Chapter 21

Download, Manual Import and Rating Import/Export

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- Download
- Manual Import
- Interface
- Import Suspects, Policy Header and Commission Information Using Microsoft Excel
- Rating Import/Export

Download

Policy and commission downloads received through your IVANS mailbox or manually imported from non-IVANS download are processed through Nexsure's **interface** screen. Prior to receiving or importing policy and commission downloads, set up your IVANS mailbox and set up Exchange Manager for non-IVANS download. Org and carrier defaults for processing downloads are set up in addition to commission defaults for carriers and people. Employees who will setup download defaults, manually import download files and process download must be given security access.

> **IMPORTANT**: Setup your IVANS mailbox when you are ready to start receiving downloads in your Nexsure site, not before. Contact your Account Manager or Nexsure Support prior to selecting the **Active** check box on your IVANS mailbox setup.

Setup	Resource
IVANS Mailbox	**"Download Setup", Chapter 3, *Admin Training Manual***
Download Defaults	**"Download Setup", Chapter 3, *Admin Training Manual***
Carrier Setup	**"Entity Setup", Chapter 5, *Accounting Training Manual***
Carrier Commissions	**"Entity Setup", Chapter 5, *Accounting Training Manual***
People Commissions	**"Employee Record Maintenance", Chapter 2, *Admin Training Manual***
Exchange Manager	**"Manual Import" later in this chapter**
Security	**"Security", Chapter 9, *Admin Training Manual***

Download files are retrieved from the IVANS mailbox every three hours between 6:00 PM and 6:00 AM Pacific Time every night. Non-IVANS download files are retrieved from the carrier website or a third party site such as TEAM-UP Download and manually imported into Nexsure.

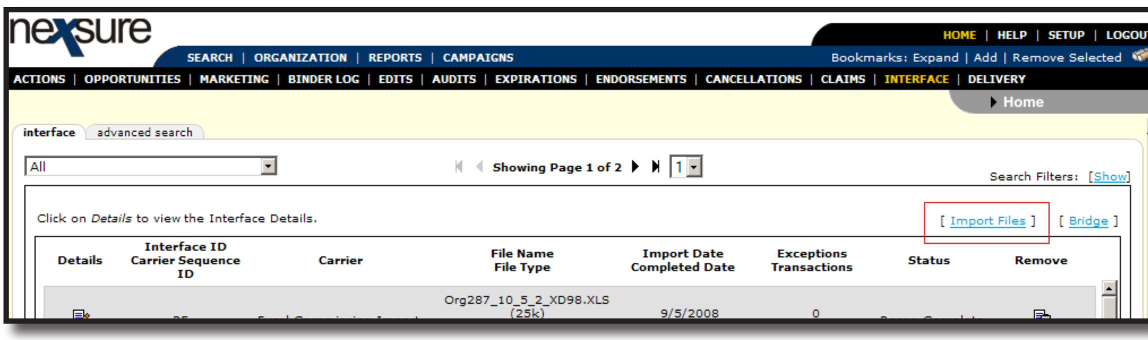
Manual Import

Non-IVANS download files are retrieved from the carrier and saved to a folder on your network or local drive. After saving the file, Exchange Manager is used to import the files into Nexsure.

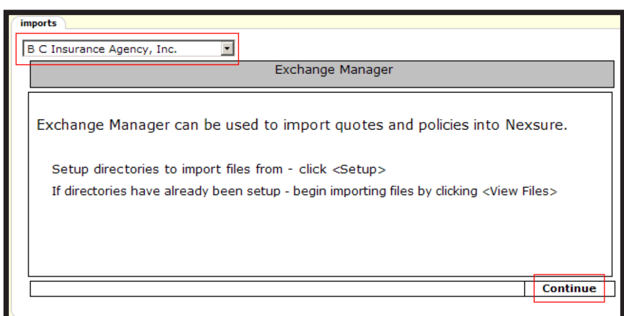
Map Exchange Manager to Source Directory

Before being able to import a file, the **Exchange Manager** must be mapped to the folder containing the files. The mapping from the Exchange Manager to the folder containing the files is set up once and applies to the machine, not the logged on user. Nexsure will remember the machine's mapping. Security rights will determine if a user is able to add a label and directory.

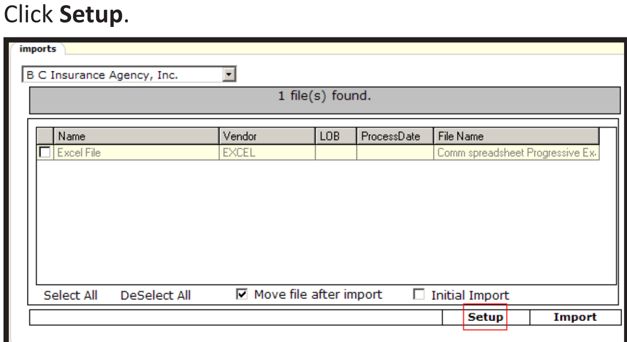
On the **Home** menu click the **INTERFACE** link. On the **interface** tab, click **[Import Files]**.



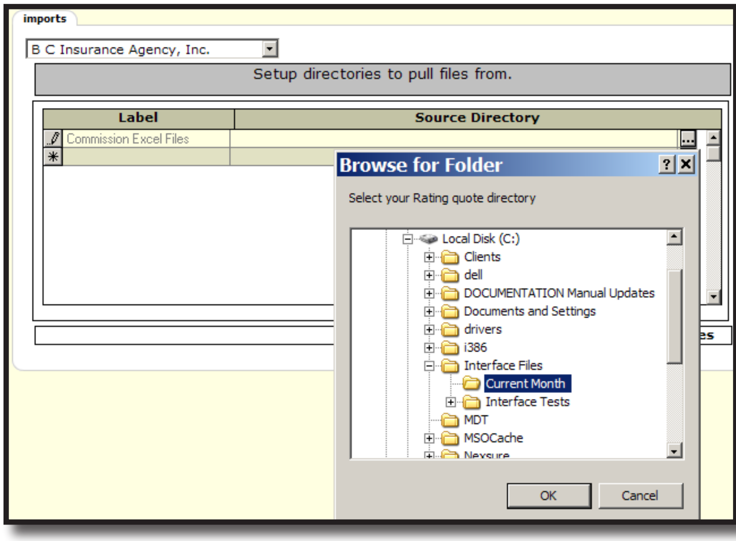
Select a branch on the **imports** tab and click **Continue**. Future imports will not be limited to the branch selected.



Click **Setup**.

