Chapter 2

Keeping Track From Home

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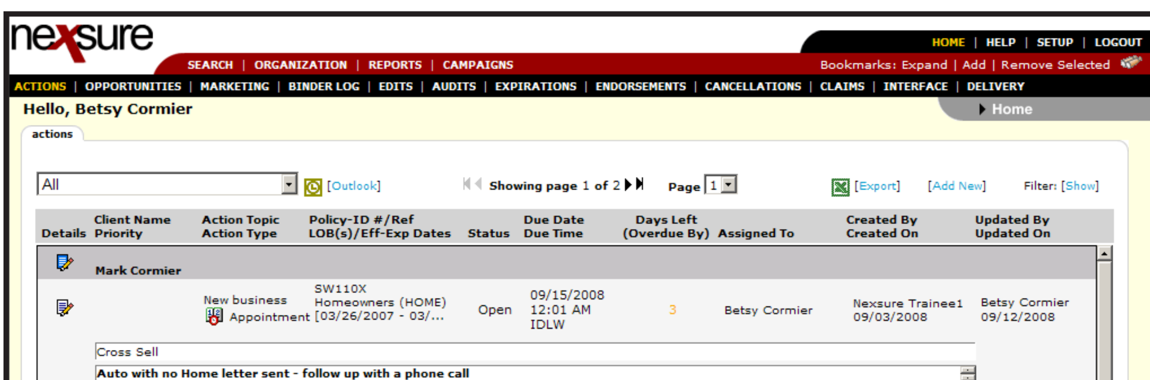
- Utilizing The Home Screens

Accessing Home

The **HOME > ACTIONS** screen is the first screen displayed after logging into Nexsure. It is also accessible from anywhere in Nexsure by clicking the **HOME** link on the **Utility** menu in the upper right hand corner of the screen. The **Home** screens display the logged in user's name on the left side beside the word **Hello,** and the word **Home** in a light gray background on the opposite side of the screen.

The **Home** menu is the third menu down and is only displayed after logging in or clicking the **HOME** link. The **Home** menu screens contain outstanding tasks like a daily planner, providing a way to keep tabs on these tasks.



Utilizing the Home Screens

Nexsure organizes all work by task on the appropriate **Home** screen. These open and closed tasks are created automatically based on daily workflow and displayed on the **Home** screens by assignment. Users not assigned to clients or policies are generally processing work for others who are assigned to clients and policies. In this case, the assignment name would be modified on each screen accordingly. Clicking the links on the **Home** menu **(ACTIONS, OPPORTUNITIES, MARKETING, BINDER LOG, EDITS, AUDITS, EXPIRATIONS, ENDORSEMENTS, CANCELLATIONS, CLAIMS, INTERFACE, DELIVERY)** lists the open tasks that meet the default or custom view criteria. When pending or submitted work is posted, aborted or sent to history, the tasks are considered complete and will no longer display on the **Home** screens. See each link topic below for specific details.

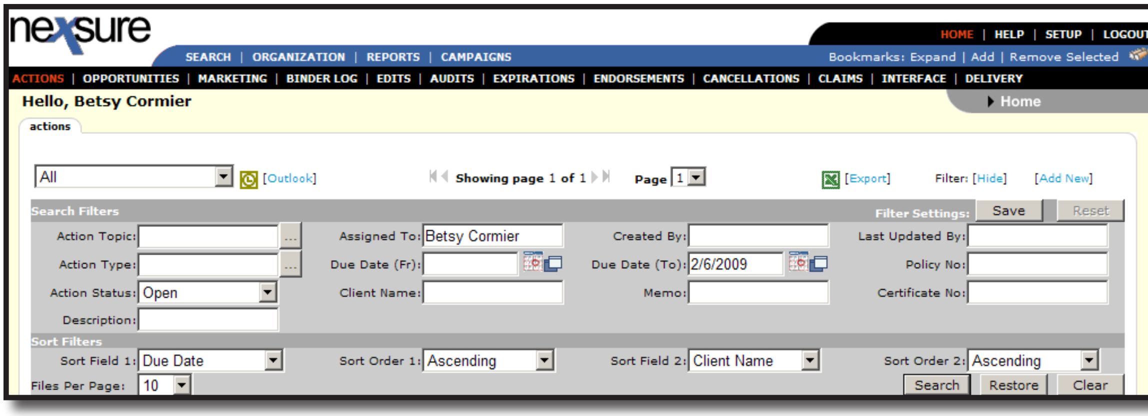
Actions

Actions are reminders added by a user to help keep track of tasks that are not automatically added to the other Home screens. For example, an action can be added as a reminder to make a scheduled call or attend a meeting. Since most workflow tasks are a tracked from other **Home** screens, adding an action is not necessary. Therefore, adding an action is not necessary. Use the **Home > Actions** screen to track any open action, generally including tasks that are not automatically added to the other **Home** screens by daily workflow. Actions that are due, or past due, will remain on the **Home > Actions** screen until closed. Closed actions may be viewed by using the **[Show]** filter.

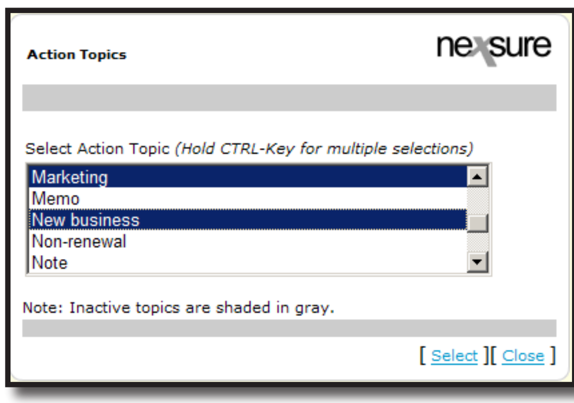
By default, the branches filter (upper left under **actions**) is set to **All**, displaying actions for all branches. The user's security settings determine which branches are available in the drop-down box. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.

Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

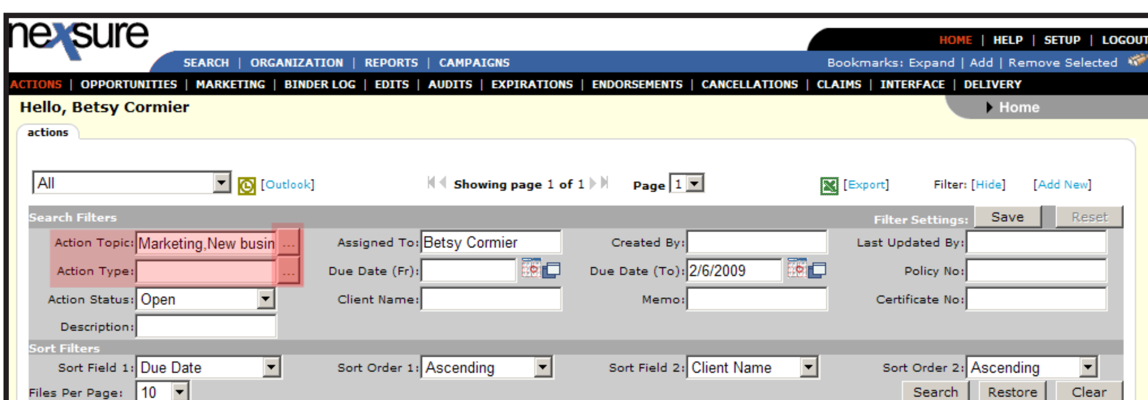
Field Name	Definition
Filter Settings	Save button is active (not saved).
Action Status	Open
Assigned To	The user logged in displays as the Assigned To.
Due Date (To)	Current date
Sort Field 1	Due Date
Sort Order 1	Ascending
Sort Field 2	Client Name
Sort Order 2	Ascending
Files Per Page	Number of records to be displayed on the screen default is 10.



The search filter is used when searching for specific items or for applying sort filters to change the order of search results. Use the **Action Topic** ellipsis to filter search results by one or more selected **Action Topics**. To select multiple **Action Topics** for use in a search, click the ellipsis button to the right of the **Action Topic** search filter box. The **Action Topics** selection box pop-up displays. Hold the **Ctrl** key and select the **Action Topics** to be used as search criteria. Click the **[Select]** link to add the selections to the **Action Topic Search Filter** box.

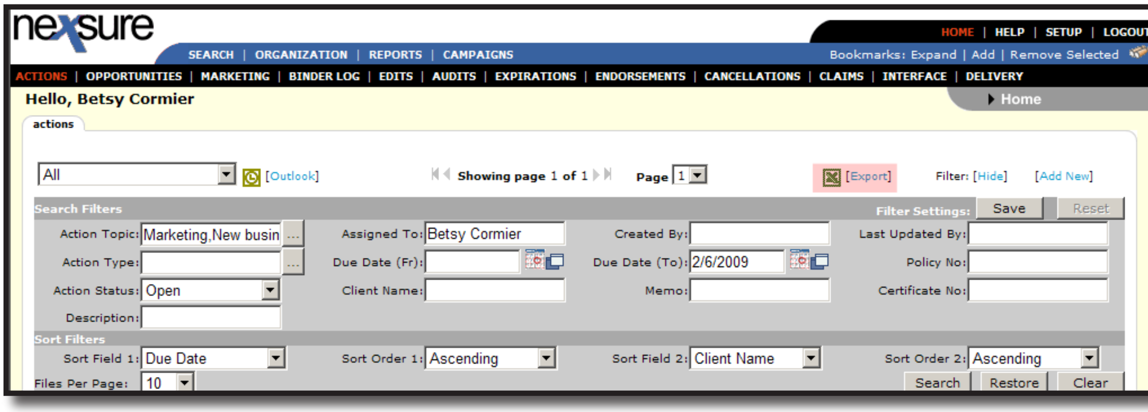


The selected **Action Topics** are listed, separated by a comma, in the **Action Topic Search Filter** box.

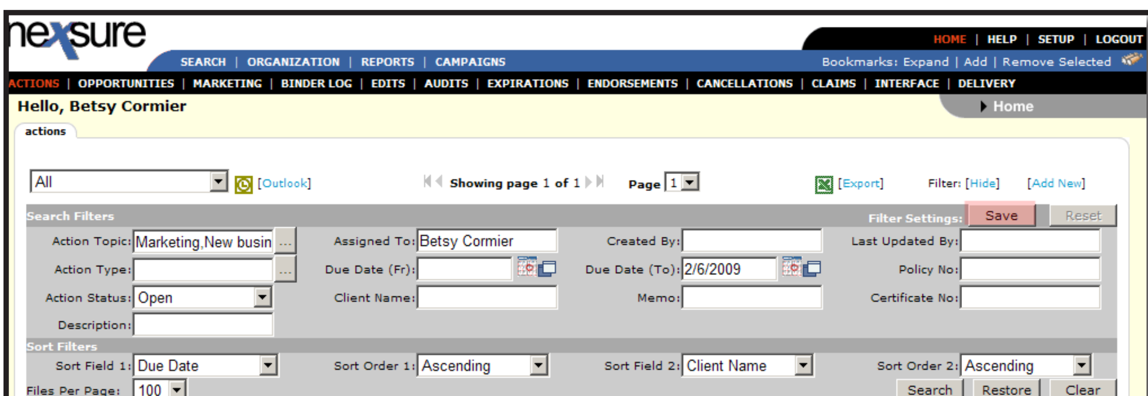


Use the **Action Type** ellipsis to select one or more **Action Types** for search filter criteria. The list of **Action Types** available to select is determined by the selected **Action Topics**. Leave this box blank to search for all **Action Types** associated with the selected **Action Topics**. Leave both **Action Types** and **Topics** search criteria blank to return results for all **Action Types** and **Topics**.

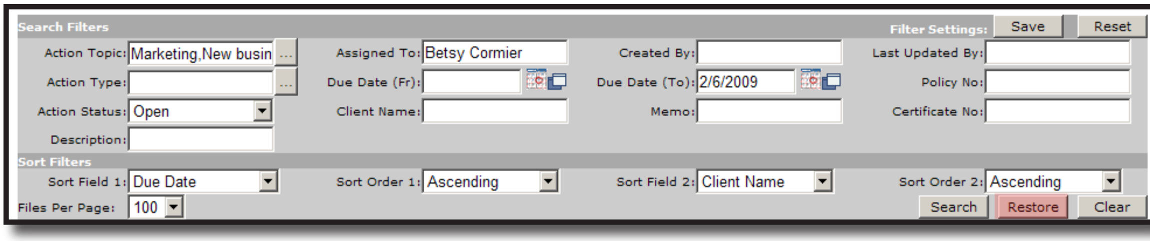
Click the **Search** button to return actions that meet the current search filter criteria. After searching for a specific result, export the list of actions to Excel by clicking the **[Export]** link on the top of the screen to the left of the Filter **[Show]/[Hide]** link. Once the action report is exported it may be saved or printed.



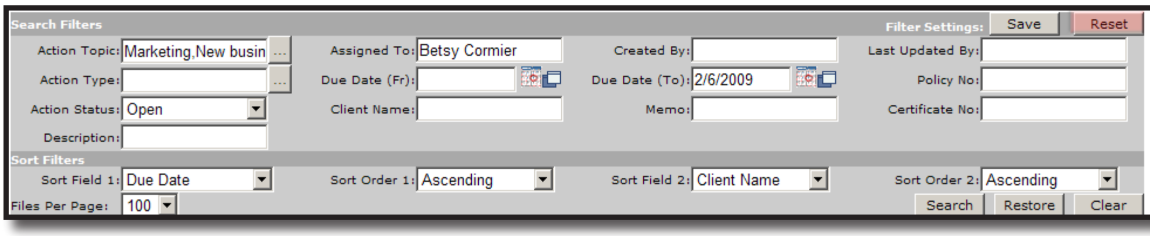
The current **Search** and **Sort** filter settings may be saved as a personal default view of **HOME** > **ACTIONS** by clicking the **Filter Settings Save** button. The next time **HOME** > **ACTIONS** is selected by the user, the items returned will be filtered by default to display actions that meet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



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



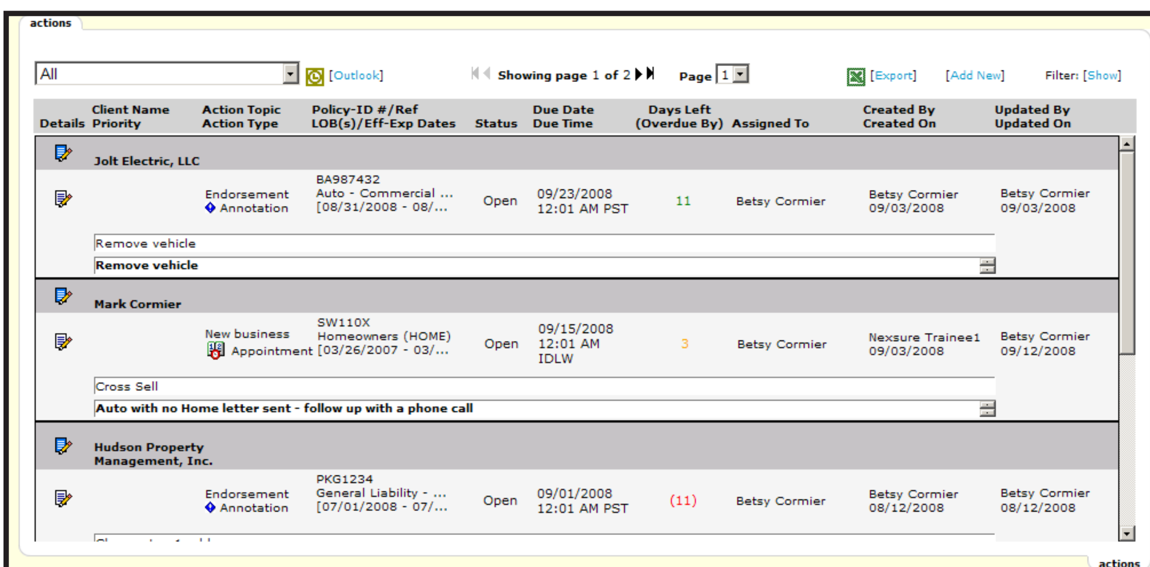
When search filters are saved, the **Reset** button is activated. **Reset** is used to restore the default filter settings to the Nexsure default. **Reset** removes any previously saved search filter criteria. The next time **HOME** > **ACTIONS** is selected by the user, the items returned will be filtered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



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

Action Due Date Color Scheme

All actions displayed on the **HOME > ACTIONS** screen are displayed with a specific colored number to help visually determine when actions are approaching or past their due date.



