Chapter 2

Keeping Track From Home

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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.

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րո									HUME	HELP SETUP LO	GUUI
	_	s	EARCH ORGANIA	ZATION REPORTS CA	MPAIGNS				Bookmarks: Expand P	dd Remove Selected	-
ACT	IONS C	OPPORTUNITIES	MARKETING BI	NDER LOG EDITS AUD	ITS EXP	IRATIONS EN	Dorsements C	ANCELLATIONS	CLAIMS INTERFACE	DELIVERY	
н	Hello, Betsy Cormier										
G	ctions										
							_				
	All		-	Outlook]	I Show	wing page 1 of	2 🕅 🛛 Page	1 💌	Export] [Add N	ew] Filter: [Show]	
	Details	Client Name Priority	Action Topic Action Type	Policy-ID #/Ref LOB(s)/Eff-Exp Dates	Status	Due Date Due Time	Days Left (Overdue By)	Assigned To	Created By Created On	Updated By Updated On	
	>	Mark Cormier								-	
	>		New business Ppointmen	SW110X Homeowners (HOME) t [03/26/2007 - 03/	Open	09/15/2008 12:01 AM IDLW	з	Betsy Cormier	Nexsure Trainee1 09/03/2008	Betsy Cormier 09/12/2008	
		Cross Sell									
		Auto with no He	ome letter sent - i	follow up with a phone ca	all				2		

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.

nexsure			HOME HELP SETUP LOGOUT
SEARCH ORGANI	ZATION REPORTS CAMPAIGNS		Bookmarks: Expand Add Remove Selected 💖
ACTIONS OPPORTUNITIES MARKETING BI	NDER LOG EDITS AUDITS EXPIRATIO	ONS ENDORSEMENTS CANCELLATIONS	CLAIMS INTERFACE DELIVERY
Hello, Betsy Cormier			Home
actions			
	ok] 🕅 🖣 Showing page 1	of 1 Page 1	Export] Filter: [Hide] [Add New]
Search Filters			Filter Settings: Save Reset
Action Topic:	Assigned To: Betsy Cormier	Created By:	Last Updated By:
Action Type:	Due Date (Fr):	Due Date (To): 2/6/2009	Policy No:
Action Status: Open 💌	Client Name:	Memo:	Certificate No:
Description:			
Sort Filters			
Sort Field 1: Due Date	Sort Order 1: Ascending	Sort Field 2: Client Name	Sort Order 2: Ascending
Files Per Page: 10 🔻			Search Restore Clear

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.

Action Topics	ne sure
Select Action Topic (Hold CTRL-Key for mult	iple selections)
Marketing	
Memo	
New business	
Non-renewal	
Note	v
Note: Inactive topics are shaded in gray.	
	[Select][Close]

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

nexsure			HOME HEL	p Setup Logout				
SEARCH ORGANIZAT	ION REPORTS CAMPAIGNS		Bookmarks: Expand Add R	emove Selected 💖				
ACTIONS OPPORTUNITIES MARKETING BINDE	R LOG EDITS AUDITS EXPIRATION	5 ENDORSEMENTS CANCELLATIONS	CLAIMS INTERFACE DELIVERY	Y				
Hello, Betsy Cormier Home								
actions								
All 💽 [Outlook]	Showing page 1 o	f1 Page 1	Export] Filter: [Hide]	[Add New]				
Search Filters			Filter Settings: Sav	e Reset				
Action Topic: Marketing, New busin	Assigned To: Betsy Cormier	Created By:	Last Updated By:					
Action Type:	Due Date (Fr):	Due Date (To): 2/6/2009	Policy No:					
Action Status: Open	Client Name:	Memo:	Certificate No:					
Description:								
Sort Filters								
Sort Field 1: Due Date	Sort Order 1: Ascending	Sort Field 2: Client Name	Sort Order 2: Ascend	ding 💌				
Files Per Page: 10 🔻			Search Rest	ore Clear				

CHAPTER 2

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.

nexsure			HOME HE	LP SETUP LOGOUT
SEARCH ORGANIZAT	ION REPORTS CAMPAIGNS		Bookmarks: Expand Add	Remove Selected 🟾 🍀
ACTIONS OPPORTUNITIES MARKETING BINDE	RLOG EDITS AUDITS EXPIRATION	S ENDORSEMENTS CANCELLATIONS	CLAIMS INTERFACE DELIVE	RY
Hello, Betsy Cormier			► H	lome
actions				
All 💽 [Outlook]	K	f1 Page 1	[Export] Filter: [Hide]	[Add New]
Search Filters			Filter Settings: Sa	Reset
Action Topic: Marketing,New busin	Assigned To: Betsy Cormier	Created By:	Last Updated By:	
Action Type:	Due Date (Fr):	Due Date (To): 2/6/2009	Policy No:	
Action Status: Open 💌	Client Name:	Memo:	Certificate No:	
Description:				
Sort Filters Sort Field 1: Due Date	Sort Order 1: Ascending	Sort Field 2: Client Name	Sort Order 2: Ascer Search Res	nding 🔽 store Clear

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** \square 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** popup to establish date criteria before (-) or after (+) the current date before clicking **Save**.

nexsure			HOME HELP SETUP LOGOUT
SEARCH ORGANIZATI	ON REPORTS CAMPAIGNS		Bookmarks: Expand Add Remove Selected 💖
ACTIONS OPPORTUNITIES MARKETING BINDER	LOG EDITS AUDITS EXPIRATIONS	ENDORSEMENTS CANCELLATIONS	CLAIMS INTERFACE DELIVERY
Hello, Betsy Cormier			► Home
actions			
All 🔽 💽 [Outlook]	Showing page 1 of	1 Page 1	Export] Filter: [Hide] [Add New]
Search Filters			Filter Settings: Save Reset
Action Topic: Marketing,New busin	Assigned To: Betsy Cormier	Created By:	Last Updated By:
Action Type:	Due Date (Fr):	Due Date (To): 2/6/2009	Policy No:
Action Status: Open 💌	Client Name:	Memo:	Certificate No:
Description:			
Sort Filters			
Sort Field 1: Due Date	Sort Order 1: Ascending	Sort Field 2: Client Name	Sort Order 2: Ascending
Files Per Page: 100 🔻			Search Restore Clear

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.

Search Filters			Filter Settings: Save Reset
Action Topic: Marketing,New busin	Assigned To: Betsy Cormier	Created By:	Last Updated By:
Action Type:	Due Date (Fr):	Due Date (To): 2/6/2009	Policy No:
Action Status: Open	Client Name:	Memo:	Certificate No:
Description:			
Sort Filters			
Sort Field 1: Due Date	Sort Order 1: Ascending	Sort Field 2: Client Name	Sort Order 2: Ascending
Files Per Page: 100 💌			Search Restore Clear

When search filters are saved, the **Reset** button is activated. **Reset** is used to restore the default filter settings to the Nexsure default. **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.