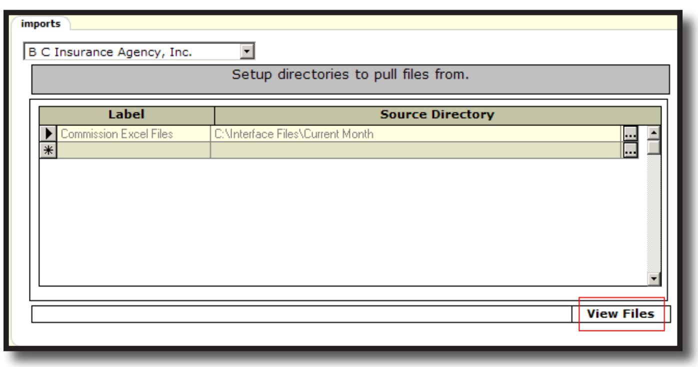


Click in the first **Label** cell and enter a descriptive name for the source directory. In the **Source Directory** column, click the **Ellipsis** icon and browse to the source directory. The **Source Directory** is a folder you have created on your local or network drive that will contain the files to be imported.

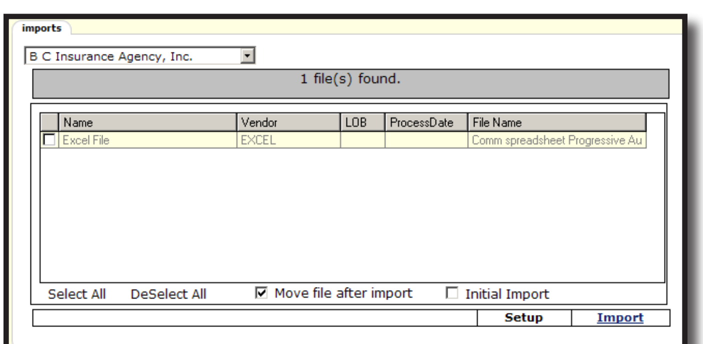


After files are imported, Nexsure creates a folder for **Failed** and **Imported** files. Name your source folder, the folder that contains files to be imported, so that it is easily identified from the other folders. In this example the source folder is **Current Month**.

Once the **Source Directory** has been mapped, click **View Files**.



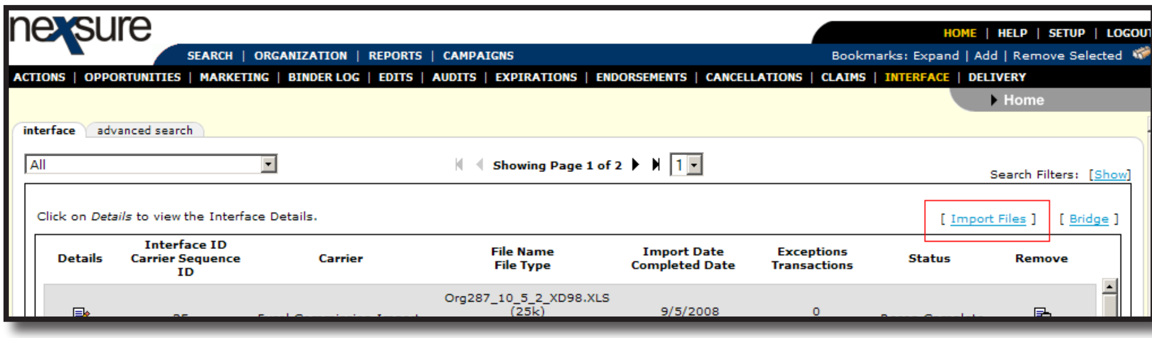
The files located within the **Source Directory** will be displayed.



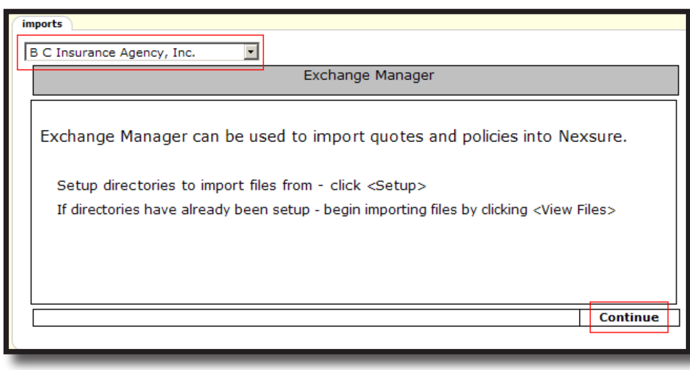
Import Files through Exchange Manager

Files to be imported are saved in a **Source Directory** and imported through Nexsure **Exchange Manager**. Files to be imported are obtained from your carrier website or formatted Microsoft Excel Files for policy or commission information. Carrier download received through your IVANS mailbox is not imported using **Exchange Manager**.

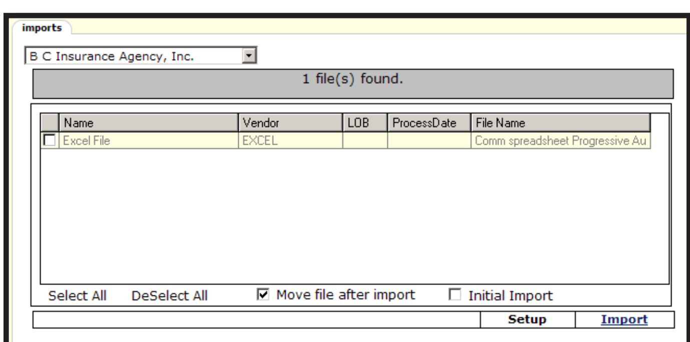
To manually import files, click the **INTERFACE** link on the **Home** menu. The **interface** tab displays. Click **[Import Files]**.



Select the appropriate branch on the **imports** tab and click **Continue**. You must select a branch in order to continue. The import will not be limited to the branch selected.



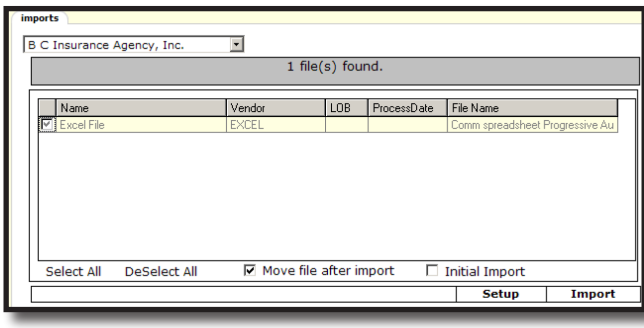
The files you have saved in the **Source Directory** will be displayed. If the files do not display, see "Map Exchange Manager to Source Directory" in this Chapter. Verify that your workstation has been mapped correctly to the **Source Directory** and that the files to be imported have been saved to the **Source Directory** folder.



