Chapter 3

Client Management

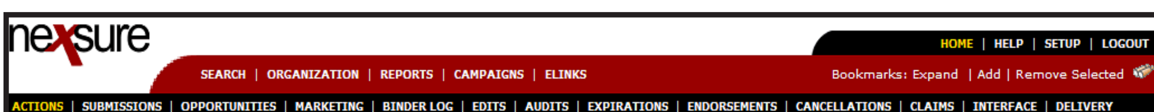
IN THIS CHAPTER

- Global Search
- Searching
- Adding Suspects, Prospects and Clients
- Using the Card File
- Personal/Commercial Profiling
- Contacts
- Locations
- Named Insureds
- Units at Risk
- Vehicles
- Related Accounts
- Assignments
- Classifieds

Global Search

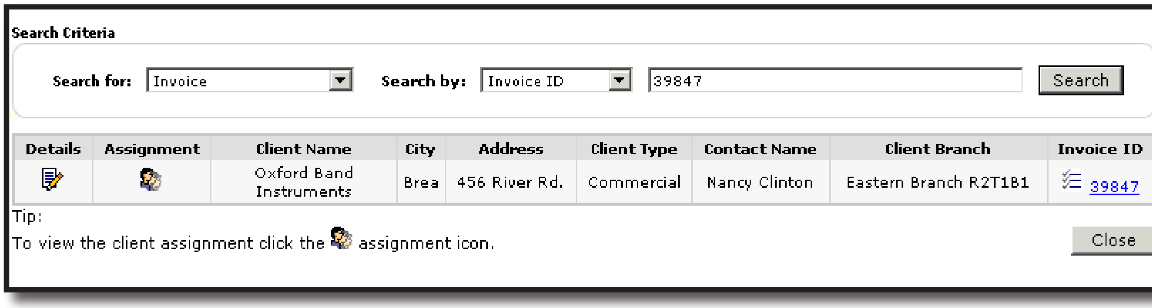
Searching for clients can be done in two places, Global search and the Search screen. Both are located on the Primary menu in Nexsure. The global search is used to search for a client without changing screens or locating an invoice but is primarily used to look up information. New clients or invoices cannot be added from the global search screen.

To search for an invoice from Global Search, click the **Binoculars** icon on the primary menu.

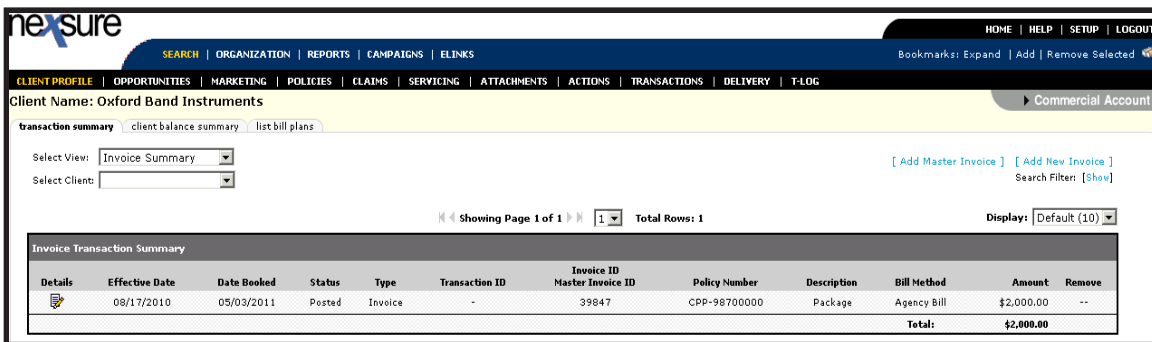


The search window is displayed. To search for an invoice in the search for drop-down box, select Invoice. The search type of **Invoice ID** is automatically selected. In the blank field to the right of the **Invoice ID** enter the **Invoice ID** being searched for. Search by invoice number requires at least three digits in order to perform a search due to the large amount of data that may need to be searched. Click the **Search** button.

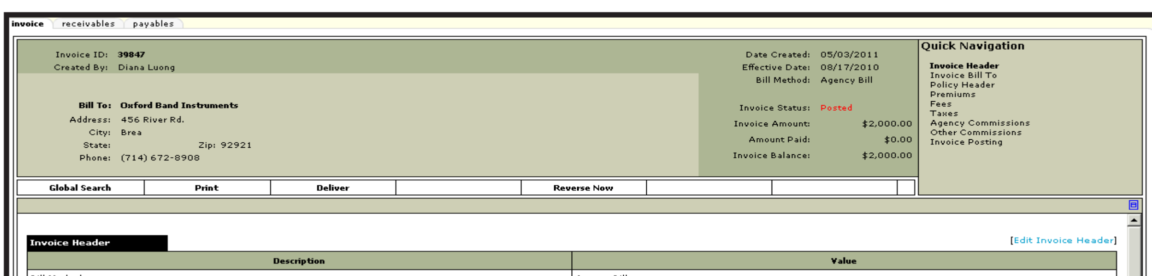
The results of the search will be displayed below the search criteria entered and sorted by Invoice # in ascending order, then client name in ascending order. If no invoices are found to match the search criteria a “No Results Found” message will be displayed.



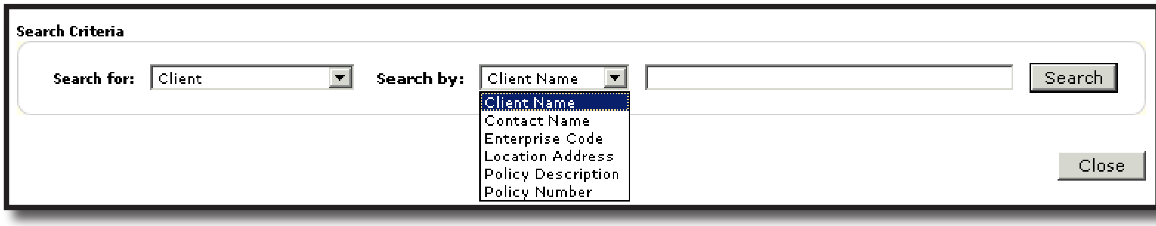
To access the invoice summary view showing the specific invoice, click the **Summary View** icon. If the icon is grayed out, this indicates it is not active which means the user does not have security rights to either the client’s branch or transaction view rights. After clicking the icon, the global search window automatically closes and navigates away from the current screen and to the transaction invoice summary view screen showing only the invoice selected.



To access the invoice detail on the global search results screen, an active invoice ID link must exist. If the link is black, this indicates it is not active which means the user does not have security rights to either the client’s branch or transaction view rights. After clicking the invoice ID link, the selected invoice detail is displayed. To return to the prior location and global search screen, click the **Global Search** link located on the **Navigation Toolbar** on the left of the screen.

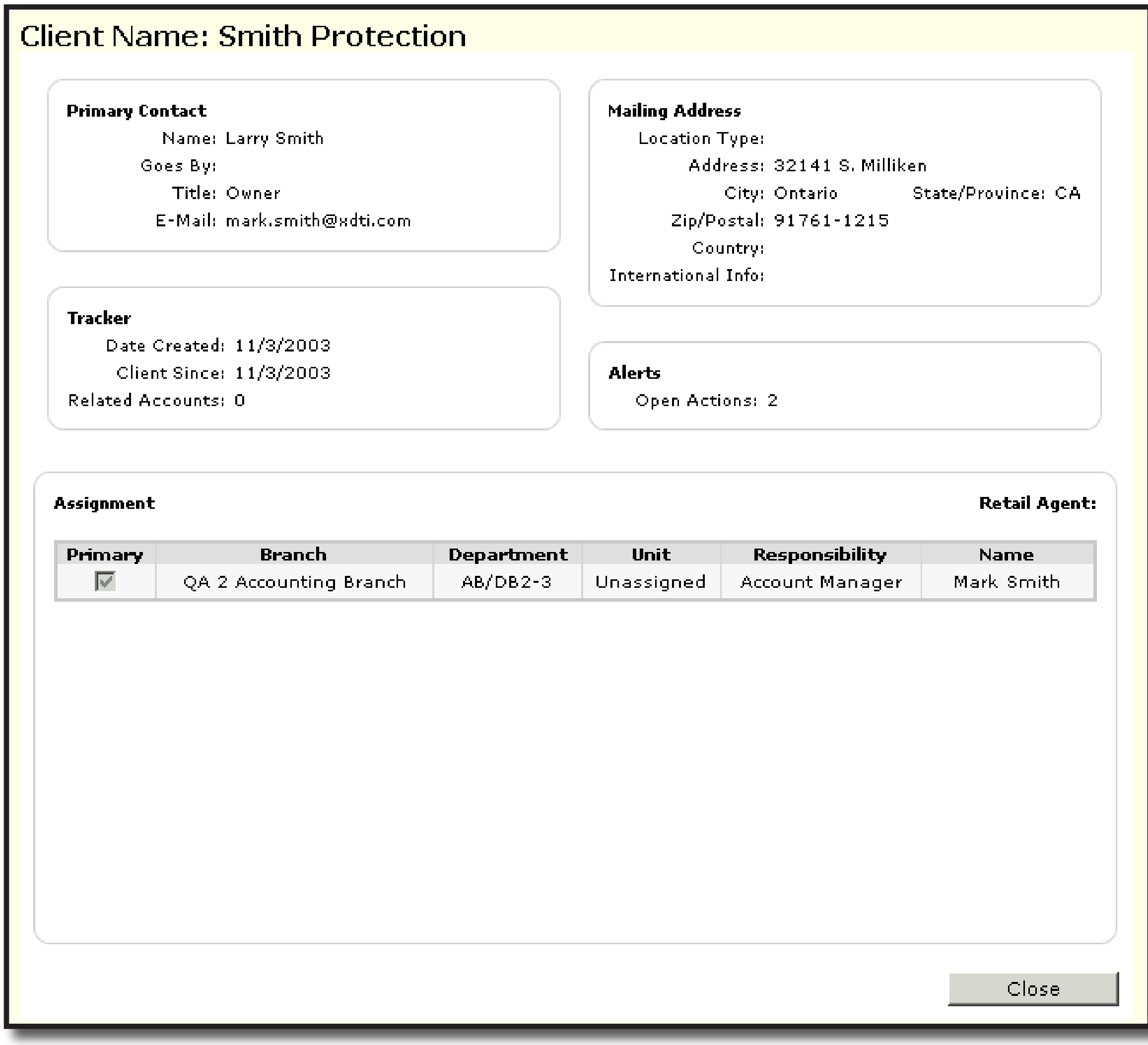


To search for a client on the **Global Search** screen, in the search for drop-down box, select **Client**. In the **Search Type** drop-down box, select **Client Name**, **Contact Name**, **Enterprise Code**, **Location Address**, **Policy Description** or **Policy Number**. In the blank field to the right of the search by selection, enter at least three characters and click the **Search** button to return results.

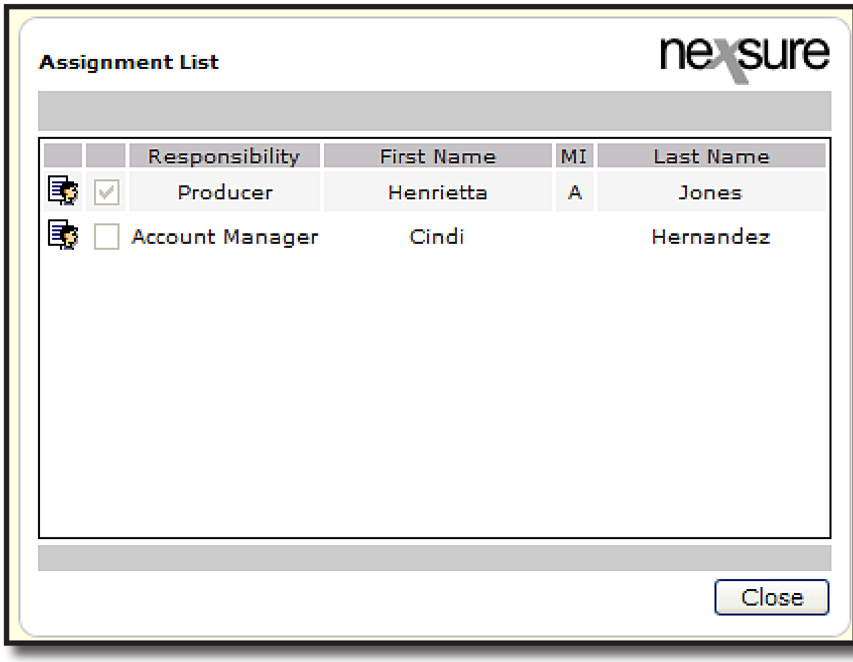


The results are displayed below the search criteria. If no results are found to match search criteria a "No Results Found" message will be displayed.

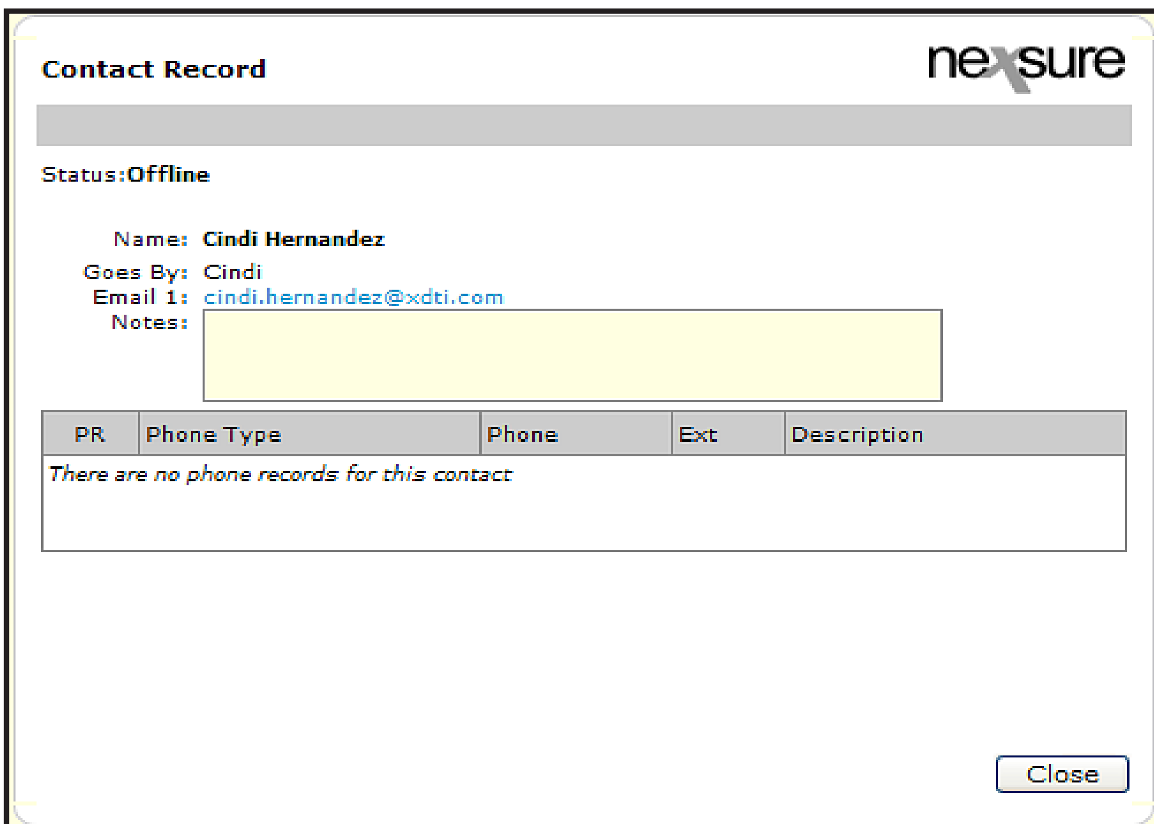
To access the client card file, click the **Details** icon. If the icon is grayed out, this indicates it is not active which means the user does not have security rights to the client's branch. After clicking the icon, the selected client card file is displayed. To close, click the **Close** button, the search screen is displayed. Click the **Close** button on the search screen.



To see the assignments on the account, click the **Assignment** icon. This will bring up users who are assigned to the client record.

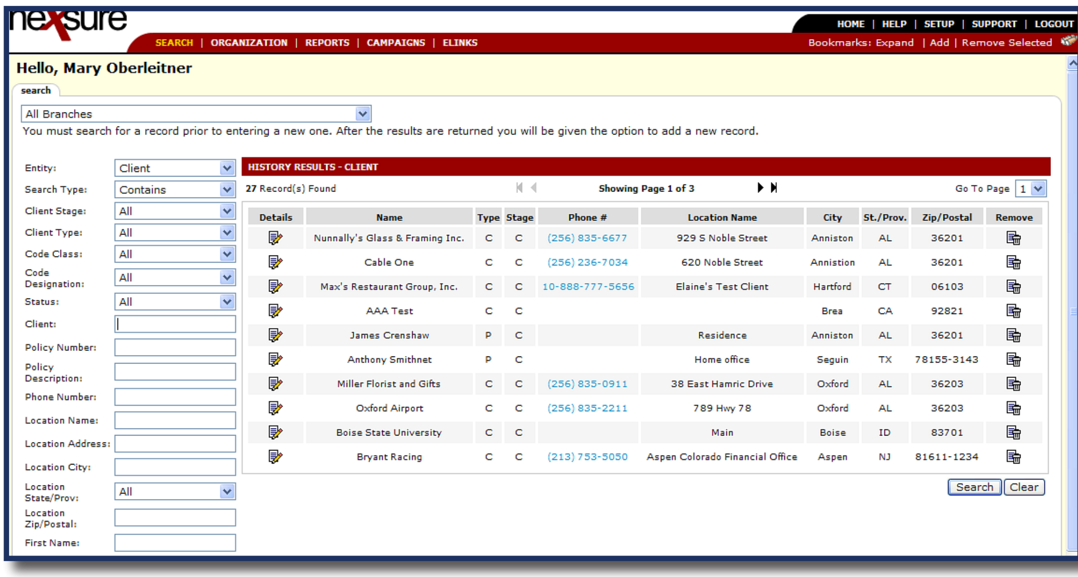


To see an assignment's detail click the **Assignment Details** icon. This allows the user to send a quick email by clicking the email address or obtain their phone number. Click the **Close** button to close the window.



Searching

Finding suspects, prospects and clients in Nexsure is done from the **SEARCH** link found on the **Primary** menu. On the right side of the screen under History Results clients are all the suspects, prospects and clients you have worked on recently. This makes getting to those clients you work on the most quickly accessible. The last fifty accessed can be found in the History Results section of this screen with ten entries listed per page. If you are new to Nexsure, this list would be empty. Nexsure provides many search fields to help ensure accurate results. Enter less information for broader results and more information for narrower results.



Note: Click the primary contact phone number to display the contacts detail.