The **Days Left (Overdue By)** column displays a number countdown of days until the action is due or overdue. The number is displayed in one of 3 colors and changes based on what the current date is in relation to the due date of the action.

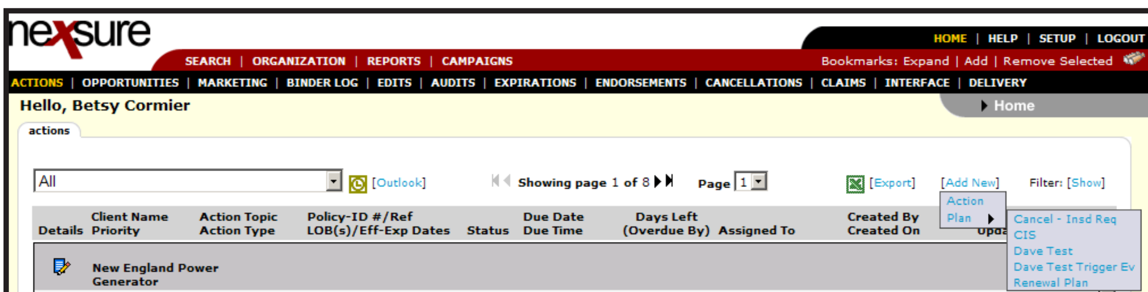
The definitions of these color coded numbers are as follows:

- **Green** - Indicates more than five days before the due date.
- **Orange** - Indicates five days or less before the due date.
- **Red** - Indicates the number of days past the due date.

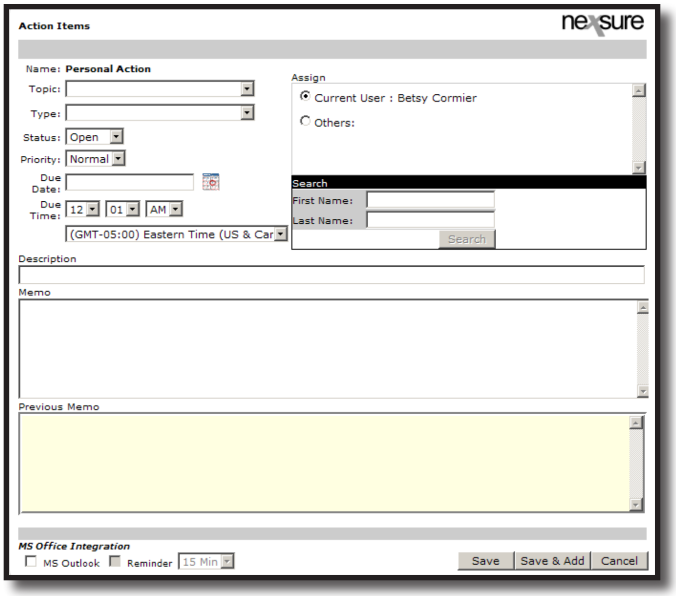
How to Add Personal Actions

Personal actions are added only on the **Home** screens. Actions may be viewed by anyone in the organization granted access to actions by modifying the **Assigned To** name in the search filter. To add a personal action, use the following steps:

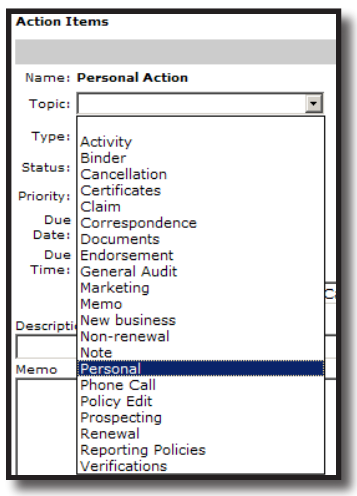
1. Place the pointer over the **[Add New]** link on the upper right hand side of the screen to display the actions menu. Select **Action** to add a new action or **Plan** to add an action plan. Selecting **Plan** opens the list of available action plans created by your organization's administrator. Selecting an action plan displays the first predetermined action for that plan.



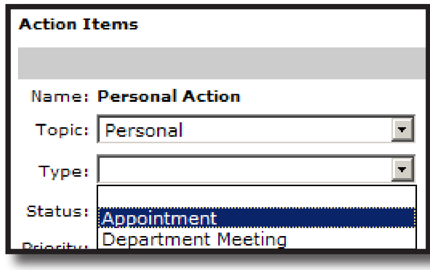
2. After selecting **Action** or **Plan** and the desired action plan, the **Action Items** dialog box displays. Notice that the **Name:** label on the action is not a client's name, indicating a personal action will be assigned to the logged in user. An added personal action **cannot** be attached to a client at a later time; all client actions must be added at the client level.



3. To complete the personal action, click the drop-down list box beside **Topic:** and select the desired topic. These topics are added by your organization's administrator in **SETUP**. For personal actions, the topic of **Personal** is most commonly used to make searches more effective.



4. The next step is to select an option from the **Type:** drop-down box. Types are associated with the Topics in **SETUP > Actions** by your organization's administrator. The types available are dependent on what is associated to the topic.

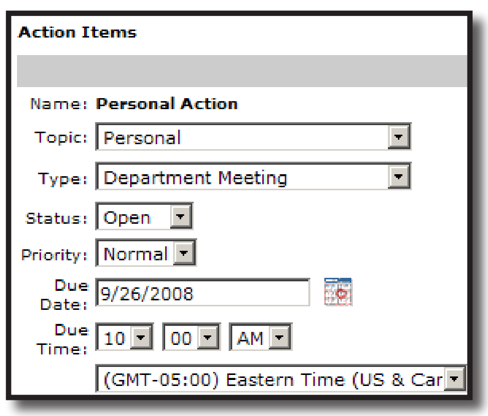


5. The **Status**: drop-down list box defaults to **Open** or **Closed** depending on how the organization's administrator set up the default. Defaults may be changed to meet particular circumstances. Selecting the status of **Open** will cause the action will show up on the **HOME > ACTIONS** screen on the designated due date until the action is closed. Choosing the status of **Closed** indicates that no reminder is necessary and the item will not display unless closed actions are searched.

6. Under the **Priority**: drop-down list box, there are two choices, **Normal** and **High**. These defaults are set by the organization's administrator when setting up the action in **SETUP**. **Normal** identifies this action as having no special urgency while a setting of **High** attaches a **Red Flag** icon indicating the urgency of the action.

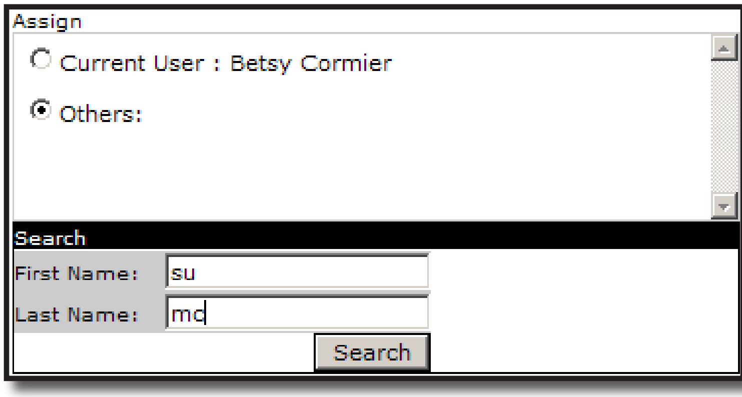
7. The **Due Date** is automatically filled according to the number of days set by the organization's administrator in **SETUP** > **Actions**. The **Due Date** is the date the action should display on the **HOME** > **ACTIONS** screen as a reminder to the assigned user. The default due date for Personal Actions is the current date. To change the default **Due Date**, type the date in the **Due Date:** box or click the **Calendar** icon and select a date from the calendar pop-up window. The date selected will populate the field automatically.

8. If the action is due at a specific time, use the **Due Time:** drop-down list boxes to select the appropriate time. This is useful if the action list is synchronized with your Microsoft® Outlook® and set up with a reminder. Finally, make sure to set the appropriate time zone by selecting the correct option from the drop-down list box.

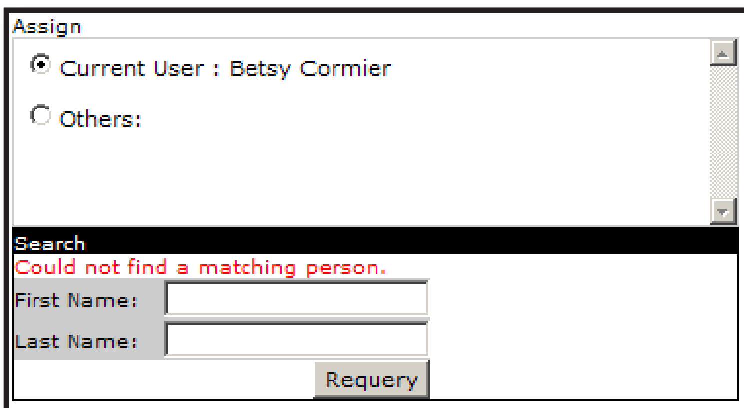


10. By default, the action is assigned to the **Current User:** but the action may be assigned to someone else. Click the **Others:** option to assign to another user. On the right side of the action enter at least 2 characters of the first and last name in the **First Name:** and **Last Name:** boxes. Click the **Search** button to return the matches.

Note: Keep in mind that these are personal actions.



11. If no match is found or another attempt is desired, enter more characters and click the **Requery** button. If the desired match is returned, click the option next to the user's name.



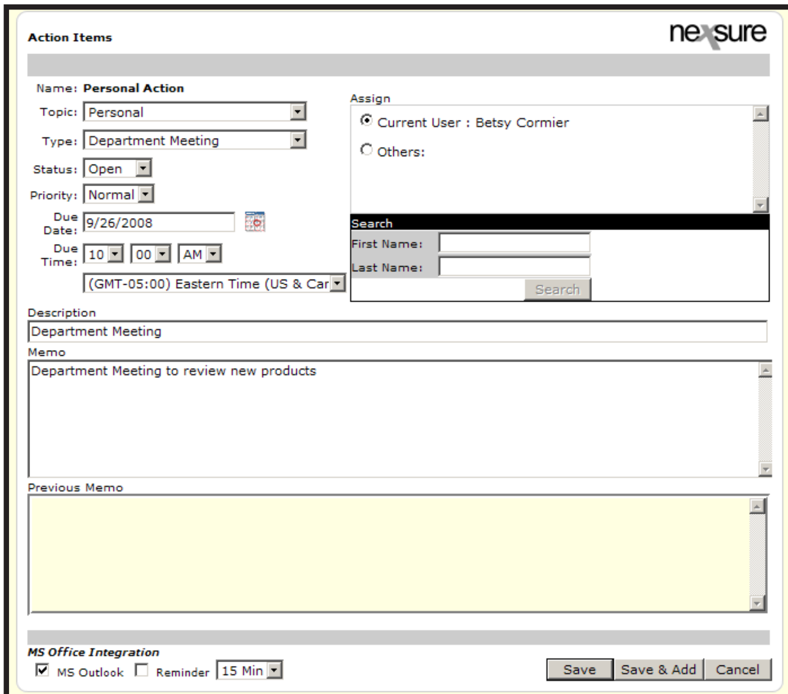
12. In the **Description** box, enter a brief description for the action that will be displayed on the action summary screens. The description will also be copied to the memo section of the action. The description will remain constant as the action is updated unless changed by the user.

13. In the **Memo** box, type the action message.

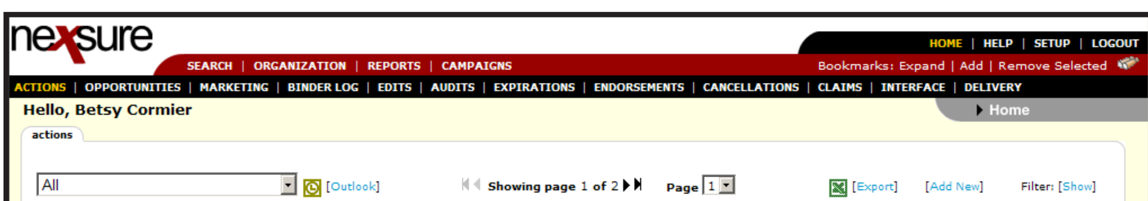
Note: The **Previous Memos** box will show memos previously added to the action. These memos cannot be edited or deleted. When an action is saved, it is a permanent record and cannot be edited or deleted once it is saved.

14. In the **MS Office Integration** area, click the **MS Outlook** check box only if it is desired to add this action to **MS Outlook** calendar or tasks. Clicking the **MS Outlook** check box activates the **Reminder** check box. To activate the reminder feature in **MS Outlook**, select this check box and use the drop-down list box to select the reminder time frame. Once synchronized, **MS Outlook** will provide a reminder before the action's **Due Date:** and **Due Time:** based on the value selected in the **Reminder** drop-down list box.

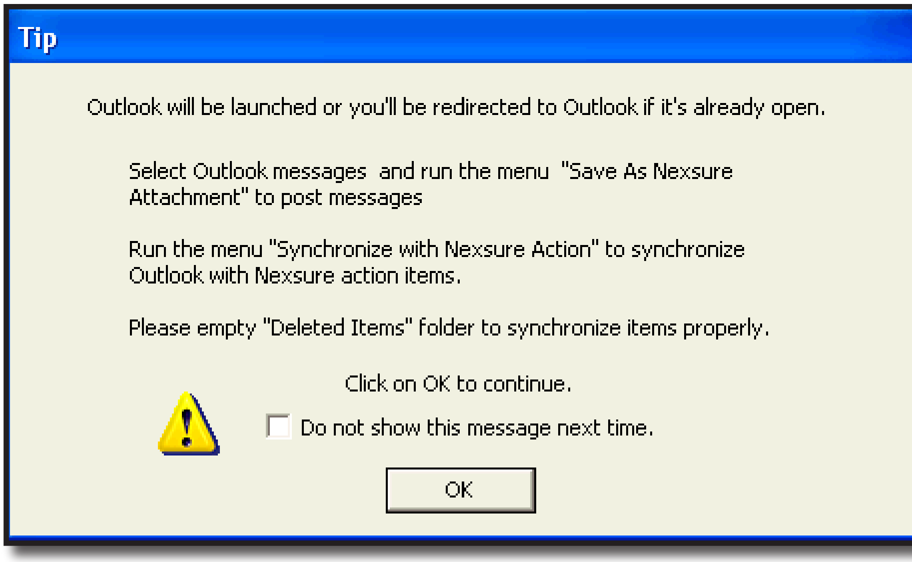
15. Click **Save** to save the action and close the **Action Items** dialog box. If the action is part of an action plan, the next action in the plan will be displayed. Clicking **Cancel** closes the action without saving. **Save & Add** saves the displayed action and opens a new blank **Actions Item** dialog box. **Save & Add** is not available for use with **action plans**.



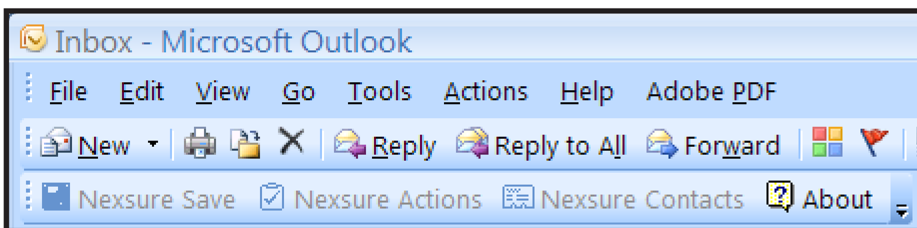
16. To synchronize personal actions, click the **[Outlook]** link to the right of the **MS Outlook** icon on the top of the **HOME > ACTIONS** screen.



