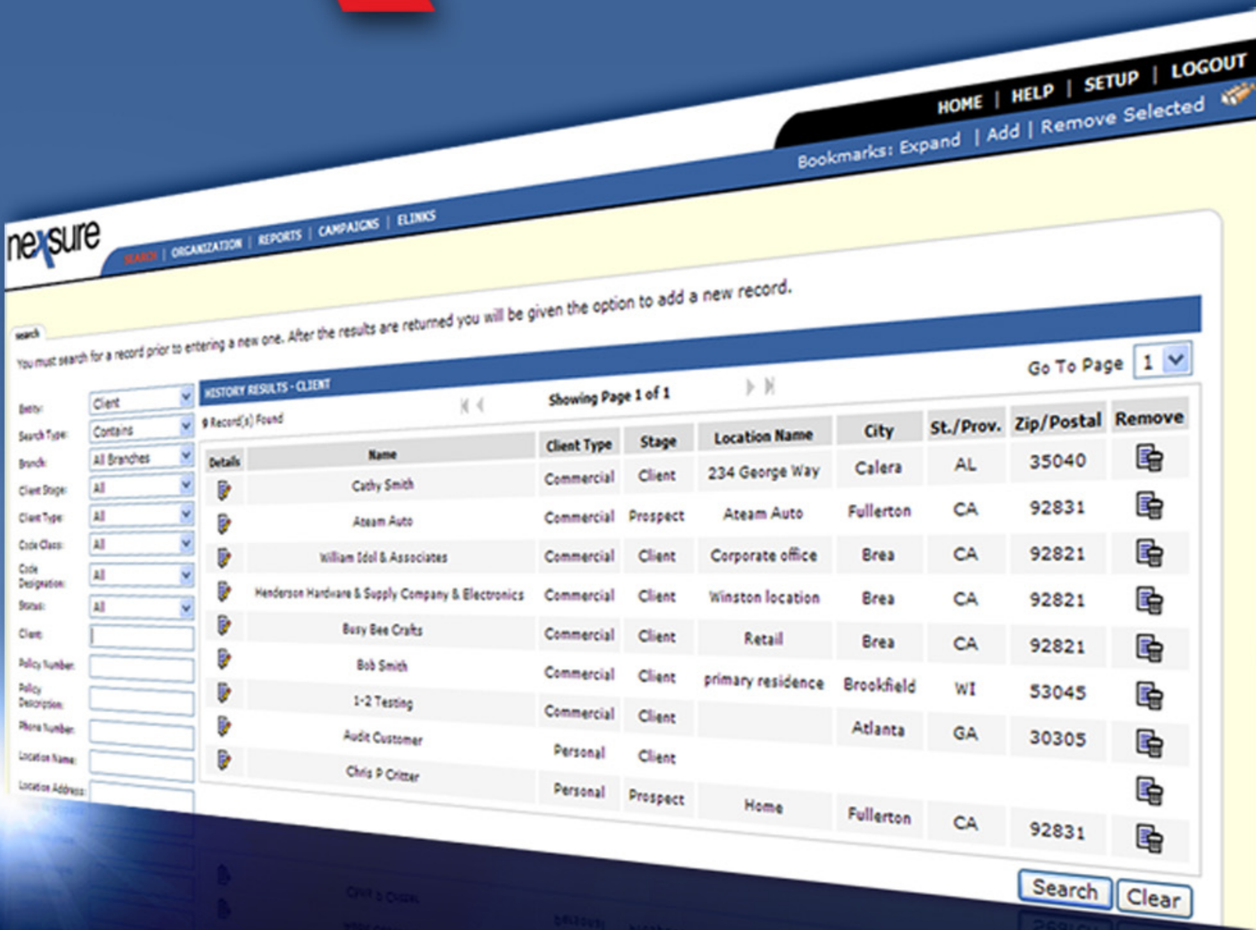
nexsure®




# CRM Training Manual

**Version 2.1.3**

X Dimensional® Technologies

# CRM Training Manual

**Version 2.1.3**

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# Chapter 1

# Introduction

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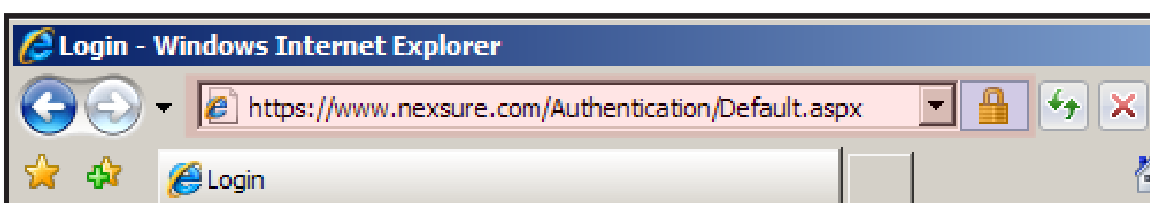
## Connecting to Nexsure

### HOW to Access the Internet and Login to Nexsure

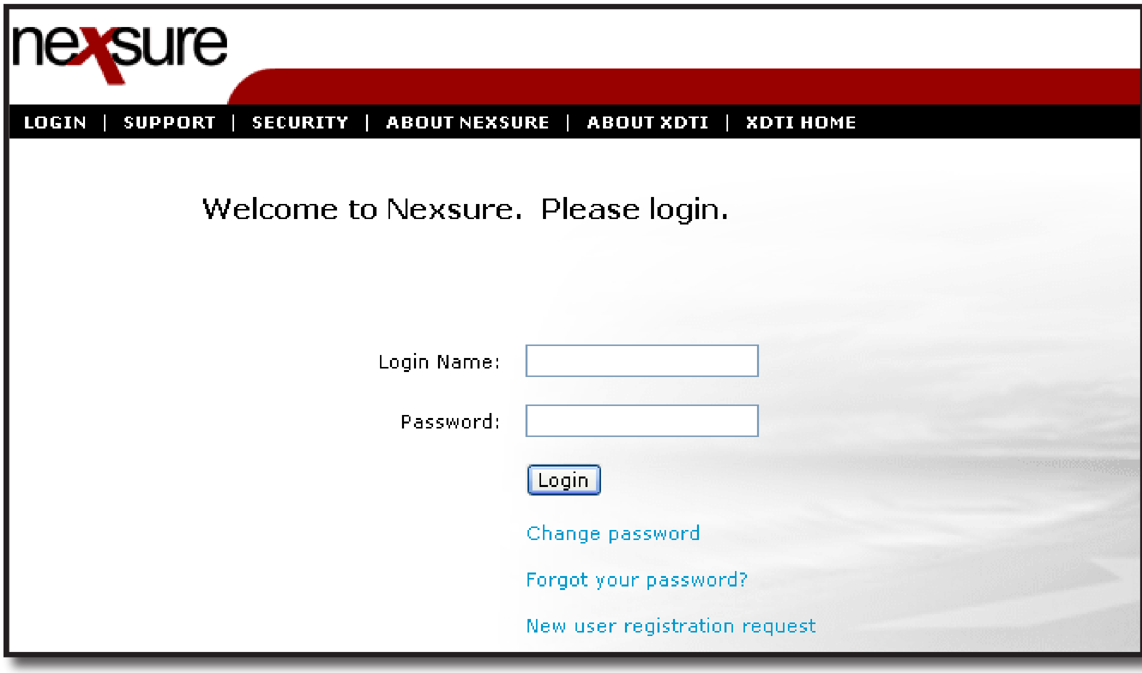
1. Double click the **Internet Explorer** icon on your desktop.


