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.

le r	sure								HOME	Help Setu	IP LO
_		SEARCH ORG	ANIZATION R	EPORTS CAI	IPAIGNS			Bookn	narks: Expand A	dd Remove S	elected
LIENT PRO	OFILE OPPO	ORTUNITIES M#	ARKETING PO	LICIES CLA	IMS SERVICI	NG ATTACHMEN	ITS ACTIONS	F TRANSACTI	ONS DELIVERY	T-LOG	
ient Na	me: Cormi	er Quick Stop	, Inc.							Commercia	al Acc
transaction	n summary c	lient balance summ	ary list bill pla	ans							
Select Vie	ew: Bala	nce Detail	*					[Add	Master Invoice]	[Add New Ir	nvoice
Select Cli	ent:		*		Showing	Page 1 of 1 🕨 🕅				Search Filter:	[Show
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount R	emove
>	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	
>	8/2/2007	8/2/2007	* Posted	Invoice	-	12137	BA1234567	Auto - Commercial	Agency Bill	\$459.00	
>	8/25/2007	8/25/2007	* Posted	Invoice	-	13085	Unassigned	Equipment Floater	Agency Bill	\$100.00	
	10/8/2008	10/8/2008	-	Receipt	1177	-	-	-	-	(\$1,000.00)	
										\$2,236.00	

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.



		HOME HELP SETUP LOGOUT
SEARCH ORGANIZ	ATION REPORTS CAMPAIGNS	Bookmarks: Expand Add Remove Selected 🖤
CLIENT PROFILE OPPORTUNITIES MARKE	TING POLICIES CLAIMS SERVICING ATTACH	IMENTS ACTIONS TRANSACTIONS DELIVERY T-LOG
Client Name: Cormier Quick Stop, In	с.	Commercial Account
transaction summary client balance summary	list bill plans	· · · · · · · · · · · · · · · · · · ·
Select View: Balance Detail 💌		[Add Master Invoice] [Add New Invoice]
Select Client:	Showing Page 1 of 1	Search Filter: [Hide]
Search Criteria		Save Filter Settings
Bill To:	Bill Methods: Agency Bill 💌	Line Of Business: Auto - Commercial
Policy Modes: 🛛 🗸	Bill Types:	Equipment Floater
Post Status: Posted-All	Include Manual Invoices:	Flood - Commercial General Liability - Commercial
Trans. Eff. Date	Trans. Eff. Date To:	
Date Booked From:	Date Booked To: 10/31/2008	
Payment Date From:	Payment Date To:	Payment Description:
Payment Id:	Invoice Id:	Payment Amount:
Paid Status: All 🗸 🗸	Policy No:	
Sort Order	,	
Sort Field 1: Date Booked 💙	Sort Order 1: Ascending 💙 Sort Fie	eld 2: 🗸 Sort Order 2: 🗸
		Search Clear
Effective Details Date Date Booked S	InvoiceID Transaction Master tatus Type Id InvoiceID	Policy Number Description Bill Method Amount Remove
7/1/2007 8/1/2007 R	Posted Invoice - 12114/-121	19 Unassigned Commercial Agency Bill \$2,575.00

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.

ex	sure								HOME	HELP SETU	JP LOG
		SEARCH ORG	GANIZATION	REPORTS CAI	MPAIGNS			Bool	kmarks: Expand Add	d Remove S	Selected
LIENT PRO		ORTUNITIES M	ARKETING P		IMS SERVIC	ING ATTACHME	ENTS ACTIO	IS TRANSAC	TIONS DELIVERY	T-LOG	
ient Na	me: Cormi	er Quick Stop	, Inc.							Commerci	al Accou
ransactior	summary c	lient balance sumr	mary list bill p	lans							
	Deta	il Assigned	~								
belect vie	W: Deta	II Assigned						[A	id Master Invoice J	[Add New I	nvoice]
Select Cli	ent:		*		Showing	Page 1 of 1 🕨 🕅				Search Filter:	[Show]
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount R	emove
>	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	Invoice	-	12120	BA1234567	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	

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.