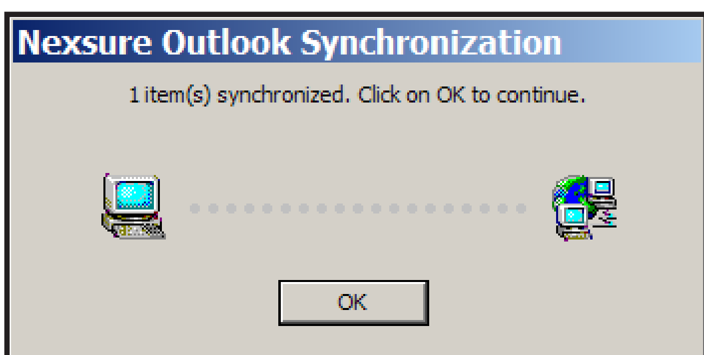
17. The Launch MS Outlook message is displayed. Click the **OK** button to proceed in launching MS Outlook. To avoid displaying the message each time MS Outlook is launched, check the box to the left of **Do not show this message next time** prior to clicking **OK**.



18. Once MS Outlook is launched, the process of synchronizing Nexsure actions begins. Launching MS Outlook from Nexsure adds the Nexsure Command Bar to Outlook. The Nexsure Command Bar is used to synchronize actions and Outlook messages to the Nexsure client.



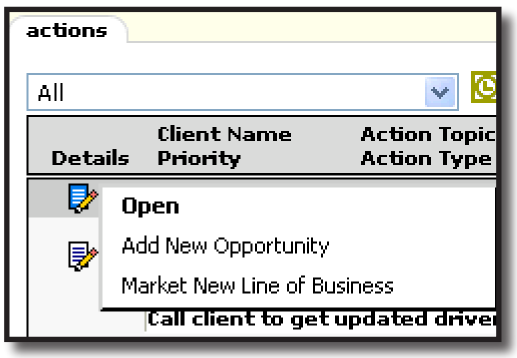
19. Once the process is complete, the number of actions synchronized is shown on the top of the **Nexsure Outlook Synchronization** window. Click **OK** to close the window.



Using the context tools on the HOME > ACTIONS Screen

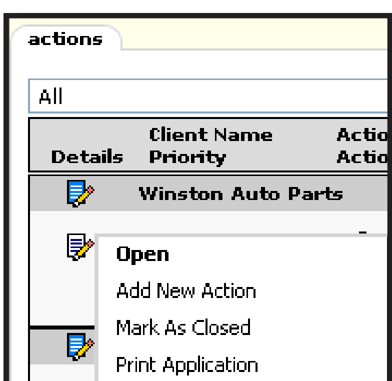
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > ACTIONS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

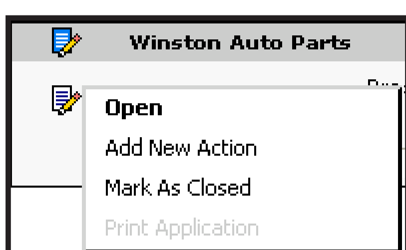
Shortcut Link	Description
Open	**Choosing this option opens the Client Profile screen.**
Add New Opportunity	**Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.**
Market New Line of Business	**Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.**



Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	**Choosing this option opens this action for modification.**
Add New Action	**Choosing this option adds a new personal action for the logged in user.**
Mark as Closed	**Choosing this option closes the action.**
Print Application	**If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.**

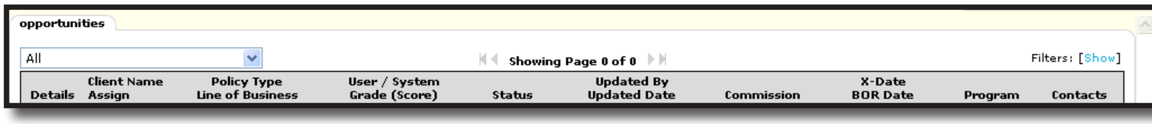




Opportunities

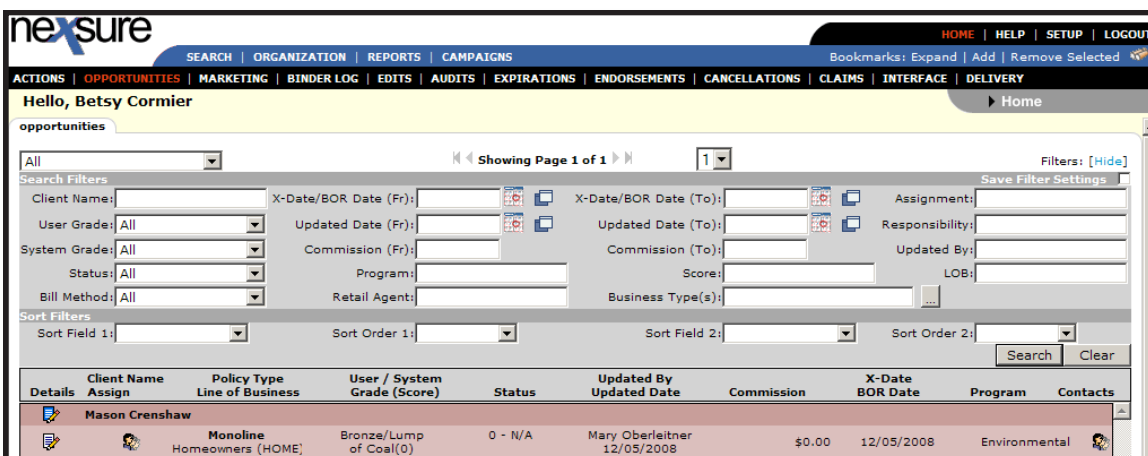
Opportunities are used as a marketing tool that allow suspects to be qualified for the marketing stage. The **HOME > OPPORTUNITIES** screen includes all opportunities that meet the search filter criteria. If the opportunity is removed or moved to marketing, it is no longer displayed on the **HOME > OPPORTUNITIES** screen. Use this screen to keep track of opportunities by **Expiration Date (X-Date) / Broker of Record Date (BOR Date)** in order to gather enough data to market the account prior to the inception of the new term.

By default, the branches filter (upper left under **opportunities**) is set to **All**, displaying opportunities for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	**Unchecked**
X-Date/BOR Date (From)	**Current Date**
X-Date/BOR Date (To)	**30 days from current date**
Assignment	**The user logged in displays as the Assignment.**
Sort Field 1	**X-Date/BOR Date**
Sort Order 1	**Ascending**

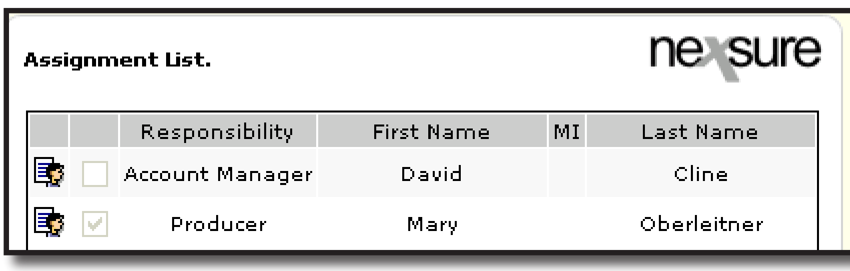


The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned opportunities will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

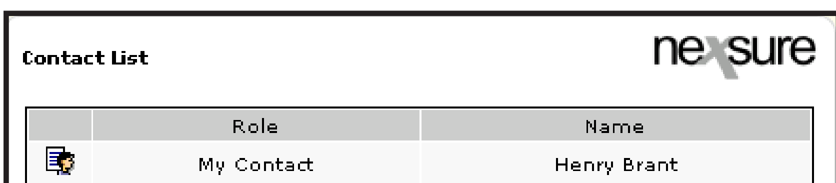
Access to opportunities for clients may be restricted to the people assigned to the opportunity. Opportunities that are restricted will display on **HOME** > **OPPORTUNITIES** only if the person logged on is assigned to them. All other non-restricted opportunities for **Suspects**, **Prospects** and **Clients** are displayed and can be searched for by all staff members, whether or not they are assigned to the opportunity.

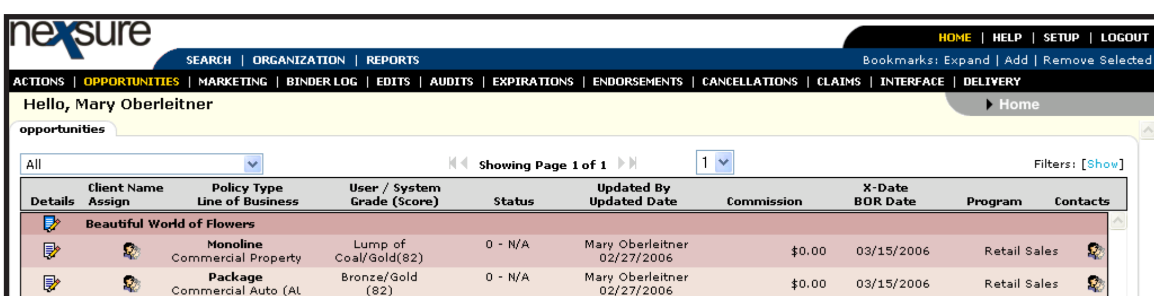
Understanding the Opportunities Screen

Opportunities on the **HOME** > **OPPORTUNITIES** screen are grouped together by client making it easy to identify the grades, status and expiration date for each policy in the specified date range. Clicking the icon on the left side of the screen displays all assignments for the opportunity.



Click the icon on right side of the opportunity to show all the contacts added to the opportunity.





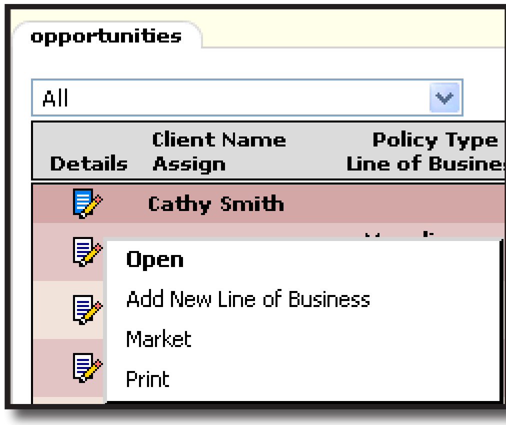
Using Context Tools on the HOME > OPPORTUNITIES Screen

The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > OPPORTUNITIES** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	**Choosing this option opens the Client Profile screen.**
Add New Opportunity	**Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.**
Market New Line of Business	**Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.**

Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

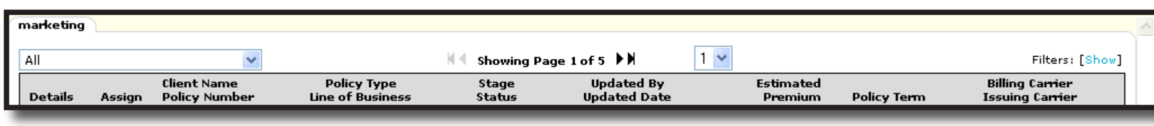
Shortcut Link	Description
Open	**Choosing this option opens the opportunity detail.**
Add New Line of Business	**Choosing this option allows the addition of a new line of business to be added to the existing opportunity.**
Market	**Choosing this option moves the opportunity to marketing. When moved to marketing the opportunity will no longer be on the Home or Client opportunities screens.**
Print	**Choosing this option brings up the PDF of the application and may be printed if desired.**



Marketing

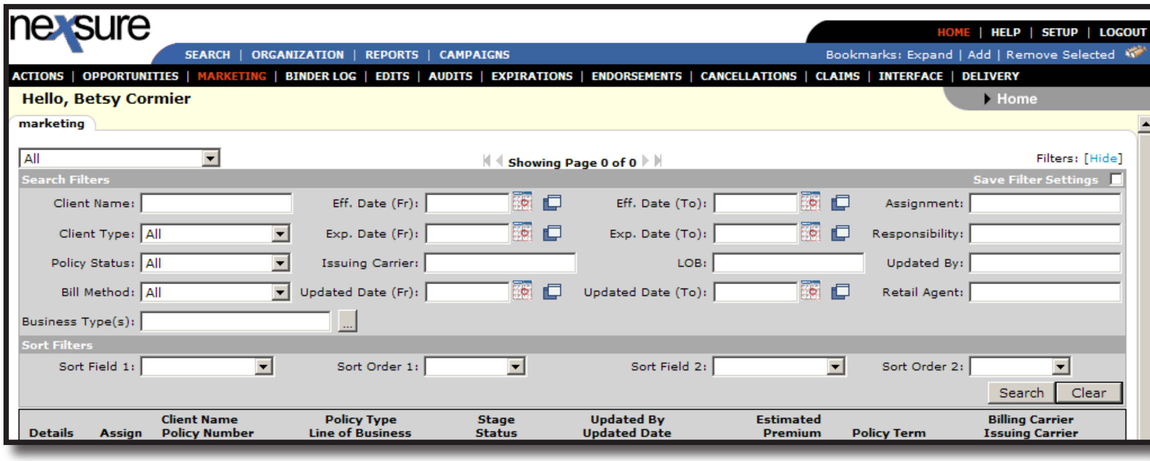
The **HOME > MARKETING** screen contains all new marketing and re-marketing submissions. All marketing submissions remain on the **HOME > MARKETING** screen until the policy has been placed in force, renewed, or the marketing submission is sent to history.

By default, the branches filter (upper left under **marketing**) is set to **All**, displaying marketing submissions for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field	Description
Save Filter Settings	**Unchecked**
Eff. Date (Fr)	**Current Date**
Eff. Date (To)	**30 Days From Current Date**
Assignment	**User Logged In**
Sort Field 1	**Effective Date**
Sort Order 1	**Ascending**

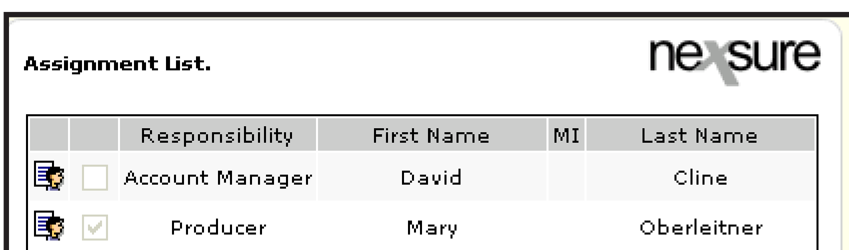


The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned marketing submissions will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

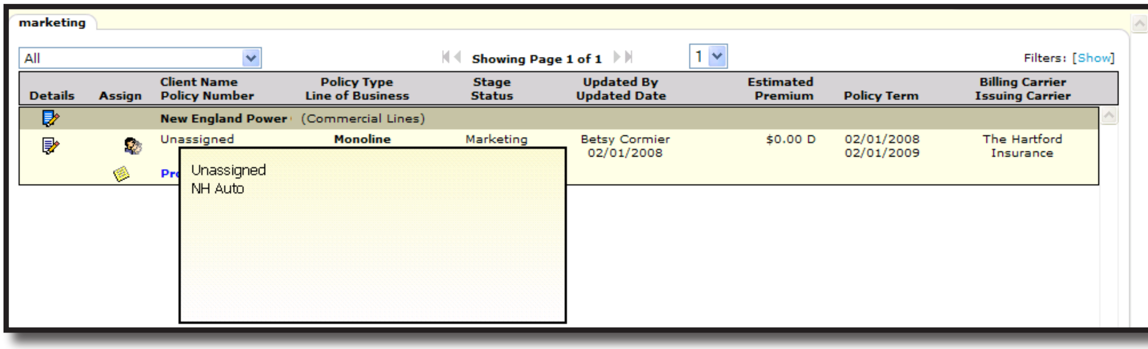
Access to marketing submissions for clients may be restricted to the people assigned to the marketing policy. Marketing submissions that are restricted will display on **HOME** > **MARKETING** only if the person logged on is assigned to them. All other non-restricted marketing submissions for **Suspects**, **Prospects** and **Clients** are displayed and can be searched for by all staff members, whether or not they are assigned to the marketing policy.

Understanding the Marketing Screen

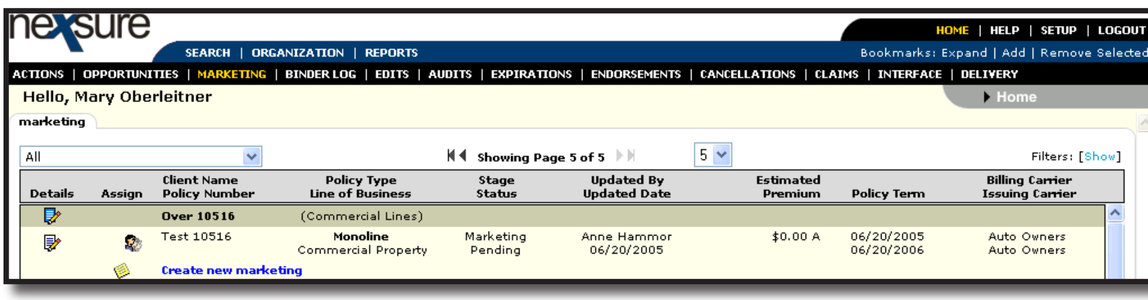
Marketing submissions on the **HOME > MARKETING** screen are grouped together by client making it easy to identify the current step in the marketing process. Clicking the icon on the left side of the screen displays all assignments for the marketing submission.