2. Internet Explorer will display the default home page. At the top of the screen on the Internet Explorer Address Bar, click and type: **www.nexsure.com** then click **Go** on the right side of the Address Bar or press **Enter** on the keyboard. The browser will redirect to the secure login page, https://www.nexsure.com/Authentication/Default.aspx. It is a good habit to bookmark your secure Nexsure URL.

**Note:** Clicking on the Internet Explorer Address Bar automatically highlights the current text, allowing replacement with entered text.



3. The Nexsure welcome screen is displayed.



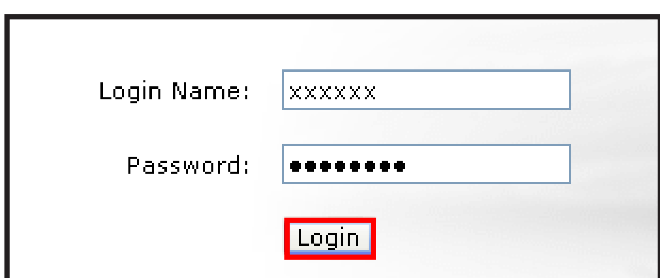

In order to login to Nexsure, you must first be assigned a Login ID and password. Each user is required to have a unique login name, which must not be shared.

## WHY the Login Needs to Be Unique

The unique login is required because this login name identifies the correct site assigned to your organization. Nexsure does not allow a login to be used if it has been previously assigned. We will recommend the preferred login methodology at the time of training to take out any guesswork. (See **Employee Security** for instructions on adding login ID's and passwords)

To access Nexsure:

- Enter the **Login Name** assigned to you by your administrator.
- Enter the **Password** supplied by your administrator.
- Click the **Login** button or press **Enter** on your keyboard.



Users may have multiple levels of security depending on security requirements within the organization. When users with multiple levels of security login to Nexsure, the active account links are displayed to allow the user to select the security level (See **Employee Security** for instructions on adding multiple levels of security). After selecting the level of security from the drop-down box, the selected security level is displayed. Clicking on the active account link logs the user in with the appropriate level of security assigned based on the selection.


**Note:** Most users will have a single security sign on. Multiple security access is available for those requiring different security levels. For example, someone may need access to work at Branch level with a high security level and at Territory level to enter cash receipts for all branches in the organization.

## Notes

# Changing Passwords

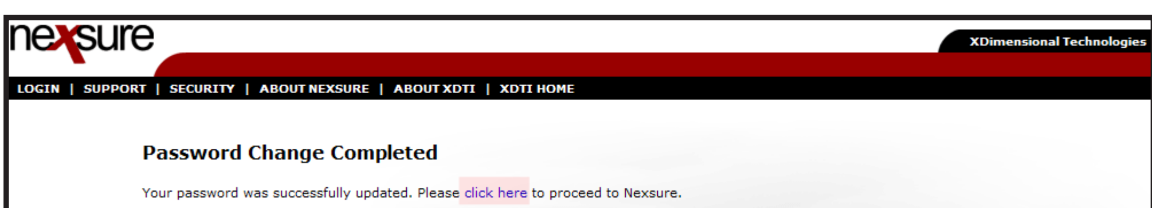
## WHY Change Passwords

Users can be required to enter a new password after a specified number of days. This feature is activated in **SETUP > Security Administration** by entering the amount of days in the **Number of days before users are required to change password** field. After the specified number of days have passed since the password was last changed on login, the user is prompted to enter a new password. (See **Security Setup** for more details on this feature)

If a user needs to change their password, this may be done by clicking on the **Change Password** link on the Nexsure Welcome screen. Clicking on the **Change Password** link displays the fields required to change the current password. New passwords must meet the criteria established by the System Administrator in Security Administration setup. For instructions on how to setup security criteria, see “Security Policy”, Chapter 9, *Admin Training Manual*.

- Begin by entering the current login name into the **Login Name:** field.
- Enter the current password into the **Old Password:** field.
- Enter the new password into the **New Password:** and **Confirm New Password:** fields.
- Click on the **Change Password** button to complete the process.


A **Password Change Completed** message displays confirming the successful completion of the password change. Click the link to proceed to Nexsure.

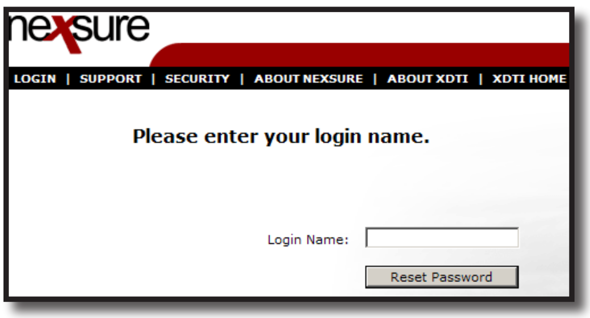


If there is an entry error, a message will appear stating why the password was not changed. Make the necessary corrections and try again.

**Note:** While using Nexsure, you are responsible for maintaining the confidentiality of your account and password as well as restricting access to your computer. You also agree to accept responsibility for all activities that occur under your account or password.