ure								HOME	HELP SETU	IP LO
	SEARCH ORG	ANIZATION	REPORTS CA	MPAIGNS			Bool	kmarks: Expand Ade	d Remove S	elected
	ORTUNITIES M.	ARKETING	POLICIES CL	AIMS SERVICI	NG ATTACHM	ENTS ACTIO	NS TRANSAC	TIONS DELIVERY	T-LOG	
ne: Cormi	er Quick Stop	, Inc.							Commerci	al Acco
summary c	lient balance sumn	narv list bi	ll plans							
Data	il Annine d									
n Deta	II Assigned	~					[A	dd Master Invoice]	[Add New I	nvoice]
nt:		*		Showing	Page 1 of 1 🕨	4			Search Filter:	[Show]
Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount R	emove
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	BB for \$2500 re	versed. New inv	oice for \$2600 p	234567	Auto - Commercial	Agency Bill	\$2,677.00	
			as issued.					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	
	ILE OPPG ILE OPPG ummary c i: Deta it: Deta 8/2/2007 10/8/2008 7/1/2007 7/1/2007 7/1/2007 10/8/2008	SEARCH ORC ILE OPPORTUNITIES N ILE OPPORTUNITIES N the: Cormier Quick Stop ummary Client balance summary Client balance summary tit Detail Assigned btt Date Booked 8/2/2007 8/2/2007 10/8/2008 10/8/2008 7/1/2007 8/1/2007 7/1/2007 8/1/2007 10/8/2008 -	SEARCH ORCANIZATION ILE OPPORTUNITIES MARKETING ILE Cormier Quick Stop, Inc. Immary client balance summary list bi The Detail Assigned ILE Potential Assigned ILE Potent	SEARCH ORGANIZATION REPORTS CA TLE OPPORTUNTITES MARKETING POLICIES CL te: Cormier Quick Stop, Inc. Inc. Inc. Inc. Inc. ummary client balance summary list bill plans Inc. Inc. Inc. Immary client balance summary list bill plans Inc. Inc. Inc. Immary Client balance summary list bill plans Invoice Invoice Date Date Booked Status Type Invoice 8/2/2007 8/2/2007 * Posted Invoice 7/1/2007 8/1/2007 * Posted BB for \$2500 re as issued. 7/1/2007 8/1/2007 * Posted Invoice 7/1/2007 8/1/2007 * Posted Invoice 10/8/2008 - Reversed Invoice	SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CAMPAIGNS COMPAIGNES CALINS SERVICE CLICES CALINS SERVICE UNITES MARKETING POLICIES CLAIMS SERVICE CLICES CLAIMS SERVICE UNITES MARKETING POLICIES CLAIMS SERVICE INTENDING POLICIES CLAIMS SERVICE INTENDING POLICIES CLAIMS SERVICE Transaction Date Booked Status Type Transaction Id DATE Booked Status Type Transaction Id DATE Booked Status Type Transaction Id T/1/2007 8/2/2008 - Receipt 1177 7/1/2007 8/1/2007 * Posted Reversed Invoice - T/1/2007 8/1/2007 * Posted Reversed Invoice - T/1/2007 8/1/2007 * Posted Reversed Invoice - T/1/2007 8/1/2007 * Posted Reversed Invoice - <tr< td=""><td>SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CLAIMS SERVICING ATTACHM THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHM termination of the second state in the second</td><td>SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CAMPAIGNS THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE COMMENT OF THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE COMMENT OF THE OPPORTUNITIES MARKETING POLICY UNIT OF THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE OPPORTUNITIES MARKETING POLICY Invoice To Service Department THE OPEN CLAIMS TYPE The Date Booked Status Type Transaction Invoice ID Master Invoice ID Policy Policy Policy 10/8/2008 T/1/2007 8/2/2007 * Posted Invoice - 12137 BA1234567 T/1/2007 8/1/2007 * Posted Reversed Invoice12119/12114 Unassigned T/1/2007 8/1/2007 * Posted Reversed Invoice - 12119/12114 Unassigned T/1/2007 8/1/2007 * Posted Reversed Invoice - 12119/12114 Unassigned T/1/2007 8/1/2007 * Posted Reversed Invoi</td><td>SEARCH ORGANIZATION REPORTS CAMPAIGNS Boot THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSAC Te: OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSAC Te: Opportunities Marketing Ist bill plans Invoice ID Invoice ID Master Policy Tht: Impoint Marketing Transaction Invoice ID Number Description 8/2/2007 8/2/2007 * Posted Invoice - 12137 BA1234567 Auto - Commercial 7/1/2007 8/1/2007 * Posted Invoice - - 12119/12114 Unassigned Auto - Commercial 7/1/2007 8/1/2007 * Posted Invoice - - 12119/12114 Unassigned Auto - Commercial 7/1/2007 8/1/2007 * Posted Invoice - 12114/-12119 Unassigned Auto - Commercial 10/8/2008 - Pasted Invoice - 12114/-12119 Unassigned Auto - Commercial</td><td>Index Index Index SEARCH ORCANIZATION REPORTS CAMPAICNS Bookmarks: Expand Add ILE OPPORTUNITIES MARKETINC POLICIES CAMINS SERVICINC ATTACHMENTS ACTIONS TRANSACTIONS DELLERY the: Opportunities MARKETINC POLICIES CAMINS SERVICINC ATTACHMENTS ACTIONS TRANSACTIONS DELLERY the: Commary Client balance summary Its bill plans [Add Master Invoice] [Add Master Invoice] [Add Master Invoice] th: Image: Status Type Transaction Master Policy Description Bill Method 8/2/2007 8/2/2007 8/2/2007 * Posted Invoice - 12137 BA1234567 Auto - Commercial Agency Bill Unassigned Balance Unassigned Balance Unassigned Balance Unassigned Balance Unassigned Balance Commercial Agency Bill Unassigned Balance 7/1/2007 8/1/2007 * Posted Invoice - - - Commercial Agency Bill Unassigned Balance</td><td>Induction Reports CAMPAIGNS Bookmarks: Expand Add Removes Bookmarks: Expand Add Removes State ORCANIZATION REPORTS CAMPAIGNS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELLYRY T-OC The: OPPORTUNITIES MARKETING POLICIES CALINS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELLYRY T-OC the: Commercial Commercial Commercial Commercial Commercial Commercial ummary Client balance summary List bill plans Invoice1D Master Policy Deleversed Commercial Add New II th: Image: Status Type Transaction Master Policy Deleversed Add or Commercial Agency Bill \$459.00 10/8/2008 10/8/2007 * Posted Invoice - 12137 BA1234567 Auto - Commercial Agency Bill \$459.00 7/1/2007 8/1/2007 * Posted Invoice - - 12137 BA1234567 Commercial Agency Bill \$2,677.00</td></tr<>	SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CLAIMS SERVICING ATTACHM THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHM termination of the second state in the second	SEARCH ORGANIZATION REPORTS CAMPAIGNS SEARCH ORGANIZATION REPORTS CAMPAIGNS THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE COMMENT OF THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE COMMENT OF THE OPPORTUNITIES MARKETING POLICY UNIT OF THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTION THE OPPORTUNITIES MARKETING POLICY Invoice To Service Department THE OPEN CLAIMS TYPE The Date Booked Status Type Transaction Invoice ID Master Invoice ID Policy Policy Policy 10/8/2008 T/1/2007 8/2/2007 * Posted Invoice - 12137 BA1234567 T/1/2007 8/1/2007 * Posted Reversed Invoice12119/12114 Unassigned T/1/2007 8/1/2007 * Posted Reversed Invoice - 12119/12114 Unassigned T/1/2007 8/1/2007 * Posted Reversed Invoice - 12119/12114 Unassigned T/1/2007 8/1/2007 * Posted Reversed Invoi	SEARCH ORGANIZATION REPORTS CAMPAIGNS Boot THE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSAC Te: OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSAC Te: Opportunities Marketing Ist bill plans Invoice ID Invoice ID Master Policy Tht: Impoint Marketing Transaction Invoice ID Number Description 8/2/2007 8/2/2007 * Posted Invoice - 12137 BA1234567 Auto - Commercial 7/1/2007 8/1/2007 * Posted Invoice - - 12119/12114 Unassigned Auto - Commercial 7/1/2007 8/1/2007 * Posted Invoice - - 12119/12114 Unassigned Auto - Commercial 7/1/2007 8/1/2007 * Posted Invoice - 12114/-12119 Unassigned Auto - Commercial 10/8/2008 - Pasted Invoice - 12114/-12119 Unassigned Auto - Commercial	Index Index Index SEARCH ORCANIZATION REPORTS CAMPAICNS Bookmarks: Expand Add ILE OPPORTUNITIES MARKETINC POLICIES CAMINS SERVICINC ATTACHMENTS ACTIONS TRANSACTIONS DELLERY the: Opportunities MARKETINC POLICIES CAMINS SERVICINC ATTACHMENTS ACTIONS TRANSACTIONS DELLERY the: Commary Client balance summary Its bill plans [Add Master Invoice] [Add Master Invoice] [Add Master Invoice] th: Image: Status Type Transaction Master Policy Description Bill Method 8/2/2007 8/2/2007 8/2/2007 * Posted Invoice - 12137 BA1234567 Auto - Commercial Agency Bill Unassigned Balance Unassigned Balance Unassigned Balance Unassigned Balance Unassigned Balance Commercial Agency Bill Unassigned Balance 7/1/2007 8/1/2007 * Posted Invoice - - - Commercial Agency Bill Unassigned Balance	Induction Reports CAMPAIGNS Bookmarks: Expand Add Removes Bookmarks: Expand Add Removes State ORCANIZATION REPORTS CAMPAIGNS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELLYRY T-OC The: OPPORTUNITIES MARKETING POLICIES CALINS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELLYRY T-OC the: Commercial Commercial Commercial Commercial Commercial Commercial ummary Client balance summary List bill plans Invoice1D Master Policy Deleversed Commercial Add New II th: Image: Status Type Transaction Master Policy Deleversed Add or Commercial Agency Bill \$459.00 10/8/2008 10/8/2007 * Posted Invoice - 12137 BA1234567 Auto - Commercial Agency Bill \$459.00 7/1/2007 8/1/2007 * Posted Invoice - - 12137 BA1234567 Commercial Agency Bill \$2,677.00

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 ricon 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.

_		SEARCH ORG	ANIZATION R	EPORTS CAI	IPAIGNS			Bookm	arks: Expand A	dd Remove S	elected
INT PRO	OFILE OPPO	DRTUNITIES MA	RKETING PO	LICIES CLA	IMS SERVICI	NG ATTACHMEN	TS ACTIONS	TRANSACTIO	DNS DELIVERY	T-LOG	
nt Na	me: Cormi	er Quick Stop	, Inc.							Commercia	al Acco
isaction	summary c	lient balance summ	ary list bill pla	ins							
lect Vie	Invo	ice Summary	*					[Add	Master Invoice]	[Add New Ir	nvoice]
lect Cli	ent:		*		Showing	Page 1 of 1 🕨 🕅				Search Filter:	[Show]
etails	Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount R	emove
>	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 rise 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.

nex	sure								HOME	HELP SETUP	LOGO
		SEARCH ORG	ANIZATION	REPORTS CAM	PAIGNS			Book	marks: Expand A	dd Remove Se	lected 🐧
CLIENT PRO	OFILE OPP	ORTUNITIES MA	RKETING	POLICIES CLAI	MS SERVICIN	IG ATTACHME	NTS ACTION	S TRANSACT	IONS DELIVERY	T-LOG	
Client Na	me: Cormi	er Quick Stop	, Inc.							Commercial	Accour
transaction	n summary c	lient balance summ	ary 🛛 list bill	plans							
Select Vie	ew: Assig	gned Payments	*					[Ad	d Master Invoice]	[Add New Inv	voice]
Select Cli	ient:		*		Showing	Page 1 of 1 🕨 🕅				Search Filter: [Show]
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	Invoice Id	Policy Number	Description	Bill Method	Amount Re	move
	10/8/2008	10/8/2008	-	Receive Payment	1177	-	-	-		(\$500.00)	
	8/2/2007	8/2/2007	-	Assign Credit	1177	12137	BA1234567	-		\$400.00	
	8/25/2007	8/25/2007	-	Assign Credit	1177	13085	Unassigned	-		\$100.00	
									Unassigned Balar	ice \$0.00	
									Total Assigned:	(\$500.00)	
									Total Received:	(\$500.00)	
							lis	t bill plans / cli	ent balance summary	transaction su	ummary

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.

