Chapter 4

Opportunities

IN THIS CHAPTER

- * Opportunities in Nexsure
- * Adding Opportunities
- * Managing Opportunities

Opportunities in Nexsure

After creating a suspect, an **Opportunity** may be produced. The **Opportunity** section is a unique area of Nexsure that allows the pre-qualification of a suspect. The **Opportunities** screen displays prospective sales data. Separate opportunities may be set up for each line of business or package policy. System defaults are provided in Nexsure and can be customized.

WHY Create an Opportunity

Opportunities are considered pre-marketing, giving the agency the "opportunity" to build a relationship or qualify an entity based on a grade generated by answering a series of questions relating to that entity.

Opportunities are not a required step, so not all suspects need to go through this step. Opportunities are a way to track potential business by using this area of Nexsure to build a relationship or qualify the exposure so a marketing application can be done and of course the last step, the in force policy.

Note: Opportunities are not limited to suspects only and can be added to a prospect or existing client.

Adding Opportunities

HOW to Add an Opportunity

- Access the appropriate suspect through **SEARCH**.
- Click the **OPPORTUNITIES** link on the **Client** menu.
- Click the [Add New Opportunity] link.

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Suspect	Name: C	ookies By Design,	Inc.					► Com	nmercial Account
opportunit	ies								
				Showi	ng Page 0 of 0 🕨		Filters: [Show] [Add N	ew Opportunity]
Details	Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BORDate	Program	Remove
			Filter result found no	record(s). Ple	ase modify search crit	eria and try again			

- The **New Opportunity** pop-up box is displayed.
- The State drop-down box should default to the State selected for the suspect. If the State drop-down box shows All, click the drop-down to select the appropriate state. The State determines what forms will be displayed for the Lines of Business.
- The Type drop-down box will display All. To narrow the Lines of Business displayed, select the appropriate Type from the drop-down box
- Using the scroll bar, scroll through the Lines of Business displayed, click on the Line of Business the opportunity is being created for.

iew Opportunity		ne sur					
State/Province:	New Hampshire		*				
'ype:	All		~				
ines of Business	s: (Hold Ctrl-Key for	multiple selections)					
AD & D - Indiviu Advertising/Mec AIA Aviation Aircraft - Glider Aircraft - Indust Aircraft - Non-C Aircraft - Non-C Aircraft - Non-C Aircraft - Non-C Aircraft - Non-C Aircraft - Pleas Airport and FBC All Terrain Vehi Anigue Auto Nt Antique Auto Nt Apartments AR/Valuable Pa	Juai Iia Liability Irial Aid wmed Lee NH k clee NH k 1 1 1 1 1						
ann - r ommer							

Note: To select multiple Lines of Business, hold down the Control key (Ctrl) while clicking multiple Lines of Business to be included in the opportunity.

Click **Save** to save the opportunity. Click **Cancel** to abort.

• The **Opportunity Summary** screen will be displayed.

HOW to Use the Opportunity Summary Screen

Unlimited opportunities may be added for an entity, they will be displayed when clicking the **OPPORTUNITIES** link on the **Client** menu. The summary view will give you pertinent information for each opportunity that has been created.

Note: Opportunities are always displayed in a salmon color.

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opportuniti	ies								
				Showing P	age 1 of 1 🕨	1 🕶	Filters:	[Show] [Add	New Opportunity]
Details	Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BORDate	Program	Remove
P	2	Monoline Auto - Commercial	Lump of Coal/Lump of	0 - N/A	Betsy Cormier 02/01/2008	\$0.00	11	-	📚 🖶 🗠

- Clicking the **Details** icon will display the **OPPORTUNITIES** > qualification tab with Grading Criteria for the Opportunity.
- Clicking the Assign icon will display the Assignment List pop-up window with the list of people in the agency assigned to this Entity.
- Holding the cursor over the Policy Type/Line of Business, the User/System Grade (Score) or the Status will display the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information.

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		SEARCH ORGAN	IZATION REPORTS				Bookn	narks: Expand A	dd Remove Selected
CLIENT PR	OFILE OP	PORTUNITIES MAR	KETING POLICIES	CLAIMS SER	VICING ATTACHME	NTS ACTIONS	TRANSACTIONS	DELIVERY T	-LOG
Suspect	Name: C	ookies By Desigr	n, Inc.					► Co	ommercial Account
opportuni	ties								
				Showing P	age 1 of 1 🕨	1 🛩	Filters:	[Show] [Add	New Opportunity]
Details	Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BORDate	Program	Remove
P	2	Monoline Auto - Commercial	Lump of Coal/Lump of	0 - N/A	Betsy Cormier 02/01/2008	\$0.00	11	-	🔊 🖻 🗠
			Monoline Auto - Commercial						

- The **Updated By** and **Updated Date** detail the person that updated the Opportunity along with the date it was updated.
- The Commission displays the commission amount the agency estimates they may receive if coverage is written.
- The X-Date BOR Date will display either the Current Policy Expiration Date or the Broker of

Record Date.