When you move your mouse over the Policy Number line, a pop-up window displays the Policy Number field and free-form Policy Description field of the marketing submission.



Any annotation actions, whether open or closed, display in the marketing submission. To look at or modify the action, click the icon with the left mouse button to open the action.



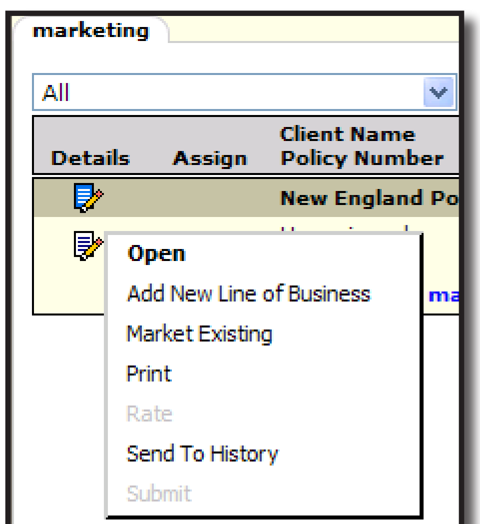
Using Context Tools on the HOME > MARKETING Screen

The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > MARKETING** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	**Choosing this option opens the Client Profile screen.**
Add New Opportunity	**Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.**
Market New Line of Business	**Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.**

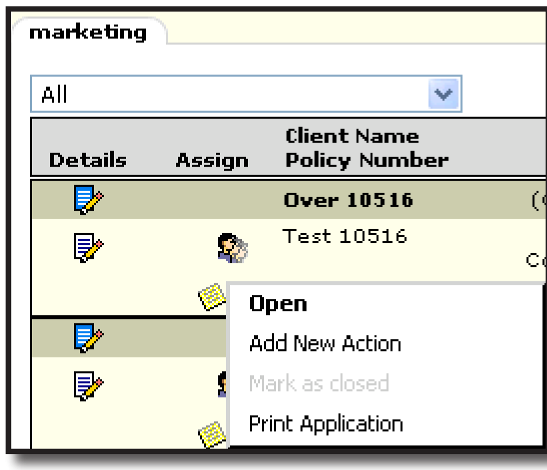
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the marketing underwriting screen.
Add New Line of Business	Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the lines of business to be selected and added.
Market Existing	Choosing this option adds an action annotation, copies the selected applications to marketing.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Rate	Choosing this option brings up the screen to rate the selected line of business. If not applicable, the rate link will be gray indicating it is inactive.
Send to History	Choosing this option sends the selected marketing submission to history.
Submit	If not applicable, the rate link will be gray indicating it is inactive.



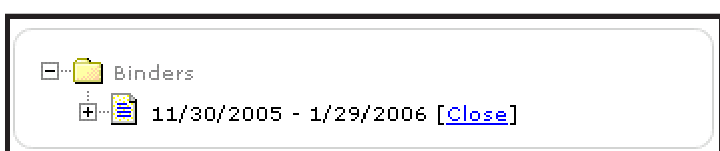
Right clicking on the **Memo** icon presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print Application	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.

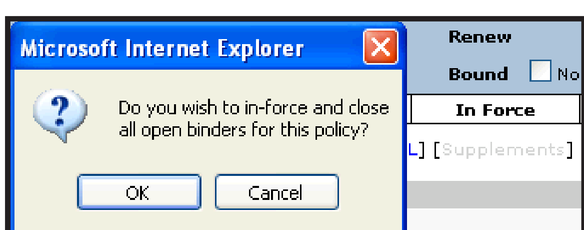


Binders

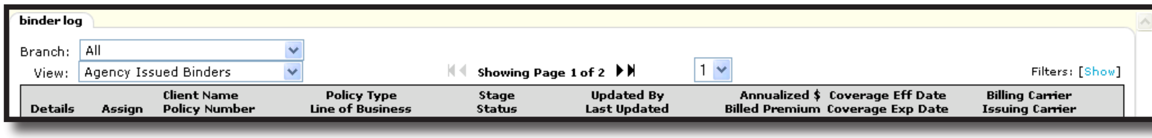
The **HOME** > **BINDER LOG** screen contains all open binders added in Nexsure. If the view is changed to **Bound/Future - No Open binder**, policies that have a status of **Bound** or **Future** may be viewed. The benefit of the **Bound/Future - No Open binder** view applies to policies that were bound by the carrier, or on an application where a separate binder was not necessary. Binders are removed from the open binders view by accessing the binder in Nexsure and clicking the **[Close]** link.



Bound/**Future** policies are removed from the list by accessing the **underwriting** screen and clicking the **In Force** link on the navigation toolbar. Click the **OK** button on the confirmation screen to confirm changing the status from **Bound** or **Future** to **In Force**.

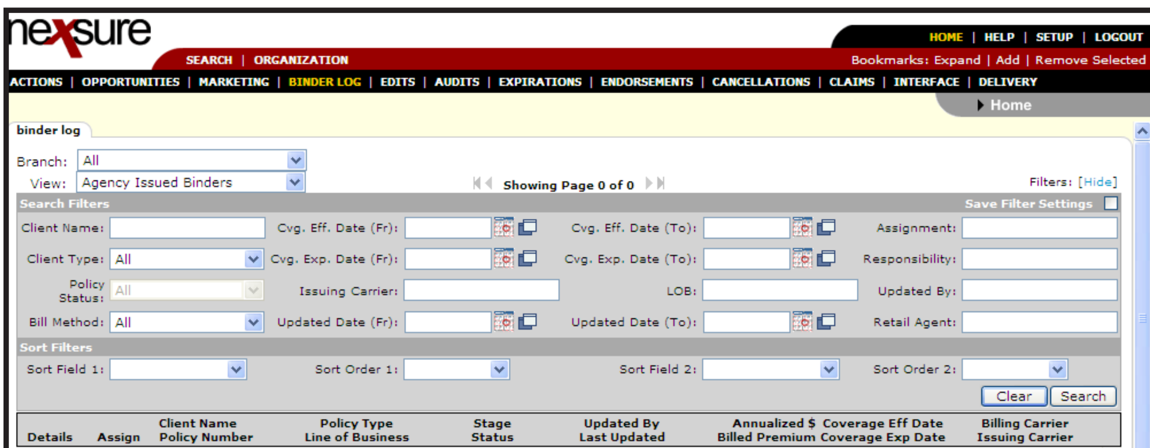


By default, the branches filter (upper left under **binder log**) is set to **All**, displaying binders for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field	Description
Save Filter Settings	**Unchecked**
Assignment	**User logged in**
Sort Field 1	**Coverage Expiration Date (Binder Exp. Date)**
Sort Order 1	**Ascending**

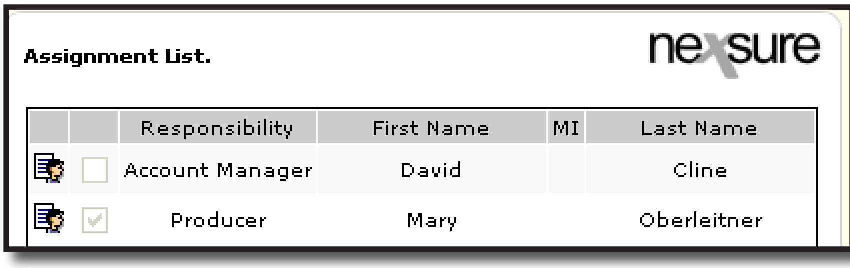


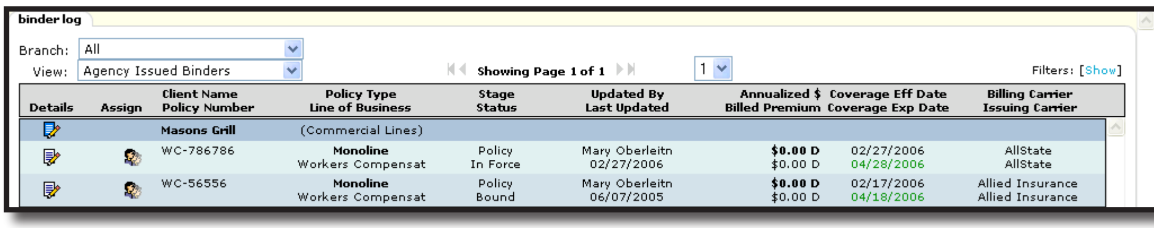
The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user the items returned will show whatever was stored in the search filter settings. Using the Save Filter Settings option also includes the view selected. Exercise caution when using the Save Filter Settings check box with a date range entered as returned binders will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

Access to **Bound** or **Future** policies may be restricted to the people assigned to the policy. **Bound** or **Future** policies that are restricted will display on **HOME** > **BINDER LOG**. The person logged on may only access policies assigned to them. All other non-restricted **Bound** or **Future** policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy.

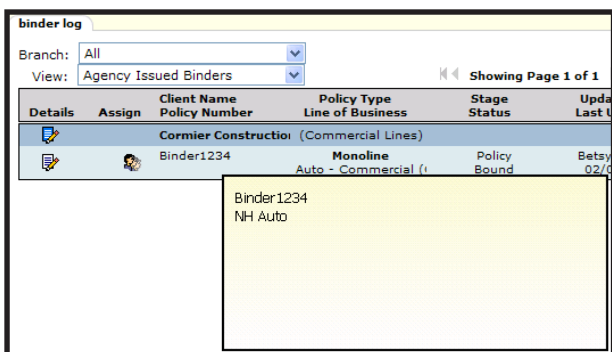
Understanding the Binder Log Screen

Binders on the **HOME > BINDER LOG** screen are grouped together by client making it easy to identify all **Open/Bound/Future** policies for each client. Clicking the icon on the left side of the screen displays all assignments for the binder log.



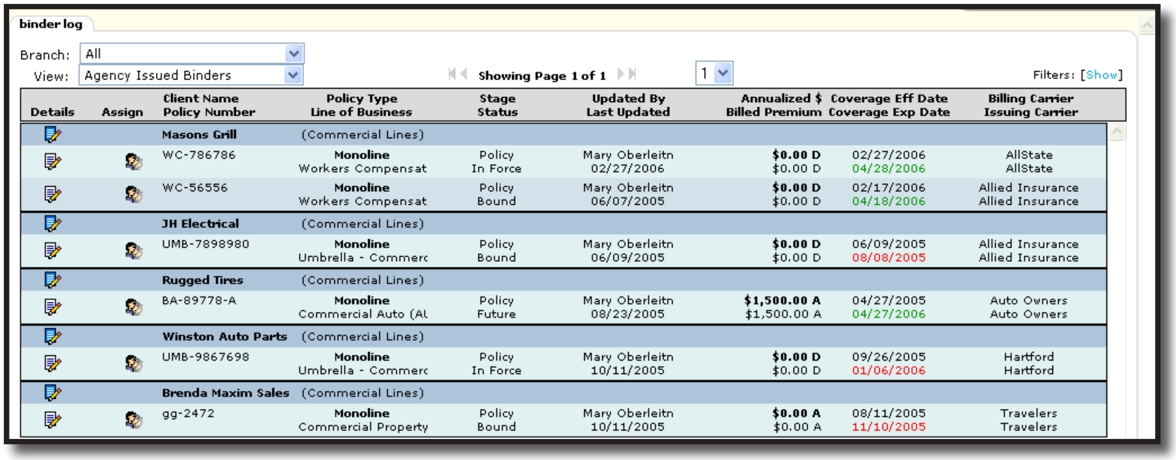


When you move your mouse over the Policy Number line, a pop-up window displays the **Policy Number** field and free-form **Policy Description** field of the Bound policy**.**



Binder Expiration (Coverage Exp) Date Color Scheme

Use the **Coverage Expiration Date** on the **HOME > BINDER LOG** screen to determine when binders should be extended and to follow-up on receipt of the policy or change. These color coded dates assist in visual determination of binders that are approaching their expiration date.



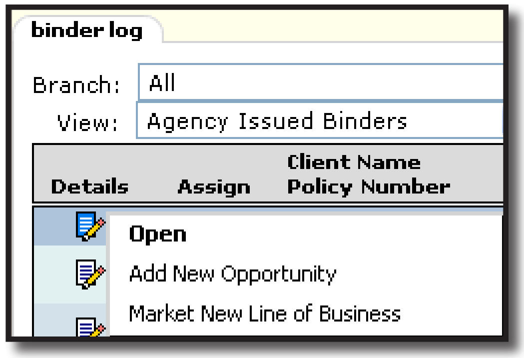
The binder **Coverage Expiration Date** is displayed in one of 4 colors and changes based on the current date in relation to the binder's Coverage Expiration Date.

- **Black** indicates that the binder will expire in 90 days or more.
- **Green** indicates that the binder will expire in the next 89 – 31 days.
- **Orange** indicates that the binder will expire in the next 30 days.
- **Red** indicates that the binder has expired.

Using Context Tools on the HOME > BINDER LOG Screen

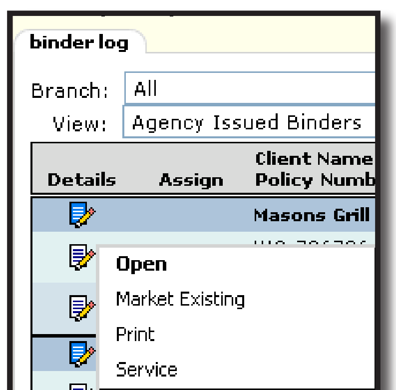
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > BINDER LOG** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the Client Profile screen.
Add New Opportunity	Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.
Market New Line of Business	Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.



Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the binder detail.
Market Existing	Choosing this option adds an action annotation, copies the selected applications to marketing.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Service	Choosing this option displays Servicing. After selecting the servicing option and selecting [Next], the policy selected from the HOME > BINDER LOG is automatically chosen for the service.



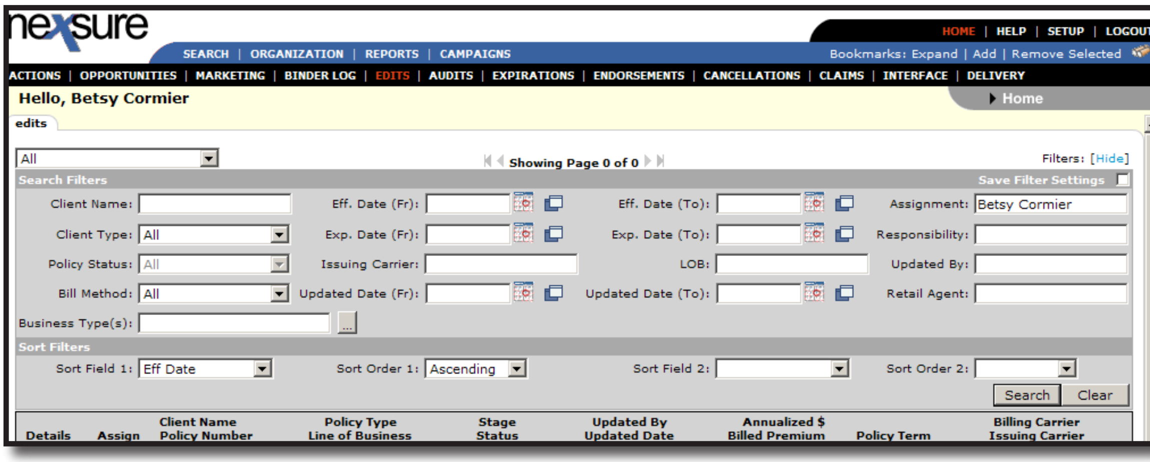
Edits

An edit is an internal change or correction made by the user on an in-force policy that does not require notification to the carrier. The **HOME > EDITS** screen shows all in-force polices that have a pending edit status. A pending edit remains on the **HOME > EDITS** screen until the edit has been posted or aborted.