The following options are available on the **Exchange Manager** screen:

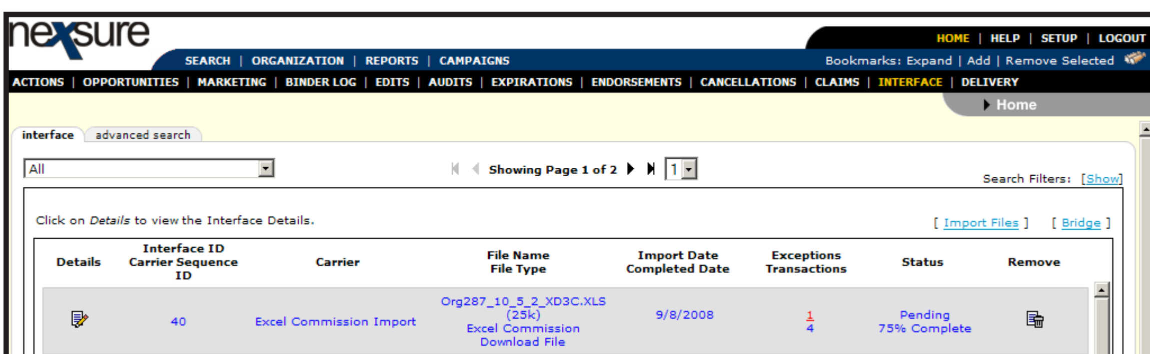
Option	Description
Select All	This will select all files located on the screen for import.
DeSelect All	This will deselect all of the files located on the screen for import.
Move file after import	When this option is selected, Nexsure will move the file after import to one of two folders, Failed or imported. The folders are created automatically by Nexsure to reduce the risk of importing a file more than once. If the Move file after import option is not selected, the next time this screen is accessed, all files will display for selection even if they have already been imported and processed.
Initial Import	This option is used to populate an empty organization. Important: The Initial Import option must be used with caution as there is a risk of creating duplicate policies and/or clients if the organization is not empty.

Select the file or files to be imported. Multiple files may be imported at the same time.



Select **Move file after import** or **Initial Import** if necessary. **Initial Import** is used with caution and only to populate an empty organization. Selection of **Move file after import** will remain as the default selection for future file imports.

Click **Import**. Once the file has been imported, the screen will refresh and the main **interface** tab is displayed with the new import file. Click the **[Show]** link to open search filters if the new file is not immediately displayed. Searching for a file status of **All** will return completed and pending files. Pending files either include exceptions or are still processing (incomplete) and display in a blue font. Completed files display in a black font. Further refine your search by File Type or other criteria.

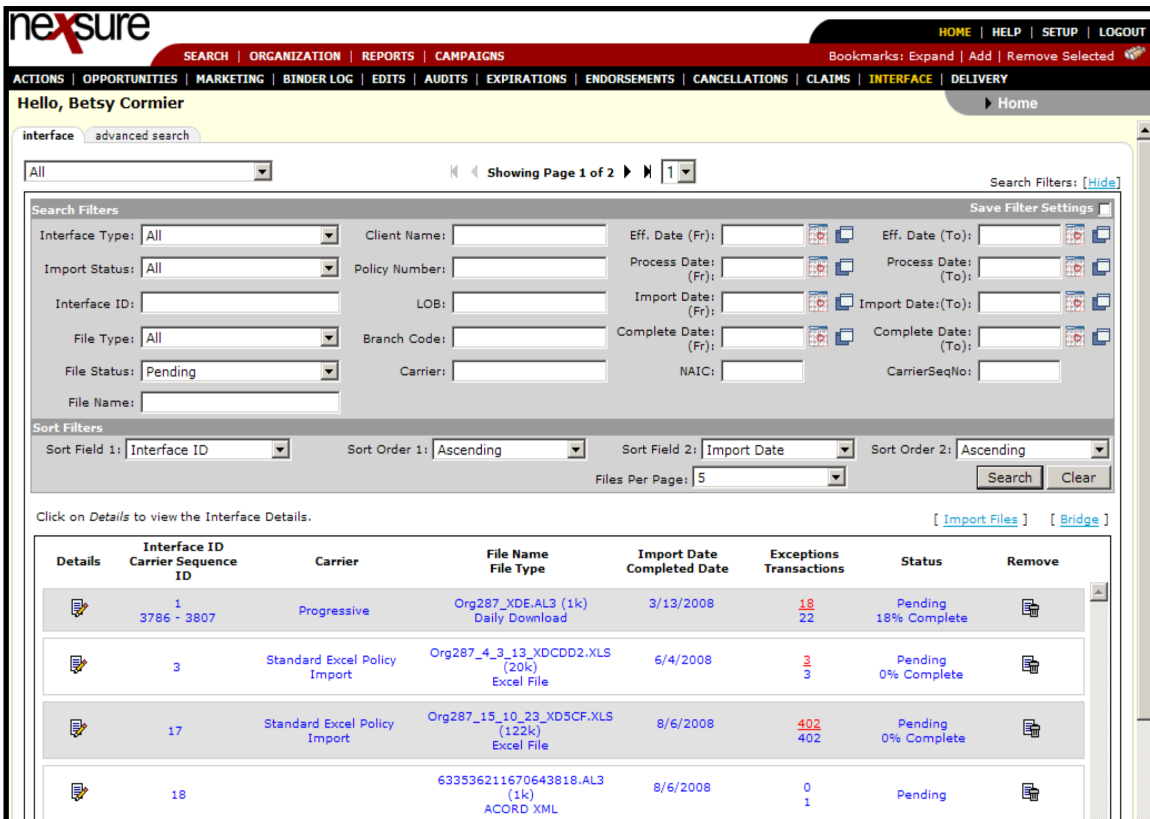


Once the imported file is on the **interface** screen, see “Interface” instructions in this chapter. For processing imported Microsoft Excel Commission Import files, see “Carrier Commission Downloads” in *Accounting Training Manual Chapter 11*.

Interface

All download files brought in to your Nexsure site via your IVANS mailbox or manual import are found on the **HOME > INTERFACE** screen. Security and Search Filter Settings determine what is displayed on the **interface** screen. By default any of the downloads with a status of Pending are displayed and grouped into files. There can be multiple files for the same carrier depending on the number of downloads. Pending downloads indicate that the download has not yet completed and agency attention is necessary to complete the process. Pending downloads have a blue font and completed have a black font.

Clicking the **[Show]** link on the interface screen opens search filters to allow searching for a specific carrier download. Change the number of **Files Per Page** to **100** to see all files using the scroll bar. The default **Sort Field** filters will display files by **Interface ID** and **Import Date**. Always process exceptions in date order.