## Forgot Your Password?

If you forgot your password, a new one may be generated by clicking on the **Forgot your password?** link on the Nexsure Welcome login screen. The screen refreshes to prompt for the **Login Name** associated with the forgotten password. Enter the **Login Name** and click the **Reset Password** button.




A system generated temporary password is emailed to the email address on file for the Login Name. A Password Reset Successully message displays.

**Note**: In order to receive the system generated password, the employee must have an e-mail address on their **employee detail** screen. For instructions on how to set up employees in Nexsure, see “HOW to Add Employees for the Organization”, in Chapter 1, *Admin Training Manual*.

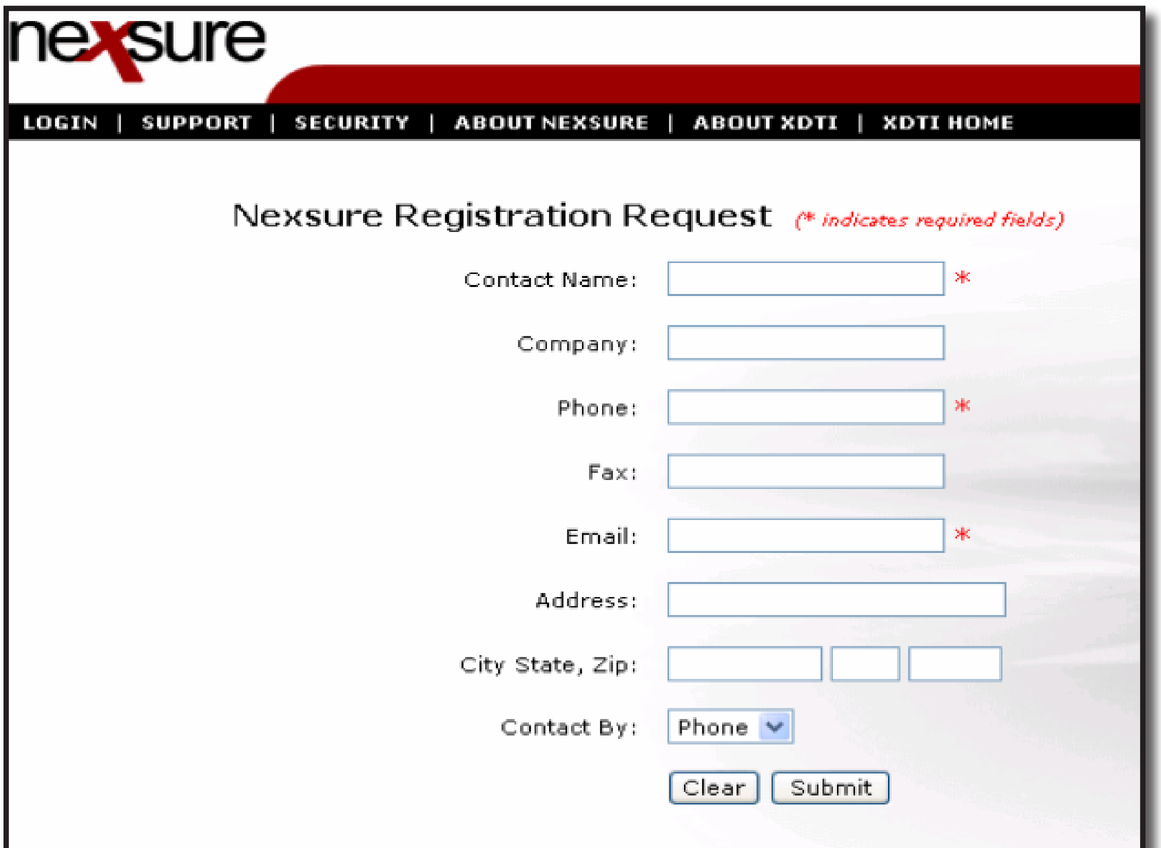
The employee will be required to change the system generated temporary password upon login to Nexsure. To change the temporary password, do the following:

- Open the System Notification email containing the new Nexsure password. Copy the password. The password will be lengthy so copying will make this process quicker.
- Log in to Nexsure with your **Login Name** and paste the system generated password in the **Password** box. Click the **Login** button.
- The Change Password screen displays with the Login Name pre-filled.
- Paste the system generated password in the **Old Password** box. Enter and confirm the new password.
- Click the **Change Password** button.
- At the **Password Change Completed** message, click the **click here** link to proceed to Nexsure.

**Note**: New passwords must meet the criteria established by the System Administrator in Security Administration setup. For instructions on how to setup security criteria, see “Security Policy”, Chapter 9, *Admin Training Manual*.

## Requesting Additional User Licenses

Organizations that have exhausted the total number of licensed users may need to send a request for additional user licenses. Clicking the **New User Registration Request** will open a form to e-mail to the XDimensional Technologies, Inc. Sales department to request the addition. The primary contact of the organization is the only one that should use this link, since only they can add user licenses. The primary contact should complete the request details and click the **Submit** button to send the e-mail. The Support department will contact the primary contact of the organization to verify the request and relay the details to our accounting department to complete the process.




### Notes

# Logging Out of Nexsure

## WHY Use the Logout Link

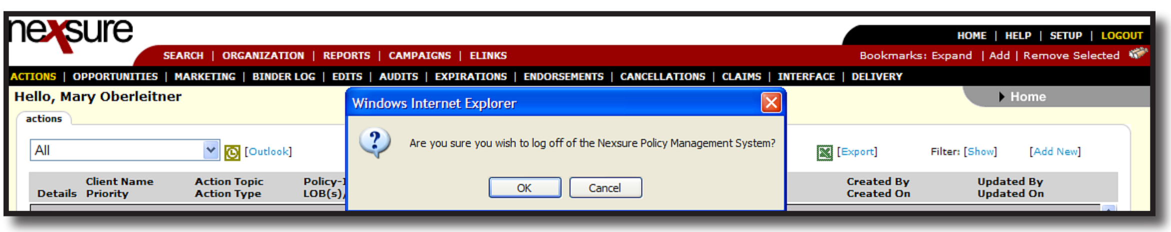
Users should log out of their Nexsure sessions when leaving the computer for any length of time to keep the site secure. If you plan to return in a few minutes and do not want to log out of Nexsure, use **Control-Alt-Delete** on the computer keyboard and select the **Lock Computer** button to block access.