Iexs	sure								HOME	HELP SETUP
		SEARCH ORG	ANIZATION	REPORTS CAM	IPAIGNS			Bookr	narks: Expand A	dd Remove Select
LIENT PRO	FILE OPP	ORTUNITIES MA	RKETING P	OLICIES CLA	IMS SERVICI	NG ATTACHME	NTS ACTION	IS TRANSACTI	ONS DELIVERY	T-LOG
lient Nar	ne: Cormi	er Quick Stop	, Inc.							Commercial Ac
transaction	summary c	lient balance summ	ary list bill p	lans						
Select View	w: Payr	nent Summary	*					[Add	Master Invoice]	[Add New Invoic
Select Clie	ent:		~		Showing	Page 1 of 1 🕨 🕅				Search Filter: [Sho
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	Invoice Id	Policy Number	Description	Bill Method	Amount Remov
	10/8/2008	10/8/2008	-	Receipt	1177	-	-	-	-	(\$1,000.00)
										(61 000 00)

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.

		SEARCH ORG	ANIZATION R						Bookmarks: Expan	d Add Rem	ove Sel
ont Na	me: Jack's	Blumbing 8:1	Heating PO	LICIES CEAIN	IS SERVICING	ATTACHMEN	S ACTIONS	TRANSACTIO		FLOG	
enciva	me. Juck 3	Flambing &	leading							Commercia	
ent balan	ce summary 🍸	transaction summ	ary 👋 list bill pla	ins							
elect Vie	w: Unpo	sted Invoices	*					[Ad	d Master Invoice]	[Add New I	nvoice]
alect Clie	ent:		~		🛛 🖣 Showing F	age 1 of 1 🕨 🕅				Search Filter:	[Show]
etails	Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount R	emove
>	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	B
>	10/1/2005	10/1/2005	Unposted	Invoice(CB)		3674 (3670)	PKG2349999	Package	Agency Bill	\$500.00	E.
>	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	6
>	1/1/2006	1/1/2006	Unposted	Invoice(CB)	-	3677 (3670)	PKG2349999	Package	Agency Bill	\$500.00	5
>	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	E.
>	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	Ē.
									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.

		SEARCH ORGA	NIZATION I	REPORTS					Bookmarks: Expar	nd Add Rem	ove Se
ENT PRO	FILE OPPO	ORTUNITIES MAI	RKETING PO	DLICIES CLAIN	IS SERVICING	ATTACHMEN	TS ACTIONS	TRANSACTION	S DELIVERY	T-LOG	
ent Na	me: Jack's	Plumbing & F	leating							Commercia	al Acco
ent balan	ce summary	transaction summa	ny list bill pl	ans							
elect Vie	w: Poste	ed Invoices	*					[Add	d Master Invoice]	[Add New I	nvoice
elect Clie	ent:		*		🕅 🖣 Showing I	Page 1 of 1 🕨 🕅				Search Filter:	[Show
						InvoiceID					
etails	Effective Date	Date Booked	Status	Type	Transaction Id	Master Invoice ID	Policy Number	Description	Bill Method	Amount R	emove
etails	Effective Date 7/1/2005	Date Booked 8/3/2005	Status Posted	Type Invoice	Transaction Id -	Master Invoice ID 3668	Policy Number CP23498765	Description Commercial Auto	Bill Method Agency Bill	Amount R \$3,200.00	emove
Details	Effective Date 7/1/2005 7/1/2005	Date Booked 8/3/2005 8/3/2005	Status Posted Posted	Type Invoice Invoice(CB)	Transaction Id - -	Master Invoice ID 3668 3671 (3670)	Policy Number CP23498765 PKG2349999	Description Commercial Auto Package	Bill Method Agency Bill Agency Bill	Amount R \$3,200.00 \$1,200.00	emove
Details	Effective Date 7/1/2005 7/1/2005 8/1/2005	Date Booked 8/3/2005 8/3/2005 8/1/2005	Status Posted Posted Posted	Type Invoice Invoice(CB) Invoice(CB)	Transaction Id - -	Master Invoice ID 3668 3671 (3670) 3672 (3670)	Policy Number CP23498765 PKG2349999 PKG2349999	Description Commercial Auto Package Package	Bill Method Agency Bill Agency Bill Agency Bill	Amount R \$3,200.00 \$1,200.00 \$500.00	emove

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.

nexs	sure								HOME	HELP SETUR	LOGO
		SEARCH ORGA	NIZATION F	REPORTS					Bookmarks: Expan	d Add Remo	ove Selec
CLIENT PRO	FILE OPPO	DRTUNITIES MA	RKETING PO	DLICIES CLAIN	IS SERVICING	I ATTACHMEN	ITS ACTIONS	TRANSACTION	S DELIVERY	T-LOG	
lient Na	me: Jack's	Flumbing & F	leating							Commercia	I Accou
client balan	ce summary	transaction summa	ary list bill pl	ans							
Select Vie	w: Poste	ed Invoices	~					[Add	d Master Invoice]	[Add New In	voice]
Select Clie	ent:		*		K Showing I	Page 1 of 1 🕨 🕅				Search Filter:	[Show]
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount Re	move
>	7/1/2005	8/3/2005	Posted	Invoice	-	3668	CP23498765	Commercial Auto	Agency Bill	\$3,200.00	
>	7/1/2005	8/3/2005	Posted	Invoice(CB)	-	3671 (3670)	PKG2349999	Package	Agency Bill	\$1,200.00	
>	8/1/2005	8/1/2005	Posted	Invoice(CB)	-	3672 (3670)	PKG2349999	Package	Agency Bill	\$500.00	
									Total:	\$4.900.00	

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.

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.

		SEARCH ORCA		EDORTS				B	HOME	HELP SETUP LOC
IENT PRO	FILE OPPO	RTUNITIES MAI	RKETING PO	LICIES CLAIN	15 SERVICING		S ACTIONS	TRANSACTIONS	DELIVERY	T-LOG
ient Na	me: Danny	Smith								Commercial Acco
lient balan	ce summary	transaction summa	ary list bill pla	ans						
Select Vie	w: Reve	rsed Invoices	*					[Add	Master Invoice]	[Add New Invoice]
Select Clie	ent:		*		🕅 🖣 Showing I	Page 1 of 1 🕨 🕅				Search Filter: [Show]
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	InvoiceID Master Invoice ID	Policy Number	Description	Bill Method	Amount Remove
		9/2/2005	Posted	Invoice(CB)	-	2869/-3699 (2862)	WC1234567	Workers Compensation	Agency Bill	\$221.42
>	8/2/2005	0,2,2000	Reversed			(2002)				

- 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.
 - **D** 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.

exs	sure								HOME	HELP SETUP LOG
-		SEARCH ORGAN	ZATION REPO	IRTS					Bookmarks: Expar	nd Add Remove Sele
LIENT PRO	FILE OPPO	DRTUNITIES MARK	ETING POLIC	IES CLAI	MS SERVICING		S ACTIONS	TRANSACTIO	NS DELIVERY	T-LOG
ient Nai	me: Jack's	s Plumbing & He	ating							Commercial Account
lient balan	ce summary	transaction summary	list bill plans							
Select Viev	w: Unas	signed Payments 💊	•					[Ad	d Master Invoice]	[Add New Invoice]
Select Clie	ent:	~	•		🕅 🖣 Showing F	Page 1 of 1 🕨 🕅				Search Filter: [Show]
Details	Effective Date	Date Booked	Status	Туре	Transaction Id	Invoice Id	Policy Number	Description	Bill Method	Amount Remove
>	8/3/2005	-	-	Payment Receipt	318	-	-	-	Advance payment for September installment	\$500.00
									Tatal	4500.00

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.