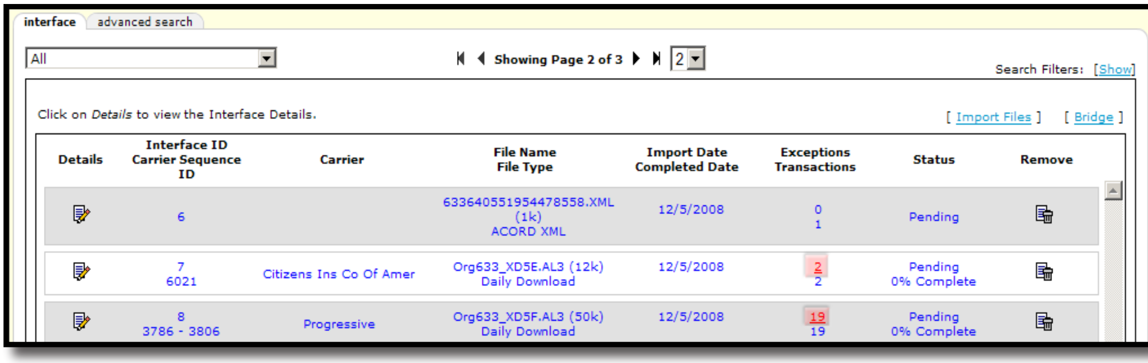


Note: Carriers may send Commission Download files through with Policy Download. If you are invoicing and not processing Commission Download, reject the Commission Download file to prevent it from processing. Rejected data remains on the **interface** screen without an active exception error. Be certain to process Policy Download files before processing Commission Download.

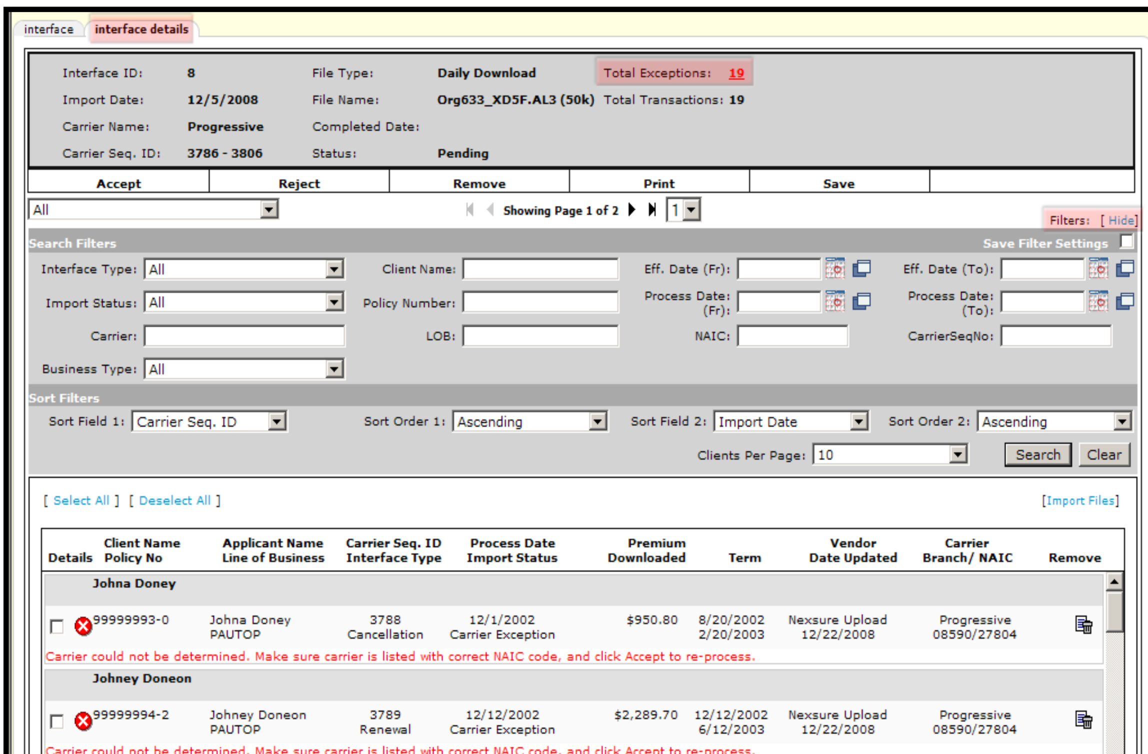
Working with the Interface Screen

Description	Use
Branch Drop-Down	"All" will display by default, but includes only those branches to which the User has rights to access. If the User has rights to only one Branch, "All" will display, but clicking the drop-down list will list only the one branch.
Details Icon	Clicking on the Details icon will open the interface details screen. It displays the individual transactions located within the file sent by the carrier. The User will only have rights to view the files within the Branch(es) they have access to. If the client cannot be found and the Branch cannot be determined, the file will display for all users as a Branch exception. If the Client cannot be found but Nexsure can determine the Branch, the Client Exception will only display for the assigned Branch.
Interface ID	The interface ID is a number assigned by Nexsure to make it easier to track specific downloads. Numbers are generated in the order received.
Carrier Sequence ID	This ID is assigned by the carrier and is pulled from the AL3 file. Excel import files will not have a Carrier Sequence ID. Selecting the Carrier Seq Rule under SETUP > Download Defaults > Exceptions Processing will require policies to be processed in the correct order per Carrier Sequence ID. Nexsure searches for matching policies and will not process a subsequent file until previous exceptions have been cleared and processed.
Carrier	Carrier name data downloaded for or type of Excel import file.
File Name	This name is generated by Nexsure and is used by support to query the database if need be.
File Type	The different file types such as Daily Download, FSC Quote and Initial Load.
Import Date / Completed Date	The date the download was received and the date the transaction was completed.
Exception / Transactions	A download file that has completed processing exceptions will display zero "0" exceptions and the total number of transactions in a black font. A pending file will display the number of exceptions in a red font and the total number of transactions in blue font. The red exception number is a link and identifies the number of exceptions that require agency attention to download. Click the red exception link to view the download file's exceptions.
Status	A download file that has not completed is shown with the status of Pending and the % of completion. Completed files list the stage that has been completed.
Remove Icon	Clicking the Remove icon will delete the download.

Click the **Details** icon of the pending file or click the Red exceptions # to display only its exceptions on the **interface details** tab.



The interface file header displays with all transactions or only exception transactions listed below. Click the filter **[Show]** link to search for a specific Client record.



At any time, click the header's Red exceptions # to quickly display all remaining exceptions. Exceptions are cleared by resolving the error alert. Files are reprocessed and no longer show as exceptions when all exceptions are cleared.

Handling the Exceptions

Automatically processed downloads do not require agency attention and are automatically placed on the client's account. If an exception occurs however, agency attention is required. Use the chart below to determine how to handle exceptions. Download defaults can minimize the number of exceptions. For example, if a download comes in that does not have a branch designation, a default branch may be setup to be used instead of creating an exception. For more information, see "Download Setup", Chapter 3, *Admin Training Manual*.

