization** link on the **primary menu.**
- Click the **Employees** tab.

Note: It does not matter what level of the organization the employee's additional login information is added to.

- Click the **Details** icon of the appropriate employee.
- Click the **additional logins** tab.
- Click the **Add New** link.



- Select carrier/third-party eService provider from the **Additional Login Type** drop-down menu.

Note: If a user is unable to locate an eService provider in the Additional Login Type menu for which they would like to have Nexsure eServices available, feel free to e-mail Nexsure.Support@xdti.com with the request along with the URL link to the login page for that carrier/provider. Such requests will be evaluated and potentially queued for future Nexsure releases. Providers can include most any third-party secured Web site. If the login page does not contain a logo for the provider, please attach the logo to the e-mail. Also indicate whether only automated login is desired or which other real-time inquiry functions are desired (billing inquiry, claims inquiry, policy inquiry, policy documents, etc.) If selected and deployed, this eService provider will appear in the additional login list for all Nexsure users (at all the Nexsure agencies).

- The required fields are the **Login ID**, **Password** and **Confirm Password**.

Note: It is necessary to overwrite the Nexsure default Login ID with the correct Login ID for that carrier Web site.

- The **Department ID** is an optional 3rd field used to collect any additional login information other than login id or password. (i.e. Department code, group id, producer code, etc.)
- Complete the **Description** field, this field is optional.

- Click **Save** to save the additional login information. Click **Cancel** to abort.
- Repeat the above steps to add the additional login information for all carriers for the employee.

Note: Users now have the capability to change their passwords from the primary eServices pop-up window. However, the first time that a particular eServices provider is added, that needs to be done from this Organization menu. Users that do not have rights to the Organization menu will need to request that eServices provider be added by their systems administrator.

- Proceed to **HOW to Access eServices** section in this chapter.

HOW to Access eServices

- Click the **SEARCH** link on the **Primary** menu.
- Click the **Details** icon of the appropriate client.
- Click the **Policies** link in the **Client** menu.

Option 1

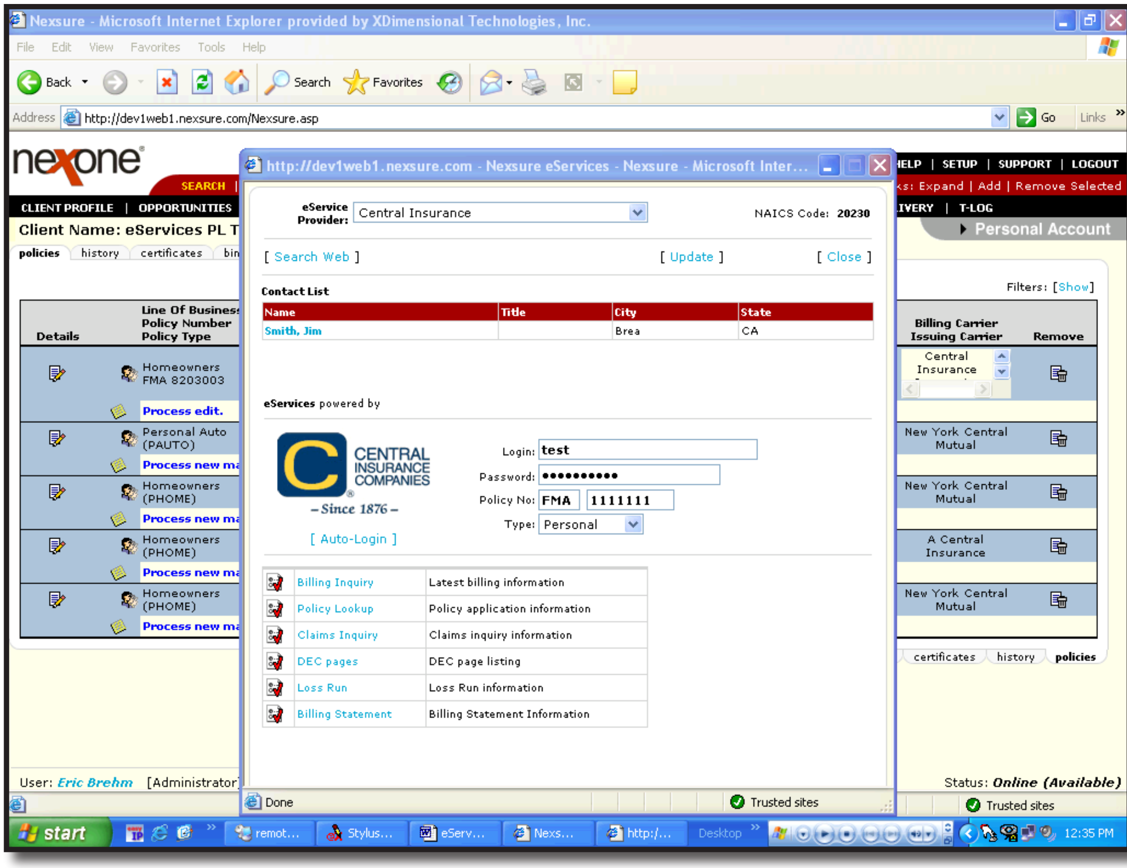
- Click the **Carrier's** name to launch eServices.