The preferred method of logging out of all Nexsure sessions is to use the **LOGOUT** link located on the **Utility** menu in the upper right corner. This method is preferred because it frees up the registered license and lets others in the organization know that you are not available. If you do not log out of Nexsure before navigating to a different Web site, the login still appears as active in the Employee List under the **ORGANIZATION** link and the license is still in use until one of the following occurs:

- You sign in again on another computer.
- The organization's administrator logs you out.
- The session times out in 4 hours.

This does not mean that multiple Internet Explorer pages cannot be open in addition to the Nexsure page. It simply means that while logged into Nexsure, typing another site address will navigate away from the Nexsure page. So if another site needs to be opened along with Nexsure, click on the **Internet Explorer** icon and open another session.

**Note:** You should logout before clicking the to close your Internet Explorer window. Closing Internet Explorer does not automatically log you out of Nexsure.



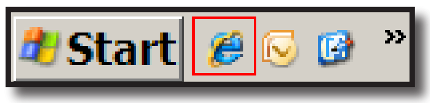
## HOW to Login to Nexsure More Than Once

Nexsure allows you to login multiple times on a single computer with your one Login Name and Password. Multiple logins allow you to work in one client and have another client open at the same time.

> **Note**: Use caution when using multiple logins to display the **same** client or area of Nexsure in more than one Nexsure browser session. One session should be used to update information and the other to view information only.

To launch another session of Nexsure on the same computer:

1. Click the Internet Explorer Icon on your desktop or Quick Launch bar.




> **Note**: Do not used Tabbed Browsing in Internet Explorer 7. You must launch a new Browser session by clicking the Internet Explorer icon.

2. Internet Explorer will display your default home page. In the Address Bar, navigate to www.nexsure.com just as you did for your initial login.
3. Login with your same Login Name and Password.
4. When you have finished working in the alternate session, click LOGOUT on the Utility menu and OK to logout.
5. Navigate to your prior session to continue working on the previous client.

Your Nexsure license will be released when you have logged out of all Nexsure sessions on your computer. If you login to Nexsure on another computer, your previous sessions will be terminated.

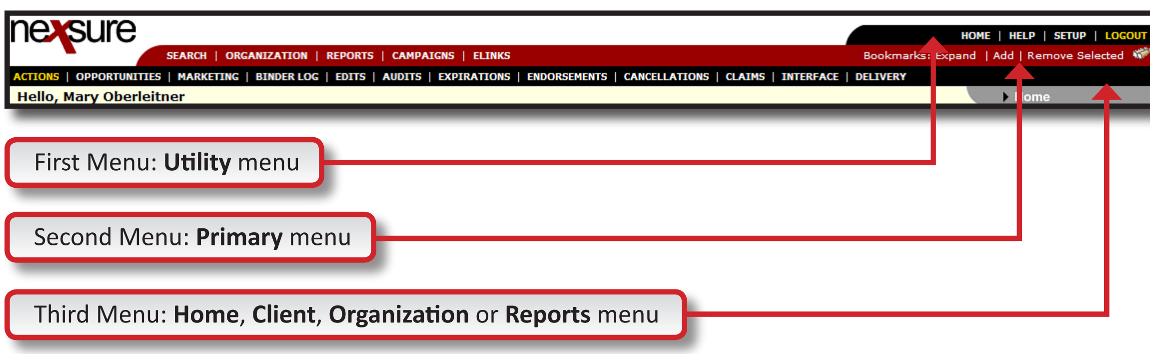
All user based settings, such as Entity Search History, Save Filter Settings and Bookmarks, will change in all sessions of Nexsure.

# Terminology

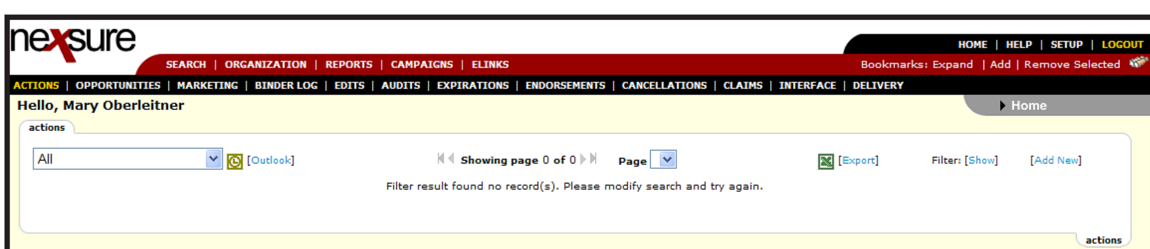
## WHY Use the Proper Terminology

Nexsure is a Web-based application and it is important to learn the proper terminology when communicating within your group and with the Support team at XDimensional Technologies, Inc.

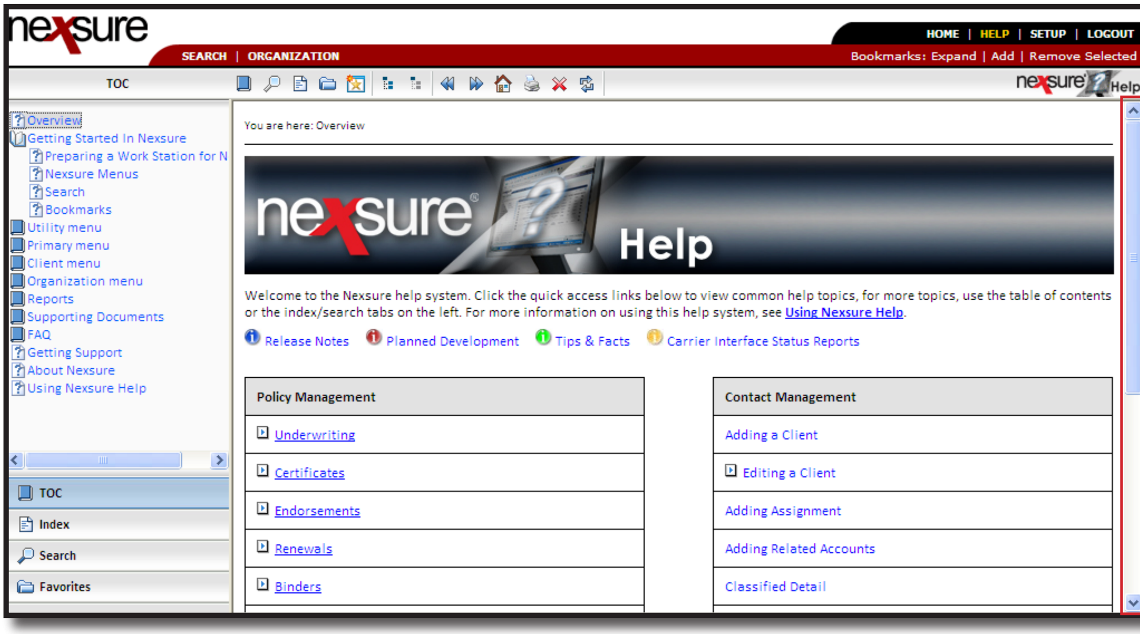
1. A **menu** contains active links to access specific areas of Nexsure and there are 3 basic menus.
   - The first menu located on the right side of Nexsure after logging in is the **Utility** menu.
   - The second located just under the **Utility** menu is identified as the **Primary** menu. The first two menus in Nexsure will always be present.
   - The third menu in Nexsure is dynamic, which means this menu is interactive and the links on the menu will change depending on what area of Nexsure you are in. The name of this menu varies and is identified as:
     - **Home** menu after clicking the **HOME** link on the primary menu.
     - **Client** menu after clicking on the client **Details** icon.
     - **Organization** menu after clicking on the **ORGANIZATION** link.
     - **Reports** menu after clicking on the **REPORTS** link.