J SU	re								HOME	HELP SETUP LO
		SEARCH ORGA	ANIZATION P	REPORTS				E	Bookmarks: Expar	nd Add Remove Sel
ENT PROFILE	OPPC	ORTUNITIES MA	RKETING PO	DLICIES CLAIN	IS SERVICING	G ATTACHMENT	S ACTIONS	TRANSACTION	S DELIVERY	T-LOG
nt Name:	: John 9	Smith								Commercial According
at balance su	Immary	transaction summa	ary list bill pl	ans						
ect View:	Oper	n Binder Bill	*					[Ada	d Master Invoice]	[Add New Invoice]
lect Client:			*		🛛 🖣 Showing I	Page 1 of 1 🕨 🕅		-		Search Filter: [Show]
ect Client: Eff	ective Date	Date Booked	Status	Туре	K Showing I Transaction Id	Page 1 of 1 Invoice ID Master Invoice ID	Policy Number	Description	Bill Method	Search Filter: [Show]
ect Client: tails Eff	ective Date 1/2006	Date Booked 2/1/2006	Status Posted	Type Invoice(B)	Showing I Transaction Id	Page 1 of 1	Policy Number BA1234567	Description Commercial Auto	Bill Method Agency Bill	Search Filter: [Show] Amount Remove \$2,300.00

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

ansactio	n summary 🍸	client balance	summar	y list bill	plans										
Select Select	View: Trans Client:	sactional	*]							[=	xport] [Add	Master Inv	oice] [Add N Search Fi	ew Invoice] Iter: [Show]
						 s	howing Page 1	of 1 🕨 🔤	🗸 🗸 Total Row	ıs: 2			ſ	Display: Defa	ult (10) 🔽
lient F	eceivables Ag	eing													
	Last Update	ed Date		Last Tr	ansaction Dat	e	Current	Over 30 days	Over 60 d	lays O	ver 90 days	Total D	ue Fi	uture Gra	nd Total
	8/3/2009 12:	10:02 AM		7/22/20	09 2:00:11	РМ	\$0.00	\$3,000.00	\$0.00		\$0.00	\$3,000	.00 \$	0.00 \$3	,000.00
nvoic	e Transactior	n 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
Þ	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		12 000 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.

nexsure				Home Help Setup Logout
SEARCH	ORGANIZATION REPORTS	CAMPAIGNS	Bookmark	s: Expand Add Remove Selected 🏁
CLIENT PROFILE OPPORTUNITIES	MARKETING POLICIES	CLAIMS SERVICING ATTA	CHMENTS ACTIONS TRANSACTION	NS DELIVERY T-LOG
Client Name: Powers Constru	uction Co., Inc.			Commercial Account
delivery				
		Showing Page 0 o	fo 🕨	Filters: [Hide] [Add New]
Search Filters				Save Filter Settings 📃
Title:	Regarding:		Created By: User Logged On	Sent By:
Date Created From:	Date Created To:		Client Name: Powers Construction	Via: Both
Date Delivered From:	Date Delivered		Sent To:	Status: Not Successful 💌
Policy No:				
Sort Filters				
Sort Field 1: Date Created	Sort Order 1: Descendin	g 💌 Sort Field 2:	Sort Order 2:	Files per Page: 50 💌
				Search Clear

- 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.

nexsure				HOME	HELP SETUP LOGOU
	SEARCH ORGANIZATION REPOR	RTS CAMPAIGNS		Bookmarks: Expand Add	Remove Selected 🕷
CLIENT PROFILE OF	PORTUNITIES MARKETING POLICIE	ES CLAIMS SERVICING	ATTACHMENTS ACT	IONS TRANSACTIONS DELIVERY	T-LOG
Client Name: Pow	ers Construction Co., Inc.			•	Commercial Account
delivery					
email fax					
		[Send] [Save Draft]	[Print] [Close]	- * .	
	E-Mail Informati	ion		Policies	Add +
	[. 60		Claims	
litle:	l	* 52		Cancellations	
From:		*		Contificator	
From Email				Verification	
Address:		*		Binders	Add II
To:		*		Others	Add IT
				Tota	al Attachments: 0
To Email Address:		*			
CC:					
BCC:					
Regarding:		*			
Message:			*		
			-1		
	* Required Field				
	nagaria (160				
		[Send] [Save Draft]	[Print] [Close]		
					fax email
					-

Sure				HOME	Help Setu	IP L
SEA	RCH ORGANIZATION REPO	ORTS CAMPAIGNS		Bookmarks: Expand Ad	dd Remove S	electe
NT PROFILE OPPORTUNI	TIES MARKETING POLIC	IES CLAIMS SER	RVICING ATTACHMENTS	ACTIONS TRANSACTIONS DELIVER	Y T-LOG	
nt Name: Powers Co	nstruction Co., Inc.				Commerci	al Acc
very						
mail fax						
	En Information	[Send] [Sav	e Draft] [Print] [Close]	Delision	Add	
	rax informat	ion		Claims	Add	Ŀ
Title		* 134		Cancellations	Add	E I
				Invoices/Reconciliations	Add	Ŧ
From:		*	li	Certificates	Add	Ŧ
From Fax		*	li	Verification	Add	+
Number: I		-	1	Binders	Add	+
From Email		*	1	Others	Add	÷
Address:				Тс	otal Attachmen	ts: 0
To:		*				
To Fax Number:		*				
Regarding:		*				
Message:						
incode a			<u> </u>			
Auto Wrap While						
			*			
Message	is limited to 19 lines and 65 cha	racters per line.				
***	a evila					
" Require	a riela					
		[Send] [Sav	e Draft] [Print] [Close]			
					fax	emai

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.
То	То	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.

Policies	Add	+
Claims	Add	+
Cancellations	Add	+
Invoices/Reconciliations	Add	+
Certificates	Add	+
Verification	Add	+
Binders	Add	+
Others	Add	+
Total Attac	hment	s: 0

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

🖉 htt	ps://nexweb25.nexsure.	com/?tab=other&mode=1&pid=-1&certid=-1&pt	oid=-1 - Add D	elivery Attachme -	
polic	ies claims cancellati	ons Y invoices Y certificates Y verification Y binde	rs other		
				ne	sure
		Showing Page 1 of 1		Filters	: [Show]
	Name	Description	Size	Date Created	Туре
☑	Certificate Holders	Cert 21 new holder list as of 1/26/2009	10.466 KB	01/27/2009	XLS
	Certificate Holders	Cert 13 Holder List	11.133 KB	01/27/2009	XLS
	DOL 9-8-08	IV R/E OP	56.5 KB	12/10/2008	DOC
	Schedule	2008 Vehicle Schedule for renewal	22.5 KB	12/09/2008	XLS
V	Schedule	2008 Driver list for renewal	19.5 KB	12/09/2008	XLS
		aller binders understand and the		Cancel	Attach
		other binders verification certificates in	voices \wedge canc		policies

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.