Search Filters			Filter Settings: Save Reset
Action Topic: Marketing,New busin	Assigned To: Betsy Cormier	Created By:	Last Updated By:
Action Type:	Due Date (Fr):	Due Date (To): 2/6/2009	Policy No:
Action Status: Open 💌	Client Name:	Memo:	Certificate No:
Description:			
Sort Filters			
Sort Field 1: Due Date	Sort Order 1: Ascending	Sort Field 2: Client Name	Sort Order 2: Ascending
Files Per Page: 100 🔽			Search Restore Clear

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.

.11		<u> </u>	Outlook]	I Shov	ving page 1 of 2	Page 1	•	Export] [Add No	ew] Filter: [Show
etails	Client Name Priority	Action Topic Action Type	Policy-ID #/Ref LOB(s)/Eff-Exp Dates	Status	Due Date Due Time	Days Left (Overdue By)	Assigned To	Created By Created On	Updated By Updated On
>	Jolt Electric, LL	.c							
P		Endorsement � Annotation	BA987432 Auto - Commercial [08/31/2008 - 08/	Open	09/23/2008 12:01 AM PST	11	Betsy Cormier	Betsy Cormier 09/03/2008	Betsy Cormier 09/03/2008
	Remove vehicl	e							-
	Remove vehic	le							-
Þ	Mark Cormier								
Þ		New business	SW110X Homeowners (HOME) t [03/26/2007 - 03/	Open	09/15/2008 12:01 AM IDLW	3	Betsy Cormier	Nexsure Trainee1 09/03/2008	Betsy Cormier 09/12/2008
	Cross Sell								-
	Auto with no H	lome letter sent - f	ollow up with a phone ca	all				12	3
>	Hudson Proper Management, 3	ty Inc.							
P		Endorsement � Annotation	PKG1234 General Liability [07/01/2008 - 07/	Open	09/01/2008 12:01 AM PST	(11)	Betsy Cormier	Betsy Cormier 08/12/2008	Betsy Cormier 08/12/2008

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.

h	ex	sure								HOME HEI	lp setup logout
			SEARCH ORGAN	IZATION REPORTS CA	MPAIGNS				Bookmarks: Expa	and Add F	Remove Selected 🟾 🌮
AC	TIONS	OPPORTUNITIE	5 MARKETING B	INDER LOG EDITS AUD	TS EXPIR	RATIONS E	NDORSEMENTS	CANCELLATIONS	CLAIMS INTERF	ACE DELIV	ERY
н	iello, E	Betsy Cormi	er							► H	ome
(actions										
	All			Outlook]	ll≮s	howing page	e 1 of 8 ▶ 🕅	Page 1	Export]	[Add New] Action	Filter: [Show]
	Detail	Client Name s Priority	Action Topic Action Type	Policy-ID #/Ref LOB(s)/Eff-Exp Dates	l Status l	Due Date Due Time	Days Lef (Overdue I	it By) Assigned To	Created By Created On	Plan) Upda	Cancel - Insd Req CIS
	₽	New England Generator	Power								Dave Test Dave Test Trigger Ev Renewal Plan

 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 <u>cannot</u> be attached to a client at a later time; all client actions must be added at the client level.

Action Items	ne sure
Tabiru Assign	
© Current User : Betsy Cormier	<u> </u>
O Others:	
Status: Open	
Priority: Normal	v
Date: Search	
Time: 12 V 01 V AM V	
(GMT-05:00) Eastern Time (US & Car	
Description	
Memo	*
	V
Previous Memo	
	-
	<u>v</u>
MS Office Integration	
MS Outlook Reminder 15 Min 🗹 Save Si	ave & Add Cancel

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.

Action It	tems
Name:	Personal Action
Topic:	
Type:	Activity
Status:	Binder Cancellation
Priority:	Certificates
Due Date:	Correspondence
Due	Endorsement
Time:	General Audit Marketing
Descriptio	Memo Y New business Non-renewal
l Memo	Note Personal
	Phone Call Policy Edit
	Prospecting
	Renewal Reporting Policies Verifications

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.

Action Items				
Name:	Personal Action			
Topic:	Personal 🔹			
Type:				
Status:	Appointment			
Prioritu	Department Meeting			

- 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** ion 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.

Action Items
Name: Personal Action
Topic: Personal
Type: Department Meeting
Status: Open 💌
Priority: Normal 💌
Due 9/26/2008
Due 10 V 00 V AM V
(GMT-05:00) Eastern Time (US & Car 💌

Note: Keep in mind that these are personal actions.

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.

C Current	User : Betsy Cormier	
• Others:		
		-
Search		_
First Name:	su	
last Name:	md	

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.

Assign	
Ourrent User : Betsy Cormier	<u> </u>
C Others:	
	-
Search	
Could not find a matching person.	
First Name:	
Last Name:	
Requery	
Reducty	

- 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.

Action Items	ne sure
Name: Personal Action	
Topic: Personal	*
Type: Department Meeting	
Status: Open 💌	
Priority: Normal	_
Due 9/26/2008	Ŧ
Due Loo Loo First Name:	
Time: 10 00 AM	
(GMT-05:00) Eastern Time (US & Car 💌 Search	
Description	
Department Meeting	
Memo Department Meeting to review new products	
Department Meeting to review new products	
	v
Previous Memo	
	~
	-
MS Office Integration	
MS Outlook Reminder 15 Min 💌	e & Add Cancel

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.

nexsure								HOME HE	LP SETUP LOG	OUT
	SEARCH ORG	ANIZATION F	REPORTS CA	MPAIGNS			Bookmark	s: Expand Add	Remove Selected	1
ACTIONS OPPORTUNITIE	S MARKETING	BINDER LOG	EDITS AUD	ITS EXPIRATIONS	ENDORSEM	ENTS CANCELLATIO	NS CLAIMS	INTERFACE DELIV	ERY	
Hello, Betsy Cormi	er							► H		
actions										
All		🔽 💽 [Outlool	k]	Showing page	1 of 2 ▶ 🕅	Page 1	Expo	ort] [Add New]	Filter: [Show]	

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.

Nexsure Outlook Synchronization				
1 item(s) synchronized. Click on OK to continue.				
СК				

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.	

actions		
Client Name Details Priority	Actio Actio rts	Winston Auto Pa
Add New Action Mark As Closed Print Application		Open Add New Action Mark As Closed Print Application

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.