Option 2

- Click the **Details** icon of the policy
- Right mouse click on the Print option on the policy detail screen and select eServices.

Option 3

- Click on the carrier names in the various Home menus (Expirations/Claims/Edits/Interface, etc).



- The eServices pop-up window is displayed.

Note: The inquiry capabilities are dependent upon each individual carrier's Web site.

- Clicking on the **Auto-Login** option will take the user into the carriers' site. The active **policy number** of the client is copied to the clipboard for easy access while browsing on the carrier's Web site.

Details regarding the initial eServices pop-up window shown above:

- The eServices provider is selected automatically based on the carrier name or NAIC code. If the eServices window is not appearing for a carrier that an additional login has added, double-check to see that the carrier's NAIC code(s) are listed in the carrier setup record. If this is a carrier for which you are currently downloading, please check with your Nexsure systems administrator before adding or changing NAIC codes. If Nexsure does not save the NAIC code, it is likely that NAIC code is already in use in your Nexsure database. In that case, check with your systems administrator. If the provider does not have a NAIC, match the format of the name with the name listed in the **Additional Login Type** menu. If that is a problem, please notify Nexsure Support.

- To select a different eServices provider for which an additional login has already been setup, just click on the drop-down box on the top of this window.

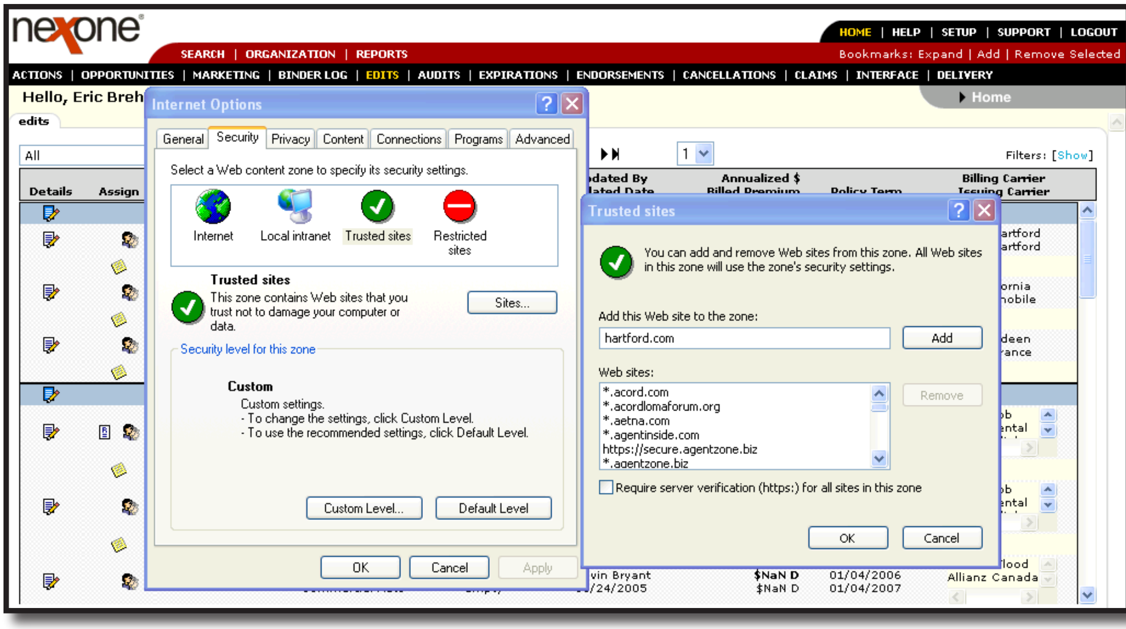
- **Search Web** will initiate a Google™ search for the provider name.