By default, the branches filter (upper left under **edits**) is set to **All**, displaying pending edits for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.

Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Assignment	User logged in
Sort Field 1	Updated Date
Sort Order 1	Ascending



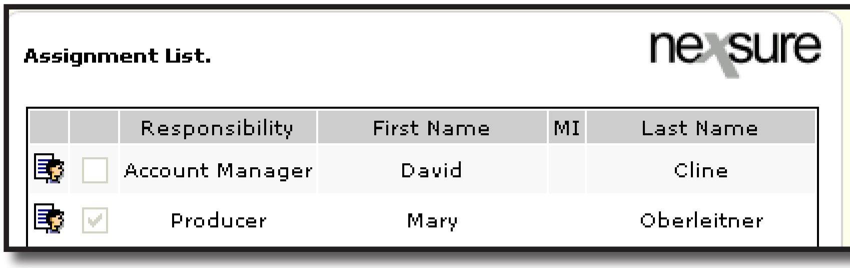
The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box since pending edits lock the policy and prevent further servicing until the edit is posted or aborted. Also, entering a date range and saving filters with the Save Filter Settings check box selected will restrict results to pending edits within this saved date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

Access to policies may be restricted to the people assigned to them. Pending edits will display on **HOME** > **EDITS** only if the person logged on is assigned to the restricted policy. All other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy with the pending edit.

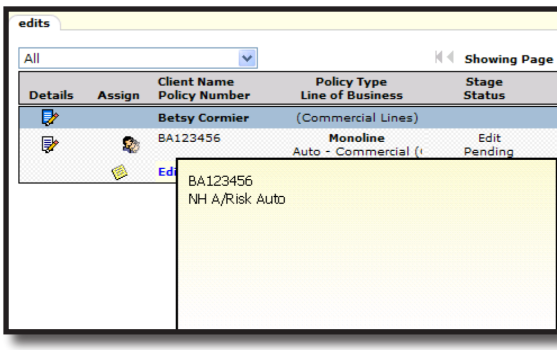
Note: Make sure to check the **Home** > **Edits** screen daily to make sure there are no outstanding edits as they will prevent further servicing of the policy. Edits must be posted or aborted in order to do other servicing functions.

Understanding the Edits Screen

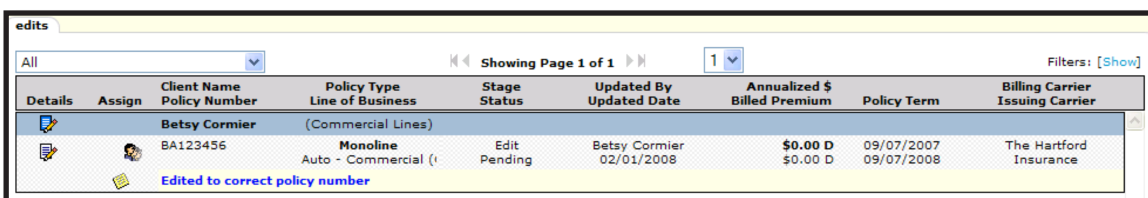
Edits on the **HOME** > **EDITS** screen are grouped together by client making it easy to identify all pending edits for each client. Clicking the icon on the left side of the screen displays all assignments for the edits.



When you move your mouse over the Policy Number line, a pop-up window displays the Policy Number field and free-form Policy Description field of the policy.



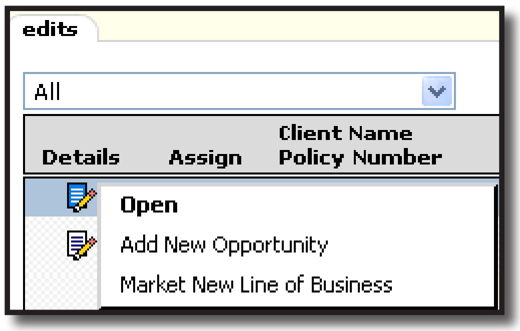
Any annotation actions, whether open or closed are displayed with the edit. To look at or modify the action, click the icon with the left mouse button to open the action.



Using Context Tools on the HOME > EDITS Screen

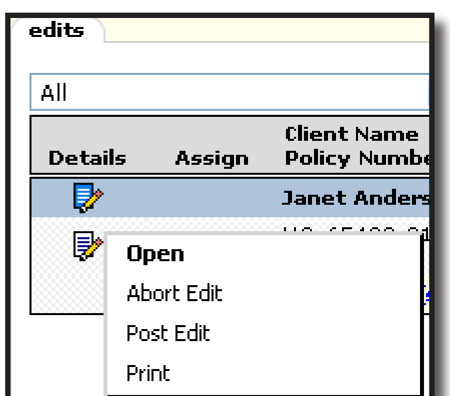
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > EDITS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the Client Profile screen.
Add New Opportunity	Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.
Market New Line of Business	Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.



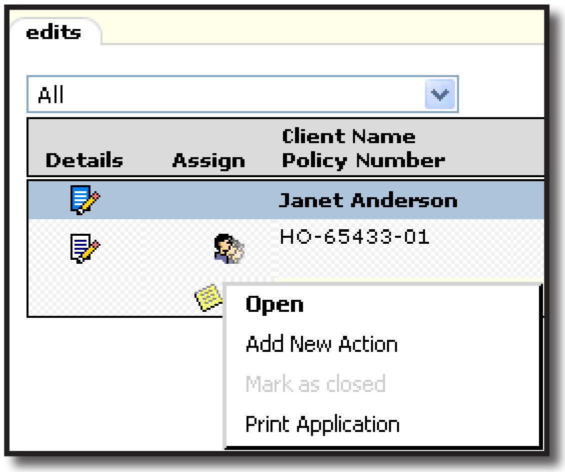
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the underwriting detail.
Abort Edit	Choosing this option aborts the pending edit and removes it from the policy and HOME > EDITS screen.
Post Edit	Choosing this option posts the pending edit. Posting pending edits sends the prior version of the policy to history and is updated with the posted edit. The posted pending edit is removed from the HOME > EDITS screen.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.



Right clicking on the **Memo** icon presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.

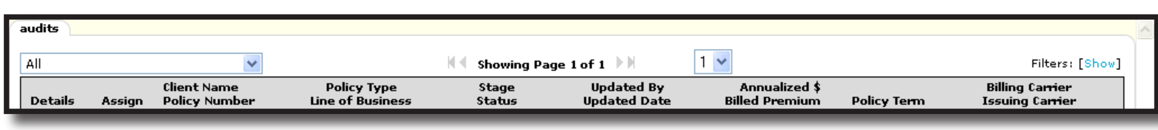


Audits

An audit in Nexsure is identified as a policy where the branch has received an audit (on an auditable policy) from the carrier for a specific time frame where additional premium may be due. Service the policy in Nexsure, choose the **Audit** option and select the policy the audit is for. This changes the status to **Pending Audit** and the policy is then displayed on the **HOME > AUDITS** screen until the audit is posted or aborted.

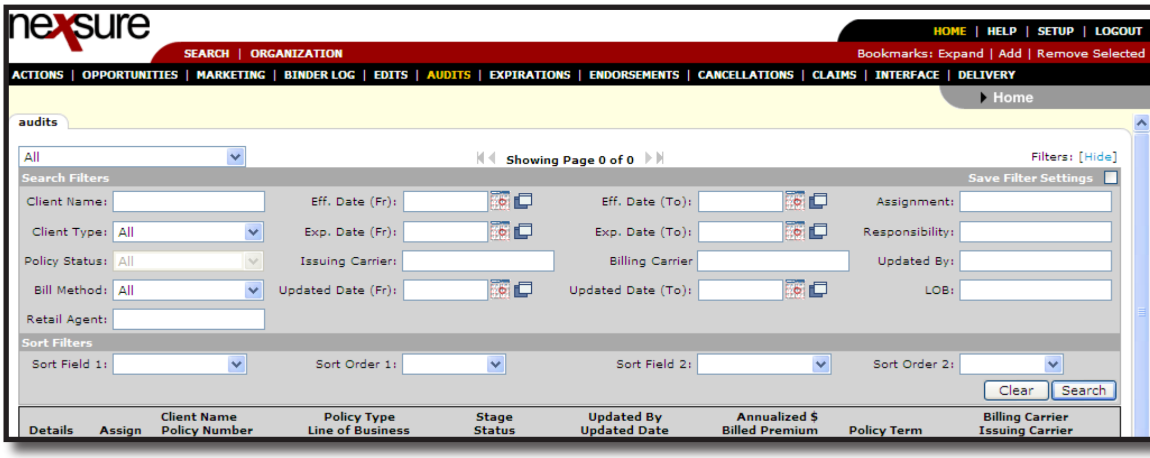
The **HOME > AUDITS** screen shows all polices that have a pending audit status. A pending audit remains on the **HOME > AUDITS** screen until the audit is posted or aborted. Use the updated date on the audit to identify when the audit was received (as long as the audit is added the day it is received). Posting the audit indicates a satisfied audit.

By default, the branches filter (upper left under **audit**s) is set to **All**, displaying pending audits for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Assignment	User logged in
Updated Date (To)	Current Date
Sort Field 1	Effective Date
Sort Order 1	Ascending

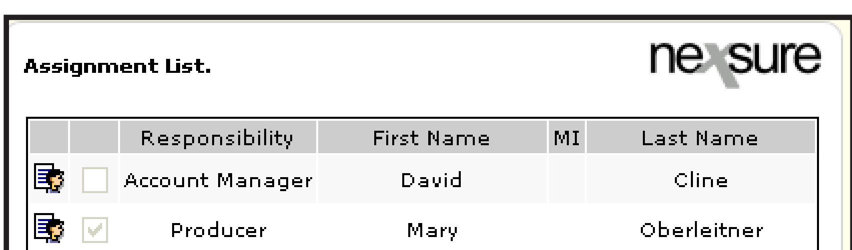


The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned pending audits will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

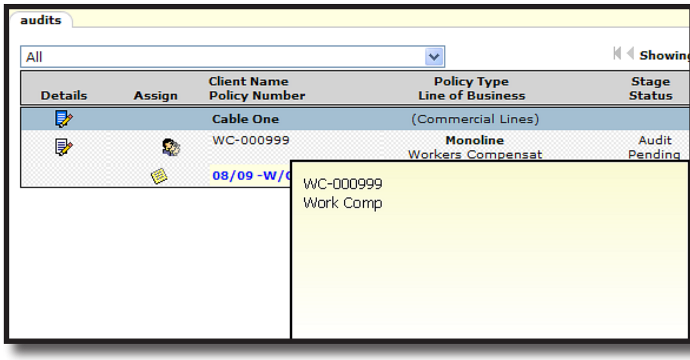
Access to policies may be restricted to the people assigned to them. Pending audits will display on **HOME** > **AUDITS** only if the person logged on is assigned to the restricted policy. All other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy with the pending audit.

Understanding the Audits Screen

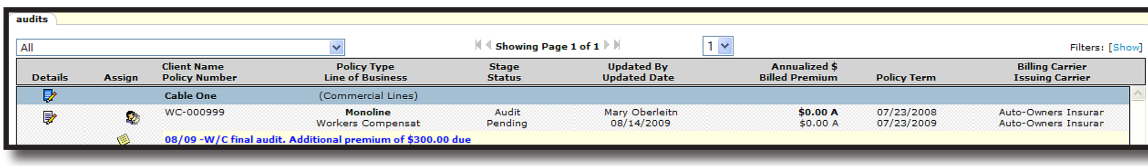
Audits on the **HOME > AUDITS** screen are grouped together by client making it easy to identify all pending audits for each client. Clicking the icon on the left side of the screen, displays all assignments for the **HOME > AUDITS** screen.



When you move your mouse over the Policy Number line, a pop-up window displays the Policy Number field and free-form Policy Description field of the policy.



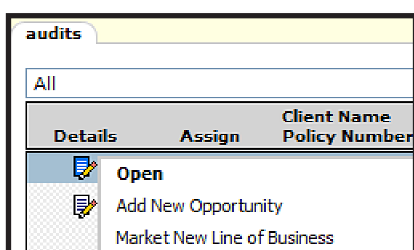
Any annotation actions whether open or closed are displayed with the audit. To look at or modify the action, click the icon with the left mouse button to open the action.



Using Context Tools on the HOME > AUDITS Screen

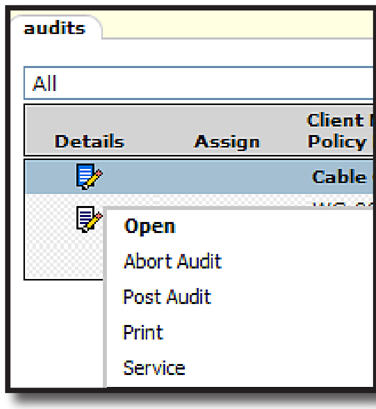
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > AUDITS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	**Choosing this option opens the Client Profile screen.**
Add New Opportunity	**Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.**
Market New Line of Business	**Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.**



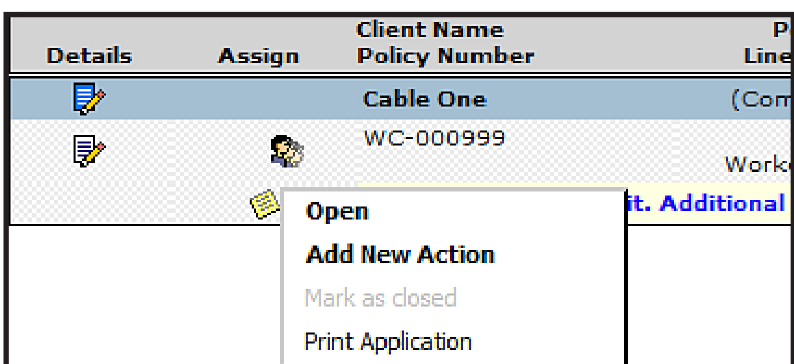
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the underwriting detail.
Abort Audit	Choosing this option aborts the pending audit and removes it from the policy and HOME > AUDITS screen.
Post Audit	Choosing this option posts the pending audit. Posting pending audits sends the prior version of the policy to history and is updated with the posted audit. The posted pending audit is removed from the HOME > AUDITS screen.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Service	Choosing this option displays Servicing. After selecting the servicing option and selecting [Next], the policy selected from the HOME > AUDITS screen is automatically selected for the service.



Right clicking on the icon presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print Application	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.