2. A **link** launches some type of an action when clicked. Links can display a different page or section of the application, launch e-mail, open an external Web site (such as MapQuest®), or even save data. In many cases clicking a **link** is like clicking a button in a software program running locally on your computer.

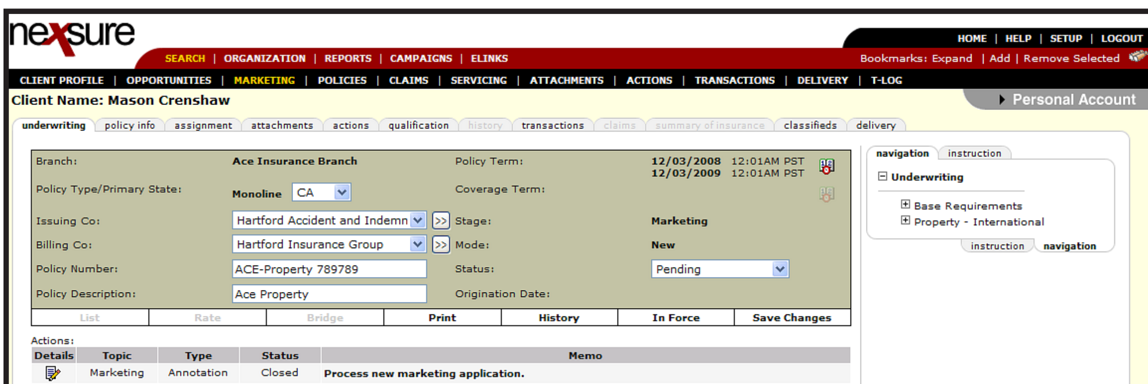


3. **Scroll bars** allow the display window to be moved to display information out of view. Click and drag the **scroll bars** horizontally or vertically when available. These bars are only available when there is other information present to view.



**Note:** The proper screen resolution for Nexsure is 1024 x 768 pixels.

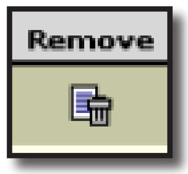
4. A **header** is the name of the shaded area displayed for all policy stages, invoices and accounting functions. The **header** contains the basic information pertaining to the current screen.



5. A **drop-down box** appears with an arrow button. Clicking the button displays a list of options allowing one selection.

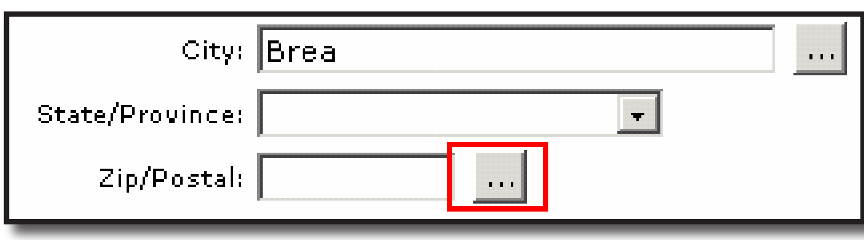

**Note:** The contents of many drop-down boxes in Nexsure can be customized by the organization such as referred by located on the **CLIENT PROFILE** > **profiling** tab.

6. An **icon** is an image representing a specific item. Clicking on an active **icon** will launch a new screen that is associated with the icon.




7. **Option buttons**, sometimes referred to as radio buttons, are small circle options that may be clicked for a single selection. When an option is clicked, a dot appears inside the selected item. Usually only one option at a time may be selected.


8. An **ellipsis** appears as a button with three dots on it. Clicking on these buttons will allow browsing applicable selections, such as a zip code or a city.



**Notes**

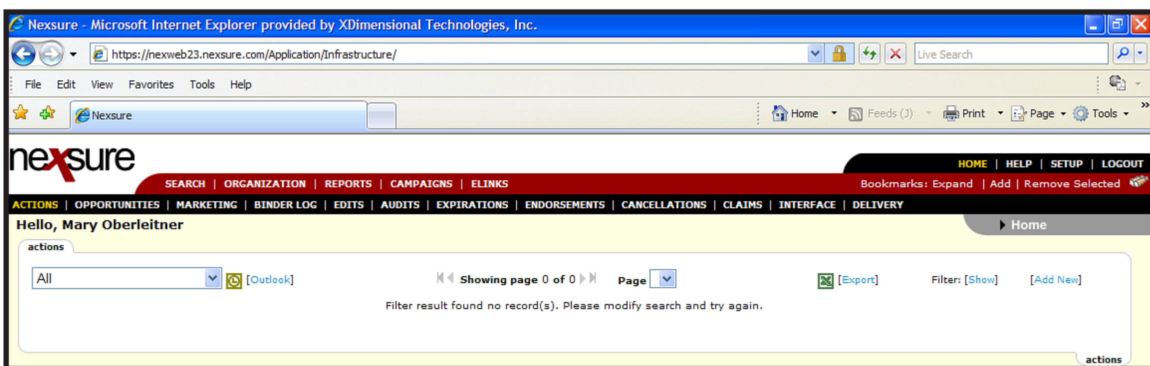
# Navigating in Nexsure

Nexsure is a Web-based Management System and has the same characteristics as any Web site. With that being said, keep in mind that refreshing the screens is required after any change is made. Typically this is automated within the normal processes of Nexsure.