1	opportuni	ities									
	All		~		Showing	Page 0 of 0 🕨				Filters: [Show]	
	Details	Client Name Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BOR Date	Program	Contacts	

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	

nexsure				Home Help Setup Logout
SEARCH ORGANIZAT	ION REPORTS CAMPAIGNS		Bookmarks: Exp	oand Add Remove Selected 🛛 🏁
ACTIONS OPPORTUNITIES MARKETING BINDE	R LOG EDITS AUDITS EXPIR	ATIONS ENDORSEMENTS CANO	ELLATIONS CLAIMS INTERFA	ACE DELIVERY
Hello, Betsy Cormier				▶ Home
opportunities				
All	Showing	Page 1 of 1 🕨 🛛 📘		Filters: [Hide]
Search Filters	ROR Data (Ec)		Accion	Save Filter Settings
	sok bate (FI):	A-bate/Box bate (To):		-the the second s
	ated Date (Fr):	Updated Date (10):	Kespons	sibility:
System Grade: All Co	mmission (Fr):	Commission (To):	Updat	ted By:
Status: All	Program:	Score:		LOB:
Bill Method: All	Retail Agent:	Business Type(s):		-
Sort Filers Sort Field 1:	Sort Order 1:	Sort Field 2:	Sort O	rder 2: Search Clear
Client Name Policy Type Details Assign Line of Business	User / System Grade (Score) Statu	Updated By s Updated Date (X-Date Commission BOR Date	Program Contacts
🃝 Mason Crenshaw				<u>~</u>
Homeowners (HOME)	Bronze/Lump 0 - N/A of Coal(0)	Mary Oberleitner 12/05/2008	\$0.00 12/05/2008	8 Environmental 🕵

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 screen of the screen displays all assignments for the opportunity.

Assi	ignm	ent List.			ne sure
		Responsibility	First Name	MI	Last Name
		Account Manager	David		Cline
B		Producer	Mary		Oberleitner

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

Contac	:t list	ne sure
	Role	Name
5	My Contact	Henry Brant

ne	sure							IOME HELP S	ETUP LOGOUT
		SEARCH ORGANIZA	TION REPORTS				Bookmarks:	Expand Add R	emove Selecter
ACTIONS	ACTIONS OPPORTUNITIES MARKETING BINDER LOG EDITS AUDITS EXPIRATIONS ENDORSEMENTS CANCELLATIONS CLAIMS INTERFACE DELIVERY								
Hello	, Mary Obe	erleitner						► Home	
opport	unities								
All		~	М	Showing Page	elof1 ▶M	1 🕶		Filt	ters: [Show]
Detai	Client Nar Is Assign	ne Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BOR Date	Program	Contacts
	Beautiful	World of Flowers							
	2	Monoline Commercial Property	Lump of Coal/Gold(82)	0 - N/A	Mary Oberleitner 02/27/2006	\$0.00	03/15/2006	Retail Sale	15 😰
	2	Package Commercial Auto (Al	Bronze/Gold (82)	0 - N/A	Mary Oberleitner 02/27/2006	\$0.00	03/15/2006	Retail Sale	:s 😰

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.

-	opportunities						
	All		*				
		Client Name	Policy Type				
	Detai	ls Assign	Line of Busine				
		Open					
		Add New Opportunil	зy				
	.	Market New Line of	Business				

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.

opport	opportunities					
All		*				
Detai	Client Name ils Assign	Policy Type Line of Busine				
- D	Cathy Smith					
	Open	ы н 				
	Add New Line of Bus	iness				
*	Market Print					

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.

r	marketing										~
	All		*		Showing Pa	ge1of5 ▶N	1 🗸			Filters: [Show]	
L	Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	I	Estimated Premium	Policy Term	Billing Ca rri er Issuing Car ri er	

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

nexsure					Home Help Setup Logout
SEARCH ORGA	NIZATION REPORTS CA	MPAIGNS		Bookmarks:	Expand Add Remove Selected 🛛 🏁
ACTIONS OPPORTUNITIES MARKETING	BINDER LOG EDITS AUDI	TS EXPIRATIONS	ENDORSEMENTS CANCE	LLATIONS CLAIMS INTE	RFACE DELIVERY
Hello, Betsy Cormier					► Home
marketing					
All		Showing P	age 0 of 0 🕨 🕅		Filters: [Hide]
Search Filters Client Name:	Eff. Date (Fr):		Eff. Date (To):	Ass	ignment:
Client Type: All	Exp. Date (Fr):		Exp. Date (To):	🤨 🚺 Resp	onsibility:
Policy Status: All	Issuing Carrier:		LOB:	Up	dated By:
Bill Method: All	Updated Date (Fr):		Updated Date (To):	🚺 🚺 Ret	ail Agent:
Business Type(s):					
Sort Filters Sort Field 1:	Sort Order 1:	•	Sort Field 2:	Sort	: Order 2: Search Clear
Client Name Details Assign Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Estimated Premium Policy Te	Billing Carrier rm Issuing Carrier

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 $\frac{1}{200}$ icon on the left side of the screen displays all assignments for the marketing submission.

Assignment List.							
		Responsibility	First Name	MI	Last Name		
		Account Manager	David		Cline		
-	V	Producer	Mary		Oberleitner		

CHAPTER 2

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.

All		~		Showing Pag	e1of1 ▶∭	1 🛩			Filters: [Sho
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date		Estimated Premium	Policy Term	Billing Carrier Issuing Carrier
>		New England Power	(Commercial Lines)						
•		Unassigned Pr Unassigned NH Auto	Monoline	Marketing	Betsy Cormier 02/01/2008		\$0.00 D	02/01/2008 02/01/2009	The Hartford Insurance

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.

nex	sure							iome Help Setup	LOGOU
SEARCH ORGANIZATION REPORTS Bookmarks: Expand Add Remove Selected									
ACTIONS	OPPORTUNI	TIES MARKETING	BINDER LOG EDITS A	UDITS EXPIRATION	S ENDORSEMENTS	CANCELLATIONS CLA	IMS INTERFACE	DELIVERY	
Hello, Mary Oberleitner Home									
marketin	ng								
All		*		Showing Page	5 of 5 🕨	5 🛩		Filters: [Show]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Estimated Premium	Policy Term	Billing Carrier Issuing Carrier	
>		Over 10516	(Commercial Lines)						^
*	2	Test 10516	Monoline Commercial Property	Marketing Pending	Anne Hammor 06/20/2005	\$0.00 A	06/20/2005 06/20/2006	Auto Owners Auto Owners	
	ø	Create new mark	eting						

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.

marketing						
All	*					
Detai	Client Name Details Assign Policy Number					
	Open					
	Add New Opportunity					
	Market New Line of Business					

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.

marketing							
All			~				
Deta	ils Assign	Client Nam Policy Num	e ber				
>		New Englar	nd Po				
>	Open		וו				
	Add New Line	e of Business	ma				
	Market Existi	ng	П				
	Print						
	Rate						
	Send To History						
	Submit						
	All Deta	All Details Assign	All Details Assign Client Nam Policy Num Open Add New Line of Business Market Existing Print Rate Send To History Submit				

Right clicking on the **Memo** ⁶ 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.

binder l	og							
Branch	All		~					
View	Agency Is:	sued Binders	~	Showing Pa	ge1of2 ▶N	1 🕶	Filters: [Show]	11
Detail	s Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Coverage Eff Date Billed Premium Coverage Exp Date	Billing Carrier Issuing Carrier	