Import Status	Description
Aborted	This means the file failed or was rejected by the agency. Contact the Support department to reset the record if needed.
Application Exception	Line of business with ?? displays as the Exception link. Example (Auto??). The carrier did not provide the required state to identify what state specific data should be populated. If this occurs, notify the Support department and inform them as to what state should be populated.
Branch Exception	The branch was not located in the system. The Branch Code on the commissions tab has not been set up for the downloading carrier NAIC Code. To add it, follow the steps below: ▪ Go to the Search screen. ▪ Search for the carrier. ▪ Click the Details icon of the carrier. ▪ Click on the commissions tab to verify the carrier is associated with the appropriate branch code under the appropriate line of business commission record. Note: Commissions must be setup for each line of business being downloaded.
Cancellation Date Exception	The cancellation date falls outside of the policy term. ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click Accept. Nexsure creates an empty policy, sends it to history and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history and replaces the empty policy with the downloaded data which is in history.
Carrier Exception	The carrier could not be found in the system. Either the carrier name and/or NAIC code haven't been entered. ▪ From the Search screen, search for the carrier. ▪ Click the Details icon of the carrier. ▪ Click on the carrier name tab to verify the NAIC code. ▪ If the NAIC code does not exist, click the Details icon beside the carrier name, add the code and update the record. Note: The issuing carrier check box must be selected.

Import Status	Description
Client Exception	The client could not be found in the system. An exact match for the client name has not been found. ▪ Click on the red Client could not be found. Click here to search existing clients, or click Accept to create a new client link. ▪ In the pop-up window, search for the client by first or last name only or by policy number. ○ If the client is located, highlight the appropriate name and click the [Use Selection] link. The data is then queued for reprocessing. Only Active clients display in Search results. ○ If client does not exist, click on the [Add New] link then click the [Add Client] link to create the new client. The record is queued for reprocessing.
Department Exception	This will occur if the you have added a new client. To process and clear the department exception: ▪ Click on the red Exception link. ▪ Select the department and click OK.
Endorsement Date Exception	The endorsement date falls outside of the policy term. ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click Accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to “Create Empty Policy”. Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
Import Completed	The file has successfully been downloaded.
LOB Exception	The policy line of business must match the carrier’s line of business. Edit the policy if necessary to correct the line of business and re-process the download. If the line of business is not currently supported for downloads, place a check in the box beside the policy(ies) and select the Reject link on the navigation toolbar.
Memo	This is an underwriting memo sent from the carrier that has been read. May be removed or attached to the client.
NAIC Code Exception	The NAIC code has not been set up in Nexsure or does not match. To correct this, follow the steps below: ▪ Add the NAIC code on the carrier. ▪ Click the check box beside the policy and the Accept link on the navigation toolbar. The policy will re-process.
New Memo	This is an underwriting memo sent from the carrier that has not been read. You can view, print or save to your desktop and/or attach to the client.

<table>
<tr><th>Import Status</th><th>Description</th></tr>
<tr><td>Policy Exception</td><td>The policy cannot be located. Cannot find a matching policy # with NAIC code in the client's POLICIES > history and policies tabs.
▪ Click on the red Exception link.
▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy.
○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.</td></tr>
<tr><td>Policy Exception Cancellation</td><td>The policy cannot be located. Cannot find a matching policy # with NAIC code in client's POLICIES > history and policies tabs.
▪ Click on the red Exception link.
▪ Select the policy to download the data to and click [Next].
○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click Accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data which is in history.</td></tr>
<tr><td>Policy Exception Endorsement</td><td>The policy cannot be located. Cannot find a matching policy # with NAIC code in client's POLICIES > history and policies tabs.
▪ Click on the red Exception link.
▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy.
○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click Accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.</td></tr>
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Import Status	Description
Policy Exception Reinstatement	Cannot find a matching policy # with NAIC code in client's POLICIES > history and policies tabs. ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click Accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
Possible Duplicate	Nexsure believes that this information already exists in the system. ▪ Go to the client policies and verify the information. ▪ Go back to the interface and place a check in the box next to the exception. Click either Accept or Reject. ○ Selecting Accept will process the policy. ○ Selecting Reject will abort the transaction disallowing further action.
Previous Version of Policy Located, Process Previous Transaction First	Download file cannot be processed because a download file for the policy with a previous Carrier Seq ID remains as an exception. This exception will display only when the Carrier Sequence Rule is selected in SETUP > Download Defaults. ▪ Find the previous policy transaction and process that exception first.
Processing Client	Searching or creating a client record. No action required on this status.
Processing Policy	Searching or creating a policy. No action required on this status.
Producer Exception	(Only applicable in CA and AZ for FSC) The producer on the downloaded file is not entered in Nexsure. Add the producer into Nexsure Branch Employee. Click the check box beside policy and the Accept link on the navigation toolbar to re-process.
Queued for Re-Processing	Item is being processed. No action required on this status. If the Queued for Re-Processing message displays for some time, the download may be stuck in the queue. Right click on the Red exception icon and select Accept option from the context menu. The download item is placed back in the queue for processing.

Import Status	Description
Reinstatement Date Exception	The endorsement date falls outside of the policy term. ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. ◦ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click Accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ◦ The following only occurs if no policies exist for this client: You will be prompted to “Create Empty Policy”. Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.

To help you to understand how policies are updated in Nexsure, below is a quick reference to assist.

Type	Description
Renewals	If the renewal policy term does not exist, the downloaded policy downloads to the policy summary page providing ample time for the agency to complete any outstanding issues on the expiring policy. Once the expiring policy is complete and ready to for history, click on the History link on the underwriting navigation toolbar and complete the process. If the renewal policy already exists (perhaps added by the agency), the policy on the policy summary automatically moves to history and is replaced with the new downloaded version. Policy Mode: Renew Stage: Policy Status: Received
New Policies	When the client exists but has no matching policy, the new downloaded policy downloads to the policy summary page. Should the policy already exist, the policy on the policy summary automatically moves to history and is replaced with the new downloaded version. Should there be no client match, an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New Stage: Policy Status: Received

Type	Description
Endorsement	When the client exists but has no matching policy, the policy endorsement downloads to the policy summary page. Should the policy already exist, the policy on the policy summary automatically moves to history and is replaced with the downloaded version. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Received
Cancellation (Current or Prior cancellation date)	When the client exists but has no matching policy, the cancellation request form adds and the policy cancellation downloads to the policy history summary page. Should the policy already exist, the cancellation request form adds and automatically moves to history. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Cancellation Status: Cancellation
Cancellation (Future cancellation date)	When the client exists but has no matching policy, the cancellation request form adds and the policy cancellation downloads to the policy summary page. Should the policy already exist, the cancellation request form adds and automatically moves the prior version to history. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Pending Cancellation Status: Cancellation
Reinstatement (Pending Cancellation)	When the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy downloads to the policy summary page. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Received