Search Screen Definitions

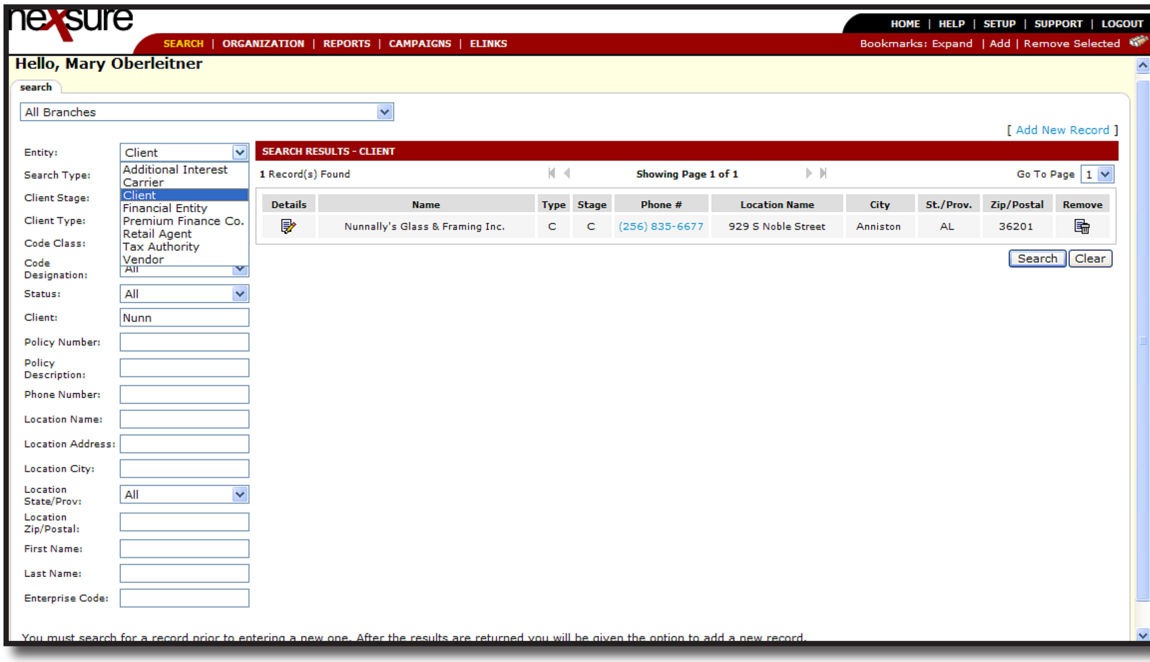
Client Search Fields	Definition
Branch	**Narrows the search to a particular branch if security access is granted.**
Entity	**Entities that may be added to Nexsure: Additional Interest (Used to add on client forms/ applications through lookup link), Carrier, Client, Financial Entity (Bank Account info), Premium Finance Co, Retail Agent, Tax Authority and Vendor (Used in Organization level to issue disbursements).**
Search Type	**Selecting the Begins With link allows searching the beginning of the field. Selecting the Contains link searches fields that contain specific characters consecutively anywhere in the selected field.**
Client Stage	**The Client Stage can limit the search if desired by: Suspect, Prospect or Client. Client stages are automatically assigned by Nexsure based on the following:** **Suspect: Has only card file information.** **Prospect: Has only a marketing quote.** **Client: Has at least one in force policy.**
Client Type	**There are two Client Types in Nexsure: Commercial and Personal. The search can be narrowed to make sure the results returned are specific to a commercial or personal client.**
Code Class(*)	**The Code Class refers to the way a Client may be classified. Selection of a Code Class will return Clients with that classification. **See Code Designation**

Client Search Fields	Definition
Code Designation(**)	The results available in the Code Designation drop-down box will populate based on the Code Class selected. Using the Code Designation drop-down in conjunction with the Code Class entered will return a more specific result. *See Code Class
Status	Select whether the search results will be All, Active, or Inactive records.
Client	Client refers to the named insured. Any named insured on the account entered in this field will return the client. For example, if there are two named insureds "John Mason" and "International Builders" on the account International Builders, enter either name to display the account.
Policy Number	Policy Number field returns results for all current and history policies added to clients. Enter all or most of the policy number to return a more specific result.
Policy Description	Policy Description field is a free-form text field used to categorize a policy. Enter at least two characters of the policy description to return a matching policy description.
Phone Number	Each account has an optional Phone Number field. If multiple phone numbers are on the account, any of those numbers may be entered here to return the client associated with the number. Entering some of the phone number returns a broader result. Enter most or all of the number for more specific results.
Location Name	Each account has an optional Location Name field that appears on the search result screen to help identify clients. Only the primary location name is displayed on the search results screen but if a secondary location name is entered for the search, the client will be found and displayed. Entering some of the name returns a broad result. Enter most or all of the name for a specific result.
Location Address	Each account has an optional Location Address field. If multiple location addresses are on the account, any of those addressees may be entered here to return the client associated with the address. Entering some of the address returns a broad result. Enter most or all for a more specific result.
Location City	Each account has an optional Location City field. If the account has multiple location addresses, any of those cities may be entered here to return the clients associated with the city. Entering just the city likely will return a broad result.
State	Each account has an optional State field. If the account has multiple states any of those may be entered here to return the clients associated with the state. Use the drop down box to select for a specific search by state. All is the default for this field.
Location Zip/Postal	Each account has an optional Zip/Postal field. If multiple location addresses are on the account, any of the zip or postal codes may be entered here to return the clients associated with the zip or postal code. Entering just the zip or postal code is likely to return a broad result.
First and Last Name	The First and Last Name fields are to search by contacts added to clients. If multiple contacts are on an account, any of those contacts may be entered to return the clients associated with the contacts. Entering some of the contact name returns a broader result, enter most or full first and last name for a more specific result.
Enterprise Code	Each client has an optional Enterprise Code field. Entering all or most of a specific enterprise code will return a more specific result.

Adding Suspects, Prospects and Clients

The **Entity** field defaults to client and this selection is used to search or add suspects, prospects, or clients. The Branch field selection defaults to All Branches. To search or add a suspect, prospect, or client to Nexsure for a particular branch, select the appropriate branch. Searches are limited to branches where security access has been granted.

To begin the search, enter the name into the **Client** field and any other pertinent information in the relevant subsequent fields. Click the **Search** button at the bottom of the search list. The Search results display to the right of the search fields. Now notice that the **[Add New Record]** link is displayed in the upper right side of the search screen. This link is available each time a search is run, so make certain that the search criteria is correct and a match was not found prior to adding a new one by clearing the fields using the **Clear** button and performing the search again.

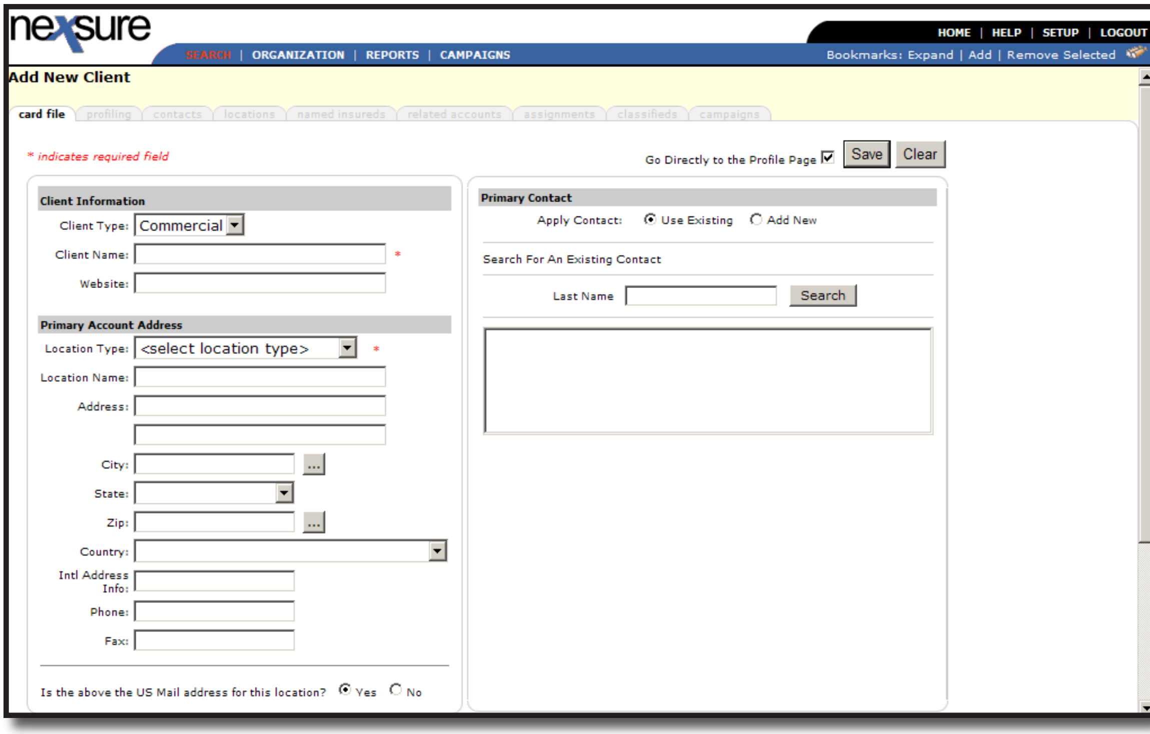


Once it is confirmed that the suspect, prospect, or client record does not exist, click the **[Add New Record]** link.

Any data entered in the search fields is automatically transferred to the new client record. When a new client is added to Nexsure, it is automatically identified as a Suspect. Nexsure identifies the client type based on whether they have a marketing or in force policy.

- An entity without at least one marketing or in force policy is automatically identified as a **Suspect**.
- If at least one marketing policy exists and no in force policy exists then the entity is automatically identified as a **Prospect**.
- The existence of at least one in force policy identifies the entity as a **Client**.

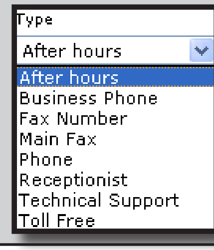
Complete the new record by entering data into the fields provided. See **Add A New Client - Field Definitions** for specific details on entering data into these fields.



Add a New Client - Field Definitions

Fields	Definition
Client Type	Use the drop-down box to select whether this account should be identified as Personal or Commercial.
Client Name	The name entered here is automatically identified as the Named Insured (Primary). This name will populate to the Applicant Name field of applications, invoices and letters by default.
Website	The website entered here will display as an active hyperlink on the client's card file.
Location Type	Location Type list is determined by the System Administrator in SETUP Lookup Management.
Location Name	It is important to enter a name that identifies the location, as this is how you choose the location address on invoices , received payments, disbursements and to help identify the account on the Search screen.
Address1-2	Enter the primary address for the account which is used to populate the applicant section of applications and the default address for invoices and letters.
City	After entering the City (for U.S. only), clicking the ellipsis ... button to the right of the field can be used to search for the Zip Code. If a Zip Code is selected, the State and Zip Code will both automatically populate with the selection.
State/Province	The State field includes all states for the United States plus provinces for Canada and Mexico.
Zip/Postal	Zip/Postal Code for U.S. City and States have a lookup provided beside the field. Enter the full Zip Code and click on the ellipsis ... button beside the field to confirm the City and State.
Country	Select country for international address
Intl Address Info	Enter international address
Phone	Phone numbers must include the area code. Enter the number without formatting. The number will automatically format when the screen is saved. International numbers as well. Example: 7016720000

Fields	Definition
Fax	**Fax numbers must include the area code. Enter the number without formatting. International numbers as well. Example: 7016720001**
Is the above the US Mail address for this location?	**Select Yes to pre-fill as mailing address on location record. Select No to display fields for entering the location's mailing address.**
Retail Agent	**Search to locate and select the Retail Agent. Adding a Retail Agent on the client identifies what agent is currently placing the business with the agency.**
Branch	**A minimum of one branch is required per organization. A branch identifies how and when the income and expenses are allocated in the general ledger. Select one branch default per client. The branch may be modified as needed at policy level, but the branch added at client level will automatically be the default branch for each policy added to the client.**
Department	**A minimum of one department is required per organization. A department identifies how and when the income and expenses are allocated in the general ledger. Select one department default per client. The department may be modified later as needed at policy level, but the department added at client level will automatically use the default department for each policy added.**
Unit	**Units are not required and are used to further breakdown income and expenses. If units are added one must be selected as the client default. Later at policy level the unit may be modified as needed, but the unit added at client level will automatically be the default unit for each policy added.**
Responsibility	**The content of this drop-down box can be populated by your administrator. This identifies what role the person assigned to the account represents. Selecting a responsibility is identifying the primary on the account. The primary assignment added at client level will be the default primary assignment for each policy added to the client. The primary assignment may be modified as needed at the policy level.**
Names	**The content of this drop-down box is populated with the employees identified in Nexsure as an employee. Choose the name of the person primarily responsible for this account. This name would correspond to the responsibility added above.**
Apply Contact: Use Existing	**Before adding any contacts to Nexsure, make sure they do not already exist by entering and searching using this feature first. If they are not found, click the Add New option instead.**
Apply Contact: Add New	**When the Add New option is selected, data entry fields are displayed for entering contact information.**
Prefix	**The Prefix should be entered so you can easily use this information with the integration portion of Nexsure, such as letters. The contents of this box can be populated by your administrator.**
First Name	**Enter the First Name of the primary contact for this account.**
MI	**Enter the Middle Initial (MI) of the primary contact for this account.**
Last Name	**Enter the Last Name of the primary contact for this account.**
Suffix	**Select the appropriate option if a Suffix exists for the primary contact, such as Jr. The contents of this box can be populated by your administrator.**
Goes By	**Enter the name the contact goes by, if applicable.**
Title	**Select the Title of the primary contact. The contents of this box can be populated by your administrator.**
Contact Role	**Select the role that the primary contact is for this named insured. The contents of this box can be populated by your administrator.**
E-mail	**Enter a valid e-mail address for the primary contact. Adding an e-mail address will create an active link that can be clicked to send and record an e-mail to this contact on the contact screens. If an e-mail address is not entered under contacts, their name will display in summary views indicating an e-mail address was not added.**

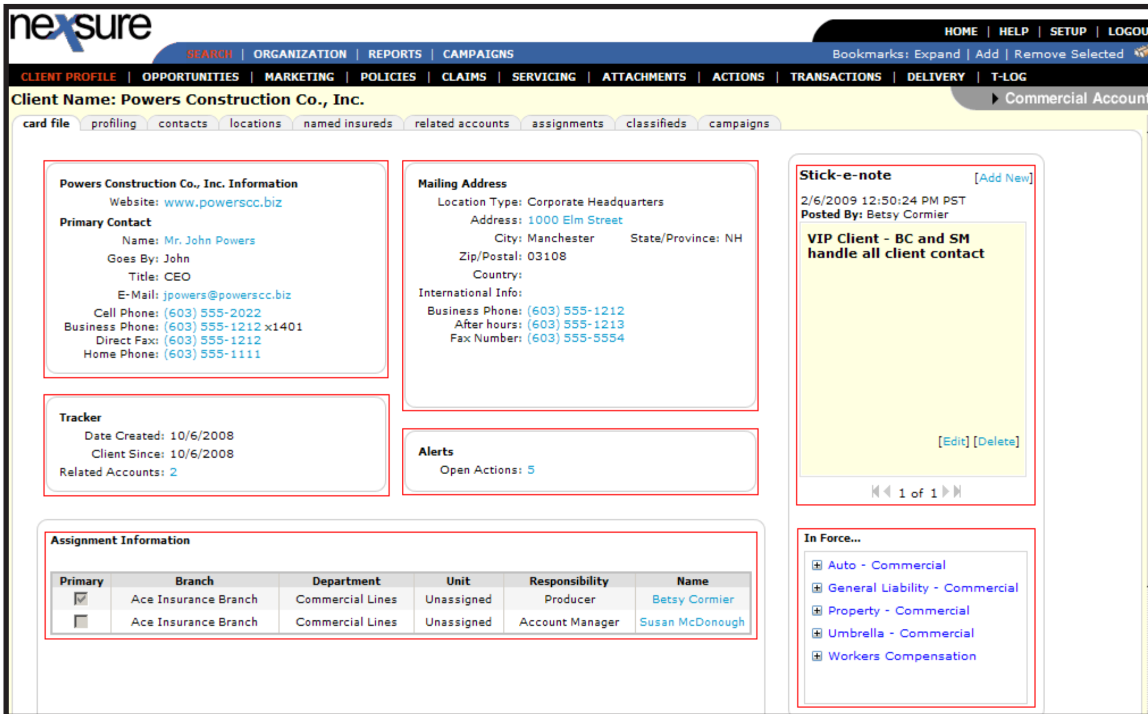
Fields	Definition
Phone Number Type	**System Phone types display by default. Additional phone types can be added to the list by your Nexsure administrator. Select the type that identifies the phone number being entered for the primary contact.** 
Number	**Enter the phone number for the primary contact without any formatting. Nexsure will format the phone number when the record is saved.**
Phone Number Ext	**Enter up to six digits for the extension**
Phone Number Description	**This field is used to further identify the phone number entered. For example enter** *6 a.m. to 3 p.m.* **or enter their cell phone provider for text messages.**
Go Directly to Profile Page	**Leaving this box checked when the record is saved automatically displays the client profiling screen. The profiling screen provides important information about the account that can be used to qualify them for your agency or strictly as quick information.**

After entering all the data, click the **Save** button to store the information. Selecting the clear button will clear the entire screen.

Note: It is important to obtain the e-mail address of all contacts because not only can they be e-mailed directly from Nexsure, but it also helps identifying them when searching for an existing contact.

Using the Card File

The **card file** tab is a summary of the client's account information that contains seven sections. Each section contains information and links relating to the client.



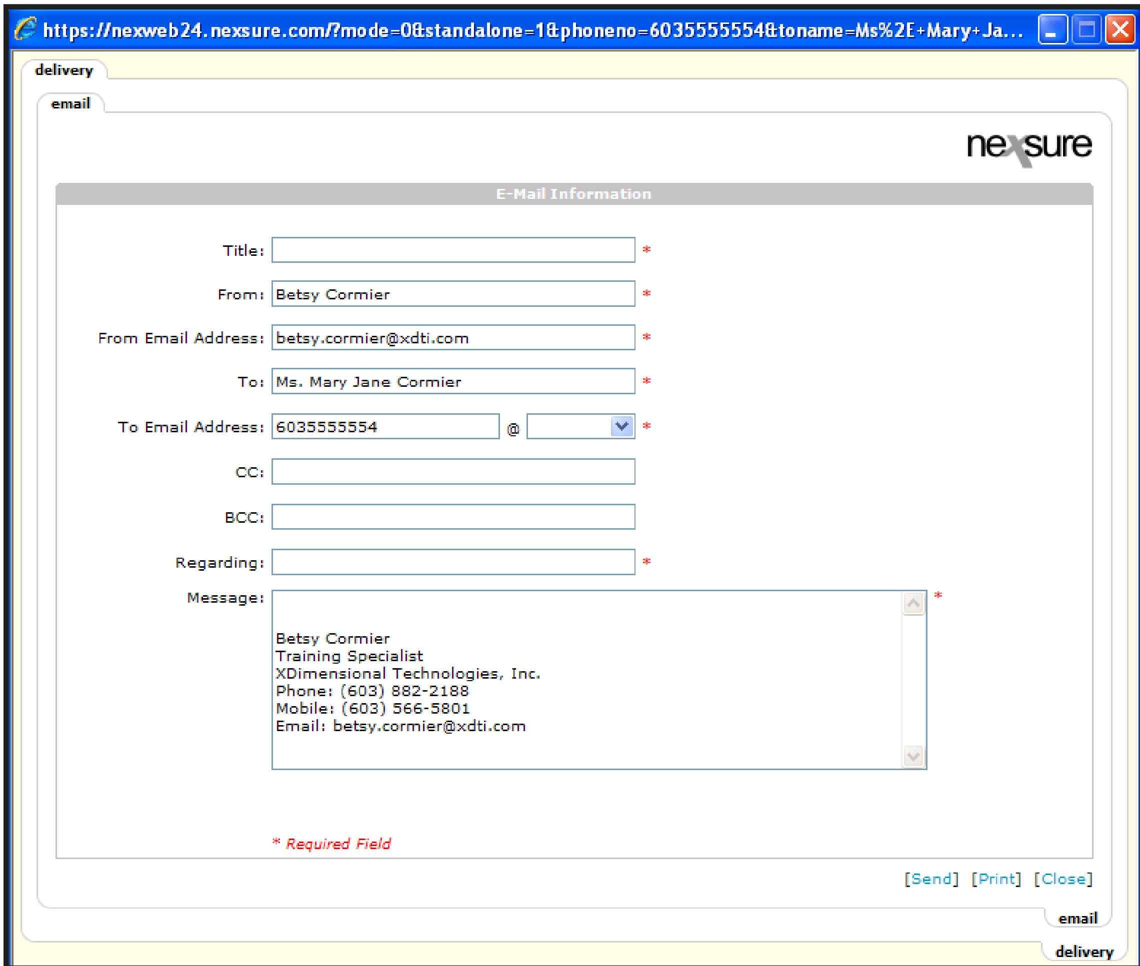
Primary Contact

The **Client Name** displays above the **Primary Contact** section. Commercial Client's website address also displays. The **Primary Contact** section contains the Name, Goes By name, Title, first E-Mail address and all phone and fax numbers for the person designated as the primary contact on the account.

Hot Links are provided to make some tasks quicker:

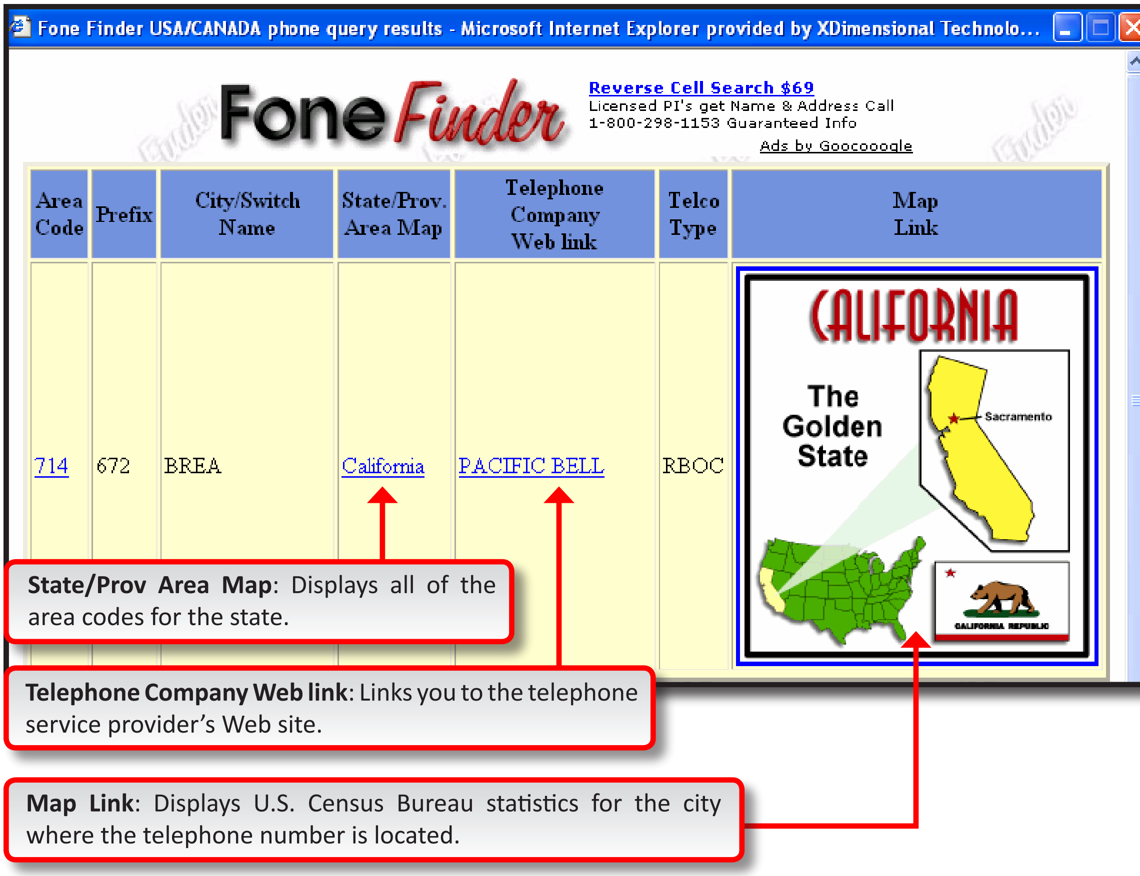
- Clicking on the **Name** link displays the Contact Record. This screen displays additional information about the primary contact and allows the user to link to other Internet options.
    - To send a text message to a contact's cell phone, click on the **Cell Phone** link, not the cell phone number. This will display a screen to send a text message. Fields that have an * next to them are required fields. Complete the required fields and enter in any other pertinent information. Click the **Send** button to send the text message to the cell phone.