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

nexsure					НОМЕ	HELP SETUP LOGOUT
SEARCH OF	RGANIZATION				Bookmarks: Expa	nd Add Remove Selected
ACTIONS OPPORTUNITIES MARKETING	BINDER LOG EDITS	AUDITS EXPIRATI	ONS ENDORSEMENTS	CANCELLATIONS CLA	IMS INTERFACE	DELIVERY
						Home
binder log						<u>^</u>
Branch: All	~					
View: Agency Issued Binders	~	Showing	Page 0 of 0 🕨			Filters: [Hide]
Search Filters						Save Filter Settings 🔲
Client Name:	Cvg. Eff. Date (Fr):		Cvg. Eff. Date (To):		Assignment:	
Client Type: All	Cvg. Exp. Date (Fr):		Cvg. Exp. Date (To):		Responsibility:	
Policy All	Issuing Carrier:		LOB:		Updated By:	
Bill Method: All	Updated Date (Fr):	1 - C	Updated Date (To):		Retail Agent:	=
Sort Filters						
Sort Field 1: 🗸	Sort Order 1:	~	Sort Field 2:	~	Sort Order 2:	~
						Clear Search
Client Name Details Assign Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Cove Billed Premium Cove	rage Eff Date rage Exp Date	Billing Carrier Issuing Carrier

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 $\frac{1}{2}$ icon on the left side of the screen displays all assignments for the binder log.

Assignm	ient List.			ne sure
	Responsibility	First Name	MI	Last Name
I	Account Manager	David		Cline
I	Producer	Mary	Oberleitner	

binder	og							
Branch	: All		*					
View	Agency Is	sued Binders	*	🕅 Showing Pa	ge 1 of 1 🕨	1 🗸		Filters: [Show]
Detai	s Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Billed Premium (Coverage Eff Date Coverage Exp Date	Billing Ca rri er Issuing Carrier
		Masons Grill	(Commercial Lines)					<u>^</u>
	20	WC-786786	Monoline Workers Compensat	Policy In Force	Mary Oberleitn 02/27/2006	\$0.00 D \$0.00 D	02/27/2006 04/28/2006	AllState AllState
	20	WC-56556	Monoline Workers Compensat	Policy Bound	Mary Oberleitn 06/07/2005	\$0.00 D \$0.00 D	02/17/2006 04/18/2006	Allied Insurance Allied Insurance

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 la	g					
Branch:	All		*			
View:	Agency Is	sued Binders	•		Showing Pag	ge 1 of 1
Details	Assign	Client Name Policy Num	e ber I	Policy Type ine of Business	Stage Status	Upda Last l
		Cormier Co	nstructio (Commercial Lines)		
-	20	Binder1234	A	Monoline uto - Commercial (I	Policy Bound	Betsy 02/0
			Binder1234 NH Auto			

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.

binder log								
Branch:	All		*					
View:	Agency Iss	ued Binders	~	🕅 🔍 Showing Pa	ge 1 of 1 🕨	1 🕶		Filters: [Sho
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Billed Premium	Coverage Eff Date Coverage Exp Date	Billing Carrier Issuing Carrier
		Masons Grill	(Commercial Lines)					
	2	WC-786786	Monoline Workers Compensat	Policy In Force	Mary Oberleitn 02/27/2006	\$0.00 D \$0.00 D	02/27/2006 04/28/2006	AllState AllState
	2	WC-56556	Monoline Workers Compensat	Policy Bound	Mary Oberleitn 06/07/2005	\$0.00 D \$0.00 D	02/17/2006 04/18/2006	Allied Insurance Allied Insurance
V		JH Electrical	(Commercial Lines)					
*	20	UMB-7898980	Monoline Umbrella - Commerc	Policy Bound	Mary Oberleitn 06/09/2005	\$0.00 D \$0.00 D	06/09/2005 08/08/2005	Allied Insurance Allied Insurance
Þ		Rugged Tires	(Commercial Lines)					
	2	BA-89778-A	Monoline Commercial Auto (Al	Policy Future	Mary Oberleitn 08/23/2005	\$1,500.00 A \$1,500.00 A	04/27/2005 04/27/2006	Auto Owners Auto Owners
		Winston Auto Parts	(Commercial Lines)					
	2	UMB-9867698	Monoline Umbrella - Commerc	Policy In Force	Mary Oberleitn 10/11/2005	\$0.00 D \$0.00 D	09/26/2005 01/06/2006	Hartford Hartford
Þ		Brenda Maxim Sales	(Commercial Lines)					
	2	gg-2472	Monoline Commercial Property	Policy Bound	Mary Oberleitn 10/11/2005	\$0.00 A \$0.00 A	08/11/2005 11/10/2005	Travelers Travelers

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.

1	binder log						
	Branch:	All					
	View:	Agency Issued Binders					
	Details	Client Name Assign Policy Number					
	2	Dpen					
	P	Add New Opportunity					
		Market New Line of Business					

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.

binder log						
Branch:	All					
View:	Agency Iss	ued Binders				
Details	Assign	Client Name Policy Numb				
		Masons Grill				
🐶 c)pen					
D 🕞 🕨	1arket Existing					
F	rint					
S S	iervice					

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.

6	edits									
[All		~		Showing Pa	ge 1 of 1 🕨	1 💌		Filters: [Show]	
	Details	Cli Assign Po	ient Name blicy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier	

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

nexsure					ном	HELP SETUP LOGOUT
SEARCH ORGAN	IZATION REPORTS CA	MPAIGNS		Bool	kmarks: Expand	Add Remove Selected 🟾 🍀
ACTIONS OPPORTUNITIES MARKETING B	INDER LOG EDITS AUDI	TS EXPIRATIONS	ENDORSEMENTS CAN	ICELLATIONS CLAIM	S INTERFACE D	DELIVERY
Hello, Betsy Cormier						► Home
edits						
All		Showing P	age 0 of 0 🕨 🕅			Filters: [Hide]
Search Filters						Save Filter Settings 📃
Client Name:	Eff. Date (Fr):		Eff. Date (To):	ē	Assignment:	Betsy Cormier
Client Type: All	Exp. Date (Fr):		Exp. Date (To):		Responsibility:	
Policy Status: All	Issuing Carrier:		LOB:		Updated By:	
Bill Method: All	Updated Date (Fr):		Updated Date (To):		Retail Agent:	
Business Type(s):						
Sort Filters						
Sort Field 1: Eff Date	Sort Order 1: Asce	ending 💌	Sort Field 2:	-	Sort Order 2:	
						Search Clear
Client Name Details Assign Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier

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 **a** icon on the left side of the screen displays all assignments for the edits.

Assignment List.						
		Responsibility	First Name	MI	Last Name	
5		Account Manager	David		Cline	
S	V	Producer	Mary		Oberleitner	

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.