Type	Description
Reinstatement (Policy in History)	When the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy downloads to the policy summary page. The cancelled policy will remain in history. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Received
Rewrite (Current or prior effective date)	When the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy downloads to the policy summary page. The cancelled policy will remain in history or is sent to history is the policy is on the policy summary. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Rewrite (Future effective date)	When the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy downloads to the policy summary page. The cancelled policy will remain in history or if will remain on policy summary. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Reissue (Current or prior effective date)	When the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy downloads to the policy summary page. The old version of the policy remains on the policy summary page and when complete may be sent to history manually. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten

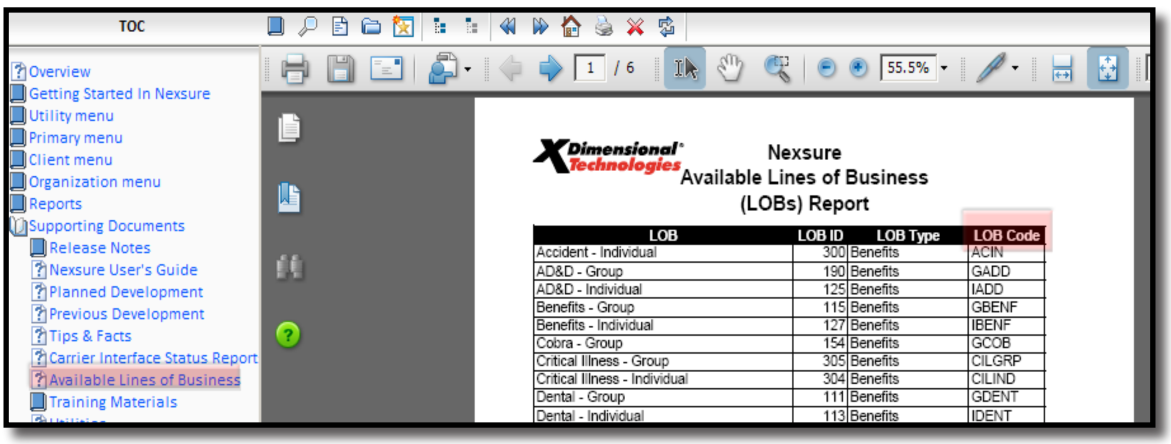
Type	Description
Reissue (Future effective date)	When the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy downloads to the policy summary page. The old version of the policy remains on the policy summary page and when complete may be sent to history manually. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Database synchronization	Policies that come from a database synchronization when the client exists but has no matching policy, the policy downloads to the policy summary page. Should the policy already exist, the policy on the policy summary automatically moves to history and replaced with the new downloaded version. Should there be no client match an exception displays providing an opportunity to search for the appropriate client before creating the new client record. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Miscellaneous Print or Memo	These are notes from the carriers and will not have any affect on client files. These records are view only and opened by clicking on the Details icon on the interface screen. These items will look like the following:  

Import Suspects, Policy Header and Commission Information Using Microsoft Excel

When an AL3 file is not provided by the carrier, three options are available to import data using a formatted Microsoft Excel spreadsheet. Microsoft Excel Spreadsheet files are available for each format option from **Help** Topic > **Importing Microsoft Excel Files**. The format selected must have the correct number of columns and columns must be in the exact order as displayed on the sample spreadsheet for the import to process correctly. All columns are required and must be present even if they will not be used. Do not change column heading names.

Information is not required under each column name; however, **Policy Information Format** options do have certain required fields.

- Where required, enter the **LOB** Code found on the Nexsure Available Lines of Business Report in Help > Supporting Documents > Available Lines of Business.



- Policy Number, Named Insured and Primary Contact information must be unique to avoid multiple items becoming one record. If a policy number is not available because the policy record to be created is not an actual policy, create a temporary policy number that contains a beginning letter, a few digits in the middle and an ending letter, such as A445879L.

<table>
<tr><th>Policy Information Format Options</th><th>Description
* = Required Field</th></tr>
<tr><td>Basic</td><td>Use this format to create a client and policy header. The policy will have no specific policy information. The formatted spreadsheet column names and order in which they need to appear are:
■ LOB*
■ Policy Number*
■ Effective Date*
■ Expiration Date*
■ Named Insured*
■ Client Type*
■ SIC Code
■ Premium
■ Primary Contact
■ Primary Contact Email
■ Location Address
■ Location City
■ Location State
■ Location Zip
■ Business Phone
■ Business Fax
■ Agency
■ Branch*
■ Department*
■ Producer First Name*
■ Producer Last Name*
■ NAIC*</td></tr>
</table>

Policy Information Format Options	Description * = Required Field
Client / Prospect	**Import the entity into the organization as either a Client or a Prospect. A client will have the associated policy imported into the system as an In Force policy. A prospect will have the associated policy imported into the system as a Marketing record. The formatted spreadsheet column names and order in which they need to appear are:** ■ LOB* ■ Policy Number* ■ Effective Date* ■ Expiration Date* ■ Named Insured* ■ Client Type* ■ SIC Code ■ Premium ■ Primary Contact ■ Primary Contact Email ■ Location Address ■ Location City ■ Location State ■ Location Zip ■ Business Phone ■ Business Fax ■ Agency ■ Branch* ■ Department* ■ Producer First Name* ■ Producer Last Name* ■ NAIC* ■ Client Stage

Policy Information Format Options	Description * = Required Field
Policy Servicing	**Format allows the agency to not only import a file to create a client and policy but will also allow servicing on existing policies. Only the following transaction types are valid: New Business, Renewal, Endorsement, Cancellation, Reinstatement and Audit. The formatted spreadsheet column names and order in which they need to appear are:** ■ LOB* ■ Policy Number* ■ Effective Date* ■ Expiration Date* ■ Named Insured* ■ Client Type* ■ SIC Code ■ Premium ■ Primary Contact ■ Primary Contact Email ■ Location Address ■ Location City ■ Location State ■ Location Zip ■ Business Phone ■ Business Fax ■ Agency ■ Branch* ■ Department* ■ Producer First Name* ■ Producer Last Name* ■ NAIC* ■ Client Stage ■ Policy Stage ■ Transaction Type* (Note: only New Business, Renewal, Endorsement, Cancellation, Reinstatement and Audit) ■ Transaction Eff Date* ■ Mailing Address ■ Mailing City ■ Mailing State ■ Mailing Zip ■ Notes ■ Retail Agent Code ■ Commission Amount

Suspect Information Format Option	Description
Suspect	Import a list of suspects into the Organization. A suspect will contain only client information and will not be associated with a policy or marketing record. Note: Excel Workbook Sheet name must be Client.