XDimensional Technologies

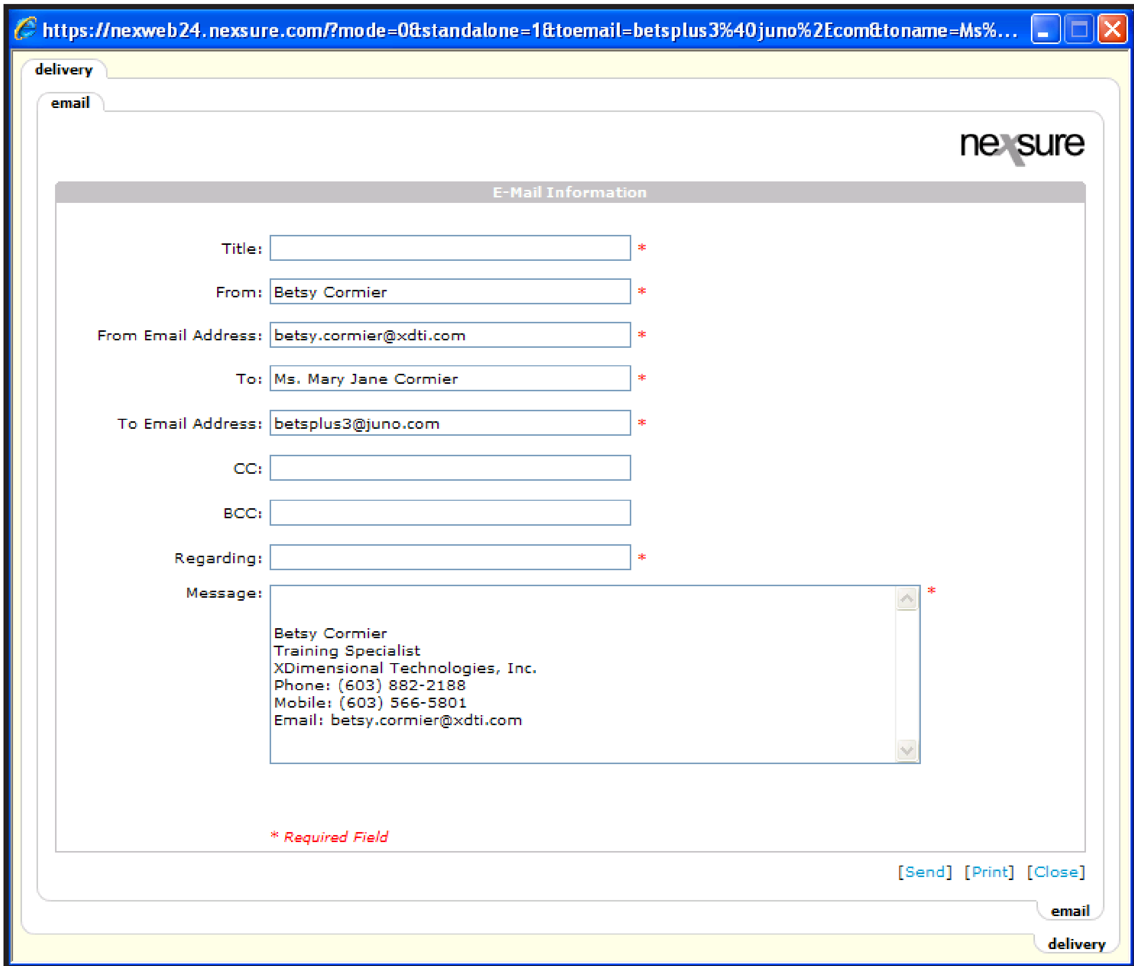


Note: The cell phone must be set up to receive text messages. Text messages sent from Nexsure are saved in **Delivery**.

- To determine the location of a telephone number, click on the phone number link. This will open an Internet link to Fone Finder. The Fone Finder screen displays the city and state where the telephone number is located.



- Clicking the **e-mail** address link displays the e-mail delivery screen. Use this link to send a quick e-mail to the primary contact's e-mail address. Fields that have an * next to them are required fields. Complete the required fields and enter in any other pertinent information. Click the **Send** link to send the e-mail message. These may be monitored on the **DELIVERY** link.



Tracker

The **Tracker** section contains the date the account was created, how long the entity has been and the number of related accounts.

- Click the **Related Account Number** link to display the related account's tab.

Mailing Address

The **Mailing Address** section contains the address and telephone information for the primary location on the account.

- Click the **Address** link to access the MapQuest® Web site, where a map of the address area will be displayed.

Alerts

The **Alerts** section contains the number of open actions for the account.

- Click the number link (2) to display all of the client's **Open Actions** on the **actions** tab.

Assignment

The **Assignment** contains the name of the employee(s) in the agency, along with their designated Responsibility for this account.

- Click on the **Name** link to display the contact record of the employee.

Stick–e-note

Stick-e-notes are an area of the system where temporary notes for the account can be stored.

- Click the **[Add New]** link to create a new Stick-e-note.
- Type your note in the yellow area.
- Click the **[Save]** link to save the Stick-e-note.
- Each saved Stick-e-note will be user, date, and time stamped.
- Click the **[Edit]** link to modify a Stick-e-note.
- Click the **[Delete]** link to remove a Stick-e-note.
- Use the page navigation links, located below the Stick-e-notes, to move to another Stick-e-note.

In Force

The **In Force** section displays all in force policies for the account in the lower right corner of the **card file** tab. If there are no in force policies for this account, there will not be an In Force section on the **card file** tab.

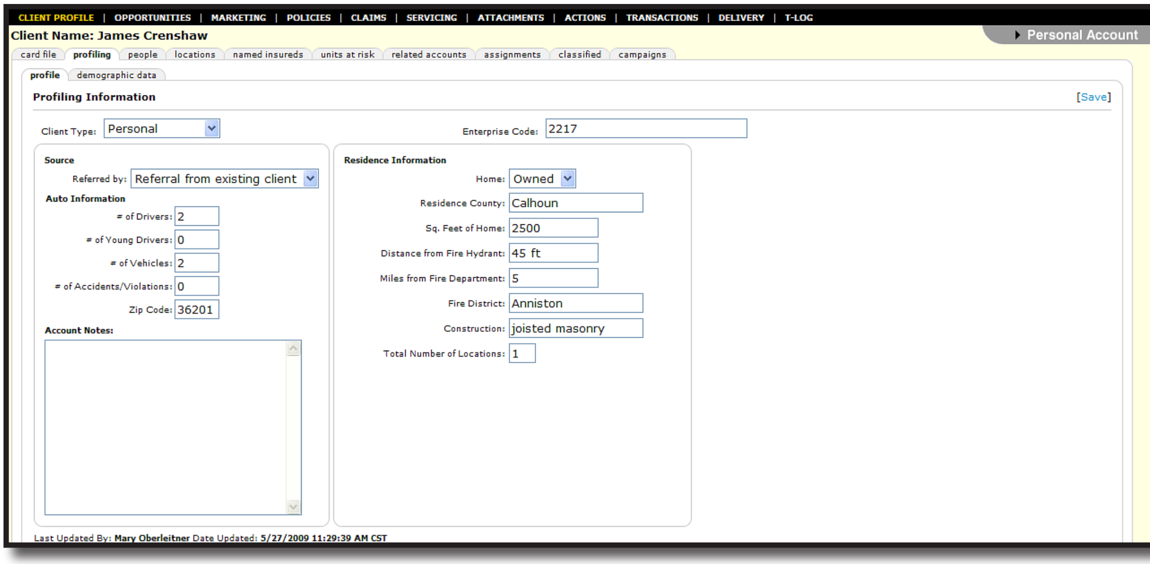
- Click the **Expansion [+]** button next to the line of business to display the policy number.
- Click the **Policy Number** link to access the underwriting screen of the policy.
- Click the **Line of Business** link to display a summary of all **In Force** policies that contain that line of business.

Note: The data on the card file tab may be modified by accessing the appropriate tabs and clicking on the **Details** icon.

Personal/Commercial Profiling

WHY the Profiling Screen is Important

Profiling information is used to capture account information that can be quickly referred to at any time by anyone in the agency. There can be only one client profile for each client. The client type selected determines the profiling screen presented for completion. Below is a Personal Lines profiling screen. After completing the screen, click the **[Save]** link in the upper right corner.



HOW to Add Profiling Information

If the **Go Directly to the Profile Page** box was checked when the user clicked on Save while saving the client information, the profiling screen is automatically displayed. If the box was not checked, the user can access the profiling screen by clicking on the **profiling** tab.

The **Enterprise Code** box is a free form area that may be used to enter information to track a client managed in Nexsure with other proprietary systems. The **Enterprise Code** is available on the **SEARCH** screen to enable searching for specific enterprise codes.

Depending upon the client type, complete the profiling screen using the following fields:

Completing the Personal Profiling Screen

- **Referred By**: Use the drop-down box and select how this client was referred to your agency. The contents of the Referred By drop-down box are added in **Setup** under **Lookup Management**.
- **Auto Information**
  - **# of Drivers**: Enter the number of drivers for this account.
  - **# of Young Drivers**: Enter the number of young drivers for this account.
  - **# of Vehicles**: Enter the number of vehicles for this account.
  - **# of Accidents/Violations**: Enter the total number of accidents/ violations for this account.
  - **Zip Code**: Enter the zip code for this account.
  - **Account Notes**: This is a free form area where notes about the client may be kept.
- **Residence Information**
  - **Home**: Use the drop-down box and select the Home Ownership. The contents of the **Home** drop-down box are added in **Setup** under **Lookup Management**.
  - **Residence County**: Enter the county in which the residence is located.

- **Sq. Feet of Home**: Enter the total square footage of the home.
- **Distance from Fire Hydrant**: Enter the number of feet from the home to the nearest fire hydrant.
- **Miles from Fire Department**: Enter the number of miles from the home to the nearest Fire Department.
- **Fire District**: Enter the Fire District the home is located in.
- **Construction**: Enter the home's construction type.
- **Total Number of Locations**: Enter the total number of locations owned or rented by the client.
- Click the **[Save]** link to save the information.

Completing the Commercial Profiling Screen

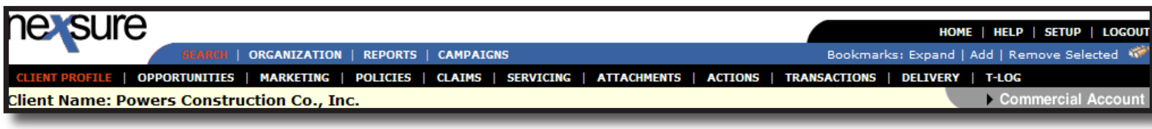
- **Referred By**: Use the drop-down box and select how this client was referred to your agency. The contents of the Referred By drop-down box are added in **Setup** under **Lookup Management**.
- **Account Notes**: This is a free form area where notes about the client may be kept.
- **Organization Information**
    - **Legal Entity Type**: Use the drop-down box and select the Legal Entity Type for the client. The contents of the Legal Entity Type drop-down box are added in **Setup** under **Lookup Management**.
    - **Years in Business**: Enter the number of years the account has been in business. Populates ACORD 125 and 130 Applicant / Organization Group, Years in Business field.
    - **# of Employees**: Enter the number of people employed by the account. Populates ACORD 125 in Applicant / Organization Group, Members and Managers field.
    - **# of Locations**: Enter the number of locations for the account.
    - **# of Vehicles**: Enter the number of vehicles owned or leased by the account.
    - **Estimated Annual Gross Sales**: Enter the estimated dollar amount of the account's Annual Gross Sales.
    - **Estimated Commission**: Enter the estimated commission amount the agency can expect to receive from this account.
    - **Monthly Payroll**: Enter the dollar amount of the account's monthly payroll.
    - **# of States/Province**: Enter the number of states and/or provinces this account does business in.
    - **Home Office State/Province**: Use the drop-down box to select the state or province this account is domiciled in.
    - **On-Line Business**: Select the appropriate option.
    - **TV/Radio Advertisement**: Select the appropriate option.
- Click the **[Save]** link to save the information.

HOW to Change Profiling Information

If the **Client Type** entered was incorrect, it can be changed in the Profiling screen by using the **Client Type** drop-down box.

- Click the **Client Type** drop-down box to select the correct client type.
- Click the **[Save]** link to save the client type.

Note: This will update the type of account displayed in the light gray bar to the right. When the profiling information is saved it will be user, date, and time stamped at the bottom of the screen.



People

The contact added when the client is first entered in Nexsure is automatically designated as Primary. The **people** tab displays all people with the **Contacts** designation as the default **View** for this entity. Unlimited contacts may be added for each entity but only one can be designated as the **Primary Contact**. The primary contact will be identified with a check box in the **Primary** column. The primary may be reassigned but deletion of a primary is not allowed. People designated as drivers or employees will be available to lookup and add to the forms. People added to forms via the **Lookup** link will be associated to the people record. Any changes made on the client's people record will prompt for an update any forms in a pliable state.

Note: Search results will not return more than 5,000 records. If more than 5,000 records exist and search limit of 5,000 has been met, a message will display in red text at the bottom of the page that states: **The search returned more than 5,000 records. The maximum number of records displayed is limited to 5,000 for performance reasons. Please consider refining search filter criteria.**

HOW to Use the People Summary View

The **people** tab displays all contacts, drivers and employees in the selected view for this entity in a summary view. Unlimited people may be added for each entity, but only one can be designated as **Primary**. The primary is identified with a check box in the **Primary** column. The primary may be reassigned but deletion of a primary is not allowed.

The **People Summary** screen shows a count of the **Active Contacts**, **Included Drivers** and **Active Employees**. The view can be changed to show not only **Contacts** (default) but **Drivers** or **Employees**. An **Umbrella** icon to the left of the **Remove** icon indicates that the record has been associated to a form and may not be deleted without first removing from the associated forms. If this is not possible the record may be flagged as inactive by clicking the **Details** icon and clicking the **Inactivate** link. Use the **[Show]** link to search for inactive or a specific record.

Exporting and Importing People Records

The **[Import]** and **[Export]** links provide the ability to export the selected records and then after updating import back into Nexsure. To export, select the views of **Contacts**, **Drivers**, or **Employees** before selecting the records to export. After associating records at underwriting level (**IMPORTANT**: **Use this feature with discretion**), the fields that are exported for **People** are as follows:

Export Fields	Description of Exported Data
Remove	**Entering an "x" in this column, flags the field so that on import the records are removed from the list if not associated with a form and they are not designated as an employee or driver.**
People Id	**This field identifies the record. Users should not remove the people ID since this will do two things. It will create another existence of the record in Nexsure, which can be confusing when searching for a contact since multiples will exist. It will also add the record as new when imported.**
Prefix	**This is the prefix for the record such as Mr., Ms., etc. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
First Name	**This is the first name field for the people record. Text field holds 25 charaters.**
Middle Initial	**This is the Middle Initial field for the people record.**
Last Name	**This is the Last name field for the people record. Text field holds 25 charaters.**
Suffix	**This is the Suffix field for the people record. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
Goes By	**This is the Goes By field for the people record.**
Email	**This is the first email address field for the people record. The email address must be in the proper format for an email address.**
Email 2	**This is the second email field for the people record. The email address must be in the proper format for an email address.**
Notes	**This is the notes field for the people record.**
People Group Details ID	**This is the ID that identifies that this people record belongs to this client. Users should not remove the ID.**
SSN	**This is the social security number field for the people record. Must be entered in the proper format.**
Marital Status	**This is the Marital Status for the record such as S, M, etc. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
Sex	**This is the Sex for the record such as F, M, etc. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
Birth Date	**This is the Birth Date field for the people record. Must be entered in the proper format (MM/DD/YYYY).**
Active	**This is the Status for the record. Inactive = FALSE; Active = TRUE.**
Role	**This is the Role for the record such as General, Claims, etc. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
Title	**This is the Title for the record such as Account Manager. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
People Phones ID	**This field identifies the phone belongs to this record. Users should not remove the ID.**
Phone Number	**This is the phone number field for the people record. Any formatting applied in the spreadsheet will be stripped on import to reformat as required by Nexsure.**
Extension	**This is the phone extension number field for the people record.**
Description	**This is the phone number description field for the people record.**
Primary Phone	**This is the primary phone number designation field for the people record. Enter either TRUE or FALSE.**

Export Fields	Description of Exported Data
Phone Type Description	This is the Phone Type Description for the record such as Business Fax. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.
Address 1	This is the Address 1 field for the address other than location. Alpha numeric field holds 30 characters.
Address 2	This is the Address 2 field for the address other than location. Alpha numeric field holds 30 characters.
City	This is the City field for the address other than location. Text field holds 30 characters.
State Name	This is the State field for the address other than location. Make sure when entering this content that it exists in the State drop down box in Nexsure.
Zip Code	This is the Zip Code field for the address other than location.
County	This is the County field for the people record.
International Address	This is the International Address field for the address other than location. Text field holds 60 characters
Country Name	This is the Country Name field for the address other than location. Make sure when entering this content that it exists in the Country Name drop down box in Nexsure.
Contact	This is the Contact designation field for the people record. Enter either TRUE or FALSE to indicate if a Contact or not.
Driver	This is the Driver designation field for the people record. Enter either TRUE or FALSE to indicate if a Driver or not.
Drivers License No	This is the Drivers License No field for the people record.
Date Licensed	This is the Date Licensed field for the people record. Make sure to enter the MM/DD/YYYY to make sure required data exists.
State Licensed	This is the State Licensed field for the people record. Make sure when entering this content that it exists in the State drop down box in Nexsure.
Driver No	This is the Driver No field for the people record.
Years Experience	This is the Years Experience field for the people record.
Driver Status	This is the Driver Status field for the people record. Enter Included or Excluded to indicate the driver status.
Accident Prevention Course Date	This is the Accident Prevention Course Date. Make sure to enter the MM/DD/YYYY to make sure required data exists.
Distant Student	This is the Distant Student designation field. Enter either TRUE or FALSE.
Good Student	This is the Good Student designation field. Enter either TRUE or FALSE.
Driver Training	This is the Driver Training field. Enter either TRUE or FALSE.
Driver Relationship	This is the Driver Relationship field. Make sure when entering this content that it exists in Nexsure.
Employee	This is the Employee designation field for the people record. Enter either TRUE or FALSE to indicate if a Employee or not.
Ownership Percent	This is the Ownership Percent field. Enter number that represents the percent of ownership.
Workers Compensation Status	This is the Workers Compensation Status field for the people record. Enter either TRUE or FALSE.
Date Hired	This is the Date Hired field. Make sure to enter the MM/DD/YYYY to make sure required data exists.
Class Code	This is the Class Code field for Workers Compensation. Enter the appropriate Work Comp class code.
Remuneration	This is the Remuneration field for Workers Compensation. Enter the appropriate remuneration amount.