All		*		Showing Pa
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status
>		Betsy Cormier	(Commercial Lines)	
>	2	BA123456	Monoline Auto - Commercial (Edit Pending
	<u>ø</u>	Edi BA123456 NH A/Risk Au	to	

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.

edits								
All		*		Showing Pa	ge 1 of 1 🕨	1 🕶		Filters: [Show]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier
		Betsy Cormier	(Commercial Lines)					<u>^</u>
P	20	BA123456	Monoline Auto - Commercial (1	Edit Pending	Betsy Cormier 02/01/2008	\$0.00 D \$0.00 D	09/07/2007 09/07/2008	The Hartford Insurance
	Ø	Edited to correct	policy number					

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.

edits						
oll.						
AII						
Detai	Ulent Name Is Assign Policy Number					
	Open					
- 🐶	Add New Opportunity					
	Market New Line of Business					

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.		

edits		
All		
Detai	ls Assign	Client Name Policy Numbe
		Janet Anders
>	Open	110 15 100 01
	Abort Edit	
	Post Edit	[]
	Print	
_		

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 b 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.			

Right clicking on the **Memo** ¹/₂ icon presents shortcut links as follows:



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.

r	audits									~
	All		*		Showing Pa	ge 1 of 1 🕨	1 🕶		Filters: [Show]	
	Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier	

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

nexsure						ном	e Help Setup Logout
	SEARCH ORG	ANIZATION				Bookmarks: Exp	and Add Remove Selecte
ACTIONS OPPORTUN	ITIES MARKETING	BINDER LOG EDITS	AUDITS EXPIRATIONS	ENDORSEMENTS	CANCELLATIONS CLAIM	MS INTERFACE I	DELIVERY
							► Home
audits							
All	*		Showing P	age 0 of 0 🕨			Filters: [Hide]
Search Filters							Save Filter Settings 📃
Client Name:		Eff. Date (Fr):		Eff. Date (To):		Assignment:	
Client Type: All	~	Exp. Date (Fr):		Exp. Date (To):		Responsibility:	
Policy Status: All	~	Issuing Carrier:		Billing Carrier		Updated By:	
Bill Method: All	~	Updated Date (Fr):		Updated Date (To):		LOB:	
Retail Agent:							
Sort Filters							
Sort Field 1:	~	Sort Order 1:	~	Sort Field 2:	~	Sort Order 2:	~
							Clear Search
Details Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier

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 $\frac{1}{200}$ icon on the left side of the screen, displays all assignments for the **HOME > AUDITS** screen.

Assignment List.								
		Responsibility	First Name	MI	Last Name			
		Account Manager	David		Cline			
	1	Producer	Mary		Oberleitner			

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.

audits					
All				*	li
Details	Assign	Client Name Policy Numbe	2r	Policy Type Line of Business	Stage Status
		Cable One		(Commercial Lines)	
P	2	WC-000999		Monoline Workers Compensat	Audit Pending
		08/09 -W/0	WC-000999 Work Comp		

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.

audits								
All			~	Showing Page	e 1 of 1 🕨 🕅	1 🗸		Filters: [Show]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier
		Cable One	(Commercial Lines)					
*	20	WC-000999	Monoline Workers Compensat	Audit Pending	Mary Oberleitn 08/14/2009	\$0.00 A \$0.00 A	07/23/2008 07/23/2009	Auto-Owners Insurar Auto-Owners Insurar
	6	08/09 -W/C final a	udit. Additional premium of \$300.00	due				

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.

audits	audits							
All								
Detai	ls Assign	Client Name Policy Number						
	Open							
	Add New Opportur	nity						
	Market New Line o	fBusiness						

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.

audits						
All						
Detai	ils Assign	Client I Policy				
		Cable				
*	Open Abort Audit					
	Post Audit					
	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.

Details	Assign	Client Name Policy Number	P Line
>		Cable One	(Corr
P	2	WC-000999	Work
	🦉 Op	en	it. Additional
	Ad	d New Action	
	Ma	rk as dosed	
	Pri	nt Application	

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.

expirations				
All	Showing Page 1 of 1	1 -	Export Primary] [Export Result]	Filters: [Show]

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

nexsure					ном	e Help Setup Log(
SEARCH OR	GANIZATION REPORTS	CAMPAIGNS		Boo	kmarks: Expand	Add Remove Selected
ACTIONS OPPORTUNITIES MARKETING	BINDER LOG EDITS	AUDITS EXPIRATIO	ons endorsements can	NCELLATIONS CLAIN	IS INTERFACE	DELIVERY
Hello, Betsy Cormier						► Home
expirations						
All		Showin	ig Page 0 of 0 ▶ 🕅	Export Pr	imary] [Export Re	sult] Filters: [Hide]
Search Filters						Save Filter Settings 📃
Client Name:	Eff. Date (Fr):		Eff. Date (To):		Assignment:	
Client Type: All	Exp. Date (Fr):		Exp. Date (To):		Responsibility:	
Policy Status: All	Issuing Carrier:		Billing Carrier		Updated By:	
Policy Mode: All	Updated Date (Fr):		Updated Date (To):		LOB:	
Bill Method: All	Business Type(s):				D P	ending Nonrenewals only
Sort Filters						
Sort Field 1:	Sort Order 1:	•	Sort Field 2:	•	Sort Order 2:	▼
						Search Clear
Client Name Details Assign Policy Number	Policy Type Line of Business	Stage Status	Updated By Mode Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier

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.

ſ	expirations									
	All		V		K Showing F	age 1 of 3	3 ▶ ₩ 1 🔽	Export Prin	nary] [Export Re	sult] Filters: [Shov
	Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier
	2		AAA Construction	(Commercial Lines)						
	>	E 🏚	Unassigned	Package General Liability - Cc	Policy In Force	New	Mary Oberleitn 12/09/2008	\$0.00 E \$0.00 E	12/09/2008 12/09/2009	Hartford Insurance G Hartford Casualty In:
		1	Create marketing p	olicy from opportunity.						

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 screen, displays all assignments for the binder log.

Assignment List.						ne sure	
			Responsibility	First Name	MI	Last Name	
			Account Manager	David		Cline	
		V	Producer	Mary		Oberleitner	

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.

II			*		Showing F	Page 1 of
Details	Assign	Client Policy	Name Number	Policy Type Line of Business	Stage Status	Mode
>		Cormie	r Constructio	(Commercial Lines)		
>	20	WC123	456	Monoline Workers Compensat	Policy In Force	Ne
	1	Increas	se payroll \$50	00 AP		
>	20	Binder	Binder1234			
		Add B	NH Auto			
>	20	BOP12				
	1	Increa				
>	20	AGCle				
	1	Action				

expirations									
All		*		Showing P	age 1 of 1	► M 1 💌	Export Prima	ary] [Export Res	ult] Filters: [Show]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Mode U	Updated By Ipdated Date	Annualized \$ Billed Premium Po	olicy Term	Billing Carrier Issuing Carrier
		Cormier Constructi	or (Commercial Lines)						<u>^</u>
₽	20	WC123456	Monoline Workers Compensat	Policy In Force	New	Betsy Cormier 11/06/2007	\$3,000.00 D \$3,000.00 D	07/13/2007	The Hartford Insurance
	6	Increase payroll \$5	500 AP						
P	20	Binder1234	Monoline Auto - Commercial (1	Policy Bound	New	Betsy Cormier 02/01/2008	\$-1,063.33 D \$1,840.00 D	07/01/2007	Safeco Safeco
	1	Add Binder Numbe	r pending receipt of poli	icy from carrier					

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** I cons 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 Policies 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.

Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier
>		NAC Communication	(Commercial Lines)						
>	20	903579442	Monoline Commercial Auto (Co	Policy In Force	New	Katie Guiou 03/31/2005	\$0.00 D \$0.00 D	09/09/2004 09/09/2005	Travelers Travelers
	1	Process edit.							
>		N Crowd Restaurant	: (Commercial Lines)						
	20	Unassigned	Package Commercial Property	Policy Renewed	New	Katie Guiou 06/27/2005	\$0.00 D \$0.00 D	08/01/2004 08/01/2005	Twin City Fire & Ma The Hartford
	1	Process new market	ting application.						
>		Danny Smith	(Commercial Lines)						
*	20	PKG132513	Package Commercial Property	Policy Renewed	New	Karen Petersoi 05/06/2005	\$3,950.00 D \$3,950.00 D	07/01/2004 07/01/2005	Safeco Ins of Ame Safeco
	0	Create new marketi	ng						

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.

expirations						
All		*				
Deta	Client Nam ils Assign Policy Nun	ie iber				
2	Open					
	Add New Opportunity					
	Market New Line of Business					

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 desired.				
Renew	Choosing this option adds an action annotation, and renews the selected version the policy. Renewing this way does not provide an opportunity to choose a marketi policy or combine lines of business. Therefore, this option should only be used wh 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 b 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.

endo	rsements 🔪						
All		~		Showing Pa	ge 1 of 2 🕨	1 🛩	Filters: [Show]
Det	tails Assigr	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Coverage Eff Date Billed Premium Coverage Exp Date	Billing Ca rrier Issuing Car ri er

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

nexsure	е					НОМЕ	HELP SETUP LOGOUT
	SEARCH OR	GANIZATION				Bookmarks: Expa	nd Add Remove Selected
ACTIONS OPPORT	UNITIES MARKETING	BINDER LOG EDITS	AUDITS EXPIRATIO	NS ENDORSEMENTS CA	NCELLATIONS CLAIMS	5 INTERFACE DE	LIVERY
							▶ Home
endorsements							^
All	~		Showing	Page 0 of 0 🕨			Filters: [Hide]
Search Filters							Save Filter Settings 📃
Client Name:		Cvg. Eff. Date (Fr):		Cvg. Eff. Date (To):		Assignment:	
Client Type: All	~	Cvg. Exp. Date (Fr):		Cvg. Exp. Date (To):		Responsibility:	
Policy Status: All	~	Issuing Carrier:		LOB:		Updated By:	
Bill Method: All	~	Updated Date (Fr):		Updated Date (To):		Retail Agent:	
Sort Filters							E
Sort Field 1:	~	Sort Order 1:	~	Sort Field 2:	~	Sort Order 2:	~
							Clear Search
Details Assig	Client Name n Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Cove Billed Premium Cove	erage Eff Date erage Exp Date	Billing Carrier Issuing Carrier

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 and icon on the left side of the screen displays all assignments for the **HOME > ENDORSEMENTS** screen.

,	\ssi	gnm	ent List.			ne sure
			Responsibility	First Name	MI	Last Name
	-		Account Manager	David		Cline
	3	1	Producer	Mary		Oberleitner

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.

	endorseme	ents			
[All			*	
	Details	Assign	Clier Polie	nt Name cy Number	Policy Typ Line of Busin
	>		Corr	nier Constructio	(Commercial
	>	20	BA2	345678	Monolin Auto - Comm
		ø	Add	BA2345678 NH Auto	

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

endorsem	ents								
All		*		Showing Page	e 1 of 1 ▶ 🕅	1 🛩		Filters: [S	how
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ C Billed Premium C	overage Eff Date overage Exp Date	Billing Carrier Issuing Carrier	
2		Cormier Construct	tio: (Commercial Lines)						_
	\$	BA2345678 Add 2007 Chev Tr	Monoline Auto - Commercial (1 uck	Endorsement Submitted	Betsy Cormier 02/01/2008	\$-1,063.33 D \$1,840.00 D	02/01/2008 07/01/2008	Safeco Safeco	

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.

endorsements						
All		*				
Client Name						
Detail	s Assign	Policy Number				
- P	Open					
P	Add New Opportunity					
	Market New Line of Business					

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.

-	endorsements						
	All						
	Detail	s Assign	Client Name Policy Numb				
			Masons Grill				
	>	Open					
		Print					
	P	Service					

Right clicking on the **Memo** ⁶ 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.

cancellatio	ns								
All		~		Showing Pag	e1of1 ▶∭	1 🛩		Filters: [S	how]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ 0 Billed Premium 0	overage Eff Date overage Exp Date	Billing Ca rri er Issuing Carrier	
		Masons Grill	(Commercial Lines)						
>	2	CB-979887	Package Commercial Property	Policy Pending Cance	Mary Oberleitn 03/16/2005	\$0.00 D \$0.00 D	04/10/2006 12/16/2006	AllState AllState	
	1	No Message(s).							