Commission Information Format Option	Description
Commission Download	Use to supply the agency policy premium and commission amounts for specified policies. For processing Commission Download files received as AL3 files from the carrier or a formatted Microsoft Excel file, see "Carrier Commission Downloads" in "Handling Carrier Statements", Chapter 11, *Accounting Training Manual*.

Save the completed worksheet in the source folder for manual import into Nexsure using Exchange Manager. For instructions see "Manual Import" earlier in this chapter. Manual import brings the file into Nexsure on the **interface** screen for processing.

Notes

Rating Import/Export

Rating Integration

Nexsure facilitates integration with EZLynx, SeaPass, WinFSC, Agency Computer Systems (ACS2000) and The Hartford's ExpressWay rating software. Marketing applications started in Nexsure can be exported for a quote, or a quote file can be imported into Nexsure as a new marketing line item.

Additional Logins

ExpressWay, EZLynx and SeaPass require an additional login to be setup with a valid user name and password. Refer to "Employee Additional Logins" in Chapter 2, "Employee Record Maintenance", of the *Admin Training Manual*.

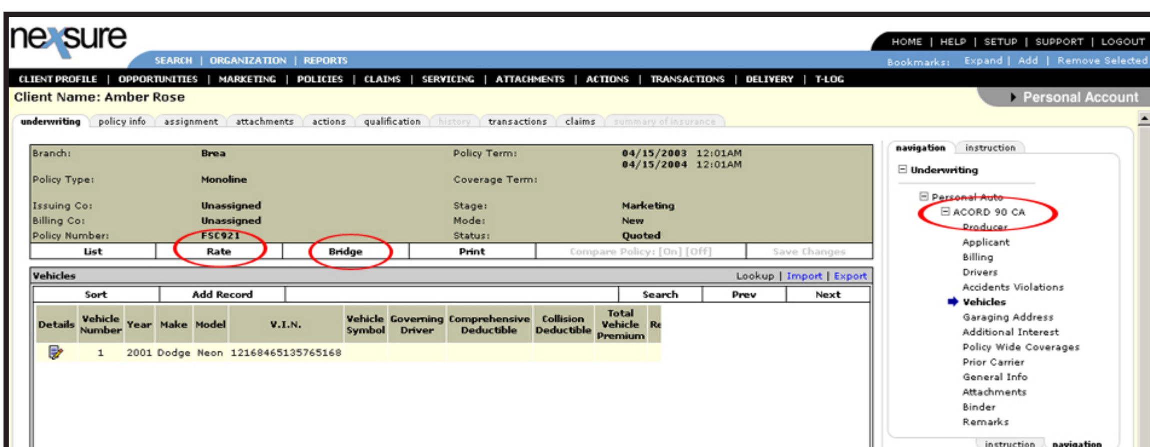
Important: EZLynx needs to enable each user individually to receive uploads from XDTI / Nexsure. Send a request to support@webcetera.com to be enabled for uploads from XDTI / Nexsure. The email may originate from the agent and does not need to come from Nexsure.

To Export (Rate) a Marketing Application

A marketing application can be exported as a blank application, or after it is completed in Nexsure. If the application is not complete when it is exported, the rating tool will prompt you to fill in the required data. If the application is completed in Nexsure before it is exported, a quote will be provided once it opens in a rater (see Mapping Notes below).

Note: Quotes obtained using EZLynx, SeaPass, or ExpressWay cannot be imported (Bridged) back to Nexsure. Only WinFSC, and ACS2000 are supported for bridging at this point.

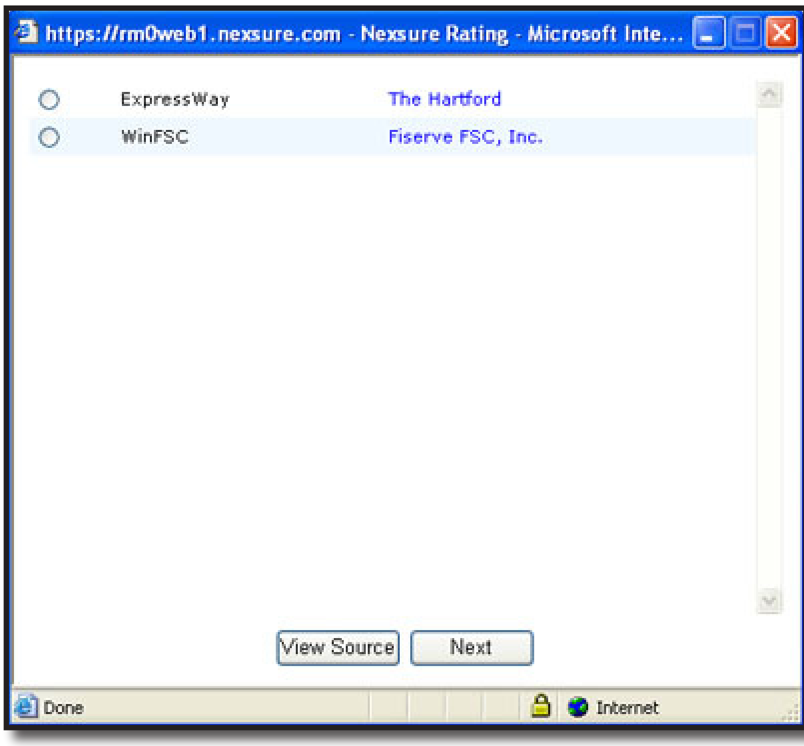
1. Select the client with the marketing application.
2. On the **Client** menu, click the **MARKETING** link.
3. Click the **Details** icon for the marketing policy to rate.



4. Select the LOB in the navigation panel, for example, the Personal Auto ACORD 90 CA. The LOB must be selected for the **Rate** (export) link to become available.

Note: If the LOB is not supported by the selected rating tool, the **Rate** link will not become active. Supported Lines of Business are listed in **HELP > Rating Integration** documentation. Look for future updates to the supported lines of business in **HELP > Planned Development > Enhancements > Integration**.

5. Click the **Rate** link. The rating tool selection screen appears:



6. Select a rater and click **Next**.

Note: Clicking View Source will display the ACORD XML data being transferred to the rater.

7. The rater will be launched with information from the application prefilled.

8. Once the quote has been provided, the application can be imported (Bridged) back to Nexsure.

Important: Quotes obtained using ExpressWay, SeaPass, or EZLynx cannot be imported (Bridged) back to Nexsure. Only WinFSC and ACS2000 are supported for bridging at this point.

To Import (Bridge) an Application into Nexsure from FSC Rater

When an application is exported to FSC Rater it is sent with a Nexsure-generated policy ID. This ID number will route the same application back into Nexsure and overwrite the original marketing application that was exported for a quote (see Mapping Notes below). To import (Bridge) applications as separate line items on the Marketing screen (to show multiple quotes for example) see: Importing from the Interface Screen below.