Web browsers store content from previously viewed sites in their Temporary Internet Files folder. This allows the browser to load a previously viewed page from a site without reloading it. When using Nexsure, it is important to clear these files periodically to make sure the new screen information is shown rather than the old. To delete the Temporary Internet Files, perform the following steps:

- In Internet Explorer, go to the **Tools** menu and select **Internet Options**.
- Under the **General** tab, click on the **Delete Files** button in Internet Explorer 6, or **Browsing history's Delete...** button in Internet Explorer 7.

The **Back** button in Internet Explorer is frequently used to navigate, but with Nexsure it is important not to use this navigation tool. A "Warning: Page has expired" message may be encountered when using the **Back** button. This backward navigation is blocked to avoid duplicating a record that you may have just added. Since Nexsure will always have a way within the program to navigate, using the Internet Explorer **Back** button is not necessary.

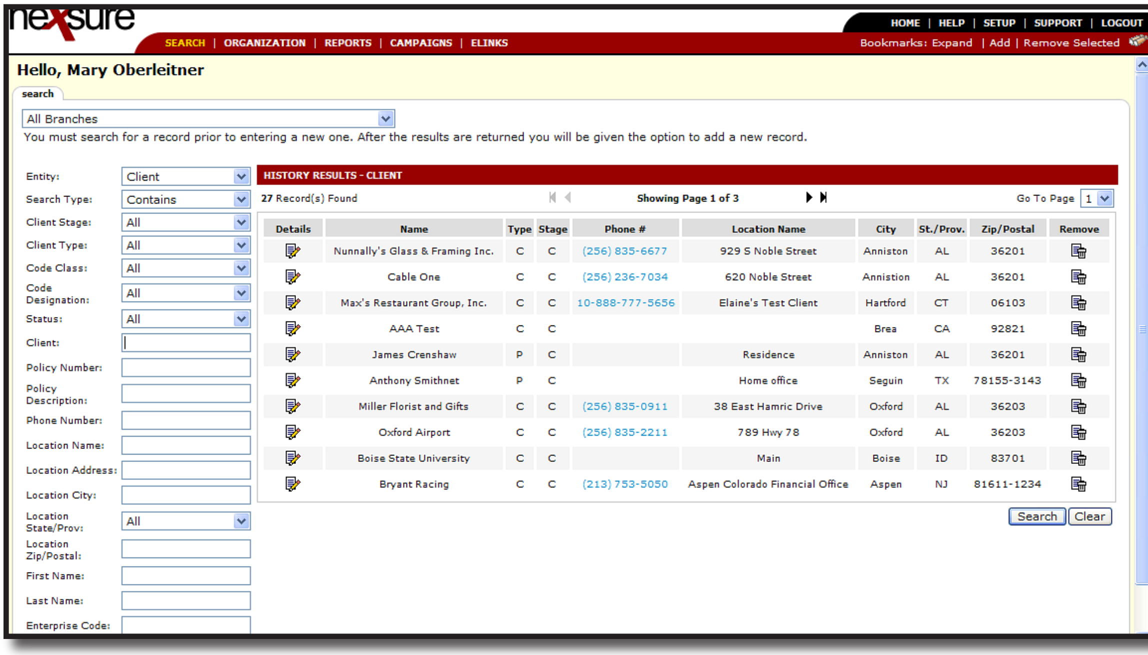



**Note:** Nexsure security is similar to that used when placing an order at a secured shopping site. Every Nexsure session is secure, using the SSL protocol and 128-bit strong encryption.

## HOW to Navigate in Nexsure

There are various ways to navigate in Nexsure and it is important to learn the basic navigation techniques.

1. Links are found throughout Nexsure and are used for various functions. When clicking a link, such as the **SEARCH** link on the **Primary** menu, it will display the item appropriate to that selection. In this case, clicking **SEARCH** displays the Search window.




Other links available in Nexsure are:

- **[Add New]:** Always allows a new record to be added.
- **[Show]**: Clicking this link is always used with the **Search Filter** feature which allows searching for a specific policy or item such as invoice. The **[Show]** link can be found on almost all summary views.
- **[Save]:** Clicking any type of **[Save]** link allows the information in the specific area of Nexsure to be saved.
- **[Update]:** Clicking this link will update any changes made to the specific record in Nexsure.
- **[Cancel]:** Aborts current activity.
- **Names:** Clicking on the actual name displays the contact record for the individual. If a carrier name is clicked and an additional login has been setup, the carrier site is automatically accessed using the login. Example of an active link: Name: John Doe
- **Addresses**: When the address itself is clicked, a MapQuest® map for the selected address is displayed.

  Example of an active link: Address: 8790 Habersham
- **E-mail Address**: Link will display an e-mail delivery screen that can be used to send an e-mail to the individual.