- **Import Facts:**

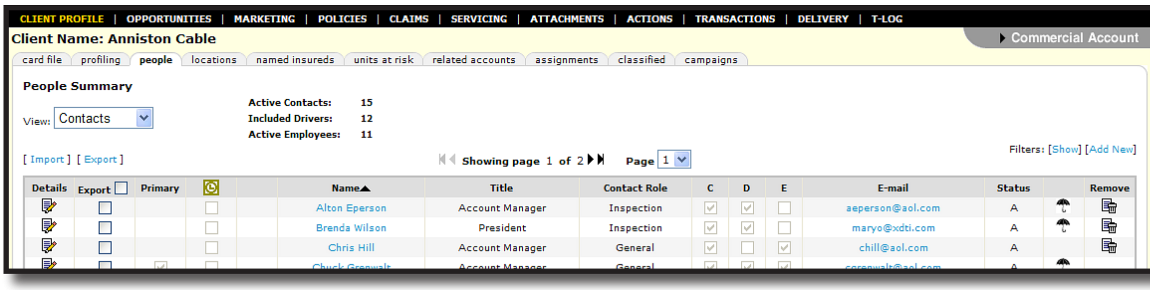
1. Importing should be used with discretion, ideally prior to any form association.
2. Only selected records will be exported, otherwise a message is displayed advising none were selected.
3. Import will only work when the formatted spreadsheet from the page is first exported.
4. In order to avoid updates occurring to records that have no changes, it is suggested that those records be removed before the import takes place.
5. Any non-date formatting applied to data in the spreadsheet will be stripped upon import and re-formatted as required by Nexsure fields.
6. When the spreadsheet is exported some fields may not appear in a readable format such as the phone number. Expand the field to display data in a readable format.
7. While the location description is not exported, the ID is. If the **Client Location ID** is blank, the first location in the dropdown box for **Select the Primary Account Location for this contact** is automatically selected. It is not advisable to remove this ID unless it is desired to change the location to the first location.
8. Users should not change any system generated IDs exported on the page since these IDs:
   - Importing information associated to an ID will always replace information currently in system.
   - The absence of an ID upon import will denote an item to be added.
9. All records upon import will display the import users updated by information including the date and time of the import as the last updated date.
10. Validation will take place before import is executed and if issues are found a failure description message will display. Validation will occur for:
    - Removing units
      - If unit is attached to a policy it cannot be removed.
      - If a people record is marked as a **Driver** or **Employee** it cannot be removed.
      - Primary contact cannot be removed.
    - Required fields (as indicated on the UI)
      - **Contact** designation is automatically added as a default if no values for **People Type** are imported.
      - IDs (existence of, if present)
      - Format of spreadsheet is same as export.
      - Values input for drop-down boxes match a valid selection.
      - If validation fails, import will be aborted.
      - Since max # of records returned is 5,000, 5,000 is the max number to be exported or imported (search results will not return more than 5,000 records).
11. Since Contacts are global to the Nexsure system, any information changed for the contact will make changes to that contact wherever it is used in the system. Changes made to contacts

used on other entities will not be able to be identified as a “changed unit”.

12. Import will not override photo image of existing people, synchronize check box, existing non-primary phone numbers or primary contact designation.

Other Screen Features

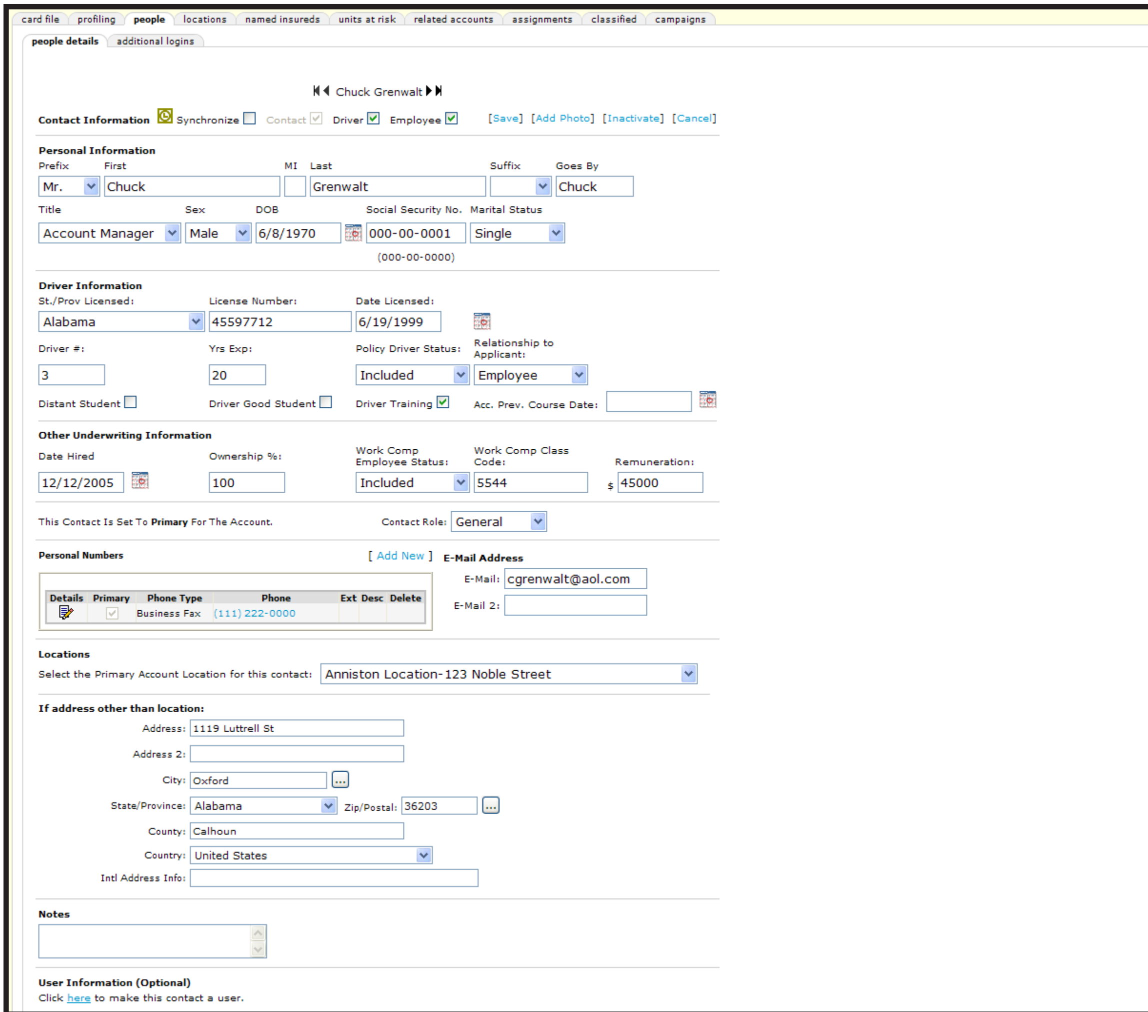
- Clicking the **Name** link displays the contact record. This screen displays additional information about the selected and allows the user to link to other Internet options. See section “HOW to Use the Card File, Primary Contact” of this chapter for further information.



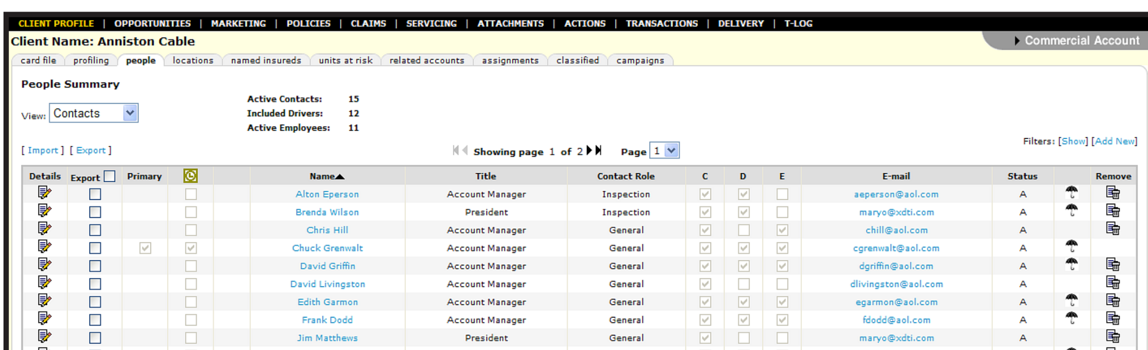
- Clicking the **Details** icon opens the **contact details** for editing.

- Enable the contact for synchronization to a personal Outlook contact list by checking the **Synchronize** check box.

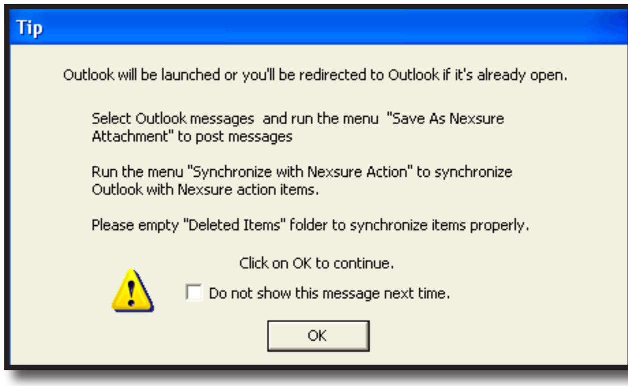
- Click **[Save]** link to save any changes or **[Cancel]** to return to the **People Summary** screen.



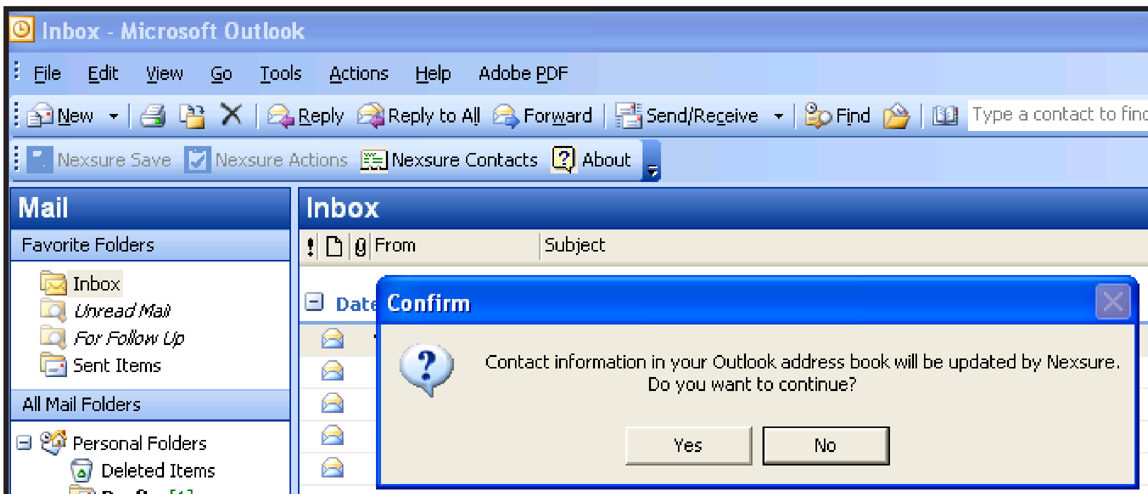
A check mark beneath the **Outlook** icon column on the **People Summary** screen identifies any users enabled for synchronization to Outlook. Click the **Outlook** icon to launch Outlook.



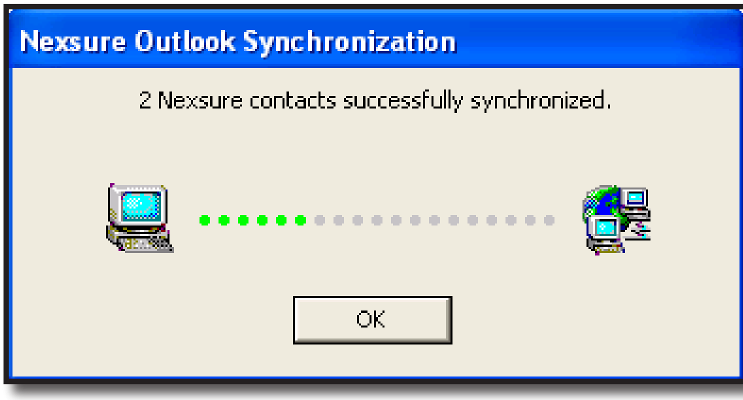
Click **OK** on the **Tip** message to launch or redirect to Outlook if it is already open. Place a check in the check box prior to clicking **OK** to not display the **Tip** message the next time you integrate with Outlook.

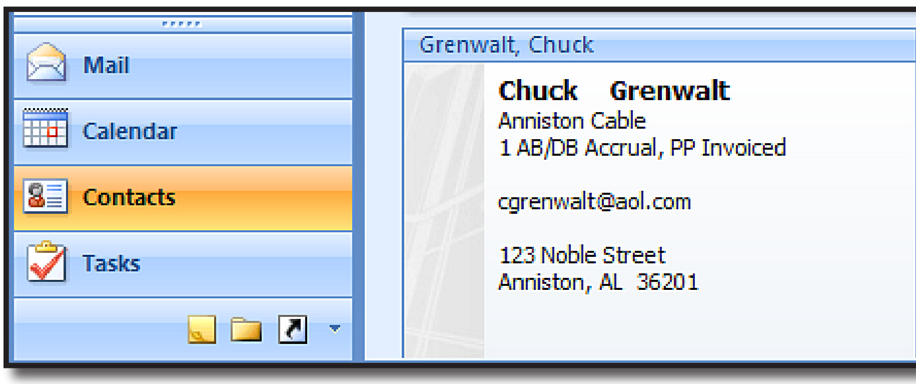


Click **Yes** in the **Confirm** message box to add the client's authorized contacts to Outlook.



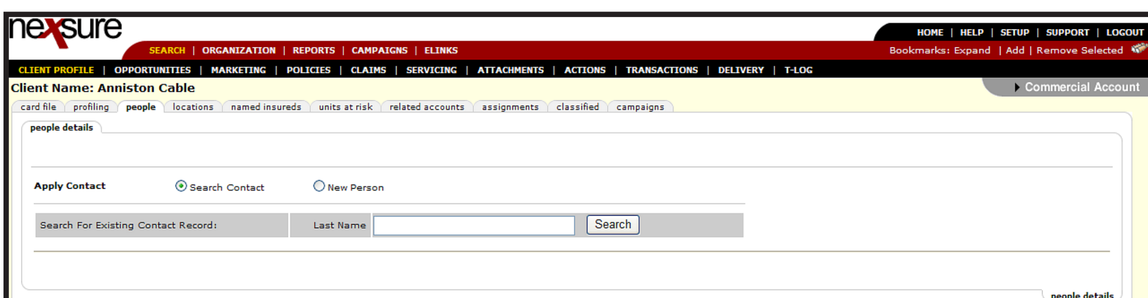
Once the **Nexsure Outlook Synchronization** is successful, click **OK** on the pop-up window. The contacts are successfully added or updated in Outlook.





Adding People

- Click the **[Add New]** link in the upper right corner of the **People Summary** screen. The **Contact Detail, Search for Existing Contact Record screen** will be displayed.



- The **Search Contact** option is selected by default. This feature allows the global contacts database for your organization to be utilized so that duplicate contact records are avoided. Type in the last name of the contact to be added in the **Last Name** field and click the **Search** Button. All contacts with that last name are displayed with their applicable e-mail address. Scroll through the search results to determine if the contact has been added.

- If the contact is found, click the **Name** to highlight it and click the **Use Selection** button. The contact information will be associated and displayed as a member of this entity.

- There are fields that are unique to the relationship with this entity. All other fields apply to the record globally and if updated, will update all records for the selected people record throughout Nexsure. The unique fields are:
    - **Title**
    - **Primary Contact**
    - **Contact Role**
    - **Location** (Commercial Clients only)
    - **Driver Information**:
        - Driver #
        - Years Exp
        - Policy Driver Status
        - Acc. Prev. Course Date
    - **Other Underwriting Information**:
        - Date Hired
        - Ownership %
        - Work Comp Employee Status
        - Work Comp Class Code
        - Remuneration

Note: All contacts added to Nexsure are stored in a global database specifically for your organization. A contact should be entered in Nexsure only one time. The contact can then be related throughout Nexsure as needed.

After searching for existing contacts and confirming the contact does not exist in Nexsure, click the **New Contact** option. The **Detail** screen will be displayed. Only people records with a designation of contact are available in search to add to other entities.

Add a New Contact - Field Definitions

Fields	Definition
Synchronize	The Synchronize check box is available after saving a new contact record. Click the synchronize check box to add a check mark. The check mark flags the selected record so it may later be added to the logged in user's personal Outlook. Contacts may only be added to Outlook separately for each customer and each user. This is done from the contact summary view.
Prefix	Select the prefix from the drop-down box. Items may be added to the drop-down box in Setup under Lookup Management.
First	Enter the first name of the contact, driver or employee.
MI	Enter the middle initial of the contact in the MI field.
Last	Enter the last name of the contact, driver or employee.
Suffix	Select the suffix from the drop-down box. Items are added to the drop-down box in Setup under Lookup Management.

Fields	Definition
Goes By	Enter the name the contact, driver or employee goes by, if applicable.
Title	Select the title from the drop-down box. Items are added to the drop-down box in Setup under Lookup Management.
Sex	Select the gender from the drop-down box.
DOB	Enter the date of birth using the calendar icon or key the date in using the correct formatting.
Social Security No.	Enter the social security no. using the correct formatting.
Marital Status	Select the marital status from the drop-down box. Items may be added to the drop-down box in Setup under Lookup Management.
St./Prov. Licensed	Select issuing state/province of the driver's license from the drop-down box.
License Number	Enter the drivers license number.
Date Licensed	Enter the date licensed using the calendar icon or key the date in using the correct formatting.
Primary Contact?	Select the Yes or No option to designate this contact as the primary contact for this entity.
Contact Role	For commercial accounts: When the contact role of Accounting, Claims and Inspection is used, the first one will populate to the new marketing ACORD 125 inspection section of the form when added. If no contact roles for Accounting, Claims or Inspection are present, the primary contact will populate the inspection portion of the form.
Personal Numbers	Click the [Add New] link to add new phone numbers. Click the Details icon to edit the number or details. Click the Remove icon to remove numbers not designated as primary. Type: The types in the drop-down box are added in SETUP under Lookup Management under the category of Miscellaneous. Number: Enter the phone number in the Number field, without formatting. Formatting is applied after saving the screen. Ext.: Enter up to 6 digits in the Ext. field. Description: Enter up to 15 characters to help describe the phone number, such as after 5pm. Make sure to designate a number as the primary number. Designating a primary number for contacts with a role of Accounting, Claims and Inspection will populate the Commercial ACORD 125 form under the inspection section. If no primary number is designated, the phone number for the primary contact will populate the form.
E-mail Address	Enter the e-mail address for the contact using the correct formatting. The E-mail Address field must contain the @ and . symbols. There are two e-mail address fields to accommodate a work and a personal e-mail address. On commercial contacts, the first e-mail address added to contacts with a role of Accounting, Claims and Inspection assigned will populate the Commercial ACORD 125 form under the inspection section when a new form is added or refreshed when servicing the policy. If no e-mail address is added, the e-mail address for the primary contact will populate the form. Note: E-mail addresses should be obtained for all contacts. E-mail addresses are placed in a global address book and available on the Delivery screen if the people record has a designation of Contact.
Locations	Select the primary account location for the contact. Locations added to the client are available for selection. If address is other than the available client account locations, fields are provided to include an alternate address.
Notes	Enter any notes regarding this contact. Note: Be cautious and keep in mind when entering account notes, the client may be given access to your Nexsure site.

When the **Driver** designation is selected from the **View** box the following fields are also available to users who have been granted security access:

Fields	Definition
Driver #	Driver number is used for sorting purposes on the summary screens.
Yrs Exp	Enter the number of years of driver experience. Will populate to the ACORD 90 and 127 if associated via Lookup.
Policy Driver Status	Select either included or excluded. When Lookup is used to associate and populate the driver info to the application only included drivers are available to associate.
Relationship to Applicant	Select the relationship to the applicant that will populate to the ACORD 90 if associated via Lookup.
Distant Driver	Place a check in the box when applicable to populate to the ACORD 90 if associated via Lookup.
Driver Good Student	Place a check in the box when applicable to populate to the ACORD 90 if associated via Lookup.
Driver Training	Place a check in the box when applicable to populate to the ACORD 90 if associated via Lookup.
Acc. Prev. Course Date	Place a check in the box when applicable to populate to the ACORD 90 if associated via Lookup.

When the **Employee** designation is selected from the **View** box the following fields are also available to users who have been granted security access:

Fields	Definition
Date Hired	Enter the date hired to populate to the ACORD 130 and 127 if associated via Lookup.
Ownership%	Enter the Ownership% to populate to the ACORD 130 if associated via Lookup.
Work Comp Employee Status	Select included or excluded to populate to the ACORD 130 if associated via Lookup.
Work Comp Class Code	Enter the W/C class code to populate to the ACORD 130 if associated via Lookup.
Remuneration	Enter the remuneration to populate to the ACORD 130 if associated via Lookup.

Click the **[Save]** link to save the changes. Click **[Cancel]** to abort.

HOW to Edit a People Record

People information may be changed or updated as needed. Always edit the first record entered when adding a new entity to complete additional information available for the record. There are fields in the contact's details that are unique to the relationship to an entity and if updated, will only affect this record. See "Adding People" in this chapter for these fields. All other fields apply to the record globally and if updated, will update all of the associated records throughout Nexsure.