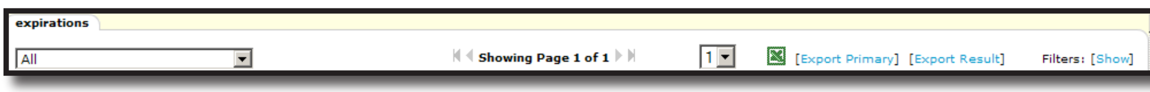


Expirations

The **HOME > EXPIRATIONS** page shows policies that will be expiring for the selected date range. The **HOME > EXPIRATIONS** screen includes all in-force policies assigned to the logged in user. Use the Expirations screen when working on upcoming renewals and to determine which policies are about to expire or have expired. The following policy statuses are listed on this screen:

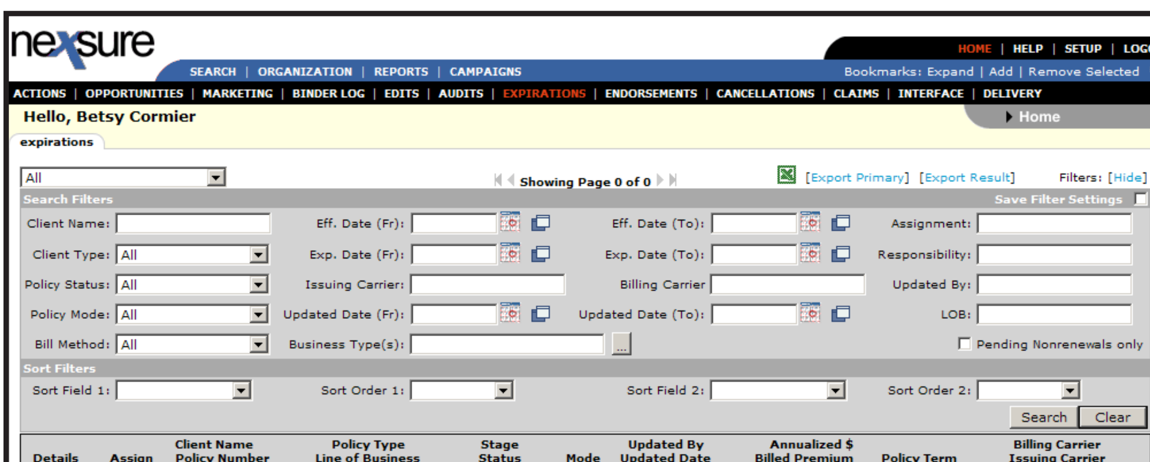
- **In Force**
- **Received**
- **Expired**
- **Bound**
- **Reinstated**
- **Rewritten**
- **Pending-Cancellation**

By default, the branches filter (upper left under **expirations**) is set to **All**, displaying the expiration list for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Assignment	User logged in
Exp. Date (Fr)	30 Days prior to the current date
Exp. Date (To)	30 Days from the current date
Sort Field 1	Expiration Date
Sort Order 1	Ascending



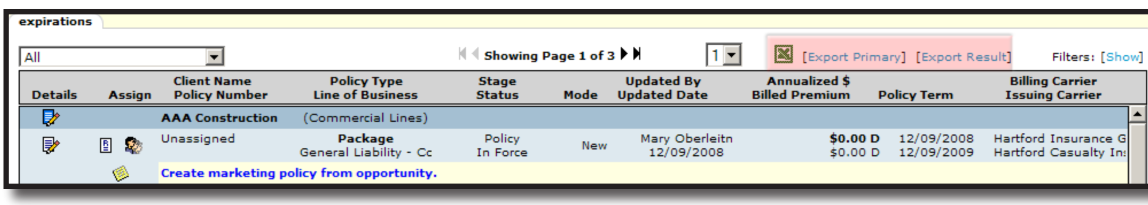
The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter**

Settings check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as the returned expiration list will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

Access to policies may be restricted to the people assigned to them. Policies will display on **HOME** > **EXPIRATIONS** only if the person logged on is assigned to the restricted policy. All other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy.

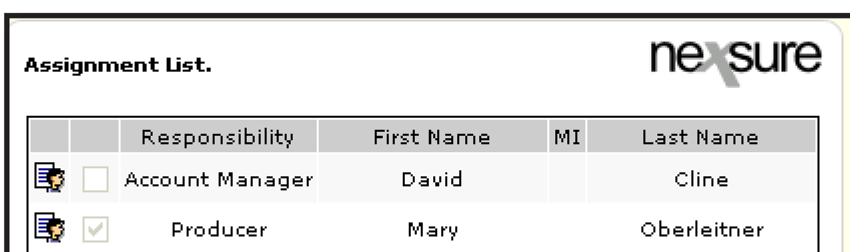
Note: Placing a check in the box beside **Pending Nonrenewals only** and searching will return all policies that are not in history but flagged as a non-renewal.

After searching for a specific result, this list may be exported to Excel by clicking the **[Export Primary] or [Export Result]** link on the top of the screen to the left of the **[Show]**/**[Hide]** link. Once the report is exported it may be saved or printed. Exported results when **[Export Primary]** is selected reports each expiration once by its Primary Assignment. Exported results when **[Export Result]** is selected reports each expiration for each of its policy Assignments. If there are three people assigned to a policy, the expiration will be listed three times on the **[Export Result]** report.

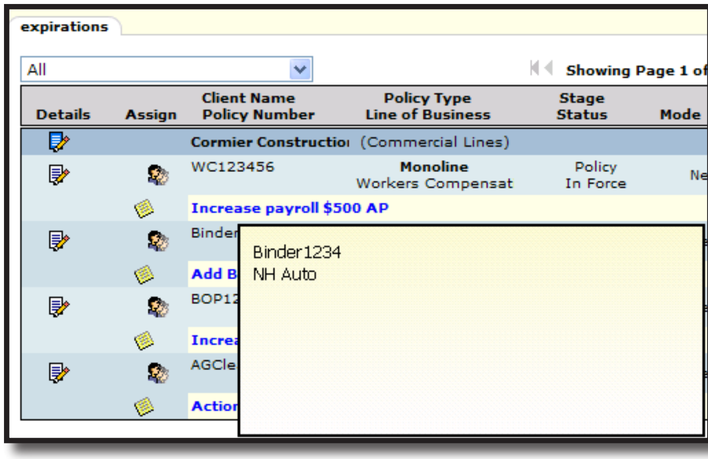


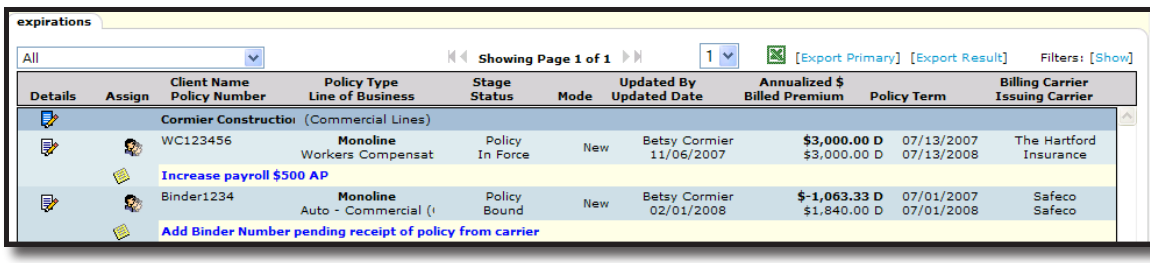
Understanding the Expiration Screen

Expiring policies on the **HOME > EXPIRATIONS** screen are grouped together by the client, which makes it easy to identify all expiring policies for each client. Clicking the icon on the left side of the screen, displays all assignments for the binder log.



When you move your mouse over the Policy Number line, a pop-up window displays the Policy Number field and free-form Policy Description field of the policy.





Expiration Date Color Scheme

Use the policy expiration date on the **HOME > EXPIRATIONS** screen to determine when policies will expire and to follow up on receipt of the renewal policy.

The **Details** icons and the policy term expiration dates are color coded to help determine visually when the policy is getting closer to the expiration date.

The policy **Details** icons are displayed in one of 3 colors with 2 of the 3 appearing on the **HOME > EXPIRATIONS** page. The 3rd color is green, which indicates a renewed policy. When a policy is renewed it no longer displays on the **HOME > EXPIRATIONS** screen. The two detail icons that are displayed on the **HOME > EXPIRATIONS** page are defined as follows:

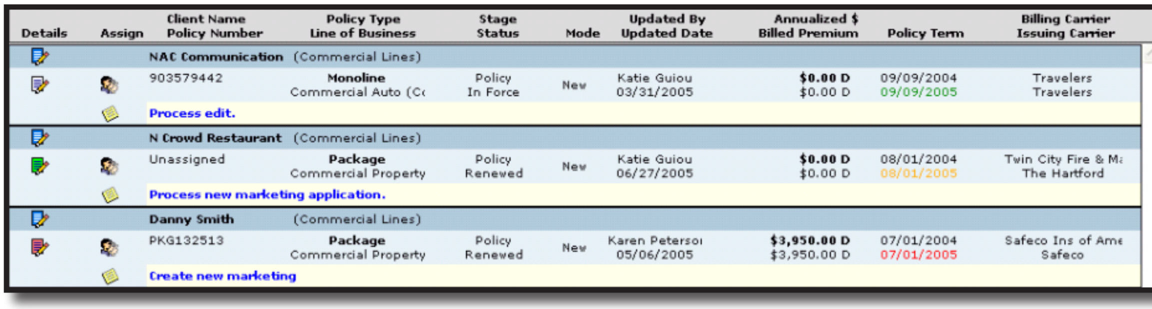
- The **White Details** icon indicates that the policy status is in force.
- The **Red Details** icon indicates that the policy is expired and no longer in force.

Note: These same icon colors are seen on the P**olicies Summary** screen and have the same meaning.

The color coded policy expiration dates help to visually determine when polices are getting closer to their expiration date. There are 4 expiration date colors and are defined as follows:

- **Black** indicates that the policy is greater than 90 days away from the expiration date.

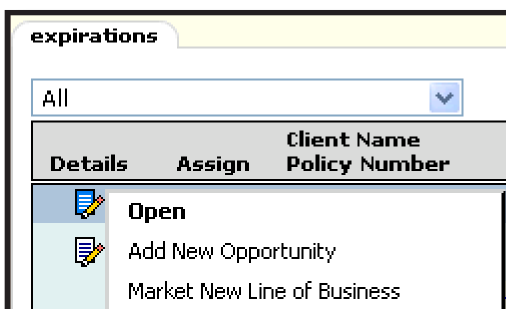
- **Green** indicates that the policy will expire in 90 days or less.
- **Orange** indicates that the policy will expire in 30 days or less.
- **Red** indicates that the policy has expired.



Using Context Tools on the HOME > EXPIRATIONS Screen

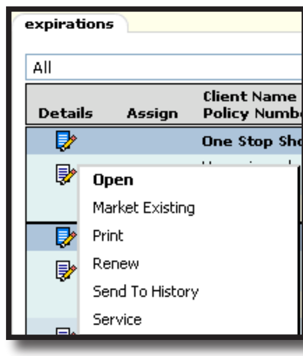
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > EXPIRATIONS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the Client Profile screen.
Add New Opportunity	Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.
Market New Line of Business	Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.



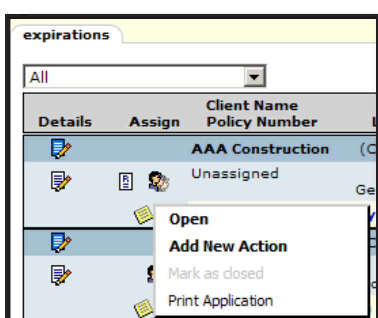
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the underwriting detail.
Market Existing	Choosing this option adds an action annotation, copies the selected applications to marketing.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Renew	Choosing this option adds an action annotation, and renews the selected version of the policy. Renewing this way does not provide an opportunity to choose a marketing policy or combine lines of business. Therefore, this option should only be used when this is the version of the policy that will be the renewal version.
Send to History	Choosing this option brings up the underwriting screen and the history reasons pop-up window providing an opportunity to enter details of why this policy is being sent to history.
Service	Choosing this option brings up the Servicing screen. After selecting the servicing option and selecting [Next], the policy right clicked from the HOME > EXPIRATIONS is automatically selected for the service.



Right clicking on the **Memo** icon presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print Application	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.

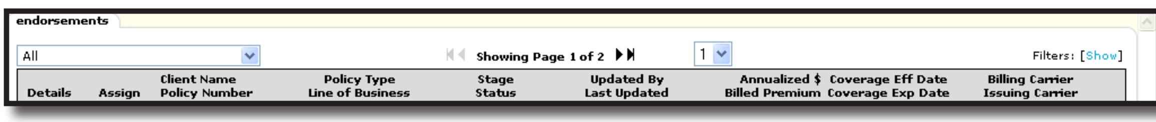


Endorsements

When an endorsement is added to the policy it is displayed on the **HOME** > **ENDORSEMENTS** screen. The endorsement remains on the **HOME** > **ENDORSEMENTS** screen as long as the status is any of the following: **Pending, Submitted, 2nd Request** or **3rd Request**. These endorsements are only removed by posting a submitted: 2nd request, 3rd request endorsement, or aborting a pending endorsement. Use this screen to keep track of outstanding endorsements by using the coverage effective date to identify when the change was effective. When the endorsement is received from the carrier, post the endorsement. Posting removes the endorsement from the **Home** screen automatically.

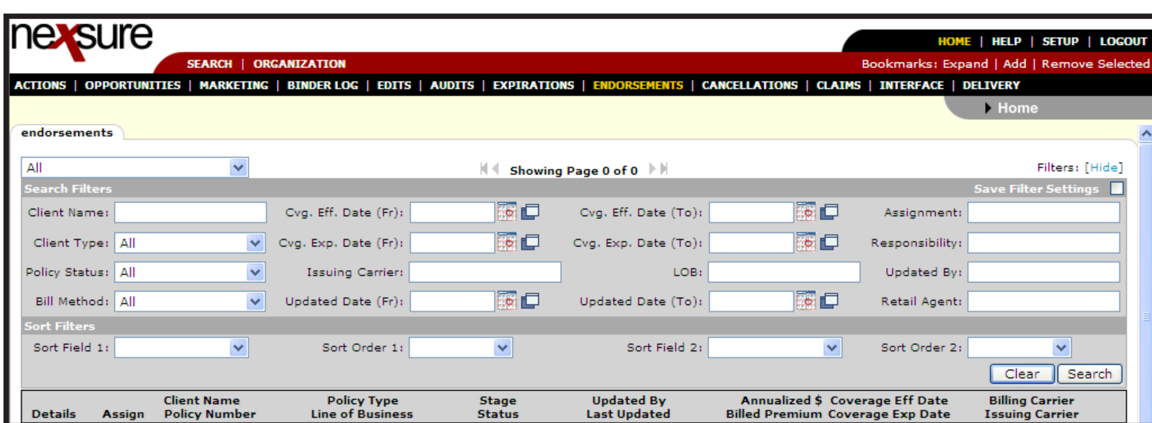
Note: A pending endorsement locks the policy, disallowing servicing functions. Change the status to Submitted, 2nd Request or 3rd Request and save changes or abort the pending endorsement to allow policy servicing.

By default, the branches filter (upper left under **endorsements**) is set to **All**, displaying pending endorsements for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Assignment	User logged in
Cvg. Eff. Date (To)	30 days from the current date
Sort Field 1	Coverage Effective Date
Sort Order 1	Ascending

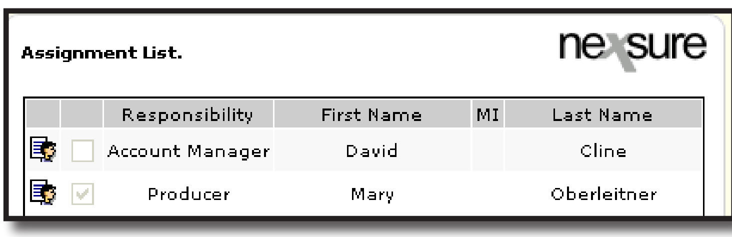


The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned pending or submitted endorsements will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

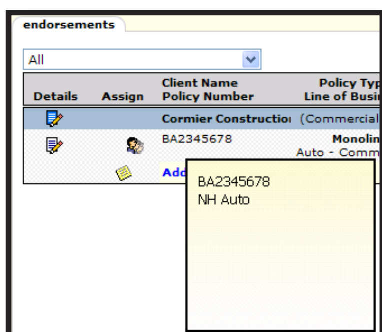
Access to policies may be restricted to the people assigned to them. Policies will display on **HOME** > **ENDORSEMENTS** only if the person logged on is assigned to the restricted policy. All other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy.

Understanding the Endorsements Screen

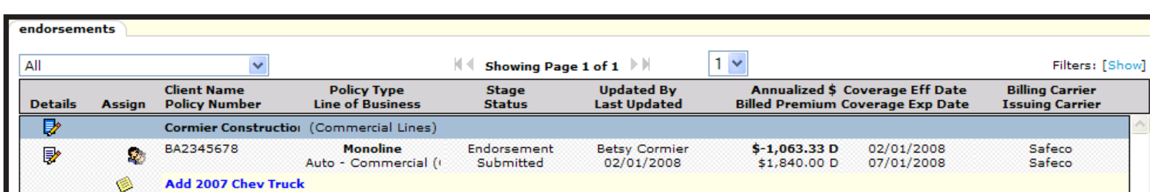
Endorsements on the **HOME > ENDORSEMENTS** screen are grouped together by client making it easy to identify all outstanding endorsements for each client. Clicking the icon on the left side of the screen displays all assignments for the **HOME > ENDORSEMENTS** screen.



When you move your mouse over the Policy Number line, a pop-up window displays the Policy Number field and free-form Policy Description field of the policy.



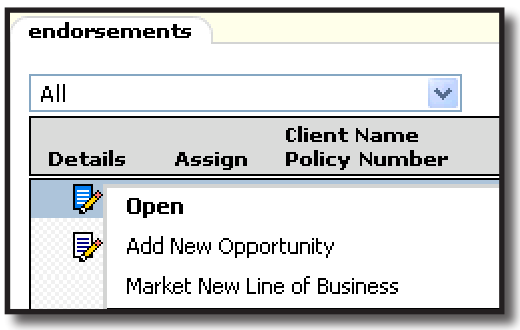
Any annotation actions whether open or closed display with the endorsement. To look at or modify the action, click the **Memo** icon with the left mouse button to open the action.