- **Update** will update the password for the eServices provider for the user. The user merely types in the new password over the hidden password shown and clicks the **Update** button. If the user wishes to update the **Login** they must also enter/re-enter the **Password** and then click the **Update** button. This feature allows users to update their eServices additional logins if they do not have access to the Nexsure Organization tab.
- The **Policy No** field will display the active policy number from Nexsure. The policy number will be formatted to match what is needed by the carrier Web site. The assumed policy number format for the carrier is usually derived from a sample downloaded policy number from that carrier, if available. If policy numbers in Nexsure contain prefixes that are not used on the carrier Web site, this is the where they can be corrected. Users may correct the formatting of the policy number here before clicking **Auto-Login** or any of the other links. The policy number could also be completely overwritten in this window if the inquiry functions are needed for a policy other than the one active in Nexsure. The eServices pop-up window will not affect the policy numbers in Nexsure.
- The policy **Type** (personal vs. commercial) selection will normally default to the correct policy type. In certain cases, especially when accessing eServices through the Home/Interface menu, the policy type is not readily available to eServices. If the incorrect policy type is displayed, the user can then select the correct one. The policy formatting option will change to match the policy type.
- Other available options are listed under the eServices provider's logo. Just click the link to access.

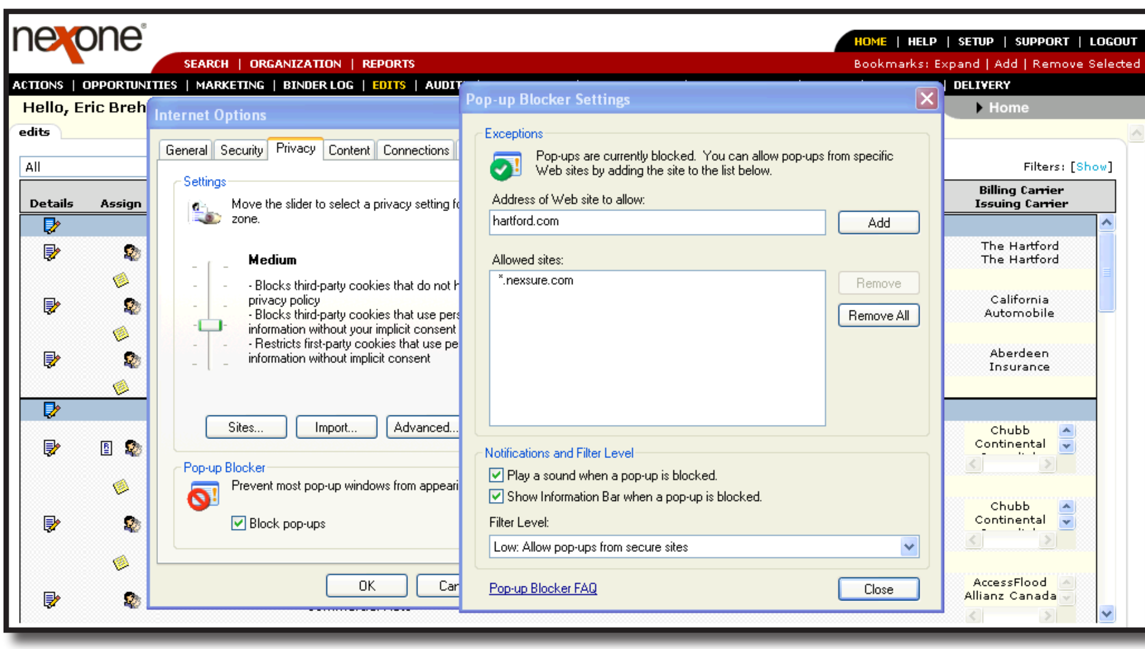
Note: Nexsure eServices are highly dependent upon the layout of carrier Web sites. Therefore, when carriers make changes to their Web sites, it is likely that eServices will stop prematurely. If the URL for the agent login page changes, eServices will not be functional until that URL is updated in a future Nexsure release. If the carrier keeps the login URL the same but changes the login page, it is possible that eServices will stop on that login page and possibly not fill in the username and/or password. These changes are rare but please report them promptly to Nexsure Support. If a link (billing inquiry, policy inquiry, etc.) does does not go as far as it went the day before or if it stops well before the described function, please report that to Nexsure Support as well. Your help on this matter is greatly appreciated.