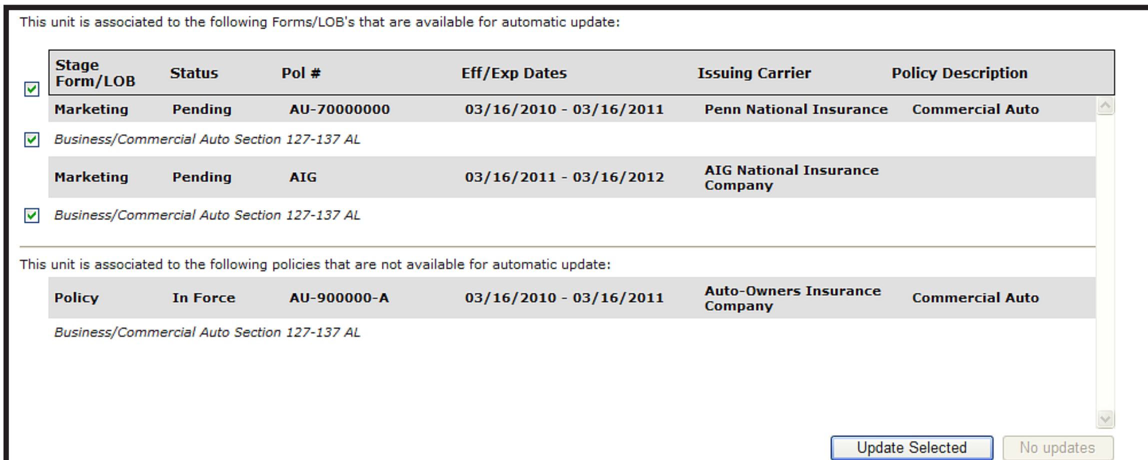
- Locate the appropriate client through **Search** and click the **people** tab. By default the people designated as contacts appear in a summary view, each record will have a **Details** icon.
- Click the **Details** icon of the record that needs to be updated.
- Make the necessary changes.
- Click the **[Save]** link to save the changes.

If the record is associated with a form, a popup screen is displayed providing an opportunity to update any forms the item is associated to and available for updating. Forms available for updates are:

- Any opportunity stage policy with any status.
- Any marketing stage policy without a status of submitted.

- An active policy in any of the following states:
  - Pending Endorsement
  - Pending Edit
  - Pending Audit
  - Future

To select all, click the check box at the top of the screen. The user will be prompted to update records that cannot not be updated because they are not in a pliable state until an edit, audit, endorsement, market existing or even renewing the policy is done. Click **Update Selected** after selecting the records. This will save the change and update the forms. If existing marketing and opportunity records are not updated at this time, they will be out of sync with the units at risk. Clicking **No Updates** when active will not update any associated forms.



Records are associated to the units at risk by clicking the **Lookup** link on the ACORD form to populate fields. Units may be added manually to pliable forms at the marketing/policy level if preferred. Units added this way will not be associated to the client level and will cause the policy and client levels to be out of sync and changes made on unassociated units at risk will not prompt to update the form since no associations exist. Once the units at risk feature has been used, it is recommended that everything is added, deleted and/or modified from the **client level** tabs.

Important: Updating a unit at the policy level does not update the unit at the client level.

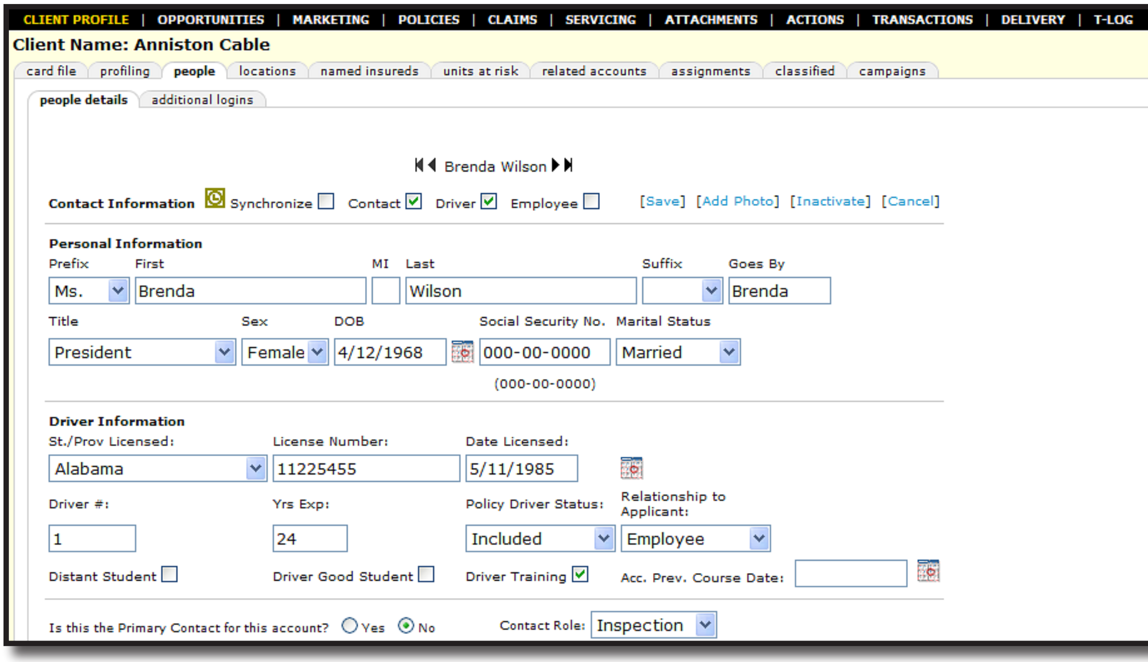
HOW to Change a Primary Designation

The first contact entered, when adding a new entity, will be designated as the **Primary Contact** and will be displayed in the contacts summary view with a check mark in the primary check box. A primary contact cannot be deleted. To change or delete a primary contact, another contact must be designated as the primary.

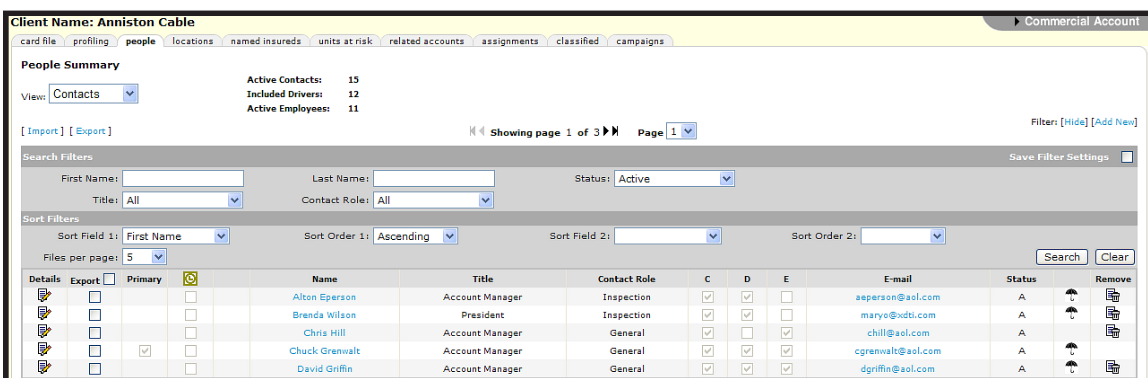
- Locate the appropriate client through **Search** and click the **people** tab. All contacts appear in a summary view, each will have their own **Details** icon.
- If there is only one displayed, it will be designated as primary and a second will need to be added.

See section “Adding People” in this chapter to add a second record.

- Select the **Yes** option to designate the new contact as the primary for this entity.



- If the person to be designated as the new primary contact is displayed in the summary view, click on their **Details** icon.
- Select the **Yes** option to the **Is this the Primary Contact for this account?** question.
- Click the **[Save]** link to save the change.
- In the contacts tab summary view, the newly appointed primary contact will be displayed with a check mark in the primary check box. The old primary contact will now have a **Remove** icon.



- Click on the **Remove** icon to delete the old primary contact, if applicable. If the **Remove** icon is not available, see the Nexsure point person within the agency for assistance. If security is not granted, the **Remove** icon will not be active to select. If the record is associated with a form, the record cannot be removed without first removing it from the application. If this is not possible, click the **[Inactivate]** link to inactivate the record.

Note: Records that display with an **Umbrella** icon to the left of the **Remove** icon are associated with a form on this client.

HOW to Delete People Records

- Locate the appropriate client through **SEARCH** and click the **people** tab. All records are displayed by default in a summary view, each will have its own **Details** icon.
- Click the **Remove** icon. If the **Remove** icon is not available, the record could be any of the following:
  - Record is designated as the **Primary**.
  - User does not have security to remove records.
- Click **OK** to delete the contact. Click **Cancel** to abort.

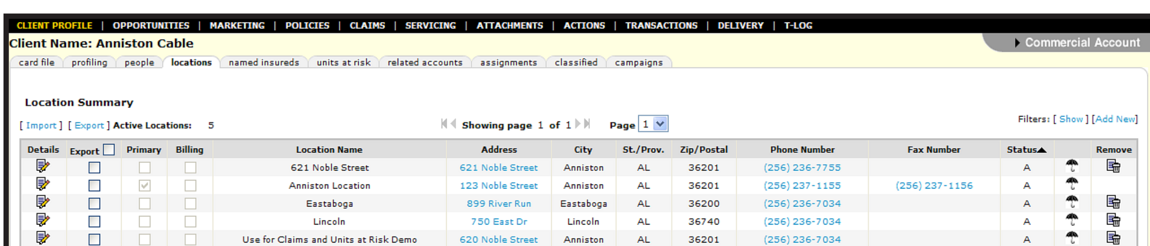
Granting Contact Security

Security may be given to a client contact to allow them access to the agent's Client Access Portal. Security is granted by making the contact a user. For instructions on how to set up security for Client Access, see "Client Access", in Chapter 2, Portal Access Training Manual.

- Locate the appropriate client through **SEARCH** and click the **contacts** tab. All contacts appear in a summary view. Each contact will have their own **Details** icon.

Locations

The location added when the client is first entered in Nexsure will automatically be designated as **Primary**. The **locations** tab displays all locations in a summary view for this entity. Unlimited locations may be added for each entity but only one can be designated as the **Primary Location**. The primary location will be identified with a check box in the **Primary** column. The primary location may be reassigned but deletion of a primary location is not allowed.

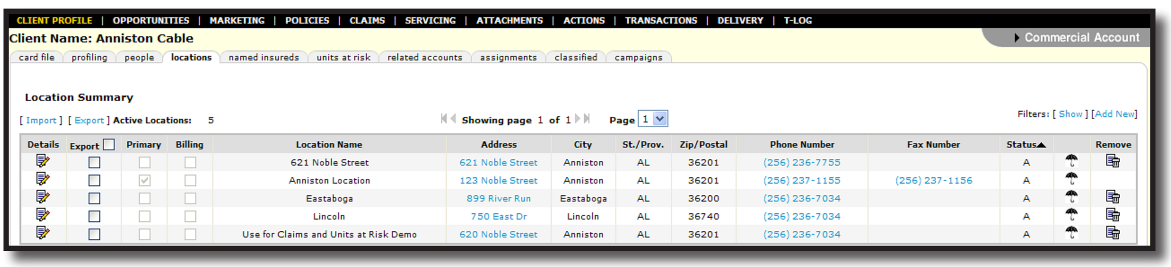


Note: Locations, and their information, added to the locations tab will be available to prefill to applications. Adding locations via the **Lookup** link to populate the forms adds the association to the Locations. Search results will not return more than 5,000 records. If more than 5,000 records exist and search limit of 5,000 has been met, a message will display in red text at the bottom of the page that states: The search returned more than 5,000 records. The maximum number of records displayed is limited to 5,000 for performance reasons. Please consider refining search filter criteria.

HOW to Use the Locations Summary View

The **locations** tab will display all locations in a summary view. The location address is a link, clicking the **Address** link will access the MapQuest® Web site where a map of the address area will display. Clicking the **Phone Number** or **Fax** number will access the Fone Finder Web site. The Fone Finder screen displays the city and state where the telephone number is located as well as additional links. Clicking the **State/Prov Area Map** link will display all of the area codes for the state. Clicking the **Telephone Company Web Link** will access the telephone company's Web site. Clicking the **Map Link** will display U.S. Census Bureau statistics for the city where the telephone number is located. The **Umbrella** icon indicates the location is associated with a form.

To sort by headers on the **Location Summary** screen, click the label in the header. Selection of header will sort based on selected field. Once heading selected, the arrow pointing up indicates ascending sort. The arrow pointing down indicates descending sort. Only one header field may be sorted at a time. This selection is temporarily reflected on the search filter in **Sort Field 1**. Selecting the **Save Filter** check box and clicking **Search** will save this setting as the user default view for the screen.



Importing and Exporting

Use the **[Show]** link to search for inactive or a specific record. The **[Import]** and **[Export]** links provide the ability to export the selected records and then after updating import back into Nexsure. After associating records at underwriting level (**IMPORTANT: Use this feature with discretion**), the fields that are exported for **Locations** are as follows:

Export Fields	Description of Exported Data
Remove	**Entering an "x" in this column, flags the field so that on import the record is removed from the list. Only records not associated with a form may be removed.**
Client Id	**This field identifies the client the record belongs to. Users should not remove the Client ID.**
Client Location ID	**This field identifies the location record. Users should not remove this ID since doing so will create another new instance of the record.**
Client Location Name	**The location name identifies the location. Location name is used when selecting the bill to on the policy info screen and invoices. Also, when searching for clients on the search screen, it is the location name identified as the primary location that displays to help identify the client record.**
Location Type	**This field identifies the type of location. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
Location Address 1	**This field is the first address line for the physical location. Alpha numeric field holds 30 characters.**

Export Fields	Description of Exported Data
Location Address 2	**This field is the second address line for the physical location. Alpha numeric field holds 30 characters.**
Location City	**This is the City field for the physical location.**
Location State	**This is the State field for the physical location. Make sure when entering this content that it exist in the State drop down box in Nexsure.**
Location Zip Code	**This is the Zip Code field for the physical location.**
Location County	**This is the County field for the physical location.**
Location Int Address	**This is the International address field for the physical location. Text field holds 60 characters.**
Location Country	**This is the Country field for the physical location. Make sure when entering this content that it exist in the Country drop down box in Nexsure.**
Mailing Address 1	**This field is the first address line for the mailing location. Alpha numeric field holds 30 characters.**
Mailing Address 2	**This field is the second address line for the mailing location. Alpha numeric field holds 30 characters.**
Mailing City	**This is the City field for the mailing location.**
Mailing State	**This is the State field for the mailing location. Make sure when entering this content that it exist in the State drop down box in Nexsure.**
Mailing Zip Code	**This is the Zip Code field for the mailing location.**
Mailing County	**This is the County field for the mailing location.**
Mailing Int Address	**This is the International address field for the mailing location.**
Mailing Country	**This is the Country field for the mailing location. Make sure when entering this content that it exist in the Country drop down box in Nexsure.**
Status	**This is the Status for the record. Inactive = FALSE; Active = TRUE.**
Phone ID	**This field identifies the phone belongs to this record. Users should not remove the ID.**
Phone Number	**This is the phone number field for the people record. Any formatting applied in the spreadsheet will be stripped on import to reformat as required by Nexsure.**
Extension	**This is the phone extension number field for the people record.**
Phone Description	**This is the phone number description field for the record.**
Phone Type Description	**This is the Phone Type Description for the record such as Business Fax. Make sure when entering this content into the spreadsheet that it is data that exists in your Org.**
GL Classification 1	**This is the GL Classification 1 field that when associated via lookup on the ACORD 126 populates to the Schedule of Hazards Description field line 1. Text field holds 25 characters.**
GL Classification 2	**This is the GL Classification 2 field that when associated via lookup on the ACORD 126 populates to the Schedule of Hazards Description field line 2. Text field holds 25 characters.**
GL Class Code	**This is the GL Class Code field that when associated via lookup on the ACORD 126 populates to the Schedule of Hazards Class Code field. Alphanumeric field holds 8 characters.**
Premium Basis	**This is the Premium Basis field that when associated via lookup on the ACORD 126 populates to the Schedule of Hazards Premium Basis drop down box which includes:** ■ **Blank** ■ **Gross sales per $1000/sales** ■ **Payroll per $1000/payroll** ■ **Area per 1000 sq ft** ■ **Total cost per $1000/cost** ■ **Admissions per 1000/Adm** ■ **Unit – per Unit** ■ **Other**

Export Fields	Description of Exported Data
WC Class Code	**This is the Workers Compensation Class Code field that when associated via lookup on the ACORD 130 populates to the Workers Compensation Class Code field in the WC Rating Info Section of the form. Alphanumeric field holds 8 characters.**
WC Description Code	**This is the Workers Compensation Description Code field that when associated via lookup on the ACORD 130 populates to the Workers Compensation Description Code field in the WC Rating Info Section of the form. Alphanumeric field holds 4 characters.**
Categories Duties Classification	**This is the Workers Compensation Categories Duties Classification field that when associated via lookup on the ACORD 130 populates to the Workers Compensation Categories Duties Classification field in the WC Rating Info Section of the form. Text field holds 38 characters.**
No Full Time EES	**This is the Number of Full Time Employees field that when associated via lookup on the ACORD 130 populates to the # Full Time Employees field WC Rating Info Section of the form. Numeric field holds 5 digits.**
No Part Time EES	**This is the Number of Part Time Employees field that when associated via lookup on the ACORD 130 populates to the # Part Time Employees field in the WC Rating Info Section of the form. Numeric field holds 5 digits.**
No Location EES	**This is the Total # location employees field that when associated via lookup on the ACORD 125 populates to the Number of employees field in the premises info section of the form. Numeric field holds 4 digits.**
Estimated Annual Remuneration	**This is the Estimated Annual Remuneration field that when associated via lookup on the ACORD 130 populates to the WC Rating Info Section; details – Estimated Annual Remuneration field on the form. Currency field holds 12 characters.**
Rating State	**This is the Rating State field that when associated via lookup on the ACORD 130 populates to the WC Rating Info Section; details – Rating State/Province Associated with location drop down field on the form.**
Premises Interest	**This is the Rating State field that when associated via lookup on the ACORD 125 populates to the Premises Info section; Part 2 sub-section – Interest drop down field on the form which includes:** ■ **Blank** ■ **Owner** ■ **Tenant** ■ **Other**
City Limits	**This is the Rating State field that when associated via lookup on the ACORD 125 populates to the Premises Info Section; Part 1 sub-section – City Limits drop down field which includes:** ■ **Blank** ■ **Inside** ■ **Outside**

- **Import Facts:**

1. Importing should be used with discretion, ideally prior to any form association.
2. Only selected records will be exported, otherwise a message is displayed advising none were selected.
3. Import will only work when the formatted spreadsheet from the page is first exported.
4. In order to avoid updates occurring to records that have no changes, it is suggested that those records be removed before the import takes place.
5. Any non-date formatting applied to data in the spreadsheet will be stripped upon import and re-formatted as required by Nexsure fields.
6. When the spreadsheet is exported some fields may not appear in a readable format such as the phone number. Expand the field to display data in a readable format.
7. While the location description is not exported, the ID is. If the **Client Location ID** is blank, the

first location in the dropdown box for **Select the Primary Account Location for this contact** is automatically selected. It is not advisable to remove this ID unless it is desired to change the location to the first location.

8. Users should not change any system generated IDs exported on the page since these IDs:
   - Importing information associated to an ID will always replace information currently in system.
   - The absence of an ID upon import will denote an item to be added.
9. All records upon import will display the import users updated by information including the date and time of the import as the last updated date.
10. Validation will take place before import is executed and if issues are found a failure description message will display. Validation will occur for:
    - Removing units
      - If unit is attached to a policy it cannot be removed.
      - If a person is marked as a **Driver** or **Employee** it cannot be removed.
      - Primary contact cannot be removed.
    - Required fields (as indicated on the UI)
      - **Contact** designation is automatically added as a default if no values for **People Type** are imported.
      - IDs (existence of, if present)
      - Format of spreadsheet is same as export.
      - Values input for drop-down boxes match a valid selection.
      - If validation fails, import will be aborted.
      - Since max # of records returned is 5,000, 5,000 is the max number to be exported or imported (search results will never return more than 5,000 records).

HOW to Add a Location

- Locate the appropriate client through **SEARCH** and click the **locations** tab. All locations appear in a summary view, each location will have its own **Details** icon.
- Click the **[Add New]** link.
- A new **Location Information** screen will be displayed.
- Complete the locations detail using the following information:

Fields	Definition
Location Type	Use the drop-down box to select the location type. Items may be added to the drop-down box in Setup under Lookup Management.
Location Name	Enter a description that identifies the location being added.
Is this the Primary Location for this Account	Select the appropriate option.
Is this the Billing Location for the Account	Select the appropriate option. The billing address is where invoices are mailed.
Location Numbers	Enter the phone numbers without formatting. Formatting will be applied after the Locations screen has been saved. Use the drop-down box to identify the type of phone number, a six-digit extension may be entered. Phone number type of 'Phone' displays on the location summary. Phone number type of 'Business Phone' prefills to commercial applications.
Physical Address	Enter the physical address for this location. If the International Address field is populated, then a Zip Code is not required. If the International Address field is not populated, a Zip Code must be entered.
Country	Use the drop-down box to select the country.
Intl Address Info	Enter the international address information for this location if applicable.
Is above address the US Mail address for this location	Select the appropriate option.
Mailing Address	If the mailing address is different from the physical address, complete the billing address section.
GL Classification	Population of one or both of the GL Classification fields will populate to the ACORD 126 Schedule of Hazards if associated via form Lookup link.
GL Class Code	Population of the GL Class Code will populate to the ACORD 126 Schedule of Hazards if associated via form Lookup link.
GL Premium Basis Code	Population of the GL Premium Basis Code will populate to the ACORD 126 Schedule of Hazards if associated via form Lookup link.
WC Class Code	Population of WC Class Code will populate the ACORD 130 WC Rating Info Section; details - class code field if associated via form Lookup link.
WC Description Code	Population of WC Description Code will populate to the ACORD 130 WC Rating Info Section; details - Description Code field if associated via form Lookup link.
Categories, Duties, Classifications	Population of Categories, Duties, and Classifications will populate to the ACORD 130 WC Rating Info Section; details - Categories, Duties and Classifications field if associated via form Lookup link.
# Full Time employees	Population of # Full Time Employees will populate to the ACORD 130 WC Rating Info Section; details - # of full time employee's field if associated via form Lookup link.
# Part Time employees	Population of # Part Time Employees will populate to the ACORD 130 WC Rating Info Section; details - # of part time employees if associated via form Lookup link.
Total # location employees	Population of Total # location employees will populate to the ACORD 125 Premises Info section if associated via form Lookup link.
Est. Annual Remuneration	Population of Est. Annual Remuneration will populate to the ACORD 130 WC Rating Info Section; details – Estimated Annual Remuneration field if associated via form Lookup link.
Rating State/Province	Population of Rating State/Province will populate to the ACORD 130 WC Rating Info Section; details – Rating State/Province Associated with location drop down field if associated via form Lookup link.
Interest	Population of Interest will populate to the ACORD 125 Premises Info section; Part 2 sub-section – Interest drop down field if associated via form Lookup link.
City Limits	Population of Interest will populate to the ACORD 125 Premises Info Section; Part 1 sub-section – City Limits drop down field if associated via form Lookup link.