e s	u	re									HOME	HELP SETUP	LOGOU
		SEAT	RCH ORGANIZATION	REPORTS	CAMPAIGNS					Bookm	arks: Expand Add	Remove Select	ed 🕷
ENT PRO	FILE	OPPORTUNI	TIES MARKETING	POLICIES	CLAIMS S	ERVICING		CHMENTS	ACTION	5 TRANSAC	TIONS DELIVERY	T-LOG	
nt Nan	ne:	Powers Cor	struction Co., In	IC.								Commercial Ac	cou
ivery													
Abtto	•11n	avwah25 nave	ure com/2tab=other	8 mode - 18 ni	d=_1&cortid=	-1&nhid	1 . Add	Delivery Att	achma				
nelicie	», / / II			contificator	worification	hindore	athar	i benver y Ad	dennie				
poncie		cianna cane	enaciona involcea	certificates	venneación	Unders	Jourer		no	SUIPA	olicies	Add 🛨	L I
			14.4			N NI			TIC/	Suic	aims	Add 🛨	
			N 4	Showing Pag	ge 1 of 1	P PI			Filter	s: [Show]	ellations	Add 🛨	
	Nan	ne	Description			S	lize	Date Cre	ated	Туре	Reconciliations	Add 🛨	
	Cert	tificate Holders	Cert 21 new ho	der list as of	1/26/2009	1	0.466 KE	01/27/20	009	XLS	ificates	Add 🛨	
	Cert	tificate Holders	Cert 13 Holder	List		1	1.133 KE	01/27/20	909	XLS	fication	Add 王	i
	6	N	(H - 😭 🖦 - 🗋)	÷				delive	y_previe	w [Read-Only]	- Microsoft Excel		
R		Home	Insert Page Lav	out Formu	las Data	Revie	w Vie	ew Devel	oper	AddJos	Acrobat		
		P12	_ (£.					oper	7.00 115	Herobat		
12		012	• (*	<i>J.</i> *								_	
		А	В		C			D		E	F	G	
		NexsureRef	Туре	NameLine1				NameLine2	Addre	ssLine1	AddressLine	2 City	S
	1												
	2		Certificate Holder	Agri Nationa	al				1717 F	ox Lane		Oklahoma Cit	y C
	3		Certificate Holder	airBand					4300 N	1ostellar		Dallas	Т

- 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.

sure						HOME	HELP SETU	P L
_	SEARCH ORGANIZATION REPORTS	CAMPAIGNS			Bookmarks: Exp	and Ado	d Remove S	electe
ENT PROFILE OP	PORTUNITIES MARKETING POLICIES	CLAIMS SERVICING A	TTACHMENTS	ACTIONS	TRANSACTIONS	DELIVERY	T-LOG	
nt Name: Powe	ers Construction Co., Inc.						Commercia	al Acc
ivery								
email fax								
		[Send] [Save Draft] [Pri	nt] [Close]					
	E-Mail Information				Policies		Add	+
					Claims		Add	+
Title:	Renewal marketing	*	1		Cancellations		Add	+
I	Pater Carrier	1.	1		Invoices/Reconcilia	tions	Add	+
From: [betsy Cormier				Certificates		Add	+
From Email	betsy.cormier@xdti.com	*			Verification		Add	+
Address -		-			Binders		Add	+
To:	George Powers; John Powers	*			Others	<i>a</i> :	Add	
To Email Address:	gpowers@powerscc.biz;jpowers@powerscc.bi	2 *		Schedule	2008 Driver list for renewal	19.5 KB	12/09/2008	, E
cc: []		Schedule	2008 Vehicle Schedule for renewal	22.5 KB	12/09/2008	B
BCC:		_		Certificate Holders	Cert 21 new holder list as of 1/26/2009	10.466 KB	01/27/2009	B
Regarding:	Request for Renewal Information	*				Tot	al Attachmen	ts: 3
Message:	Please review the attached schedules in pre finalize your renewal plan for 2009.	sparation of our meeting to	*					
3	* Required Field							
		[Send] [Save Draft] [Pri	nt] [Close]					

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	lcon	Status	Status Message	Successful
Email / Fax	Þ	Draft		No
Email / Fax		Processing Forms	Rendering PDF	No
Email / Fax	8	Pending		No
Fax		Processing	Picked up	No
Fax	U	Processing	Sending	No
Fax	U	Processing	Phone line problem	No
Email / Fax	P	Successful	Completed	Yes
Fax	8	Error Occurred	Line busy	No
Fax	8	Error Occurred	Human answered	No
Fax	8	Error Occurred	Transmission error	No
Fax	8	Error Occurred	Bad Conversion	No

ne	e)	S	sure						Home Help Setur	P LOGO
		7	SEARCH	ORGANIZATION REPOR	RTS CAMPAIGNS			Bookmark	s: Expand Add Remove Se	elected 🚿
ACTI	ONS	0	OPPORTUNITIES MARKET	ING BINDER LOG EDIT	S AUDITS EXPIRATION	S	ENDORSEMENTS CANCEL	LATIONS CLAIMS	INTERFACE DELIVERY	
He	llo,	Be	etsy Cormier						► Home	
del	ivery	2								
					Showing Page	1	of 1 🕨		Filters:	[Show]
		U	From Name From Email	To Name Sent To	Entity Name Created By		Title Regarding	Status Message	Date Created Date Delivered	Via
Ę	>	1	Betsy Cormier betsy.cormier@xdti.com	Wyman Insurance Agency, Inc. nexsurecontact@aol.c	Wyman Insurance Agency, Inc. Betsy Cormier	5	Agreement Signed 2009 Agreement	Successful Email sent	02/23/2009 07:13:04 PST 02/23/2009 07:13:04 PST	Email
Ę	>	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
Ę	>	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
Ę	>	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
•	8	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
Ę	>	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.

nevsure					
			Bookmarks		Romovo Selected
					T-LOC
Client Name: Park Meadow Development Inc	CENTRS SERVICING				Commercial Account
delivery					
details					
[Re	-Send] [Print] [Close]				
E-Mail Information			Others		
Title: Certificate		Name	Description	Size	DateCreated
From: Betsy Cormier		Q Certificates	2007 Print Batch of all holders	2881.724 KB	12/01/2008
Address: betsy.cormier@xdti.com				Total	Attachments: 1
To: Hartford Underwriter					
To Email Address: nexsurecontact@aol.com					
CC:					
BCC:					
Regarding: Park Meadow Development, Inc. Certificate	s Issued				
Message: Copy of certificates issued for new policies	A				
Account Manager					
	•				
Delivery Information					
Date Created: 12/01/2008 10:19:01 PST					
Date Delivered: 12/01/2008 10:19:01 PST					
Status: Successful					
Status Message: Email sent					
Created by: Betsy Cormier					

• 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 4 icon next to the attachment on the delivery details screen.

nevsure			HOME HE	ELP SETUP LOGOUT
SEARCH ORGANIZATION REPORTS CAMPAIGNS		Bookmarks: B	xpand Add	Remove Selected 🐲
CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICIN	G ATTACHMENTS	ACTIONS TRANSACTIONS	DELIVERY	T-LOG
Client Name: Park Meadow Development, Inc.				Commercial Account
delivery				
details				
vecans				
[Re-Send] [Print] [Close]				
E-Mail Information		Others		
Title: Certificate	Name	Description	Size	DateCreated
From: Betsy Cormier	Q Certificates	2007 Print Batch of all holders	2881.724 KB	12/01/2008
From Email Address: betsy.cormier@xdti.com			Total	Attachments: 1
To: Hartford Underwriter				
To Email nexsurecontact@aol.com				

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 is is displayed. By default the address book tab will display the Delivery History.

intity Delivery History	Y [Count] [Class]					
	[search] [Ulear]	Condo				
nspray Name	send to	Gina M	r Morgan			
	Search Results					
Display Name	Send to	Via	Sender			
Alice Bennorth	gina.morgan@×dti.com	EMail	Gina Morgan			
Alicia Conroy	gina.morgan@xdti.com	EMail	Gina Morgan			
всс	gina.morgan@×dti.com	EMail	Gina Morgan			
cc	gina.morgan@xdti.com	EMail	Gina Morgan			
Sally North	gina.morgan@xdti.com	EMail	Gina Morgan			
○ From ⊙ To ○ CC ○ BCC [Select] [Close]						

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:

Entity
Delivery History 🛛 😽
Add. Interest Location
Carrier Location
Certificate Holder Location
Contacts
Delivery History
Organization Location
Policy Assignments
Retail Agents Location

- 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.