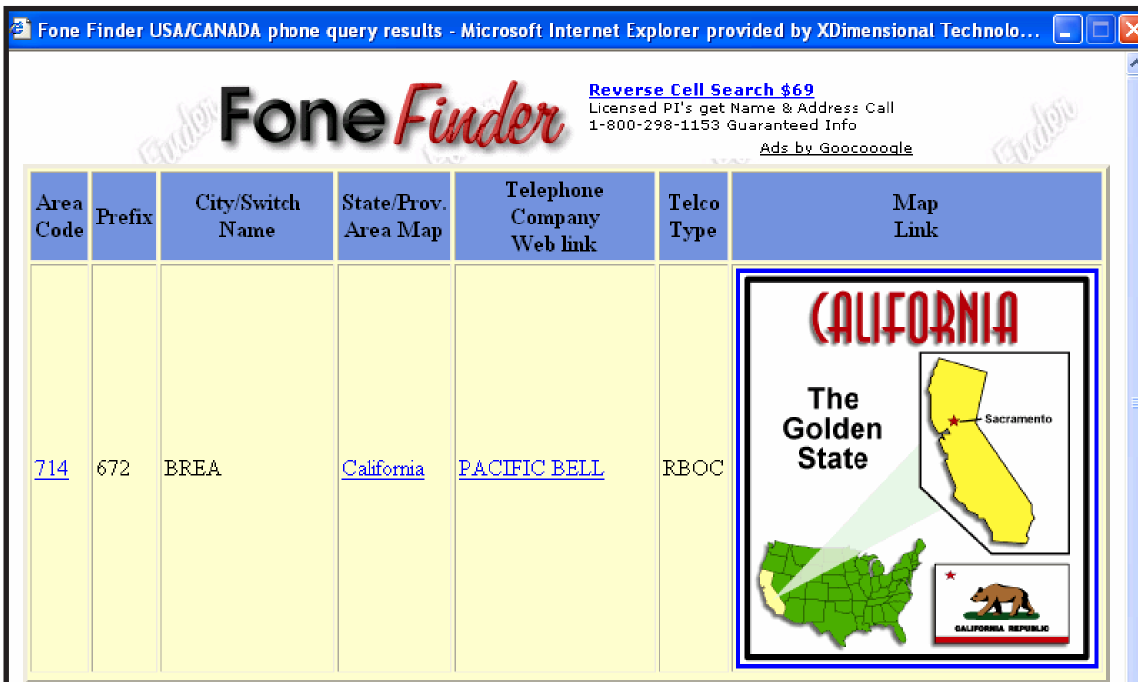
  Example of an active link: E-mail: jdoe@xdti.com

**Note:** Sending an e-mail using the e-mail link allows it to be stored on the Delivery page for this client. Use the HOME > DELIVERY page to track delivery success.

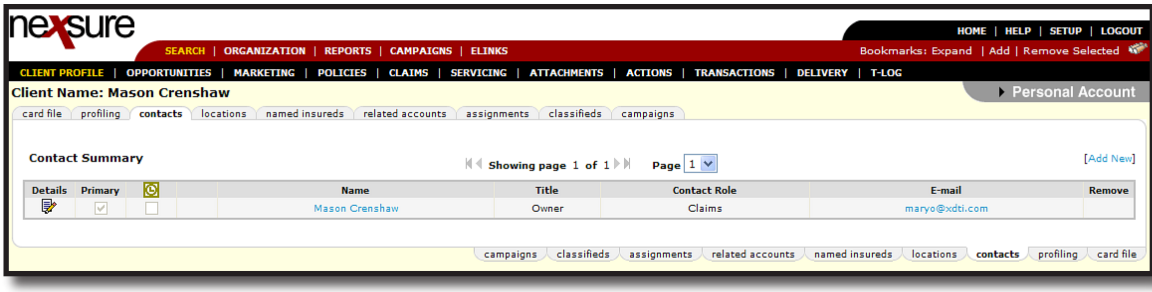
- **Cell Phone**: Clicking on the words cell phone in a contact's record will allow a text message to be sent to the individual's cell phone.

**Note:** The cell phone must be set up to receive text messages. There is no record kept in Nexsure of the text message sent. To keep a record of the text message you can CC yourself and attach the text message to Nexsure from Outlook.

- **Phone Numbers:** Links launch Internet Explorer and display the Fone Finder query results for that phone number.

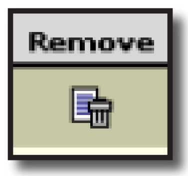



2. Tabs always appear below menus and are associated with that menu. Tabs display a summary view of data. A **Details** icon is generally provided to look at the details of each item in the view.




**Note:** Tabs can be found at both the top and bottom of the summary view screens. This feature makes scrolling back to the top unnecessary.

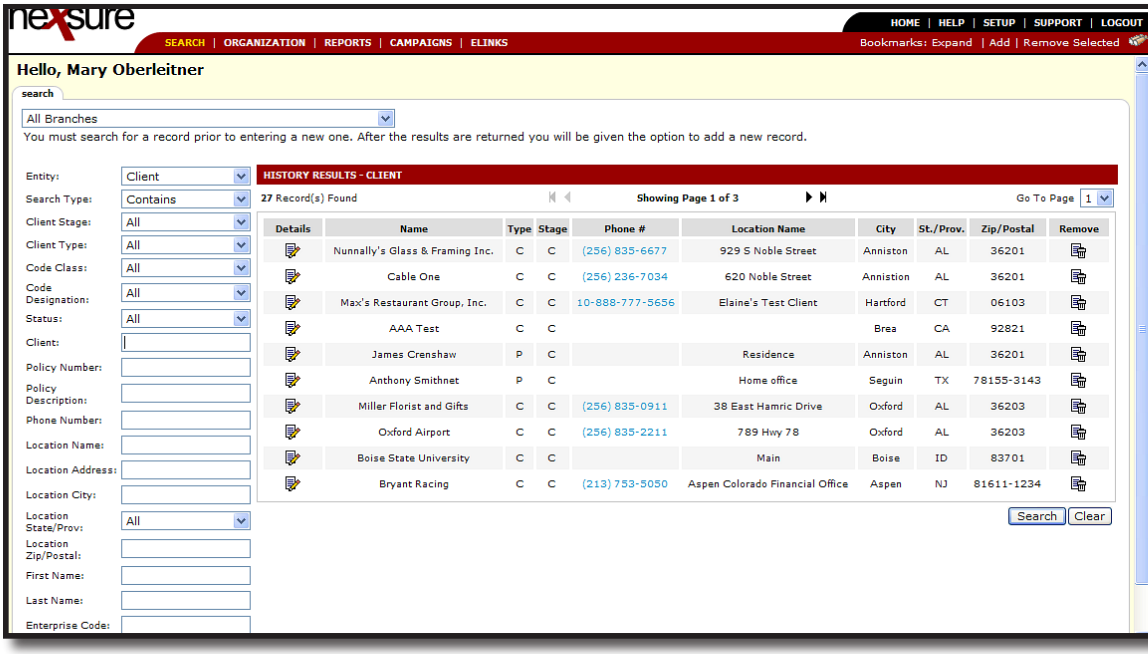
3. **Remove** icons are displayed on tabs in a summary view, one **Remove** icon per record. Clicking the **Remove** icon will allow the deletion of a record if security has been granted.