Click the [**Save**] link to save. Click [**Cancel**] to abort.

Copying Locations

In order to make entering locations quicker, a [**Copy**] link has been added. To use this feature, perform the following:

- Locate the appropriate client through **SEARCH** and click the **locations** tab. All active locations appear in a summary view, each will have its own **Details** icon.
- Click the **Details** icon of the location that will be used for the copy.
- Click the [**Copy**] link in the upper right on the screen to bring up the copy window.
- Select the number of times to copy the record and click the **Copy** button.
- The copied locations are listed on the **Locations Summary** screen as non-primary locations and non-billing location.
- **Copy of** is added to the front of the **Location Name** field to make identification of the copied records easier.
- Any changes made on the screen will be saved when the **Copy** button is clicked.
- For each record created the **Last Updated By** name and **Last Updated Date** is populated with the current user name, date and time and is not carried over from the record being copied.
- Edit each record as needed. (See section, "HOW to Edit a Location", in this chapter for more details on editing records.)

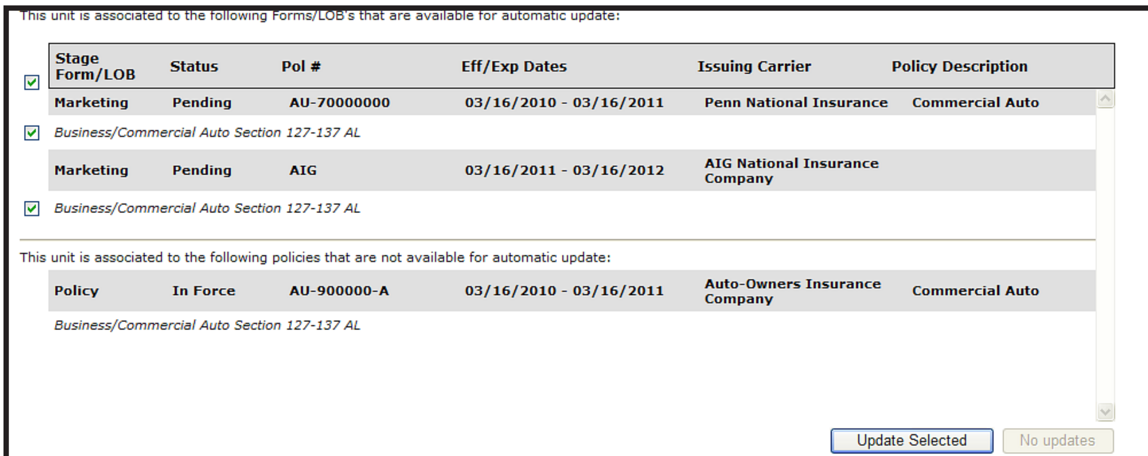
HOW to Edit a Location

Location information may be changed or updated as needed. Always edit the first location entered when adding a new entity to complete additional information available for the location record. If the location is associated to a form an **Umbrella** icon is displayed. The presence of an **Umbrella** icon indicates that all changes should be made to the locations at the client level so that the updates can be applied to the associated forms.

- Locate the appropriate client through **SEARCH** and click the **locations** tab. All locations appear in a summary view, each location will have its own **Details** icon.
- Click the **Details** icon of the location that needs to be changed.
- Make the necessary changes to the location.
- Click the [**Save**] link to save the changes. Click [**Cancel**] to abort or [**Delete**] to delete the location.
- If the record is associated with a form, a popup screen is displayed providing an opportunity to update any forms the item is associated to and available for updating. Forms available for updates are:
    - Any opportunity stage policy with any status.
    - Any marketing stage policy without a status of submitted.
    - An active policy in any of the following states:
        - Pending Endorsement

- ➢ Pending Edit
- ➢ Pending Audit
- ➢ Future

To select all, click the check box at the top of the screen. The user will be prompted to update records that cannot not be updated because they are not in a pliable state until an edit, audit, endorsement, market existing or even renewing the policy is done. Click **Update Selected** after selecting the records. This will save the change and update the forms. If existing marketing and opportunity records are not updated at this time, they will be out of sync with the units at risk. Clicking **No Updates** when active will not update any associated forms.



Important: Updating a unit at the policy level does not update the unit at the client level.

HOW to Change a Primary Location

The first location entered, when adding a new entity, will be designated as the **Primary Location** and will be displayed in the locations summary view with a check mark in the **Primary** check box. A primary location cannot be deleted, to change or delete a primary location another location must be added and designated as primary.

- Locate the appropriate client through **SEARCH** and click the **locations** tab. All locations appear in a summary view, each location will have its own **Details** icon.
- If there is only one location displayed, it will be designated as Primary and a second location will need to be added. See **How to Add a New Location** to add a second location.
- Select the **Yes** option to designate the new location as the **Primary Location** for this entity.

- If the location to be designated as the new primary location is displayed in the summary view, click on the **Details** icon.
- Select the **Yes** option for **Is this the Primary Location for this account?**.
- Click the **[Save]** link to save the change.
- In the **locations** tab summary view the newly appointed primary location will be displayed with a check mark in the **Primary** check box. The old primary location will now have a **Remove** icon.

HOW to Delete a Location

- Locate the appropriate client through **SEARCH** and click the **locations** tab. All locations appear in a summary view, each location will have its own **Details** icon.
- Click the **Remove** icon. If the **Remove** icon is not available, the record could be any of the following:
    - Record is designated as the primary.
    - User does not have security to remove records.
- Click **OK** to delete the location. If associated with a form a message is displayed advising the record cannot be removed. Inactivate the record by clicking the **[Inactivate]** link. The location will reside on the list as **Inactive** and may be accessed if needed by searching for inactive records. Click **Cancel** to abort.

Note: A primary location cannot be deleted or inactivated. A second location needs to be added and designated as primary. See the 'HOW to Change a Primary Location' section in this chapter.

Named Insureds

The named insured is added when the client is first entered in Nexsure and is automatically designated as primary. The **named insureds** tab displays all named insureds added for this entity in a summary view. Unlimited named insureds may be added for each entity but only one can be designated as the primary named insured. The primary will be identified with a check box in the **Primary** column. The primary may be reassigned but deletion of a primary named insured is not allowed. The **Umbrella** icon indicates the location is associated with a form. In the **Status** column, an **A** means the record is active while an **I** means it is inactive. Inactive records cannot be found in the **Lookup** window on forms. The total number of active named insured are displayed at the top of the summary screen.

To sort by headers on the summary screen, click the label in the header. Selection of header will sort based on selected field. Once the heading is selected, an up arrow indicates the sort is in ascending order. The down arrow indicates the sort is in descending order. Only one header field may be sorted at a time. This selection is temporarily reflected on the search filter in **Sort Field 1**. Selecting the **Save Filter** box and clicking **Search** will save this setting as the user default view for the screen.

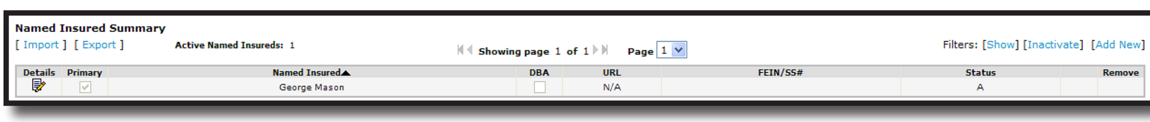
Note: Named insureds, and their information, added to the named insureds tab will be available to prefill to applications. Adding Named Insureds via the lookup link to populate the forms adds the association to the Named Insured. Search results will not return more than 5,000 records. If more than 5,000 records exist and search limit of 5,000 has been met, a message will display in red text at the bottom of the page that states: **The search returned more than 5,000 records. The maximum number of records displayed is limited to 5,000 for performance reasons. Please consider refining search filter criteria.**

WHAT is Displayed in the Named Insured Summary View

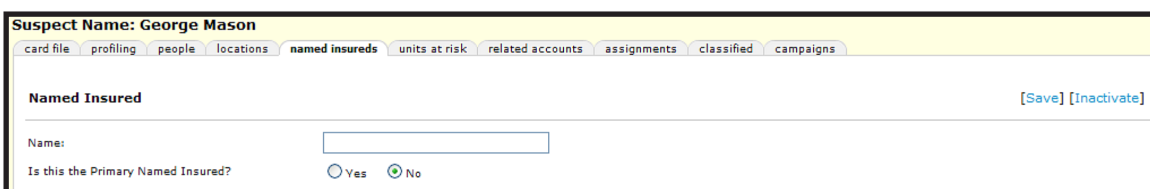
What is displayed in the **Named Insured Summary** view will depend on the client type entered. A personal client will display only the named insured. A commercial client will display the **Named Insured**, **DBA** check box, **URL** and **FEIN**.

HOW to Add a Personal Named Insured

- Locate the appropriate client through **SEARCH** and click the **named insureds** tab. All named insureds appear in a summary view, each name will have its own **Details** icon.
- Click the **[Add New]** link.



- A new **Named Insured** screen will be displayed.

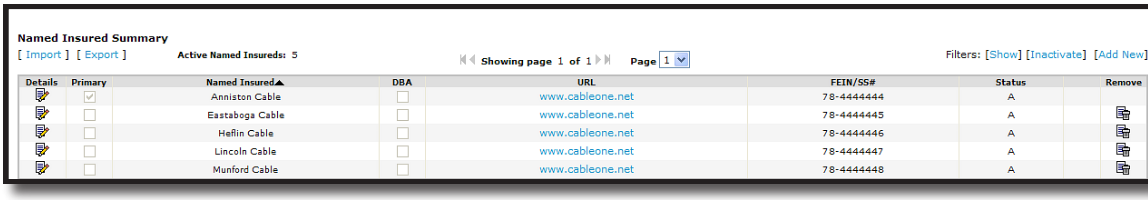


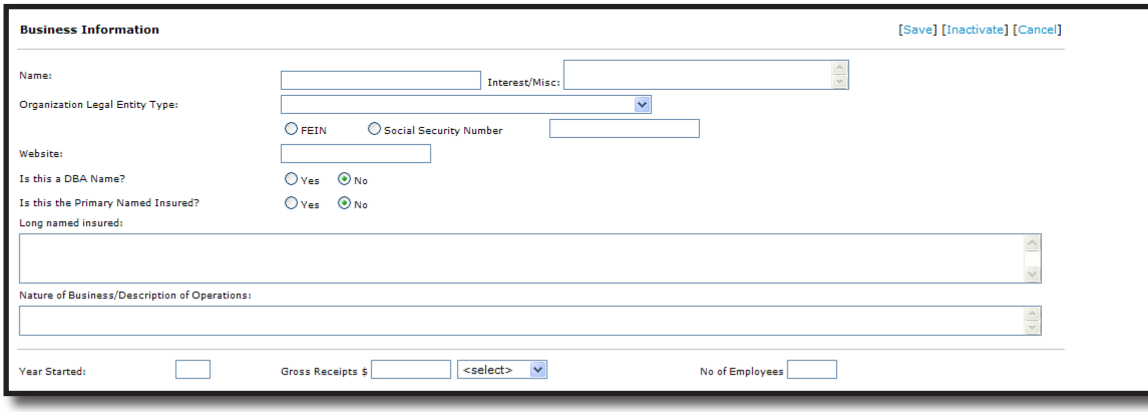
- Enter the **Name**.
- **Is This the Primary Named Insured?**: Select the appropriate option.
- Click the **[Save]** link to save the change. Click **[Cancel]** to abort.

HOW to Add a Commercial Named Insured

- Locate the appropriate client through **SEARCH** and click the **named insureds** tab. All named insureds appear in a summary view, each name will have its own **Details** icon.

- Click the **[Add New]** link.



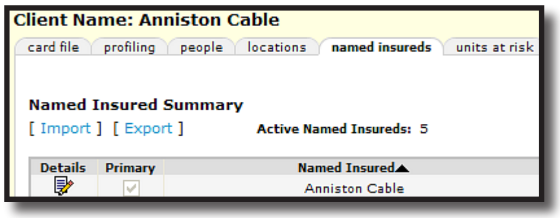


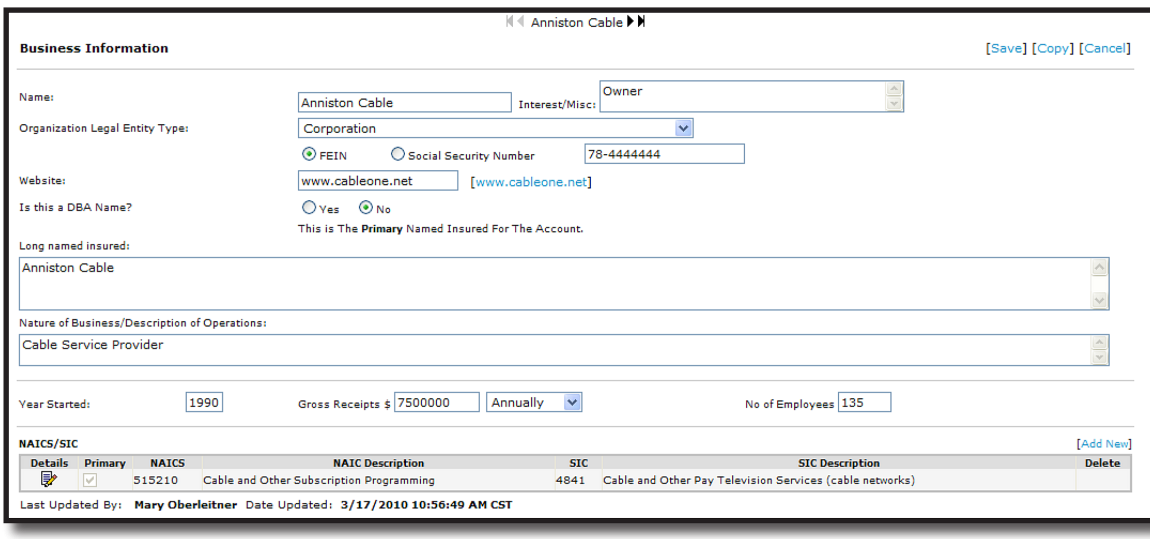
Complete the following:

Fields	Description
Name	**Enter the short name of the insured in this field. When applications are added this field for the named insured designated as the primary populates to the application's Applicant Name section.**
Interest/Misc.	**Enter a description that describes the interest for this named insured. This field populates the Other Named Insured section on the ACORD 125 when lookup is used.**
Organization Legal Entity Type	**Use the drop-down box to select the Legal Entity type. Items may be added to the drop-down box in SETUP, under Lookup Management.**
FEIN/Social Security Number	**Enter the FEIN code (Federal Employee ID Number) or the Social Security Number using the proper formatting.**
Website	**Enter the client's Web site address which will populate applicable forms.**
Is This a DBA Name?	**If the name entered is the DBA Name, mark the appropriate option button.**
Is This The Primary Named Insured?	**Select Yes if the named insured being added is to be assigned as the Primary Named Insured on the named insureds summary. Select No if the named insured is not primary.**
Long named insured	**The named entered in the Name box pre-fills as the Long named insured. If a short name was added in the Name field, enter the complete named insured in the Long named insured box. Enter up to 300 Characters for the long named insured. When lookup is used to add Other Named Insureds to the ACORD 125, the Long named insured of the selected name populates to the Named Insured Supplement overflow section of the form. All named insureds added at the client level are available to lookup and add to the Other Named Insureds section of the ACORD 125.**
Description	**Enter up to 300 Characters in the description as needed for the named insured. The description entered here prefills to the Nature of Business / Description of Operations section of the ACORD 125. When lookup is used on the ACORD 125 for the Other Named Insureds section and added, the description entered here populates the description field of the Named Insured Supplement overflow page.**
Year Started	**Enter the year started for this named insured.**

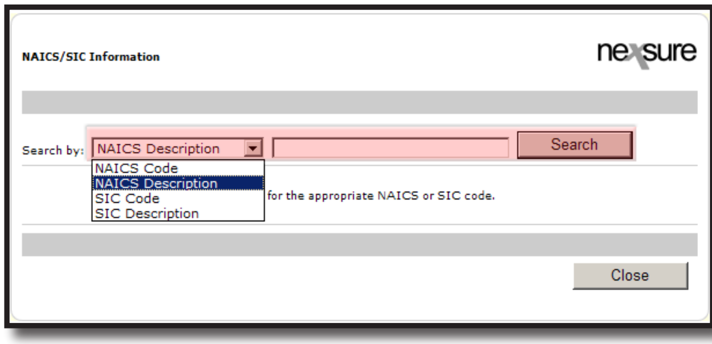
Fields	Description
Gross Receipts	**Enter the gross receipts for this named insured and select if annual or monthly from the drop down box.**
Number of Employees	**Enter the number of employees for this named insured.**

The Primary named insured record contains a section to record NAICS/SIC codes for the client. To add NAICS/SIC codes, click the **Details** icon of the primary named insured from the **named insureds** summary. NAICS/SIC: Click the **[Add New]** link above the NAICS/SIC grid to add all applicable NAICS/SIC codes for the primary named insured.

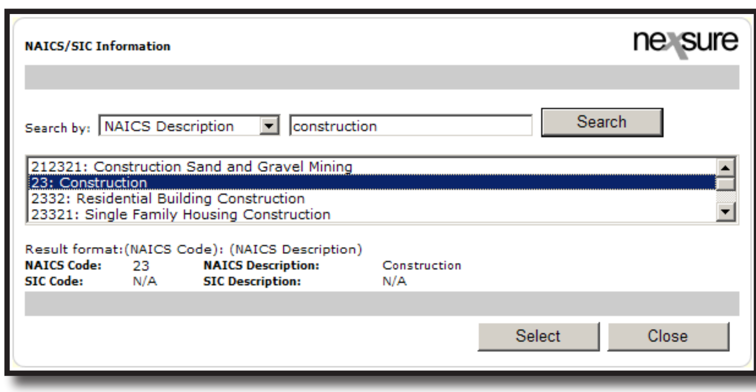




- The NAICS/SIC code pop-up box is displayed. Select the type of search to be conducted from the **Search by** drop-down box.



- Enter the **Code** or **Description** to search by and click the **Search** button.
- A list of results will be displayed.
- Click the **Description** that best matches the insured's line of business. The NAICS and SIC codes and description will display below the selection.



- Click the **Select** button.
- The NAICS and SIC codes and description will display.
- Select the **Yes** or **No** option to the **Is this the Primary NAICS/SIC Code?** question.
- Click the **Save** Button.

NAICS/SIC codes may be edited.

- Click the **Details** icon next to the code that needs to be changed.
- Make the necessary changes
- Click the **Save** button.

Note: Add multiple NAICS/SIC codes as needed to the Primary Named Insured.

Copying Named Insureds

In order to make entering records quicker, a **[Copy]** link has been added. To use this feature, perform the following:

- Locate the appropriate client through **SEARCH** and click the **named insureds** tab. All flagged as active will appear in a summary view, each will have its own **Details** icon.

- Click the **Details** icon of the named insured that will be used for the copy.
- Click the **[Copy]** link in the upper right on the screen to display the **Copy** window.
- Select the number of times to copy the record and click the **Copy** button.
- The copied records are listed on the summary screen as non-primary.
- **Copy of** is added to the front of the **Named Insured** field to make identification of the copied records easier.
- Only fields that are displayed on the non-primary commercial named insured detail screen will be copied. These fields are on the commercial lines named insured only and include: Name, Interest/Misc, Organization Legal Entity Type, FEIN/SS#, Website, DBA designation, Long Named Insured, Nature of Business/DOO, Year Started, Gross Receipts and # of employees. Personal lines named insured name is the only field that exists and copies for personal named insureds.
- Any changes made on the screen will be saved when the **Copy** button is clicked.
- For each record created last updated by name and date is populated with the current user name, date and time and is not carried over from the record being copied.
- Edit each record as needed. (See section, "HOW to Edit a Named Insured", in this chapter for more details on editing records.)

HOW to Edit a Named Insured

Named Insured information may be changed or updated as needed.