ne	Σ	S	sure					Home Help Setup	LOGOUT
			SEARCH	ORGANIZATION REPORTS	CAMPAIGNS		Bookmarks:	Expand Add Remove Selec	ted 💞
CLIE	IT F	RO	FILE OPPORTUNITIES	MARKETING POLICIES	CLAIMS SERVICING	ATTACHMENTS ACTIONS	TRANSACTIONS	DELIVERY T-LOG	
Clien	t١	lar	ne: Powers Construc	ction Co., Inc.				Commercial A	ccount
deliv	егу								
					Showing Page 1	of 1 🕨		Filters: [Hide] [Ad	ld New]
Sea	ircl	h Fi	lters					Save Filter Settin	gs 🔲
			Title:	Regarding	:	Created By: Bets	y Cormier	Sent By:	
D	ate	Cr	eated From: 02/23/2009	Date Created	:	Client Name: Pow	ers Construction	Via: Both	-
Da	te (Deli I	vered From:	Date Delivered	;	Sent To:		Status: Draft	-
	F	olic	y No:						
Sor	tF	ilte	rs						
s	Sort	Fie	eld 1: Date Created 💌	Sort Order 1: Descendi	ng 💌 Sort Field 2:	▼ Sort C	rder 2:	Files per Page: 50	•
								Search Cl	lear
		Û	From Name From Email	To Name Sent To	Client Name Created By	Title Regarding	Status Message	Date Created Date Delivered	Via
Þ	•	o	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

ne	X	sure						Home Help Setup Lo	OGOU
		SEAR	CH ORGANIZATION REPO	RTS CAMPAIGNS			Bookmarks	: Expand Add Remove Selected	d 🚿
ACTION	IS	OPPORTUNITIES MAR	RKETING BINDER LOG EDI	TS AUDITS EXPIRATION	IS EN	DORSEMENTS CAN	ICELLATIONS CLAIMS	INTERFACE DELIVERY	
Helle	о, В	etsy Cormier						► Home	
delive	ery								
				Showing Pag	je 1	of 1 🕨 🕅		Filters: [Hi	lide]
Sea	rch I	Filters						Save Filter Settings	
		Title:	Regar	ding:		Created By:	Betsy Cormier	Sent By:	
Da	ate C	From: 02/23/2009	Date Cre	ated To:		Entity Name:		Via: Both	
Dat	e De	From:	Date Deliv	vered To:		Entity Type:	Client	Status: Draft	
	Po	licy No:	Ser	t To:	1				
Sor	t Filt	ers							
s	ort F	ield 1: Date Created	Sort Order 1: Desc	ending 💌 Sort Field 2:		T 5	Sort Order 2:	▼ Files per Page: 50 ▼	1
								Search Clear	r
	Ű	From Name From Email	To Name Sent To	Entity Name Created By	T	itle legarding	Status Message	Date Created Vi Date Delivered Vi	lia
Þ	0	Betsy Cormier betsy.cormier@xdti.c	John Powers com jpowers@powerscc.biz	Powers Construction Co., Inc. Betsy Cormier		Certificate Certificate for Futur ndustries	re Draft	02/23/2009 14:05:18 PST Em	nail

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 provide the delivery to be re-sent.

(deliver	y)							
					Showing Page 1	of 1 🕨 🕅		Filters: [Show] [Ad	id New]
		Û	From Name From Email	To Name Sent To	Client Name Created By	Title Regarding	Status Message	Date Created Date Delivered	Via
	8	1	Betsy Cormier nexsurecontact@aol.com	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

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



delivery							
details							
	[Re-Send] [Print] [Clo	se]					
	Fax Information					Certificate	s
Title: Certific	cate		CertNo	ID	Holder	Reference	Description
From: Betsy C	Cormier	Q	35	1	Agri National		08-09 AL GL WC UL 10DNOC
From Fax number: (714) 4	476-7224						Total Attachments: 1
From Email Address:	recontact@aol.com						
To: John Po	owers						
To Fax (603) 8 Number:	882-2188						
Regarding: Certific	cate for Agri National						
Message: Your co attache	opy of the requested certificate for Agri National is 🗆 ed.						
	Delivery Information						
Date Creat	ated: 02/23/2009 13:24:10 PST						

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.

		[Send] [Save Draft] [Print] [Close]				
	Fax Information			Policies	Add	+
				Claims	Add	+
Title:	Certificate	* 📴	Ca	ancellations	Add	+
From	Betsy Cormier	*	Invoice	s/Reconciliations	Add	+
	beby conner		(Certificates	Add	-
From Fax Number:	7144767224	*	CertNo ID Holder	Reference Desc	ription	
			35 1 National	10DN		
Address:	nexsurecontact@aol.com	*	ν. V	/erification	Add	+
Ter	John Devers			Binders	Add	+
10.	John Powers			Others	Add	+
To Fax Number:	6038822188	*			Total Attachmen	ts: 1
To Fax Number:	6038822188	*			Total Attachmen	ts: 1
To Fax Number: Regarding:	6038822188 Certificate for Agri National	*			Total Attachmen	ts: 1
To Fax Number: Regarding: Message:	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag	* * i National is D			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Nuto Wrap While	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	• • • National is 0			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Nuto Wrap While Edit I	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	* • • National is 0 🔺 *			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Nuto Wrap While Edit 🗹	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	* • i National is D			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Luto Wrap While Edit 🗹	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	* * i National is 0 🔺 *			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Luto Wrap While Edit 🗹	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	* • • National is 0			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Luto Wrap While Edit ♥	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	• • • National is 0 🔺 •			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Luto Wrap While Edit 🔽	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	• • • National is 0			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: uuto Wrap While Edit 🔽	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached.	* i National is 0 🗡 *			Total Attachmen	ts: 1
To Fax Number: Regarding: Message: Juto Wrap While Edit 🔽	6038822188 Certificate for Agri National Your copy of the requested certificate for Ag attached. Message is limited to 19 lines and 65 characters	* * i National is 0			Total Attachmen	ts: 1

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.

nexsure		HOME HELP SETUP LOGOUT
	SEARCH ORGANIZATION REPORTS	Bookmarks: Expand Add Remove Selected
_		

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.

nex	sure							HOME	HELD SE	
		SEARC	H ORGANIZATION	I REPORTS				Bookmarks: Hide	Add Re	move Selecte
Select	Detail	Task	Operation	Client Name	Polic	y No.	Memo	Date Time		
	۲	Client	View	Peterson's Pet Palace	N/A	. View Client Locations		7/20/2005 8:	07:36 AM	
	*	Client	View	ABC Preschool			View Client Contacts	7/20/2005 8:	D6:01 AM	
	*	Client	View	Peterson's Pet Palace	N/A		View Client	7/20/2005 8:	00:58 AM	
	*	Client	View	Moe's Tavern	N/A		View Client	7/20/2005 8:	00:41 AM	
Location Details	n Summar Primary B	¥ Silling	Location Name	K Page 1 Address	of 1 🕨 🕅 City	St./Prov.	Zip/Postal	Filters: Phone Number	[Show] [Fax	Add New] Remove
>	V		Pet Store	123 Main Street	Brea	CA	92821	(712) 555-4433		
				classified	d assignme	nt related	accounts named insure	ds locations contacts	, profiling	card file

- 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.

nex:	sure							HOME	IELP SE	TUP LOG
		SEARCH	ORGANIZATION	REPORTS				Bookmarks: Hide	Add Re	move Sele
elect	Detail	Task	Operation	Client Name	Polic	y No.	Memo	Date Time		
2	۳	Client	View	Peterson's Pet Palace	N/A		View Client Locations	7/20/2005 8:0	17:36 AM	
	۲	Client	View	ABC Preschool N			View Client Contacts	7/20/2005 8:0	6:01 AM	
~	*	Client	View	Peterson's Pet Palace	N/A		View Client	7/20/2005 8:0	10:58 AM	
	*	Client	View	Moe's Tavern	N/A		View Client	7/20/2005 8:0	0:41 AM	
						TTACUMENTE			100	
lient Na	ame: Pet	erson's Pe	et Palace	POLICIES CLAIMS SE		TACHMENTS	ACTIONS INANSA	CHORS BELIVERI I	Commer	cial Acco
card file	profiling	contacts	ocations named in	sureds related accounts	assignment	classified				
Location	n Summar	y		🕅 🖣 Page :	L of 1 🕨 🕅			Filters:	Show] [Add New]
Details	Primary	Billing	Location Name	Address	City	St./Prov.	Zip/Postal	Phone Number	Fax	Remove
>	V		Pet Store	123 Main Street	Brea	CA	92821	(712) 555-4433		
				classifi	ed assignm	ent ∕ related a	accounts $igstyle hammed insure$	ds locations contacts	profiling	card f

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 ricon 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.

nex	sure	Э			HOME HELP SETUP LOGOUT		
		SE	Bookmarks: Hide Add Remove Selected				
Select	Detail	Task	Operation	Client Name	Policy No.	Memo	Date Time
	۲	Setup	View		N/A	View User Rights Template - Account Manager	7/20/2005 8:51:00 AM
	٣	Client	View	ABC Preschool	N/A	View Client Contacts	7/20/2005 8:06:01 AM
	۳	Client	View	Moe's Tavern	N/A	View Client	7/20/2005 8:00:41 AM

Notes

Dimensional

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.