Using Context Tools on the HOME > ENDORSEMENTS Screen

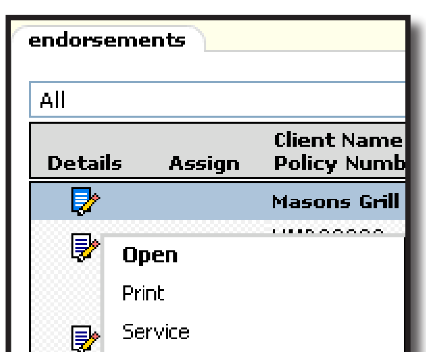
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > ENDORSEMENTS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the Client Profile screen.
Add New Opportunity	Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.
Market New Line of Business	Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.



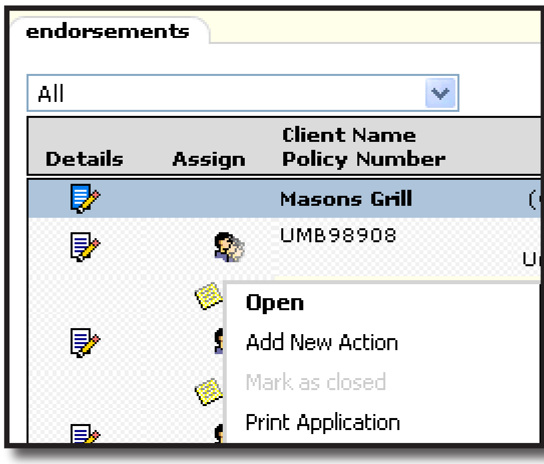
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the underwriting detail.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Service	Choosing this option displays the Servicing screen. After selecting the servicing option and selecting [Next], the policy you right clicked on from the HOME > ENDORSEMENTS screen is automatically selected for the service.



Right clicking on the **Memo** icon presents shortcut links as follows:

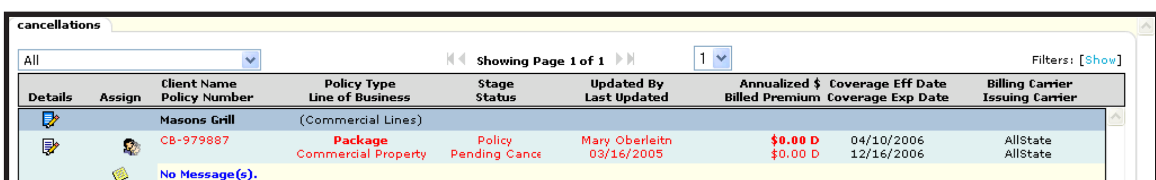
Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print Application	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.



Cancellations

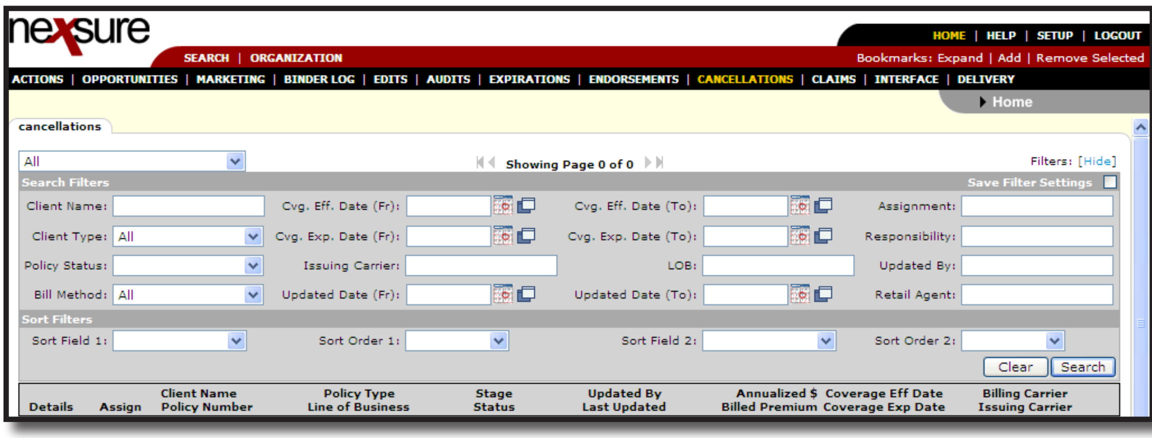
When a cancellation is added to the policy it is displayed on the **HOME > CANCELLATIONS** screen. The cancellation remains on this screen as long as the status is pending. When the cancellation is posted or aborted, it is removed from the **HOME > CANCELLATIONS** screen. Use this screen to monitor receipt of the cancellation paperwork from the client and carrier. Pending cancellations display policy information in a red font.

By default, the branches filter (upper left under **cancellations**) is set to **All**, displaying cancellations for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Assignment	User logged in
Policy Status	Pending Cancellation
Sort Field 1	Coverage Expiration Date
Sort Order 1	Ascending

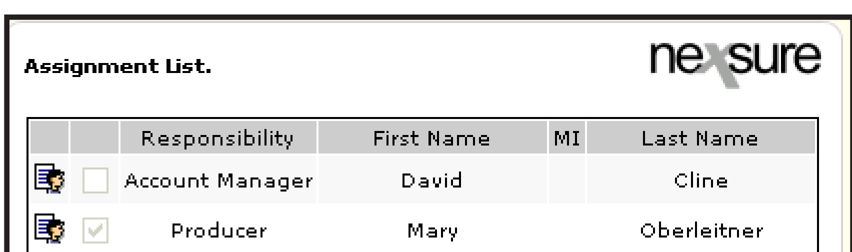


The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned pending or submitted cancellations will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

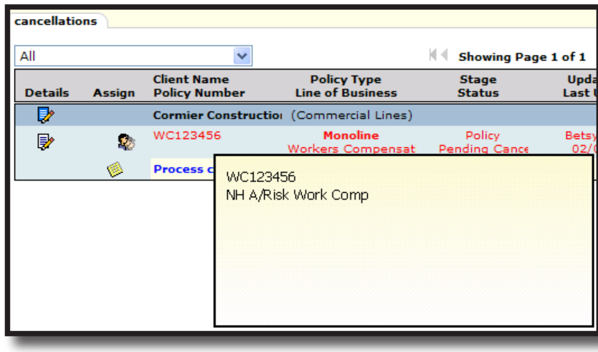
Access to policies may be restricted to the people assigned to them. Policies will display on **HOME** > **CANCELLATIONS** only if the person logged on is assigned to the restricted policy. All other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy.

Understanding the Cancellations Screen

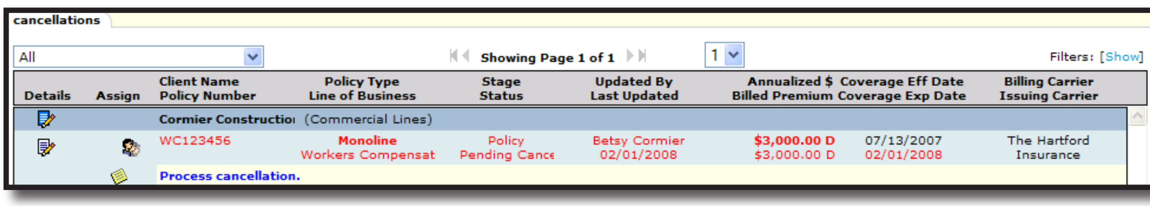
Cancellations on the **HOME > CANCELLATIONS** screen are grouped together by client making it easy to identify all outstanding cancellations for each client. Clicking the icon on the left side of the screen, displays all assignments for the **HOME > CANCELLATIONS** screen.



When you move your mouse over the Policy Number line, a pop-up window displays the Policy Number field and free-form Policy Description field of the policy.



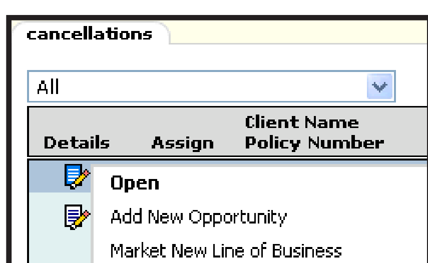
Any annotation actions whether open or closed display with the cancellation. To look at or modify the action, click the icon with the left mouse button to open the action.



Using Context Tools on the HOME > CANCELLATIONS Screen

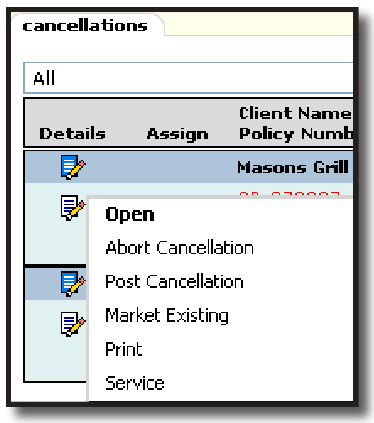
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > CANCELLATIONS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	**Choosing this option opens the Client Profile screen.**
Add New Opportunity	**Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.**
Market New Line of Business	**Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.**



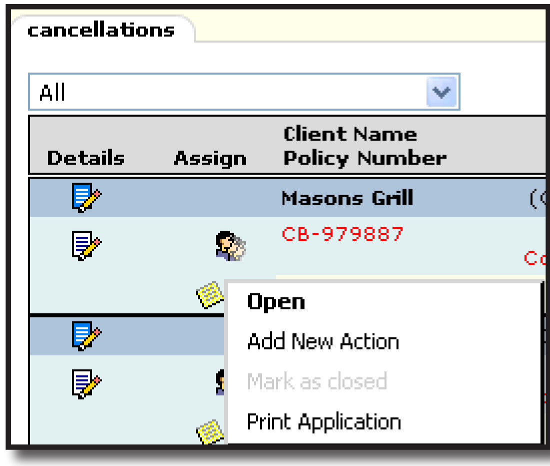
Right clicking on the **Details** icon without the blue border presents shortcut links as follows

Shortcut Link	Description
Open	Choosing this option opens the underwriting detail.
Abort Cancellation	Choosing this option aborts the cancellation on the selected policy.
Post Cancellation	Choosing this option posts the cancellation which sends the policy to history.
Market Existing	Choosing this option adds an action annotation, copies the selected applications to marketing.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Service	Choosing this option displays Servicing. After selecting the servicing option and selecting [Next], the policy selected from the HOME > CANCELLATIONS screen is automatically selected for the service.



Right clicking on the icon presents shortcut links as follows:

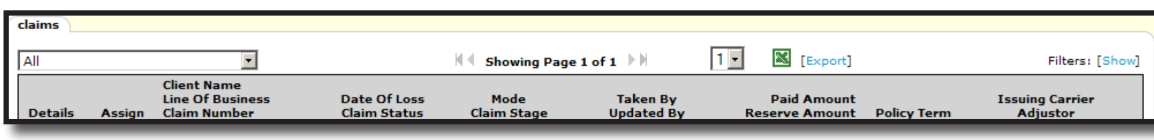
Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print Application	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.



Claims

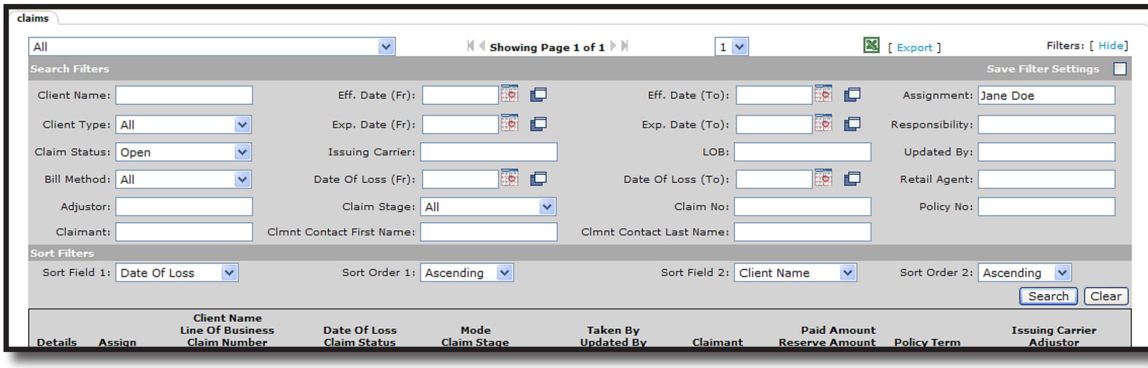
When a claim is added to the policy it is displayed on the **HOME > CLAIMS** screen. Claims remain on this screen as long as the status is open. When the claim is closed or aborted, it is removed from the **HOME > CLAIMS** screen. Use this screen to monitor claims. Search for closed claims by using the search filter and changing the status to closed.

By default, the branches filter (upper left under **claims**) is set to **All**, displaying pending claims for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.



Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Assignment	User logged in
Client Type	All
Claim Status	Open
Bill Method	All
Date of Loss (To)	Current date
Claim Stage	All
Sort Field 1	Date of Loss
Sort Order 1	Ascending
Sort Field 2	Client Name
Sort Order 2	Ascending



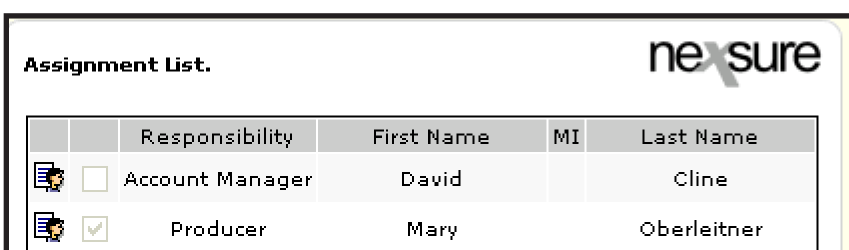
The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned pending or submitted claims will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

Access to policies may be restricted to the people assigned to them. Claims will display on **HOME** > **CLAIMS** only if the person logged on is assigned to the restricted policy. Claims for all other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy.

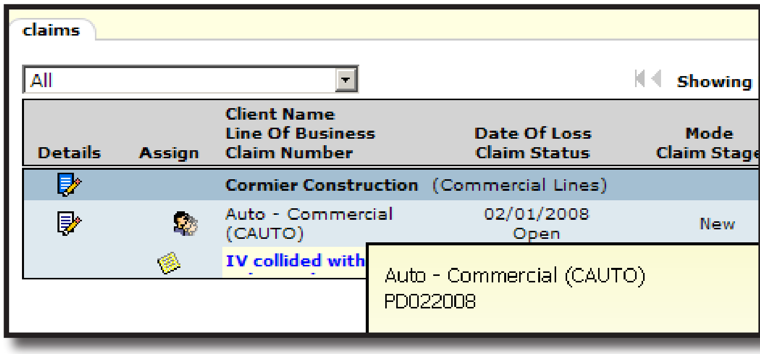
After searching for a specific result, this list may be exported to Excel by clicking the **[Export]** link on the top of the screen to the left of the **[Show]**/**[Hide]** link. Once the report is exported it may be saved or printed.

Understanding the Claims Screen

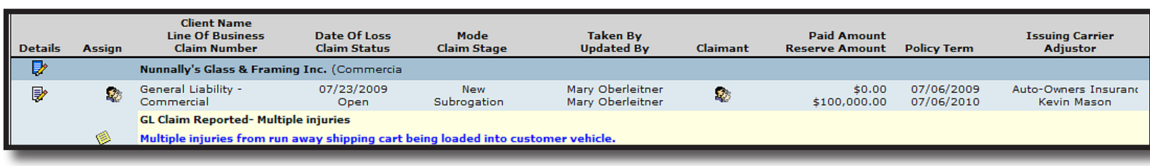
Claims on the **HOME > CLAIMS** screen are grouped together by client making it easy to identify all outstanding claims for each client. Clicking the icon on the left side of the screen displays all assignments for the selected policy.



When moving the pointer over the Line Of Business and Claim Number line, a pop-up window displays the Line of Business and Claim Number of the open claim.