- Locate the appropriate client through **SEARCH** and click the **named insureds** tab. All named insureds will appear in a summary view, each name will have their own **Details** icon.
- Click the **Details** icon of the named insured that needs to be updated.
- Make the necessary changes.
- Click the **[Save]** link to save the changes. Click **[Cancel]** to abort. After save is selected, if the record is associated with a form, a popup screen is displayed providing an opportunity to update any forms the item is associated to and available for updating. Forms available for updates are:
    - Any opportunity stage policy with any status.
    - Any marketing stage policy without a status of submitted.
    - An active policy in any of the following states:
        - Pending Endorsement
        - Pending Edit
        - Pending Audit
        - Future
- Records are associated in the following ways:
    - Using the lookup feature within the ACORD form

- Adding a new record at client level and updating a pliable state policy with the newly added unit
- Units may be added manually to pliable forms at the marketing/policy level if preferred. Units added this way will not be associated to the client level and will cause the policy and client levels to be out of sync. Once the units at risk feature has been used, it is recommended that all be added, deleted and/or modified from the client level tabs.

Note: Updating a unit at the policy level does not update the unit at the client level.

HOW to Change a Primary Named Insured

The first contact entered, when adding a new Entity, will be designated as the **Primary Named Insured** and will be displayed in the Named Insured Summary view with a check mark in the **Primary** check box. A primary named insured cannot be deleted; to change or delete a primary named insured**,** another named insured will need to be designated as primary.

- Locate the appropriate client through **SEARCH** and click the **named insured** tab. All named insured appear in a summary view, each named insured will have their own **Details** icon.
- If there is only one named insured displayed, it will be designated as **Primary** and a second named insured will need to be added. See **HOW to Add a Personal/Commercial Named Insured** to add a second named insured.
- Select the **Yes** option to designate the new named insured as the primary named insured for this entity.
- If the named insured to be designated as the new primary named insured is displayed in the summary view, click on its **Details** icon.
- Select the **Yes** option for **Is this the Primary Named Insured?**.
- Click the **[Save]** link to save the change.
- In the named insureds summary view the newly appointed primary named insured will be displayed with a check mark in the Primary check box. The old primary named insured will now have a **Remove** icon.

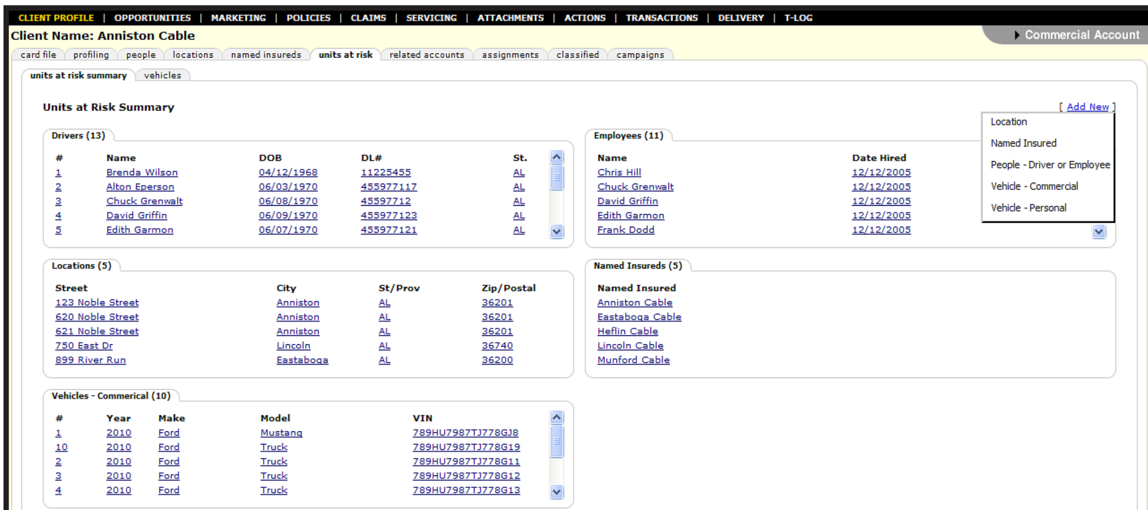
HOW to Delete a Named Insured

- Locate the appropriate client through **SEARCH** and click the **named insureds** tab. All named insureds will appear in a summary view, each will have its own **Details** icon.
- Click the **Remove** icon. If the **Remove** icon is not available, see the Nexsure point person within the agency for assistance.
- Click **OK** to delete the Named Insureds. Click **Cancel** to abort. If associated with a form a message is displayed advising the record cannot be removed. Inactivate the record by clicking the **[Inactivate]** link. The record will reside on the list as inactive and may be accessed if needed by searching for inactive records.

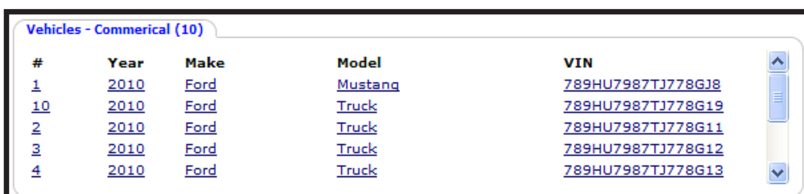
Note: A primary named insured cannot be deleted. A second named insured needs to be added and designated as **Primary**. See section, “HOW to Change a Primary Named Insured”, in this chapter.

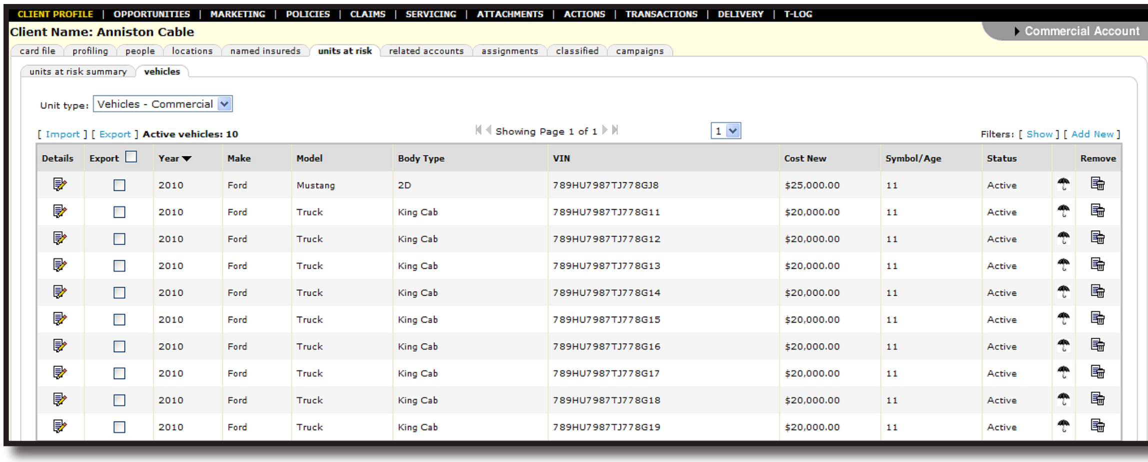
Units at Risk

To access the **units at risk** tab, begin by locating the client on the **SEARCH** screen, click the **Details** icon and click on the **units at risk** tab. The **units at risk** tab is a dashboard view of all units at risk added for the client. Drivers and employees are added on the **people** tab, locations are added on the **locations** tab, named insureds are added on the **named insureds** tab and vehicles are added on the **vehicles** tab. Units at Risk may also be added by hovering over the **[Add New]** link on the **units at risk** tab and selecting the unit type to add. The units at risk data can be used to populate the forms via **Lookup** on the appropriate form. When used to populate the forms via **Lookup**, this creates an association between the units at risk and the form so that when a change is made on a unit at risk at the client level, the user will be prompted to update the associated forms. It is this process that keeps the forms in sync with the client’s units at risk. For each unit at risk type, the total count is displayed beside the tab label. Clicking the label displays the selected **Units at Risk Summary** screen. The **vehicles** tab is only displayed after adding a vehicle from the **units at risk** tab. To add units from the **units at risk** tab, hover over the **[Add New]** link to bring up the menu and click on the link for the type of unit to be added.



Each unit is a link so that when clicked the detail of the unit is displayed for editing or viewing.



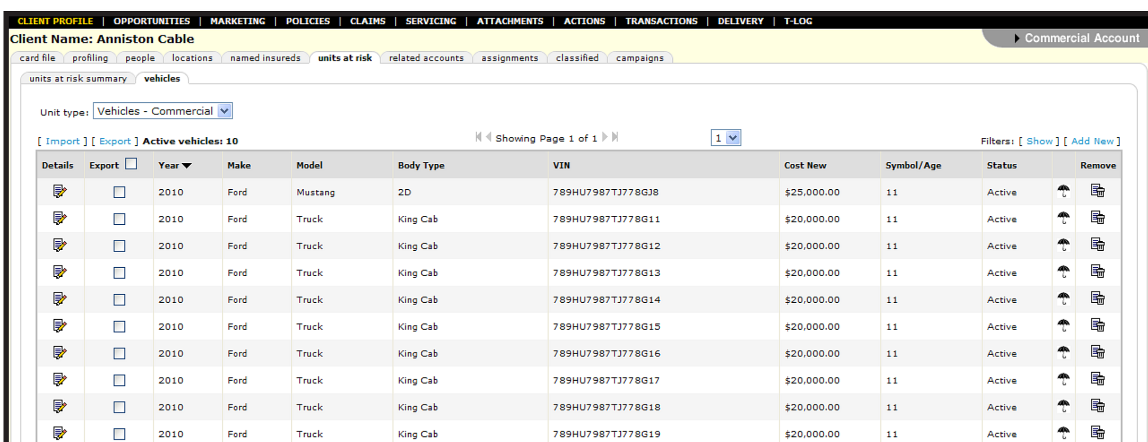


After editing any associated unit will display a pop-up window providing the opportunity to update any forms that are in a pliable state. Any forms not in a pliable state are also shown as an alert that these changes affect associated forms and servicing the un-pliable form is necessary so it can be updated to include the recently made changes. If the change is not done, the next time servicing is done on the policy the opportunity to update will be presented. Any units that are not selected to be updated will continue to show out of sync when these servicing functions are performed. If the servicing function is aborted, the out of sync units at risk will be presented the next time policy servicing is done.

Vehicles

On the top left of the **vehicles** tab is the **Unit type** list. Also included for selection is **All** to show both commercial and personal vehicles. When the **All** unit type is selected, it disables the **[Export]** link since fields for commercial and personal autos are different. When adding vehicles from the **vehicles** tab, make sure to select the **Unit type** being added before clicking on the **[Add New]** link since this is used to identify the type of screen to present at this level.

Search results will not return more than 5,000 records. If more than 5,000 records exist and search limit of 5,000 has been met, a message will display in red text at the bottom of the page that states: The search returned more than 5,000 records. The maximum number of records displayed is limited to 5,000 for performance reasons. Please consider refining search filter criteria.

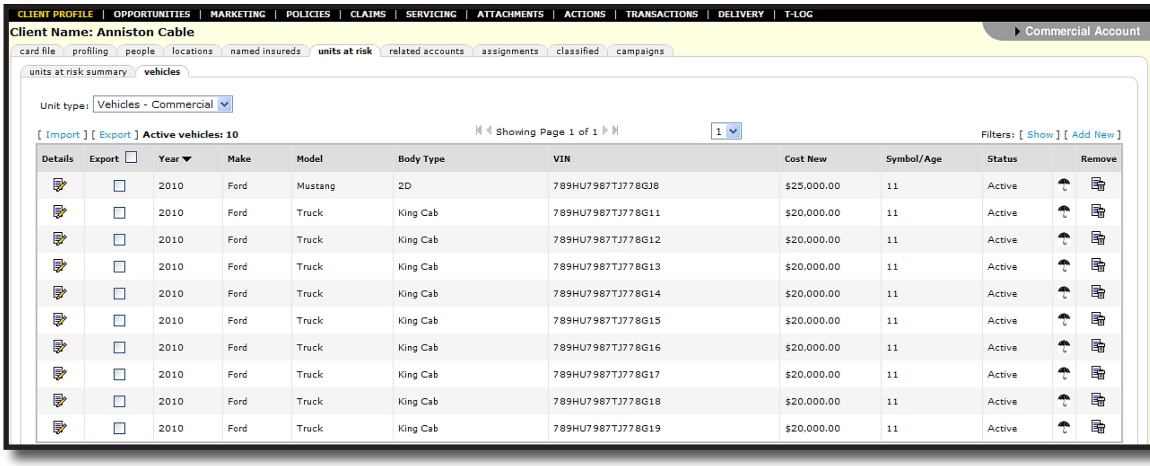


HOW to Edit a Vehicle

Vehicle information may be changed or updated as needed. This is done as follows:

- After accessing the appropriate client through **SEARCH**, click the **units at risk** tab and then click on the **vehicles** tab. Vehicles appear in a summary view, each will have a **Details** icon.
- Click the **Details** icon of the record that needs to be updated.
- If the wrong record was selected, the navigation arrows at the top of the screen may be used to navigate to the next record. If the vehicle details was selected from the **All** unit type, paging controls will page through both commercial and personal vehicles.
- Make the necessary changes to the vehicle.
- Click the **[Save]** link to save the changes.
    - If the record is associated with a form, a popup screen is displayed providing an opportunity to update any forms the item is associated to and available for updating. Forms available for updates are:
        - Any opportunity stage policy with any status.
        - Any marketing stage policy without a status of submitted.
        - An active policy in any of the following states:
            - Pending Endorsement
            - Pending Edit
            - Pending Audit
            - Future

To select all, click the check box at the top of the screen. The user will be prompted to update records that cannot not be updated because they are not in a pliable state until an edit, audit, endorsement, market existing or even renewing the policy is done. Click **Update Selected** after selecting the records. This will save the change and update the forms. If existing marketing and opportunity records are not updated at this time, they will be out of sync with the units at risk. Clicking **No Updates** when active will not update any associated forms.



Records are associated to the units at risk by clicking the **Lookup** link on the ACORD form to populate fields. Units may be added manually to pliable forms at the marketing/policy level if preferred. Units added this way will not be associated to the client level and will cause the policy and client levels to be out of sync and changes made on unassociated units at risk will not prompt to update the form since no association exist. Once the units at risk feature have been used, it is recommended that all be added, deleted and/or modified from the client level tabs.

Important: Updating a unit at the policy level does not update the unit at the client level.

Copying Vehicles

In order to make entering records quicker, a **[Copy]** link has been added. To use this feature, perform the following:

- Locate the appropriate client through **SEARCH** and click the **units at risk** tab and the **vehicles** tab. Active records appear in a summary view, each will have its own **Details** icon.
- Click the **Details** icon of the record that will be used for the copy.
- Click the **[Copy]** link in the upper right on the screen to display the **Copy** window.
- Select the number of times to copy the record and click the **Copy** button.
- The copied records are listed on the summary screen.
- **Copy of** is added to the front of the **Make** field to make identification of the copied records easier.
- Any changes made on the screen will be saved when **Copy** is selected.
- For each record created last updated by name and date is populated with the current user name, date and time and is not carried over from the record being copied.
- Edit each record as needed. (For more details on editing records see section, "HOW to edit a vehicle", in this chapter.)

HOW to Delete a Vehicle

- Locate the appropriate client through **SEARCH** and click the **units at risk** tab > **vehicles** tab. All records appear in a summary view, each will have its own **Details** icon.
    - Click the Remove icon. If the Remove icon is not available, the user does not have security to remove records.
- Click **OK** to delete the record. If the record is associated to a form a message will be displayed indicating that it is associated and cannot be removed. Inactivate the record by clicking the **[Inactivate]** link. The vehicle will reside on the list as inactive and may be accessed if needed by searching for inactive records. To abort deletion, click **Cancel**.

Exporting and Importing Vehicles

The **[Export]** link located on the vehicles tab provide the ability to export the selected records and then after updating and saving the Excel spreadsheet, click the **[Import]** link to import back into Nexsure. To export, make sure to check in the **Select** check box, use the **[Select All]** link for all. After associating records at underwriting level (**IMPORTANT: Use this feature with discretion**), the fields that are exported for vehicles are as follows:

Commercial Lines Vehicle Export Detail

Export Fields	Description of Exported Data
Remove	**Entering an "x" in this column, flags the field so that on import the record is removed from the list. Only records not associated with a form may be removed.**
Commercial Vehicle ID	**This field identifies the vehicle record. Users should not remove this ID.**
Client ID	**This field identifies the client the record belongs to. Users should not remove the Client ID.**
Active	**This is the Status for the record. Inactive = FALSE; Active = TRUE.**
Vehicle Number	**This field is used to sort the vehicle list displayed on the Units at risk screen.**
Year	**This is the Year of the vehicle and should be entered as YYYY.**
Make	**This is the Make of the vehicle which is a Text field and holds up to 15 characters.**
Model	**This is the Model of the vehicle which is a Text field and holds up to 15 characters.**
Body Type	**This is the Make of the vehicle which is a Text field and holds up to 20 characters.**
VIN	**This is the Make of the vehicle which is a Text field and holds up to 17 characters.**
Vehicle Type	**This is a drop down box which contains the following selections. Blank, PP, SPEC, COML.**
Garaging City	**This is the Garaging City of the vehicle.**
Garaging State	**This is the Garaging State of the vehicle which should match the States currently in Nexsure in the drop down selection box.**
Garaging Zip	**This is the Garaging Zip of the vehicle which is a Numeric field and holds up to 10 digits.**
Symbol Age	**This is the Symbol/Age of the vehicle which is a Text field and holds up to 5 characters.**
Cost New	**This is the Cost New of the vehicle which is a Currency field and holds up to 8 characters.**
Licensed State	**This is the Licensed State of the vehicle which which should match the States currently in Nexsure in the drop down selection box.**
Vehicle Weight	**This is the Vehicle weight of the vehicle which is a Text field and holds up to 10 characters.**

Export Fields	Description of Exported Data
SIC Code	This is the SIC Code of the vehicle which is a Text field and holds up to 4 characters.
Seating Capacity	This is the Seating Capacity of the vehicle which is a Text field and holds up to 4 characters.
Radius Of Use	This is the Radius of Use of the vehicle which is a Text field and holds up to 5 characters.
Farthest Terminal	This is the Farthest Terminal of the vehicle which is a Text field and holds up to 13 characters.
Driven to Work or School	This is the number of miles driven to work or school field and can contain any of the following from the drop down box: Blank, Less than 15 miles, More than 15 miles.
Vehicle Use	This is the number of miles driven to work or school field and can contain any of the following from the drop down box: Blank, Pleasure, Farm, Commercial, Retail, Service.

Personal Lines Vehicle Export Detail

Export Fields	Description of Exported Data
Remove	Entering an "x" in this column, flags the field so that on import the record is removed from the list. Only records not associated with a form may be removed.
Personal Vehicle ID	This field identifies the vehicle record. Users should not remove this ID.
Client ID	This field identifies the client the record belongs to. Users should not remove the Client ID.
Active	This is the Status for the record. Inactive = FALSE; Active = TRUE.
Vehicle Number	This field is used to sort the vehicle list displayed on the Units at risk screen.
Year	This is the Year of the vehicle and should be entered as YYYY.
Make	This is the Make of the vehicle which is a Text field and holds up to 15 characters.
Model	This is the Model of the vehicle which is a Text field and holds up to 15 characters.
Body Type	This is the Make of the vehicle which is a Text field and holds up to 20 characters.
VIN	This is the Make of the vehicle which is a Text field and holds up to 17 characters.
Symbol	This is the Symbol of the vehicle which is a Text field and holds up to 4 characters.
Class	This is the Class of the vehicle which is a Text field and holds up to 8 characters.
Registration State	This is the Registration State of the vehicle which should match the States currently in Nexsure in the drop down selection box.
Date Leased	This is the Date Leased of the vehicle which is a Text field and holds up to 7 digits, MM/YYYY format.
Date Purchased	This is the Date Purchased of the vehicle which is a Text field and holds up to 7 digits, MM/YYYY format.
New or Used	This is the New or Used field and can contain any of the following from the drop down box: Blank, New, Used.
Cost New	This is the Cost New of the vehicle which is a Currency field and holds up to 8 characters.
Miles One Way	This is the Miles one way of the vehicle which is a Numeric field and holds up to 3 digits.
Days Per Week	This is the Days per week of the vehicle which is a Numeric field and holds up to 1 digit.
Weeks Per Month	This is the Weeks per month of the vehicle which is a Numeric field and holds up to 1 digit.
Usage	This is the Usage field and can contain any of the following from the drop down box: Blank, Business, Commute, Drive to and from School, Farm, Clergy, Pleasure, Car Pool, Show – Restricted Use, Driven to and from Work, Other.
Odometer Reading	This is the Odometer Reading of the vehicle which is a Numeric field and holds up to 8 digits.
Estimated Annual Future Mileage	This is the Estimated Annual Future Mileage of the vehicle which is a Numeric field and holds up to 8 digits.