Ie s	ure						Home Heip Settip Lo	COUT
		SEARCH OR	GANIZATION REPOR	rs			Bookmarks: Expand Add Remove Sel	lected
LIENT PRO	FILE OPP		ARKETING POLICIE	S CLAIMS S	ERVICING ATTACHMENTS	ACTIONS TRANSACTION	IS DELIVERY T-LOG	
lient Na	me: ABC	Preschool					Commercial Acco	ount
T-L og								
							Filter: [Show]	
				I Show	ving Page 1 of 6 🕨 🛛 💌			
Detail	Task	Operation	Client Name	Policy No.	Memo	User Name User Rights	Date Time	
>	T-Log	View	ABC Preschool	N/A	View TLog	Karen Peterson Administrator	7/20/2005 12:01:17 PM	
>	Client	View	ABC Preschool	N/A	View Client	Karen Peterson Administrator	7/20/2005 12:01:10 PM	
*	Client	View	ABC Preschool	N/A	View Client Contacts	Karen Peterson Administrator	7/20/2005 8:20:29 AM	
*	Client	View	ABC Preschool	N/A	View Client	Karen Peterson Administrator	7/20/2005 8:20:23 AM	
>	Client	View	ABC Preschool	N/A	View Client Contacts	Karen Peterson Administrator	7/20/2005 8:06:00 AM	
P	Client	View	ABC Preschool	N/A	View Client	Karen Peterson Administrator	7/20/2005 8:05:54 AM	
>	Client	View	ABC Preschool	N/A	View Client	Karen Peterson Administrator	6/1/2005 12:33:39 PM	
>	Client	View	ABC Preschool	N/A	View Client	Karen Peterson Administrator	5/4/2005 1:23:00 PM	

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.

nevsure								Home Help <mark>Setup</mark> Logout
SEARCH	ORGANIZA	TION RE	PORTS				Bookmarks	:: Expand Add Remove Selecter
Use the navigation below to access Nexsure setup information.								
Setup Console 🛛 🗵	security	policy u:	ser rights templ	ates access log	T-Log			
Expand Minimize								Filter: [Show]
Actions Color Schemes					K Showing	Page 1 of 7 🕨 1 💌		
 Lookup Management Opportunities 	Detail	Task	Operation	Client Name	Policy No.	Memo	User Name User Rights	Date Time
Print Blank Forms Recordence	₽	T-Log	View		N/A	View TLog	Karen Peterson Administrator	7/20/2005 12:28:51 PM
Document Templates	P	Setup	View	ABC Preschool	N/A	View Security Policy	Karen Peterson Administrator	7/20/2005 12:28:47 PM
LI Security Administration	P	Setup	View	ABC Preschool	N/A	View Action Details	Karen Peterson Administrator	7/20/2005 12:28:08 PM
		T-Log	View	ABC Preschool	N/A	View TLog	Karen Peterson Administrator	7/20/2005 12:11:39 PM
	>	Client	View	ABC Preschool	N/A	View Client Contacts	Karen Peterson Administrator	7/20/2005 12:11:18 PM

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.

nexsure								Home Help <mark>Setup</mark> L	OGOUT
SEARCH	ORGANIZA	TION R	EPORTS				Bookmarks	s: Expand Add Remove S	elected
Use the navigation below to access Nexsure setup information.									-
Setup Console 🛛 🛛	security	policy u	ser rights templ	ates access log	T-Log				^
Expand Minimize								Filter: [Hide	1
Actions Color Schemes	Search T	n Criteria ask:	1		Operation:		Client Name:		
Lookup Management	Policy	(No:			Memo:		User Ka	aren Peterson	
Opportunities Print Blank Forms	Date ⁻ Fr	Time rom: 7/20	/2005 🛛 🙋	Dat	te Time To: 7	/20/2005	User Rights:		
 Programs Document Templates 	Sor	rt By ame: Date	e Time 🔽		Sort By Direction:	Descending 🔽		Clear Search	
Security Administration					🕅 🖣 Showing	Page 1 of 7 🕨 1 💌			
	Detail	Task	Operation	Client Name	Policy No.	Memo	User Name User Rights	Date Time	
	₽	T-Log	View		N/A	View TLog	Karen Peterson Administrator	7/20/2005 12:28:51 PM	
	₽	Setup	View	ABC Preschool	N/A	View Security Policy	Karen Peterson Administrator	7/20/2005 12:28:47 PM	
	₽	Setup	View	ABC Preschool	N/A	View Action Details	Karen Peterson Administrator	7/20/2005 12:28:08 PM	

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

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.

Edit Via	iew Favorites Tools Help		111				
ark 🔻	🔿 - 😰 🖪 🔥 🔘 Searc	rh 🤶 Favorites 🙆 📿	. 🔍 🗖 .				
	tp://dev1web1.nexsure.com/ivexsure.asp						
	ne					HOME HELP SETUP	SUPPORT LO
	SEARCH ORGANIZATIO	on Reports				Bookmarks: Expand	Add Remove Se
NIZATIO	DN PROFILE ALL EMPLOYEES ALL	L LOCATIONS					Organization
nizati	UNNAME: XUTI XDEV-X						Organization
zation							
T xDev	<u>v-x</u> >> Eric Brehm Previous Page					Add Nev	,
rd file	regions territories branches de	epartments locations emplo	oyees accounting v				
employee	e detail identity additional logins	security commissions ac	counting transactions				
Additi	ional Login Information	ki ai s	howing Page 12 of 29	N	12 😺		
suarci		A	Leele	-	13		
D-t-ll-		ACCOUNT NO.		n	a na dia Adama		
Details	Harlevsville		Login	De	scription	3/22/2005	Remove
Details	Harleysville Hartford EBC	http://dev1web1.ne	exsure.com - Login Ir	nformation - M		3/22/2005 11/29/2004	
Details	Harleysville Hartford EBC Hartford Expressway	Add a new Login	exsure.com - Login Ir	nformation - M		3/22/2005 11/29/2004 6/17/2005	
Details	Harleysville Hartford EBC Hartford ERC Hartford Expressway Hastings Mutual	Add a new Login	exsure.com - Login Ir	nformation - M		3/22/2005 11/29/2004 6/17/2005 3/22/2005	
Details	Harleysville Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance	Add a new Login Additional Login Type:	exsure.com - Login Ir Abram Interstate	nformation - M		3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005	
Details	Harleysville Hartford EBC Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance Homesite	Add a new Login Additional Login Type: Account Number:	exsure.com - Login Ir Abram Interstate	nformation - M		3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005	
Details	Harleysville Hartford EBC Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance Homesite Hotmail-MSN Mail	Add a new Login Additional Login Type: Account Number: Login ID:	Abram Interstate	nformation - M		3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005	
Details	Login Type Harleysville Hartford EBC Hartford Expressway Hastings Mutual Havkeye-Security Insurance Homesite Hotmail-MSN Mail Hull & Company	Add a new Login Additional Login Type: Account Number: Login ID: Password:	Abram Interstate	Der nformation - M N		3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005	
Details	Login type Harleysville Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance Homesite Hotmail-MSN Mail Hull & Company Humana Insurance	Add a new Login Additional Login Type: Account Number: Login ID: Password: Confirm Password:	Abram Interstate	nformation - M		3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005 10/10/2005	
Details	Image: Source of the section of the	Add a new Login Additional Login Type: Account Number: Login ID: Password: Confirm Password: Department ID:	Abram Interstate	nformation - M	coptional)	3/22/2005 3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005 10/10/2005 10/12/2005	
Details	Harleysville Hartford EBC Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance Homesite Hotmail-MSN Mail Hull & Company Humana Insurance IA&B Group	Add a new Login Additional Login Type: Account Number: Login ID: Password: Confirm Password: Department ID: Description:	Abram Interstate	Der Information - M N	coptional)	3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005 10/10/2005 10/12/2005	
Details	Harleysville Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance Homesite Hotmail-MSN Mail Hull & Company Humana Insurance IA&B Group	Add a new Login Additional Login Type: Account Number: Login ID: Password: Confirm Password: Department ID: Description:	Abram Interstate	nformation - M	optional)	Jate Ureated 3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005 10/10/2005 10/10/2005 10/11/2/2005 preal logins identity	Remove
Details	Login Type Harleysville Hartford EBC Hartford Expressway Hastings Mutual Hawkeye-Security Insurance Homesite Hotmail-MSN Mail Hull & Company Humana Insurance IA&B Group	Add a new Login Additional Login Type: Account Number: Login ID: Password: Confirm Password: Department ID: Description:	Abram Interstate		optional)	Jate Ureated 3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005 10/10/2005 10/10/2005 10/12/2005 nnches territories	Kemove
Details	Login Type Harleysville Hartford EBC Hartford Ekpressway Hastings Mutual Hawkeye-Security Insurance Homesite Hotmail-MSN Mail Hull & Company Human Insurance IA&B Group	Add a new Login Additional Login Type: Account Number: Login ID: Password: Confirm Password: Department ID: Description:	Abram Interstate	Cance	optional) sites	3/22/2005 11/29/2004 6/17/2005 3/22/2005 9/7/2005 3/31/2005 9/6/2005 3/22/2005 10/10/2005 10/10/2005 10/12/2005 nollogins identity Inches territories r Statu	employee detail egions card file