General Setup Considerations

Since Nexsure eServices provide automated access to real-time inquiry information from various carrier Web sites, Windows security setup is very important. Please see Windows XP Service Pack 2 security settings for further information. For each carrier Web site, enter that domain (Hartford.com, Travelers.com, Safeco.com) as a trusted site. Do not be more specific as you will want Windows to trust all content coming from that carrier site. You can access this menu through **Tools > Internet Options > Security**. See below.



Privacy Tab: If pop-ups are being blocked you will need to put in the carrier domain as a site to allow pop-ups. See below.

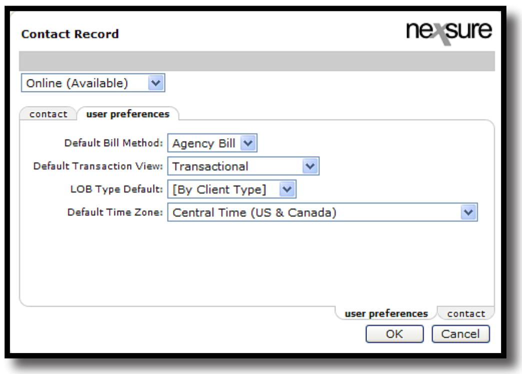


Nexsure.com should also be setup as a trusted site and a site which pop-ups are allowed from. If these security settings are not enabled, it is likely that eServices will not be able to automatically launch any pop-up windows once inside the carrier site and the eService will not appear to be working.

Setting User Preferences

User preferences may be set after the user has logged into Nexsure for the **Default Bill Method**, (Line of Business) **LOB Type Default** and the **Default Time Zone**. To change these preferences, click the **User** name link at the bottom of the Nexsure screen to bring up the contact window.

On the **Contact Record** dialog box, click the **user preferences** tab.



By default these settings are as follows:

- **Default Bill Method**: Direct Bill
- **Default Transaction View**: Detail Assignment
- **LOB Type Default**: By Client Type
- **Default Time Zone**: As set by your Org. Administrator

The **Default Bill Method** is the default that is populated on all new marketing records added on the policy info screen. Keep in mind that this is just a default and the bill method may be changed on the record as needed.

The **Default Transaction View** can be selected to default to the most used transaction view. Views available are:

- Assigned Payments
- Balance Detail
- Detail Assignment – (Default)
- Invoice Summary
- Open Binder Bill
- Payment Summary
- Posted Invoices
- Reverse Invoices

- Summary View
- Transactional View
- Unassigned Payments
- Unposted Invoices

The **LOB Type Default** can be set to **Commercial**, **Personal** or **Client Type**. In Nexsure the client types are identified as either commercial or personal. If the user works mostly on personal line accounts, choosing personal as the default allows the quick addition of personal lines of coverage even if the client type is commercial. Keep in mind that this is just a default and the type may be changed as needed when adding lines of business to the record.

The **Default Time Zone** is used in Nexsure as a time stamp on work processed in Nexsure by this user. When this preference is changed all work will be use the selected time zone. When changing the time zone, logging out and back in is necessary after saving the preferences in order for the change to take effect.

Click **OK** to store the changes.

Notes