Export Fields	Description of Exported Data
Horsepower	**This is the Horsepower of the vehicle which is a Numeric field and holds up to 3 digits.**
Number Cylinders	**This is the Number of Cylinders of the vehicle which is a Numeric field and holds up to 2 digits.**
Performance Code	**This is the Performance Code field and can contain any of the following from the drop down box: Blank, Basic, High, Intermediate, Sports Premium, Sports Car.**
Passive SeatBelt	**This is the Performance Code field and can contain any of the following from the drop down box: Blank, None, Active Seat Belt, Passive Both Front Seat Belts, Passive Driver Seat Belt.**
Airbag	**This is the Performance Code field and can contain any of the following from the drop down box: Blank, Driver Side Airbag Only, Both Front Driver and Passenger.**
Antilock Brakes	**This is the Performance Code field and can contain any of the following from the drop down box: None, All Wheel Anti-Lock, Front Wheel Only, Rear Wheel Only.**
Antitheft Device	**This is the Performance Code field and can contain any of the following from the drop down box: None, Alarm System, Active Disabling, Electronic Retrieval, Etched Window, Fuel Cut-Off, Hood Lock, Ignition Cut-Off, Steering Lock, No Anti-Theft Device Present, Passive Disabling, Shaker Switch, Window ID, Anti-Theft Device Present.**

- **Import Facts:**

1. Importing should be used with discretion, ideally prior to any form association.
2. Only selected records will be exported, otherwise a message is displayed advising none were selected.
3. Import will only work when the formatted spreadsheet from the page is first exported.
4. In order to avoid updates occurring to records that have no changes, it is suggested that those records be removed before the import takes place.
5. Any non-date formatting applied to data in the spreadsheet will be stripped upon import and re-formatted as required by Nexsure fields.
6. When the spreadsheet is exported some fields may not appear in a readable format such as the phone number. Expand the field to display data in a readable format.
7. Users should not change any system generated IDs exported on the page since these IDs:
   - Importing information associated to an ID will always replace information currently in system.
   - The absence of an ID upon import will denote an item to be added.
8. All records upon import will display the import users updated by information including the date and time of the import as the last updated date.
9. Validation will take place before import is executed and if issues are found a failure description message will display. Validation will occur for:
   - Removing units
     - If unit is attached to a policy it cannot be removed.
   - Required fields (as indicated on the UI)
     - IDs (existence of, if present)
     - Format of spreadsheet is same as export.
     - Values input for drop-down boxes match a valid selection.

- If validation fails, import will be aborted.
- Since max # of records returned is 5,000, 5,000 is the max number to be exported or imported (search results will not return more than 5,000 records).

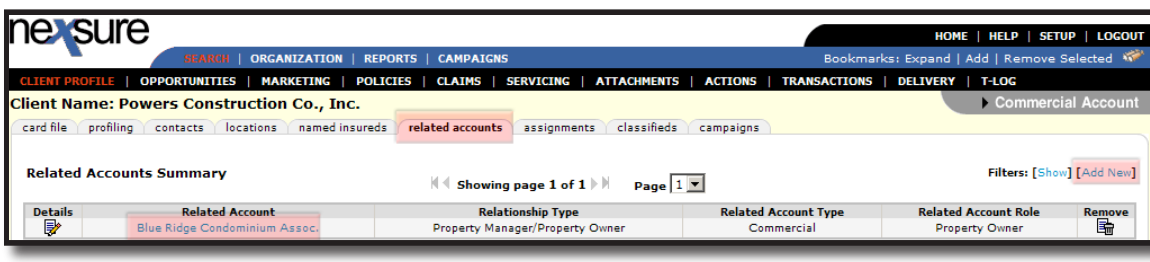
Related Accounts

The purpose of **Related Accounts** is to identify an account that might be related to another account such as a Personal and Commercial relationship. Example: The owner of a large commercial account also has a personal lines account with the agency. To associate these two accounts use the **related accounts** tab, this tab will allow you to cross-reference these accounts. Related accounts are available to select as the **Bill To** name and address in invoicing and may also be invoiced from the selected client using the List Bill functionality. An unlimited number of related accounts may be added. Related accounts and their **Relationship Types** may be added to the drop-down box in **Setup** under **Lookup Management**.

Note: Entering information on the related accounts tab is not required.

HOW to Use the Related Accounts Summary View

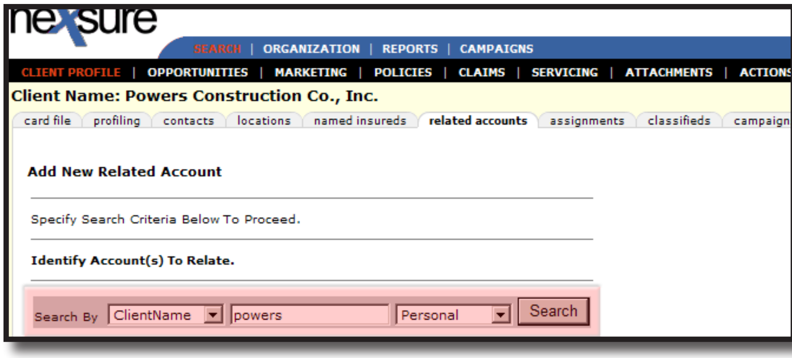
All related accounts will appear on the **related accounts** tab in a summary view. The **Name** of the related account is a link, clicking on the related accounts name will take you to the **card file** tab of the client.



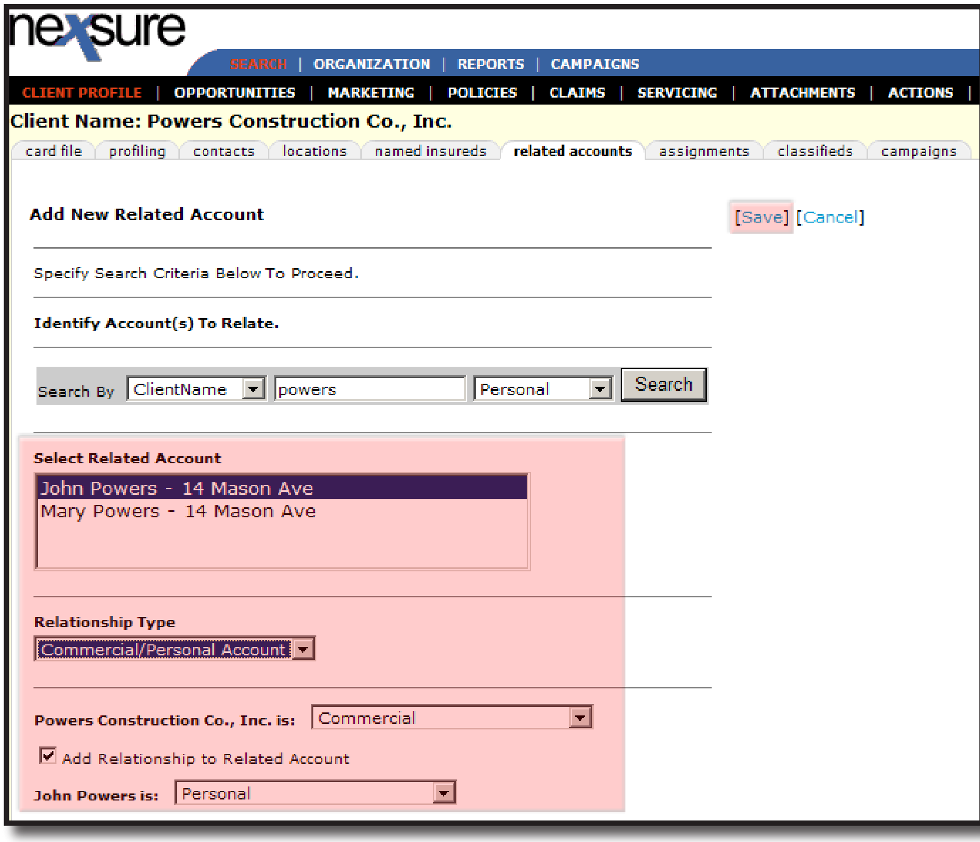
Note: The number of related accounts will appear as a link on the client's card file tab in the Tracker section. Clicking on the link will take you to the Related Accounts tab for the client.

HOW to Add a Related Account

- Locate the appropriate client through **SEARCH** and click the **related accounts** tab. If there are related accounts entered they will appear in a summary view, each related account will have its own **Details** icon.
- Click the **[Add New]** link.
- The **Add New Related Account** screen will be displayed.



- Enter the **Search By** from the drop-down box
- Enter at least two characters of the **Name** being searched for.
- Select the **Client Type**, **Commercial** or **Personal**, being searched from the drop-down box.
- Click the **Search** button.
- The **Select Related Account** box will display all clients matching the search results.
- Scroll through the list and click the **Name** of the account the relationship is being created for.
- Select the **Relationship Type** from the drop-down box.
- Select the relationship of the **Related Account** from the drop-down box.
- To add the relationship to the account being related to, leave the **Add Relationship to Related Account** check box checked.



- Click the **[Save]** link to save the changes. Click **[Cancel]** to abort.

HOW to Edit a Related Account

- Locate the appropriate client through **SEARCH** and click the **related accounts** tab. All related accounts entered will appear in a summary view, each related account will have its own **Details** icon.
- Click the **Details** icon of the related account that needs to be changed.
- Make the necessary changes.
- Click **[Update]** to save the changes. Click **[Cancel]** to abort or **[Delete]** to delete the relationship.

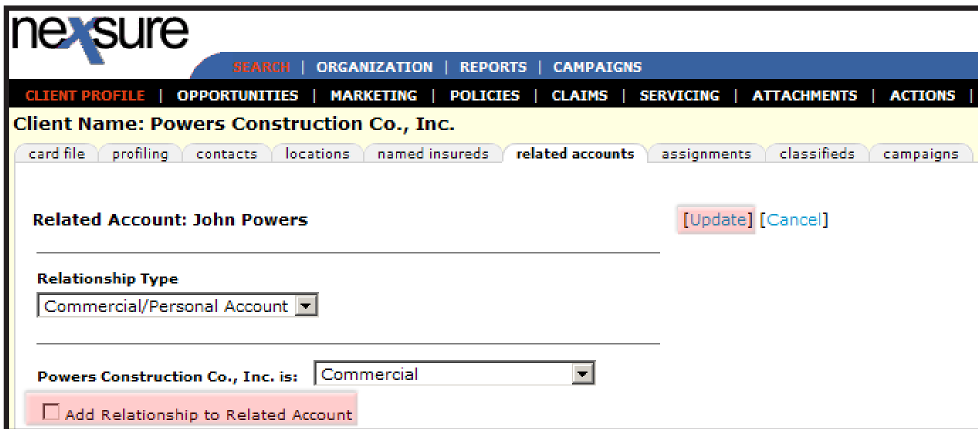
HOW to Delete an Account Relationship from One Account

- Locate the appropriate client through **SEARCH** and click the **related accounts** tab. All related accounts entered will appear in a summary view, each related account will have its own **Details** icon.
- Click the **Remove** icon. If the **Remove** icon is not available, see the Nexsure point person within the agency for assistance.
- Click **OK** to delete the Relationship. Click **Cancel** to abort.

Note: Clicking the **Remove** icon in the related account summary view DOES NOT delete the relationship from the other account to this client.

HOW to Delete the Account Relationship from Both Accounts

- Locate the appropriate client through **SEARCH** and click the **related accounts** tab. All related accounts entered will appear in a summary view, each related account will have its own **Details** icon.
- Click the **Details** icon of the related account that needs to be deleted.
- Click in the check box to remove the check in the **Add Relationship to Related Account**.
- Click **[Update]** to save the change.



- The summary view will be displayed. Click the **Remove** icon. If the **Remove** icon is not available, see the Nexsure point person within the agency for assistance.
- Click **OK** to delete the Relationship. Click **Cancel** to abort.

Assignments

The **Assignment** is the person within the agency responsible for the client and/or client's policy. An assignment is appointed when the client is first entered in Nexsure, this assignment will automatically be designated as **Primary**. There are two levels of assignments, **Client Level Assignment(s) and Policy Level Assignment(s)**. This section covers client level assignments.

WHAT is a Client Level Assignment

The **Client Level Assignment** pertains to the overall client account. This assignment is appointed to the client when they are first added to Nexsure and will follow to all policies added for the client unless the assignment at the policy level is changed.

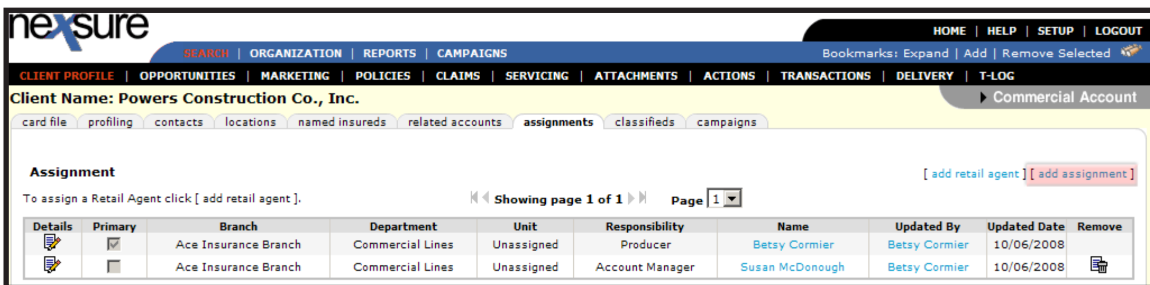
HOW to Use the Assignment Summary View

The **assignments** tab displays all assignments added for this entity in a summary view. Unlimited assignment may be added for each entity but only one can be designated as the Primary Assignment. The Primary Assignment is identified with a check box in the Primary column. The primary may be reassigned but deletion of a Primary Assignment is not allowed.

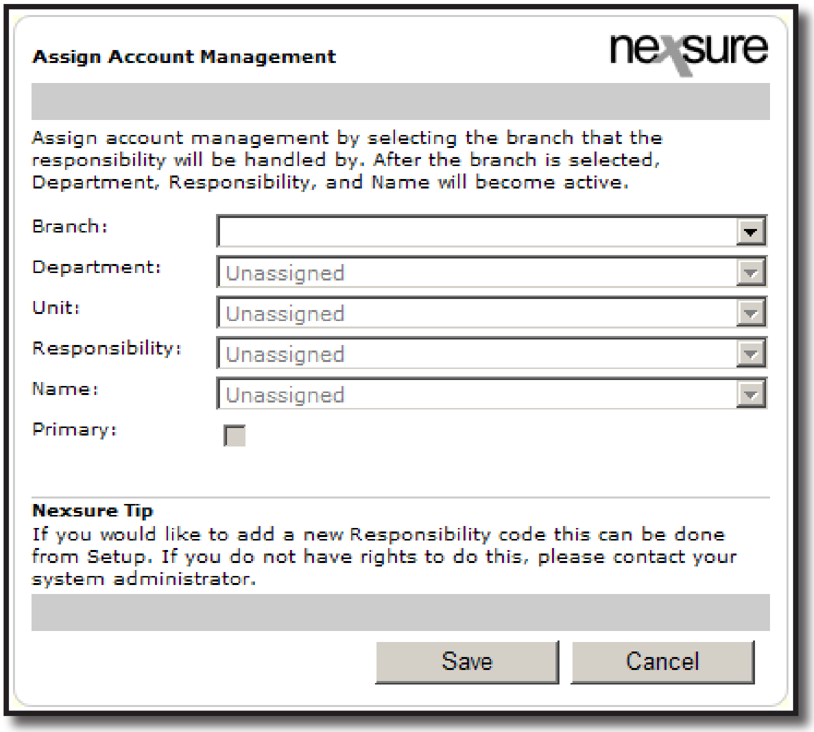
- Clicking the **Name** link displays the contact record. This screen displays additional information about the Primary Assignment and allows the user to link to other Internet options.

HOW to Add a New Client Level Assignment

- Locate the appropriate client through **SEARCH** and click the **assignments** tab. All assignments appear in a summary view, each assignment will have its own **Details** icon.



- To add a new assignment, click the **[add assignment]** link.
- The **Assign Account Management** window will display.



Select the following from the drop-down boxes:

- **Branch**: Select the appropriate branch for this client.
- **Department**: Select a department within the specified branch for this client.
- **Unit**: Select a unit pertaining to the department, if applicable. Units are not required.
- **Responsibility**: Select the appropriate responsibility. The responsibilities appearing in the drop-down box may be added to in **Setup, Lookup Management**.
- **Name**: Select the name of the person responsible for this client. The Names appearing in the drop-down box are appointed from the employees at the branch level.
- **Primary**: Check this box to set this assignment as the primary responsibility for the account.

  Note: A primary assignment cannot be deleted. An existing or new assignment must be designated as primary, and then the old primary can be deleted.

- Click **Save** to save the changes. Click **Cancel** to abort the change.

HOW to Change the Primary Assignment

The first assignment entered, when adding a new Entity, will be designated as the **Primary Assignment** and will be displayed in the Assignment Summary view with a check mark in the Primary check box. A primary assignment cannot be deleted; to change or delete a primary assignment another assignment will need to be designated as primary.

- Locate the appropriate client through **SEARCH** and click the **assignments** tab. All assignments appear in a summary view, each Assignment will have their own **Details** icon.
- If there is only one assignment displayed, it will be designated as primary and a second assignment will need to be added. See **HOW to Add a New Client Level Assignment** to add a second assignment.
- Select the **Yes** option to designate the new assignment as the primary assignment for this entity.
- If the assignment to be designated as the new primary assignment is displayed in the summary view, click on its **Details** icon.
- Click the **Primary** check box to designate this assignment as the new primary assignment.
- Click the **Save** link to save the change.
- In the **assignments** tab summary view the newly appointed Primary Assignment will be displayed with a check mark in the **Primary** check box. The old primary assignment will now have a **Remove** icon.

HOW to Delete an Assignment

- Locate the appropriate client through **SEARCH** and click the **assignments** tab. All assignments appear in a summary view, each assignment will have its own **Details** icon.
- Click the **Remove** icon. If the **Remove** icon is not available, see the Nexsure point person within the agency for assistance.
- Click **OK** to delete the assignment. Click **Cancel** to abort.

Note: A primary assignment cannot be deleted. A second assignment needs to be added and designated as Primary. See the 'HOW to change a Primary Assignment' section in this chapter.

Classifieds

Suspects, prospects and clients may have unlimited **Class Codes** and **Designations**. Class codes and designations can be used to segment prospects and clients for mailing labels. They can also be used to designate how the client accesses the Internet, what language they speak, household income, etc. An unlimited number of class codes may be added. Class codes and designations may be added to the drop-down box in **Setup** under **Lookup Management**.

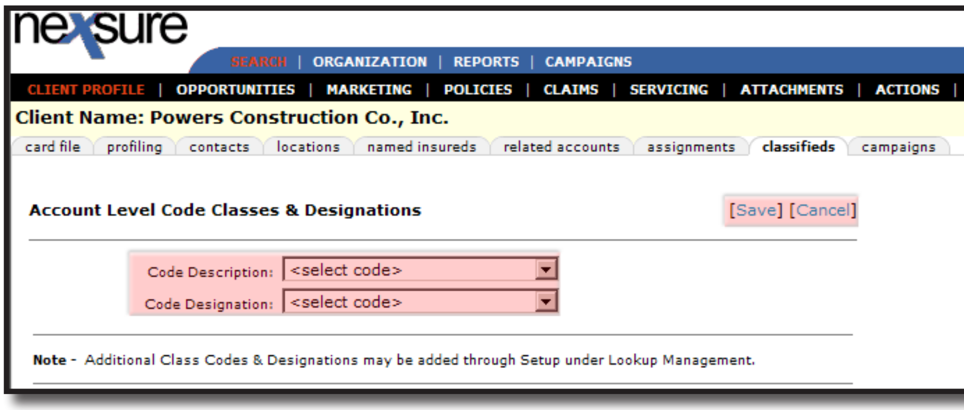
Note: Entering information on the classified tab is not required.

HOW to Use the Classifieds Summary View

The **classifieds** tab displays all code classes, descriptions and designations added for this entity in a summary view. Unlimited classifications may be added for each entity.

HOW to Add a Class Code and Designation

- Locate the appropriate client through **SEARCH** and click the **classifieds** tab. If there are **Code Class** and **Designations** entered they will display on the **classified** tab in a summary view, each code class will have its own **Details** icon.
- Click the **[Add New]** link.
- The **Account Level Code Classes & Designations** window will display.



- Select the **Code Description** from the drop-down box.
- Select the **Code Designation** from the drop-down box. The **Code Designation** drop-down box will populate based on the **Code Description** selected.
- Click the **[Save]** link to save the changes. Click the **[Cancel]** link to abort.
- The **classified** summary displays the **Code Class** and **Code Description** and **Designation** on the **Classifieds Summary** screen. The **Type** of "**C**" indicates a client level classified.

HOW to Edit Class Codes and Designations

Class code information and designations may be changed or updated as needed.

- Locate the appropriate client through **SEARCH** and click the **classifieds** tab. All classifications will appear in a summary view, each classification will have its own **Details** icon.
- Click the **Details** icon of the classification that needs to be updated.
- Make the necessary changes.
- Click the **[Update]** link to save the changes. Click **[Cancel]** to abort or **[Delete]** to delete this classification.

HOW to Delete a Class Code and Designation

- Locate the appropriate client through **SEARCH** and click the **classifieds** tab. The code classes and designations entered on this tab will appear in a summary view, each code class will have its own

Details icon.

- Click the **Remove** icon of the appropriate code class. If the **Remove** icon is not available, see the Nexsure point person within the agency for assistance.
- Click **OK** to delete the code class. Click **Cancel** to abort.