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

SEARCH ORGANIZATION Bookmarks: Expand Add Remove Selected ACTIONS OPPORTUNITIES MARKETING BINDER LOG EDTS AUDITS EXPIRATIONS ENDORSEMENTS CALINS INTERFACE DELIVERY Filters: [Hide] Save Filters Cancellations All V K Showing Page 0 of 0 > M Filters: [Hide] Search Filters Save Filter Settings Cient Name: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Assignment: Filters Client Name: V V Cvg. Eff. Date (Fr): Cvg. Exp. Date (To): Responsibility: Policy Type Bill Method: All V Updated Date (Fr): Updated Date (To): Sort Field 2: Sort Order 2: V Sort Field 1: V Sort Order 1: V Sort Field 2: Sort Order 2: V	nexsure						номе	HELP SETUP LOGOUT
ACTIONS OPPORTUNITIES MARKETING BINDER LOG EDTIS AUDITS EXPIRATIONS ENDORSEMENTS CANCELLATIONS CLAIMS INTERFACE DELIVERY HOME All V K Showing Page 0 of 0 V Filters All V K Showing Page 0 of 0 V Filters: [Hide] Search Filters Client Name: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Set Assignment: Client Type: All V Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): Cvg. Eff. Date (To): Cvg. Eff. Responsibility: Client Type: All V Updated Date (Fr): Cvg. Exp. Date (To): Cvg. Eff. Responsibility: Bill Method: All V Updated Date (Fr): Cvg. Eff. Date (To): Cvg. Eff. Retail Agent: Sort Filters Sort Filed 1: V Sort Order 1: V Sort Field 2: V Sort Order 2: Client Search Date of Client Name Policy Type Stage Updated By Annualized 5 Coverage Eff Date Billing Carrier		SEARCH OR	GANIZATION				Bookmarks: Expa	and Add Remove Selected
All V K Showing Page 0 of 0 Filters: Sort Field 1: V Sort Order 1: Voldated Date (To): Sort Field 2: Voldated Page: Clear: Search Eliters: Sort Field 1: V Sort Order 1: Voldated Page: Voldated Page: Filters: Clear: Search Eliters: Eliter: Filters: Filter:	ACTIONS OPPORTUNI	TIES MARKETING	BINDER LOG EDITS	AUDITS EXPIRATIO	ns Endorsements 🛛	NCELLATIONS CLAIMS	INTERFACE D	ELIVERY
Cancellations All V Kill showing Page 0 of 0 >> Filters: [Hide] Search Filters Save Filter Settings Client Name: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Cvg. Eff. Date (To): <td< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>Home</th></td<>								Home
All Id showing Page 0 of 0 >> Filters: [Hide] Search Filters Save Filter Settings Client Name: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Policy Status: Client Type: All V Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): Policy Status: Policy Status: V Issuing Carrier: LOB: Updated By: Policy Status: Sort Fileds Sort Filed 1: V Sort Order 1: V Sort Filed 2: V Sort Order 2: V Client Name Policy Type Stage Updated By: Policy Status Status Status Policy Type Stage Policy Policy Policy Status Status Policy Type	cancellations							^
Search Filters Save Filter Settings Client Name: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Filter Settings Client Type: All V Cvg. Exp. Date (To): Filter Settings Policy Status: V Issuing Carrier: LOB: Updated By: Bill Method: All V Updated Date (Fr): Filter Settings Sort Filders Sort Filde1: V Sort Order 1: V Client Name Policy Type Stage Updated By Client Search	All	*		Showing	Page 0 of 0 🕨			Filters: [Hide]
Client Name: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Assignment: Client Type: All Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): Responsibility: Policy Status: Issuing Carrier: LOB: Updated By: Bill Method: All Updated Date (Fr): If Color	Search Filters							Save Filter Settings 📃
Client Type: All V Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): EP Responsibility: Policy Status: V Issuing Carrier: LOB: Updated By: Bill Method: All V Updated Date (Fr): EP Retail Agent: Sort Field 1: V Sort Order 1: V Sort Field 2: V Clear Search Client Name Policy Type Stage Updated By extremel Billing Carrier	Client Name:		Cvg. Eff. Date (Fr):	ie 🗗	Cvg. Eff. Date (To):		Assignment:	
Policy Status: V Issuing Carrier: LOB: Updated By: Bill Method: All Vupdated Date (Fr): Updated Date (To): Retail Agent: Sort Filders Sort Field 1: Sort Order 1: Sort Field 2: Sort Order 2: Clear Search Clear Search	Client Type: All	~	Cvg. Exp. Date (Fr):		Cvg. Exp. Date (To):		Responsibility:	
Bill Method: All V Updated Date (Fr): Updated Date (To): Retail Agent: Sort Field 1: V Sort Order 1: V Sort Field 2: V Clear Search Client Name Policy Type Stage Updated By Annualized \$ Coverage Eff Date Billing Carrier	Policy Status:	~	Issuing Carrier:		LOB:		Updated By:	
Sort Filed 1: Sort Order 1: Sort Field 2: Sort Order 2: Clear Search Client Name Policy Type Stage Updated By Annualized \$ Coverage Eff Date Billing Carrier	Bill Method: All	*	Updated Date (Fr):		Updated Date (To):		Retail Agent:	
Sort Field 1: V Sort Order 1: V Sort Field 2: V Sort Order 2: V Clear Search Client Name Policy Type Stage Updated By Annualized \$ Coverage Eff Date Billing Carrier	Sort Filters							=
Client Name Policy Type Stage Updated By Annualized \$ Coverage Eff Date Billing Carrier	Sort Field 1:	*	Sort Order 1:	~	Sort Field 2:	~	Sort Order 2:	~
Client Name Policy Type Stage Updated By Annualized \$ Coverage Eff Date Billing Carrier								Clear Search
Details Assign Policy Number Line of Business Status Last Updated Billed Premium Coverage Exp Date Issuing Carrier	Details Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Cove Billed Premium Cove	rage Eff Date rage Exp Date	Billing Carrier Issuing Carrier

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 22 icon on the left side of the screen, displays all assignments for the **HOME > CANCELLATIONS** screen.

Assignment List.						
	Responsibility	First Name	MI	Last Name		
😨 🗆	Account Manager	David		Cline		
B 🗸	Producer	Mary		Oberleitner		

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.

cancellatio	ns				
All		(~	Showing Page	e 1 of 1
Details	Assign	Client Name Policy Numbe	Policy Type r Line of Business	Stage Status	Upda Last (
>		Cormier Cons	tructio: (Commercial Lines)		
>	20	WC123456	Monoline Workers Compensat	Policy Pending Cance	Betsy 02/0
	ø <u></u>	Process c M	VC123456 H A/Risk Work Comp	Pending Cance	02/0

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

cancellatio	ons								
All		~		Showing Page	e1of1 ▶∭	1 💌		Filters: [S	how]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized \$ C Billed Premium C	overage Eff Date overage Exp Date	Billing Carrier Issuing Carrier	
		Cormier Construction	(Commercial Lines)						
P	20	WC123456	Monoline Workers Compensat	Policy Pending Cance	Betsy Cormier 02/01/2008	\$3,000.00 D \$3,000.00 D	07/13/2007 02/01/2008	The Hartford Insurance	
	1	Process cancellatio	n.						

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.

cancel	cancellations					
All	All					
Deta	Client Name ils Assign Policy Number					
2	Open					
	Add New Opportunity					
	Market New Line of Business					

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.

cancellations						
All						
Detai	ls Assign	Client Name Policy Numb				
- ಶ		Masons Grill				
	Open	00.070007				
	Abort Cancella	ition				
	Post Cancellat	ion				
	Market Existing					
	Print					
	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.

cancella	cancellations						
All		~					
Details	Assigr	Client Name Policy Number					
2		Masons Grill ((
P	2	CB-979887 C					
	6	Open					
		Add New Action					
	5	Mark as closed					
	1	Print Application					

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.