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 <u>Nexsure</u>. <u>Support@xdti.com</u> 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 price
- 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).

) Nexsure - i	Microsoft Internet Exp	lorer provided by XDime	nsional Technologies, Inc.		
File Edit Vie	ew Favorites Tools H	elp			
🚱 Back 🔹	🔊 · 💌 🖻 🏠	🔎 Search	s 🤣 🍰 🍓 🔟 📒		
Address 🍓 http	p://dev1web1.nexsure.com/	Nexsure.asp			🖌 🄁 Go 🛛 Links 🎽
noto	no"				
		http://dev1web1.nexs	ure.com - Nexsure eServices - Nexsu	ıre - Microsoft Inter 📕 🔲 🗙	IELP SETUP SUPPORT LOGOUT
CLIENT PROFI	LE OPPORTUNITIES	eService Provider: Central In	nsurance 💌	NAICS Code: 20230	IVERY T-LOG Personal Account
policies hist	tory certificates bin	[Search Web]		[Update] [Close]	
		Contact List			Filters: [Show]
	Line Of Busines:	Name	Title City	State	Dilling Couries
Details	Policy Type	Smith, Jim	Brea	CA	Issuing Carrier Remove
P	Pineowners FMA 8203003	-0			Central Insurance
	🤌 Process edit.	eservices powered by			
	Personal Auto (PAUTO) Process new ma		L Login: test		Mutual
	Real Homeowners	COMPANIE	Bolicy Not EMA 1111111		New York Central
	🤞 Process new ma	- Since 1876 -	Type: Personal		
>	Phomeowners (PHOME)	[Auto-Login]			A Central 📑
	🤞 Process new ma	Billing Inquiry	Latest billing information		
>	PHOME)	Policy Lookup	Policy application information		New York Central 🔓
	🔌 Process new ma	Claims Inquiry	Claims inquiry information		
		DEC pages	DEC page listing		certificates history policies
		Loss Run	Loss Run information		
		Billing Statement	Billing Statement Information		
Hann Frie Dr	TA desision to a				Chabura Dalian (Aur-1-1-)
user: Eric Br	enm [Administrator]	Done		Trusted sites	Status: Unline (Available)
A start		remot Stylue	Masery Al Neve Al http:/		
Start		remot _{@X} stylus	eserv e nexs e nup),		

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.

nex	one		HOME HELP SETUP S	SUPPORT LOGOU
		SEARCH ORGANIZATION REPORTS	Bookmarks: Expand Add	Remove Selecte
CTIONS 0	OPPORTUNI	TIES MARKETING BINDER LOG EDITS AUDITS EXPIRATIONS E	NDORSEMENTS CANCELLATIONS CLAIMS INTERFACE DELIVERY	
Hello, E	ric Breh	Internet Options ? 🔀	► Hon	ne
All		General Security Privacy Content Connections Programs Advanced	►H 1 .	Filters: [Show]
		Select a Web content zone to specify its security settings.	dated By Annualized \$ Billing	Carrier
Details	Assign	🚳 💐 🕥 🖨	Trusted sites	g Carrier
Þ	\$	Internet Local intranet Trusted sites Restricted sites	You can add and remove Web sites from this zone. All Web sites in this zone will use the zone's security settings.	artford artford
>	8	Trusted sites This zone contains Web sites that you Trust not to damage your computer or Sites	Add this Web site to the zone:	ornia nobile
*	\$	Security level for this zone	hartford.com Add	deen rance
	Ø	Custom	Web sites:	
V	E 🕸	Custom settings. - To change the settings, click Custom Level. - To use the recommended settings, click Default Level.	Acordiomaforum.org Acordiomaforum.org Acatha.com thus://secure.agentione.biz Acatha.com	ob ental
•	پ ک	Custom Level Default Level	Require server verification (https:) for all sites in this zone	antal
	ø		OK Cancel	
*	20	OK Cancel Apply	vin Bryant \$NaN D 01/04/2006 Allianz C	anada 🗸

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.

nexone			HOME HELP S	etup support logout
	SEARCH ORGANIZATION REPORTS		Bookmarks: Expa	nd Add Remove Selected
ACTIONS OPPORTUN	ITIES MARKETING BINDER LOG EDITS AUDIT	- Dissister Cattions		LIVERY
Hello, Eric Breh	Internet Options	IP BIOCKET SETTINGS		Home
edits	General Security Privacy Content Connections	eptions Pop-ups are currently blocked. You can allow pop-ups Web sites by adding the site to the list below.	from specific	Filters: [Show]
Details Assign	All	ddress of Web site to allow:		Billing Carrier
	zone.	artford.com	Add	<u> </u>
	All - Blocks third-party cookies that do not h privacy policy - Blocks third-party cookies that use pers information without your implicit consent - Restrict Birsparty cookies that use per information without implicit consent	iowed sites: nexsure.com	Remove Remove All	The Hartford The Hartford California Automobile Aberdeen Insurance
	Sites Import Advanced	ifications and Filter Level Play a sound when a pop-up is blocked. Show Information Bar when a pop-up is blocked. er Level: ww. Allow pop-ups from secure sites		Chubb Continental Chubb Continental
🤣 🚯	OK Car Po	p-up Blocker FAQ	Close	AccessFlood

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.

User: Mary Oberleitner	[Administrator]	Signed On At 6/1/2009 3:26:12 PM CST	e	Status: Online (Available)

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

Contact Record	nexsure						
Online (Available)							
contact user preferences							
Default Bill Method: Agency Bill 🗸							
Default Transaction View: Transactional 🗸							
LOB Type Default: [By Client Type] 💟							
Default Time Zone: Central Time (US & Canada)	~						
	user preferences contact						
	OK Cancel						

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