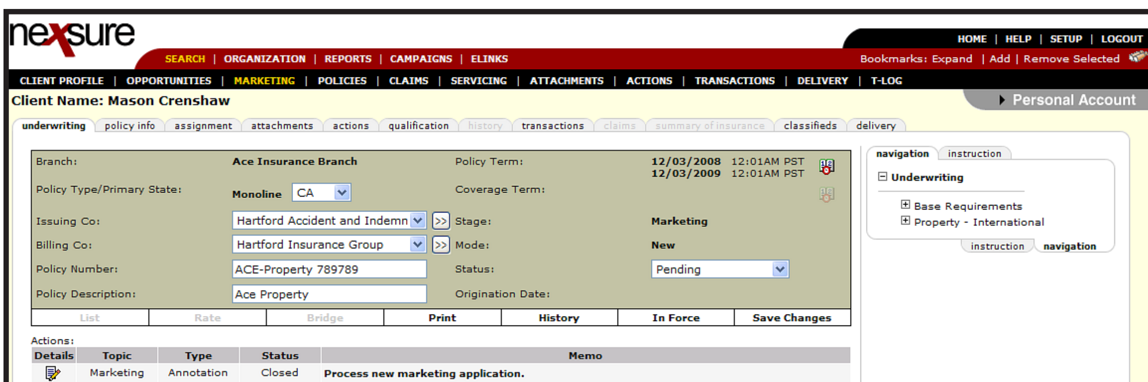

**Note:** The Remove icon availability is based on the security template the user has been assigned to.

4. **Page navigation links** activate when the results of a search are larger than one page. The **paging link** is used to navigate through multiple pages or the **paging drop-down box** can be used to go directly to the selected page.

- Single Page Forward ▶
- Single Page Back ◀
- Last Page ▶|
- First Page |◀

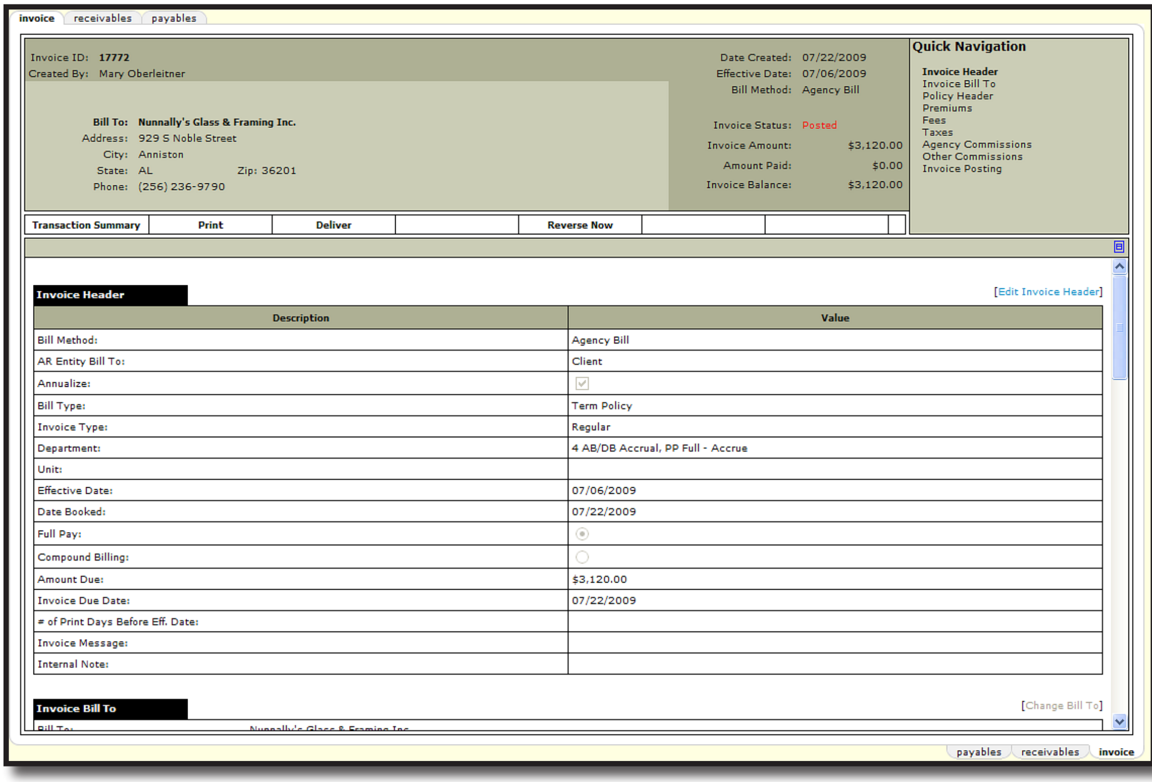



5. The **Navigation Toolbar** is found under Policy headers, Invoice headers and all Accounting headers. The **Navigation Toolbar** links will pertain to the record accessed.




**Note:** Some links on the navigation toolbar will be grayed out, the links will become active as needed.

6. **Quick Navigation** links are displayed in a tree view on the right hand side of a Policy in the navigation tab, on Invoices and all Accounting functions. Clicking a **Quick Navigation** link will take you directly to that section of the form or invoice.


invoice
receivables
payables
Invoice ID: 17772
Created By: Mary Oberleitner
Date Created: 07/22/2009
Effective Date: 07/06/2009
Bill Method: Agency Bill
Quick Navigation
Invoice Header
Invoice Bill To
Policy Header
Premiums
Fees
Taxes
Agency Commissions
Other Commissions
Invoice Posting
Bill To: Nunnally's Glass & Framing Inc.
Address: 929 S Noble Street
City: Anniston
State: AL
Zip: 36201
Phone: (256) 236-9790
Invoice Status: Posted
Invoice Amount: $3,120.00
Amount Paid: $0.00
Invoice Balance: $3,120.00
Transaction Summary
Print
Deliver
Reverse Now
Invoice Header
[Edit Invoice Header]
Description
Value
Bill Method: Agency Bill
AR Entity Bill To: Client
Annualize:
Bill Type: Term Policy
Invoice Type: Regular
Department: 4 AB/DB Accrual, PP Full - Accrue
Unit:
Effective Date: 07/06/2009
Date Booked: 07/22/2009
Full Pay:
Compound Billing:
Amount Due: $3,120.00
Invoice Due Date: 07/22/2009
# of Print Days Before Eff. Date:
Invoice Message:
Internal Note:
Invoice Bill To
[Change Bill To]
payables
receivables
invoice

## Notes