٢	claims								
	All		•		Showing Page	elofi 🕨	1 • [Export]		Filters: [Show]
	Details	Assign	Client Name Line Of Business Claim Number	Date Of Loss Claim Status	Mode Claim Stage	Taken By Updated By	Paid Amount Reserve Amount	Policy Term	Issuing Carrier Adjustor

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

claims			
All	Showing Pag	e 1 of 1 🕨 🕺 🔰	Export] Filters: [Hide]
Search Filters			Save Filter Settings
Client Name:	Eff. Date (Fr):	Eff. Date (To):	Assignment: Jane Doe
Client Type: All	xp. Date (Fr):	Exp. Date (To):	Responsibility:
Claim Status: Open 💌 Is	ssuing Carrier:	LOB:	Updated By:
Bill Method: All 💟 Date	e Of Loss (Fr):	Date Of Loss (To):	Retail Agent:
Adjustor:	Claim Stage: All	Claim No:	Policy No:
Claimant: Clmnt Conta	ict First Name:	Clmnt Contact Last Name:	
Sort Filters			
Sort Field 1: Date Of Loss	Sort Order 1: Ascending 🔽	Sort Field 2: Client Name	Sort Order 2: Ascending
			Search Clear
Client Name Line Of Business Da Details Assign Claim Number Cla	ate Of Loss Mode aim Status Claim Stage	Taken By Paid Updated By Claimant Reserve	Amount Issuing Carrier Amount Policy Term Adjustor

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.

claims			
All	🛚 < Showing Page 1 of 1 🕨 🕅	1 💽 [Export]	Filters: [Hide]

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 and the left side of the screen displays all assignments for the selected policy.

,	Assignment List.					
			Responsibility	First Name	MI	Last Name
	-		Account Manager	David		Cline
		V	Producer	Mary		Oberleitner

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.

-	claims				
	All				Showing
	Details	Assign	Client Name Line Of Business Claim Number	s Date Of Loss Claim Status	Mode Claim Stage
			Cormier Constru	iction (Commercial Lines)	
	>	20	Auto - Commerc (CAUTO)	ial 02/01/2008 Open	New
		1	IV collided with		0)
				PD022008	-,

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

Details	Assign	Client Name Line Of Business Claim Number	Date Of Loss Claim Status	Mode Claim Stage	Taken By Updated By	Claimant	Paid Amount Reserve Amount	Policy Term	Issuing Carrier Adjustor
		Nunnally's Glass & Framing Inc. (Commercia							
>	20	General Liability - Commercial	07/23/2009 Open	New Subrogation	Mary Oberleitner Mary Oberleitner	20	\$0.00 \$100,000.00	07/06/2009 07/06/2010	Auto-Owners Insuranc Kevin Mason
		GL Claim Reported- Multiple injuries							
	Ø	Multiple injuries from ru	n away shipping cart b	eing loaded into cu	stomer vehicle.				
_									

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.

claims	claims					
All		*				
Detail	s Assign	Client Name Line Of Business Claim Number				
Þ	Open					
- 🐶	🛃 Add New Opportunity					
	Market New Lir	ne of Business				

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.

claims					
All					
Detail	s Assign	Client Name Line Of Busii Claim Numbi			
		Janet Ander			
P	Open	DAUTO .			
	Market Existing	, [
~~	Print				
	Service				

Right clicking on the **Memo** ⁶ 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			
Claimant List				^
Claimant Name	Contact First Name	Last Name	Phone #	
Adely Zelner	Adely	Zelner	(256) 112-5587	
Clint Henderson	Clint	Henderson	(256) 885-2255	i
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	е

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.

interface advanced search		
All	🕺 🖣 Showing Page 1 of 10 🕨 🕅 🚺 💌	Search Filters: [Show]

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

nexsure					HOME HELP	SETUP LOGOUT
	SEARCH ORGANIZATION REPO	ORTS CAMPAIGNS		Bookm	arks: Expand Add Re	emove Selected 🟾 🂞
ACTIONS OPPORTUNITIES	MARKETING BINDER LOG EDI	TS AUDITS EXPIRATIO	NS ENDORSEMENTS CANCELLATIO	DNS CLAIMS	INTERFACE DELIVER	W
Helio, Betsy Corniler					Ho	ne
interface advanced search	1					
All		🕴 🖣 Showing Pag	ge 1 of 2 🕨 🕅 📘		Sear	ch Filters: [<u>Hide]</u>
Search Filters					Save Fi	ter Settings 🗾
Interface Type: All	 Client 	Name:	Eff. Date (Fr):	- iii - iii	Eff. Date (To):	
Import Status: All	Policy N	umber:	Process Date: (Fr):	- 💽 🗗	Process Date: (To):	
Interface ID:		LOB:	Import Date: (Fr):	- iei ei	Import Date: (To):	
File Type: All	Branch	n Code:	Complete Date:(Fr):	- 10	Complete Date: (To):	
File Status: Pending		Carrier:	NAIC:		CarrierSeqNo:	
File Name:						
Sort Filters						
Sort Field 1: Interface	ID 🔹 Sort Orde	er 1: Ascending	 Sort Field 2: Import Date 	•	Sort Order 2: Ascendin	g 💌
			Files Per Page: 5	•	Clea	r Search

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.

int	interface ``advanced search``								
A	All Showing Page 1 of 10 V N 1 V Search Filters: [Show]								
	Click on Details to view the Interface Details.							ige]	
	Details	Interface ID Carrier Sequence ID	Carrier	File Name File Type	Import Date Completed Date	Exceptions Transactions	Status	Remove	
	P	8	BADGER MUTUAL INSURANCE	Unknown (1k) Daily Download	11/10/2003 4/23/2004	<u>6</u> 6	Pending 0% Complete	E:	

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.

Г	Accept Reject
Ca	Search
	View 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.

interface advanced search					
All	*	🗐 🖣 Showing	Page 1 of 1 🕨 🕅		Search Filters: [Hide]
Search Filters					Save Filter Settings 🔲
Interface Type: All	Clie	nt Name:	Eff. Date (Fr):	🚺 🗖 Eff. Date (To):	
Import Status: All	V Policy	Number:	Process Date: (Fr):	Process Date:(To):	
Interface ID:		LOB:	Import Date:(Fr): 3/24/2010	Import Date:(To):	
File Type: All	Bran	nch Code:	Complete Date: (Fr):	Complete Date: (To):	
File Status: All	~	Carrier:	NAIC:	CarrierSeqNo:	
File Name:					
Sort Filters					
Sort Field 1: Interface ID	Sor Sor	t Order 1: Ascending	Sort Field 2: Carrier	Sort Order 2:	Ascending 💌
			Clients Per Page: 5	~	Search Clear
Accept	Reject	Remove	Print		

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

delivery					
		Showing Pa	ge0 of0 ▶ 🕅		Filters: [Hide]
Search Filters					Save Filter Settings 📃
Title:	Re	egarding:	Created	By:	Sent By:
Date Created From:	Date	Created To:	Entity Nar	ne:	Via: Both 💌
Date Delivered From:	Date	Delivered To:	Entity Ty	pe: All	Status: All
Policy No:		Sent To:			
Sort Filters					
Sort Field 1:	Sort Order 1:	Sort Field 2	2:	Sort Order 2:	▼ Files per Page: 50 ▼
					Search Clear
From Name From Email	To Name Sent To	Entity Name Created By	Title Regarding	Status Message	Date Created Via Date Delivered

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

delive	ry 🗋							
	Showing Page 1 of 1 M Filters: [Show]					[Show]		
	Ű	From Name From Email	To Name Sent To	Client Name Created By	Title Regarding	Status Message	Date Created Date Delivered	Via
8	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
Ê	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

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

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
8	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