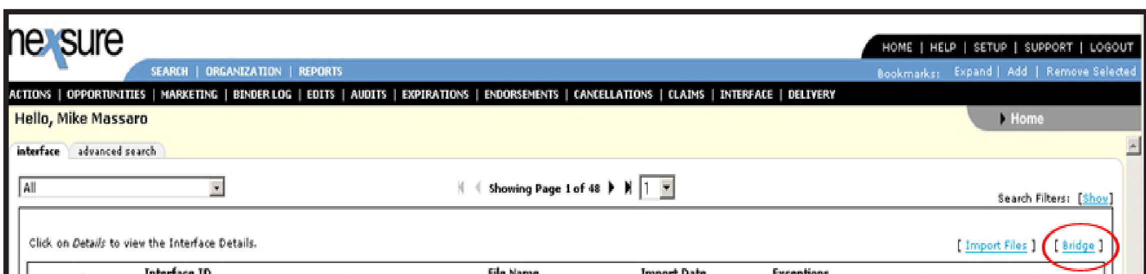
Note: Before an application can be imported from FSC Rater, the quote file must be exported from FSC Rater. In FSC Rater, on the Tools menu, click Export. The file can now be imported by Nexsure.

1. Select the client with the original marketing application.
2. On the **Client** menu, click the **MARKETING** link.
3. Click the **Details** icon for the marketing policy.
4. Click the **Bridge** link. The original marketing application will be overwritten with the quoted application from FSC Rater.

Importing from the Interface Screen

To import multiple quotes on the same application, quote files from FSC Rater must be imported from the Interface screen. A new marketing line item will be added for each quote on the Marketing screen for the specified client. When applications are originated in FSC Rater, FSC Rater will first search the Nexsure database for the exact name of the client. If a match is found it will be added as a new marketing line item. If no match is found the new client will be automatically generated in Nexsure.

1. On the **Home** menu, click **Interface**.



2. Click the **Bridge** link. Any files in the FSC export folder will be added to Nexsure. If the client already exists in Nexsure, each quote will be added as a separate marketing line item to that client. If the client does not exist in Nexsure, the client will be automatically created based on the information in the quote file (see Mapping Notes below).

ACS2000 Mapping Notes

Some ACORD information is not captured or provided by ACS2000:

Does not provide:

- Vehicle Registration State
- Loss Years

ACS does not capture:

- Towing Coverage
- Rental Coverage
- Residence Owned
- Applicant - Employer Name/Address
- Homeowners Rating Credits
- Building Code Effectiveness Grade Inspection
- Hurricane Resistive Glass
- Date Heating System Last Serviced
- Circuit Breakers and Fuses Knob & Tube or Aluminum Wiring
- Plumbing System - Any Known Leaks
- Condition of Roof
- # of Amps
- Sprinkler Info
- # of Household Residents
- # of Weeks Rented
- Condition of Plumbing
- Carrier Name

Additional Notes

- When starting a quote from ACS2000 and bridging to Nexsure, the user will want to verify that the client name is exactly the same in both ACS2000 and Nexsure or a duplicate client could be created in Nexsure. If a quote is started in Nexsure, rated with the Nexsure-ACS2000 integration, and then bridged back to Nexsure, this will not be an issue.
- The ACS2000 “Transfer to Management System (Nexsure)” option is not yet enabled by ACS. Choose the option to “Export to a File (ACORD XML)” instead.

ExpressWay Mapping Notes

- Expressway requires that the Applicant Name and Phone Number be provided to successfully start a quote.
- Expressway can only be exported using the **Rating** option. You cannot bridge an Expressway quote back into Nexsure.

EZLynx Mapping Notes

Nexsure to EZLynx

- Integration with EZLynx will fail if the application is blank.
- EZLynx can only be exported using the **Rating** option. You cannot bridge an EZLynx quote back into Nexsure.

FSC Mapping Notes

Nexsure to FSC

- The employer, occupation and work address that populates in FSC will always come from driver #1 in Nexsure.
- The driver #1 name comes from Named Insured (so it may differ from driver # 1 name in Nexsure).
- Default occupation in FSC is Employed (even if Student is input in Nexsure it still displays as Employed in FSC).
- For rental reimbursement to be quoted, both the limit per day and maximum must be populated in Nexsure (if only the limit per day is entered, the rental will not be quoted).
- If the driver's license number of digits is invalid for the state licensed, the license state will not carry over to FSC (ex. California Driver License numbers have 7 digits. If an 8 digit number is entered, the license state will not carry over as California for that driver).
- Named Insured - Because named insured in Nexsure is not separated into first, middle and last names, names brought over to FSC may need some adjusting (ex. If two named insureds are entered with an "&" separating them, the "&" may be brought in as a middle name).
- DP1 & DP3 - If the coverage type selected is Fire, Fire & EC or Fire, EC & VMM then FSC will rate policy as a DP1. If either broad or special coverage type are selected, FSC will launch DP3 rating.

FSC to Nexsure

- If no payment plan is selected, the default payment plan from FSC is Full Pay.
- Client Name and Client Profile Named Insured will come from FSC First Name, Last Name; but the application name will come from Legal Name (if any in FSC).
- For Property LOBs, distance to fire hydrant is carried over to the application as the maximum distance for each group: 1000 ft or less from fire hydrant, (none of the three check boxes is selected) , 5 miles or less from station, (first check box is selected) , 5 - 10 miles from station, (second check is box selected) , 10 or more miles from station (third check box is selected).
- Input By in FSC Rater will determine the Branch in Nexsure that the client will be added to.

- First Name and Last Name in FSC Rater are matched in Nexsure with the Named Insured. The names must match exactly in order for the quote to import to the existing client.
- Nexsure also matches the mailing address line #1 (Street Address). If this field is left blank in FSC Rater, Nexsure will use the garaging or property address line 1.

Note: If the quote originated in Nexsure, then the resulting quote will be attached to the client it came from in Nexsure (no matching of the name and address is needed).

FSC Quote Import Exceptions

- Producer Exception - When an FSC quote is imported, a search is performed to determine the branch/producer and who is assigned to the quote. This search is performed using the "Input By:" information from FSC Rater. If the Input By: (FSC Rater) name and the Producer (Nexsure) name match, the assignment will be generated using the first match found.

  If no match is found, a Producer Exception is generated in Nexsure's Interface screen. To resolve the exception, add the employee under a branch in Nexsure, and accept the exception.
- NAIC Code Exception - This exception can occur if Nexsure is unable to resolve the NAIC code from FSC Rater's proprietary CarrierID.
- Carrier Exception - This exception occurs when the NAIC code for the quote being imported is not listed under the carriers in Nexsure. To resolve this exception, add the carrier or carrier name with the appropriate NAIC code and accept the exception.

Notes