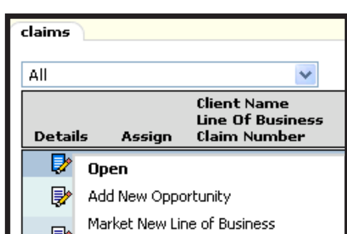
Any annotation actions whether open or closed display with the claim. To look at or modify the action, click the **Memo** icon with the left mouse button to open the action.



Using Context Tools on the HOME > CLAIMS Screen

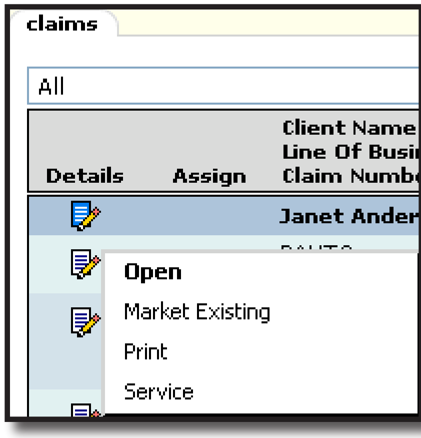
The context tools are shortcut links that are accessed by right clicking either of the **Details** icons on the **HOME > CLAIMS** screen. To use these links, right click the desired **Details** icon, position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	**Choosing this option opens the underwriting detail.**
Add New Opportunity	**Choosing this option opens the Add New Opportunity screen allowing the lines of business to be selected.**
Market New Line of Business	**Choosing this option adds a marketing action annotation and marketing screen. The line of business selection screen is displayed ready for the line of business to be selected and added.**



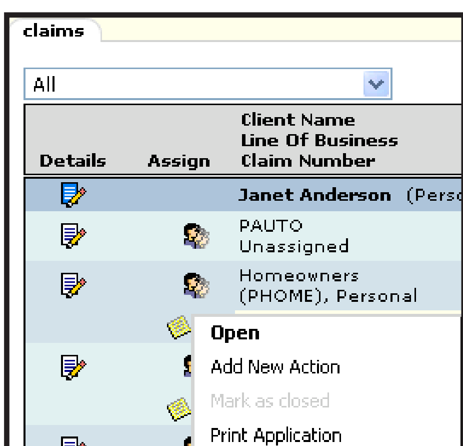
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens the underwriting detail.
Market Existing	Choosing this option adds an action annotation, copies the selected applications to marketing.
Print	Choosing this option brings up the PDF of the application and may be printed if desired.
Service	Choosing this option displays Servicing. After selecting the servicing option and selecting [Next], the policy selected from the HOME > CLAIMS screen is automatically selected for the service.

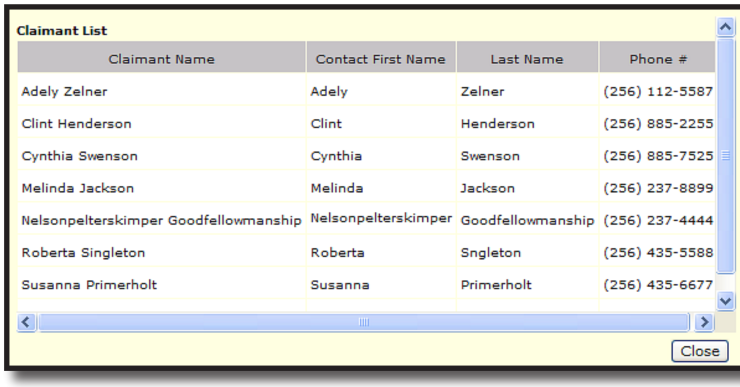


Right clicking on the **Memo** icon presents shortcut links as follows:

Shortcut Link	Description
Open	Choosing this option opens this action for modification.
Add New Action	Choosing this option adds a new personal action for the logged in user.
Mark as Closed	Choosing this option closes the action. If the action is marked as closed, this link will be gray indicating it is inactive.
Print Application	If a policy is associated with the action, choosing this option brings up the PDF of the application and may be printed if desired. If no application is associated with the action, this link will be gray indicating it is inactive.



Clicking the **Claimant** icon displays claimants added to a claim. If the **Claimant** icon is not shown on the screen this indicates no claimants have been added.


Claimant List

Claimant Name	Contact First Name	Last Name	Phone #
Adely Zelner	Adely	Zelner	(256) 112-5587
Clint Henderson	Clint	Henderson	(256) 885-2255
Cynthia Swenson	Cynthia	Swenson	(256) 885-7525
Melinda Jackson	Melinda	Jackson	(256) 237-8899
Nelsonpelterskimper Goodfellowmanship	Nelsonpelterskimper	Goodfellowmanship	(256) 237-4444
Roberta Singleton	Roberta	Sngleton	(256) 435-5588
Susanna Primerholt	Susanna	Primerholt	(256) 435-6677

Close

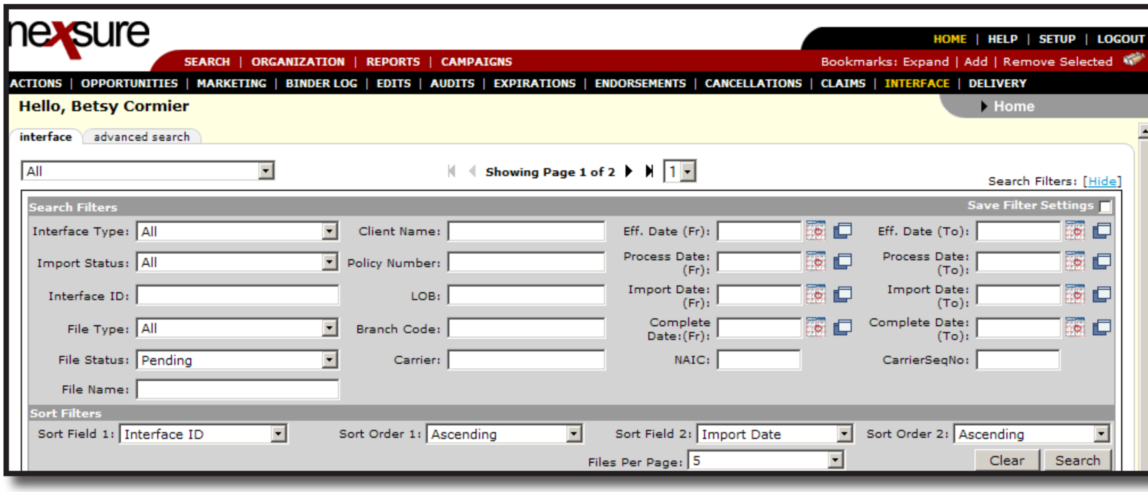
Interface

The **HOME > INTERFACE** screen contains the carrier downloads received from IVANS® and/or carrier downloads that have been manually imported. Rating software quotes such as FSC™ can also be imported or bridged into Nexsure on the **HOME > INTERFACE** screen.

By default, the branches filter (upper left under **interface**) is set to **All**, displaying pending downloads for all branches. The user's security settings determine which branches are available. If security has only been granted for one branch, then changing this setting will not be necessary. Click the drop-down box to select a branch and the screen will automatically refresh to include only the items for that branch.

Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

Field Name	Default
Save Filter Settings	Unchecked
Import Type	All
Import Status	All
File Type	All
File Status	Pending
Sort Field 1	Interface ID
Sort Order 1	Ascending
Sort Field 2	Import Date
Sort Order 2	Ascending



The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned pending or submitted downloads will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

Understanding the Interface Screen

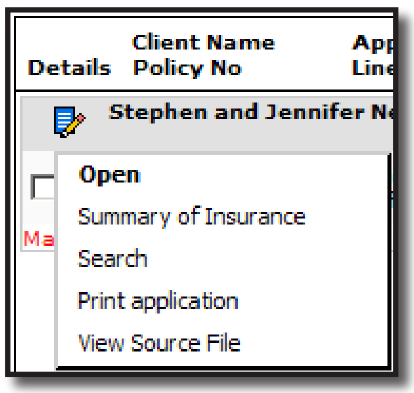
Pending downloads require user attention. Click the **Details** icon to show polices that need user interaction to complete the download.

Using Context Tools on the HOME > INTERFACE Screen

The context tools are shortcut links that are accessed by right clicking **Details** icons on the **HOME** > **INTERFACE** screen. To use these links, right click the desired **Details** icon , position the mouse pointer over the desired option to highlight, and left click. Right clicking on the **Details** icon with the blue border does not present any shortcut links.

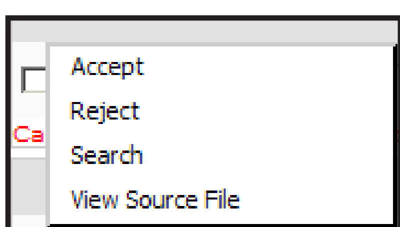
Right clicking on the **Details** icon without the blue border presents shortcut links as follows:

Shortcut links	Description
Open	Choosing this option opens the underwriting detail.
Summary of Insurance	Choosing this option opens the policy level summary of insurance.
Search	Choosing this option searches for all download files for the Client Name within the download file.
Print Application	Choosing this option brings up the PDF of the application and may be saved or printed.
View Source File	Choosing this option displays the download source file.

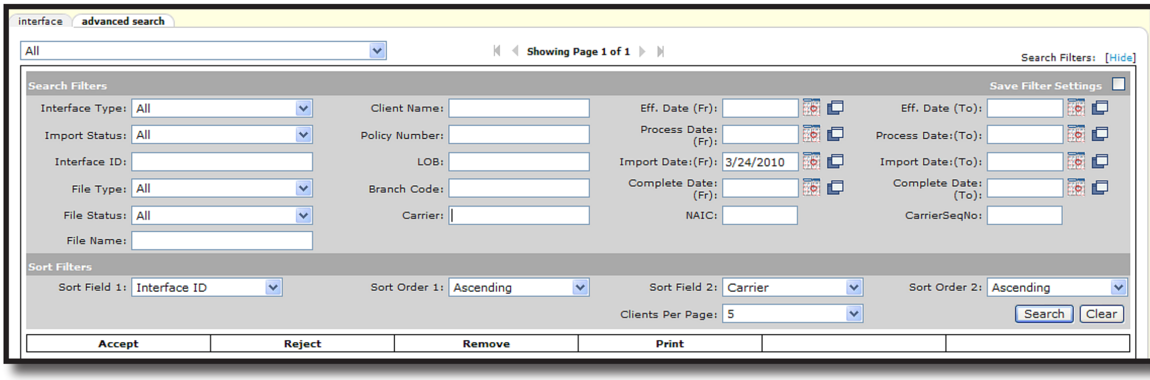


Right clicking on the **Error** icon presents shortcut links as follows:

Shortcut links	Description
Accept	Choosing this option will process the download file again.
Reject	Choosing this option will reject the download and prevent it from processing. Rejected data remains on the Interface screen without an active exception error.
Search	Choosing this option searches for all download files for the Client Name within the download file.
View Source File	Choosing this option displays the download source file.



To print the interface details, begin by searching for data to be printed. Click the **[Show]** link and modify the filters and click **Search**. Click the **Print** link to bring up the report. The report will contain only items returned in the search.

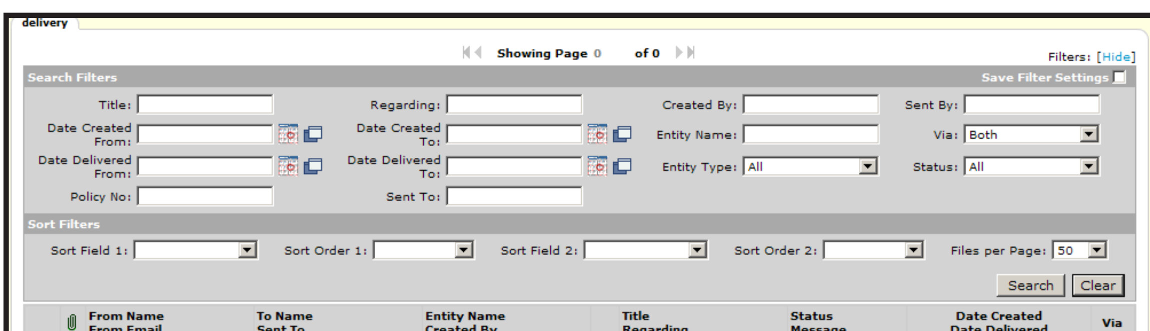


Delivery

Any e-mails and faxes sent from Nexsure Delivery are displayed by default on the **HOME > DELIVERY** screen for the current date for any unsuccessful deliveries. Once delivered they are no longer displayed. Use this screen to make sure all deliveries are successful.

Clicking the **[Show]** link on the upper right side of the screen opens the search filter. The defaults for this screen are as follows:

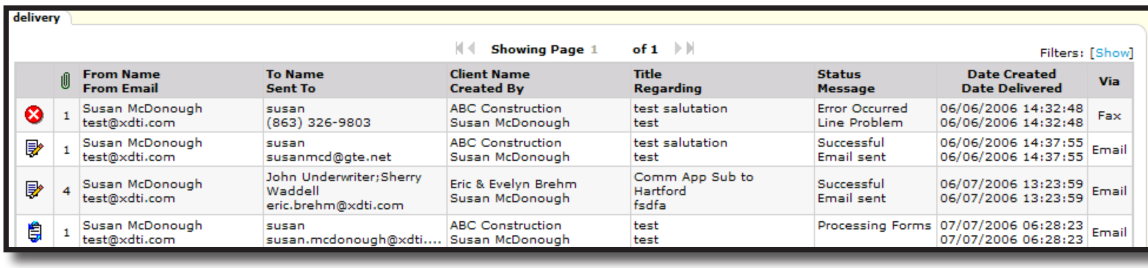
Field Name	Default
Save Filter Settings	**Unchecked**
Created By	**User Logged in**
Date Created From	**Current Date**
Via	**Both Email and Fax**
Entity Type	**Client**
Status	**Not Successful**
Sort Field 1	**Date Created**
Sort Order 1	**Descending**
Files per Page	**50**



The search filter is used when searching for specific items or for applying sort filters. Clicking the **Save Filter Settings** check box on the Search Filters screen and clicking the **Search** button will change the default setting view. The next time the screen is selected by this user, the items returned will show whatever was stored in the search filter settings. Exercise caution when using the Save Filter Settings check box with a date range entered as returned pending or submitted downloads will be restricted to that date range. Use the **Variable** icon to enter a variable number of days to set a continuous date range to be used with **Save Filter Settings**. Enter **+** or **-** and the number of days up to three digits. The date will then be **+** (after) or **-** (before) the current date. As a general rule, check the filter settings each time this screen is accessed.

Understanding the Delivery Screen

Deliveries on the **Home > DELIVERY** screen display in the order determined by Filter Settings.


delivery

Showing Page 1 of 1 Filters: [Show]

		From Name / From Email	To Name / Sent To	Client Name / Created By	Title / Regarding	Status / Message	Date Created / Date Delivered	Via
	1	Susan McDonough test@xdti.com	susan (863) 326-9803	ABC Construction Susan McDonough	test salutation test	Error Occurred Line Problem	06/06/2006 14:32:48 06/06/2006 14:32:48	Fax
	1	Susan McDonough test@xdti.com	susan susanmcd@gte.net	ABC Construction Susan McDonough	test salutation test	Successful Email sent	06/06/2006 14:37:55 06/06/2006 14:37:55	Email
	4	Susan McDonough test@xdti.com	John Underwriter;Sherry Waddell eric.brehm@xdti.com	Eric & Evelyn Brehm Susan McDonough	Comm App Sub to Hartford fsdfa	Successful Email sent	06/07/2006 13:23:59 06/07/2006 13:23:59	Email
	1	Susan McDonough test@xdti.com	susan susan.mcdonough@xdti....	ABC Construction Susan McDonough	test test	Processing Forms	07/07/2006 06:28:23 07/07/2006 06:28:23	Email

Icons on the left side of the screen identify the status of each delivery. Clicking the icon displays the delivery details. The Context tool right click shortcut links are not available for use on delivery icons.

Icon	Description
	Failed Delivery
	Successful Delivery
	Delivery in Process

Access to Deliveries may be restricted to the people assigned to them. Deliveries with attachments associated to restricted policies will display on **HOME** > **DELIVERIES** only if the person logged on is assigned to the restricted policy. Deliveries for all other non-restricted policies are displayed and can be searched for by all staff members, whether or not they are assigned to the policy.

Notes