- The **Program** will display any program the opportunity may be qualifying for.
- The Contacts are icon on the far right, will display any contacts that have been added to the opportunity.
- The Remove icon will allow this opportunity to be deleted. If the Remove icon is not available, see the Nexsure point person within the agency for assistance.

Note: As an opportunity is modified and saved, the information in the Opportunity Summary view will update as well.

HOW to Grade an Opportunity

- Click the **Details** icon of the opportunity.
- The OPPORTUNITIES > qualification tab, with the Grading Criteria for the opportunity, is displayed. The opportunity is displayed with four system default labels that separate the screen into four sections. The system default labels are Qualifying Information, Opportunity Criteria, Opportunity Status, and Contacts.

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suspect Name: Co	bokies by Design, Inc.							
underwriting Y policy in	fo Yassignment Yattachments	actions qualificati	on history trans			of insurance γ (classifieds	
Branch:	B C Insurance Agency, Inc.	Policy Term:	0	2/01/2008	12:01AM EST]		
Policy Type:	Monoline	Coverage Term	;	2/01/2009	12:01AM EST			
Issuing Co:	Unassigned	Stage:	c	pportunity				
Billing Co:	Unassigned	Mode:	N	ew				
Policy Number:	Unassigned	Status:) - N/A	✓			
Policy Description:								
List	Print	History	Market	Sav	ve Changes			
Qualitying Informatio	n:							
X/BOR Date:								
Program:	*							
Buying Mode:		*						
Opportunity Criteria:								
Potential Profitability:	5 - less than \$1000		*					
Proximity: 2	20 - less than 5 miles from age	ency office	*					
Presentation to Personnel:	25 - Direct Presentation to dec	ision maker	*					
Pressure on Prospect: 2	25 - Definitely will adopt new p	product/provider	*					
Opportunity Status								
Total: N	/A							
System Grade: L	Imp of Coal							
User Grade:	ump of (10al 🛛 💙							

Note: The salmon colored field, and the information contained in it, is the Opportunity Header. The navigation links for the opportunity are located in the navigation toolbar beneath the header.

Section 1 – Qualifying Information

- X/BOR Date: Enter the Policy Expiration Date or the Broker of Record Date for the suspect using the Calendar icon or key the date in using the correct formatting. This field is mandatory.
- Program: Select the program, if any, that this opportunity is being qualified for from the dropdown box. Program availability is linked to Branches. If a program is not listed in the drop-down box, contact the Nexsure point person in your agency to have it added.
- Buying Mode: Select the appropriate buying mode from the drop-down box. The Buying Mode is an indication of the buying attitude of the suspect.

Section 2 – Opportunity Criteria

Use the drop-down boxes to select the appropriate answers for the following questions:

- Potential Profitability
- Proximity
- Presentation to Personnel
- Pressure on Prospect

Note: As answers are selected for each question in the Opportunity Criteria section, the Total and System Grade in the Opportunity Status section automatically calculates the appropriate total and grade based on the answers selected.

Section 3 – Opportunity Status

- **Total**: The total is automatically calculated based on the answers in the Opportunity Criteria section.
- **System Grade**: The system grade is automatically calculated based on the total score and the answer requirements.
- User Grade: The user grade is selected for each opportunity based upon your knowledge of the account and factors that may not be considered in the criteria questions.
- **Commission**: Enter the estimated commission amount for this opportunity.
- Click the Save Changes link in the navigation toolbar under the Opportunity header to save the changes before proceeding to Section 4 – Contacts.

Section 4 - Contacts

- Contacts: Contacts that have been added to the contacts tab for this entity can be associated with this opportunity and assigned a role in the buying process.
- Click on the [Add New] link to associate the Contacts with the opportunity.
- Select the **Contacts** from the drop-down box.
- Select this **Contact Role** for the opportunity.

Note: A maximum of four contacts may be entered for each opportunity.

SEARCH ORCANIZATION REPORTS CLIENT PROFILE OPPORTUNITIES MARKETINC POLICIES CLAIMS SERVICINC AT Suspect Name: Cookies By Design, Inc. Policy Number: Unassigned Status: Policy Description: Important Profile Market Topological Profile Market Topological Profile Market Qualifying Information: X/BOR Date: 4/1/2008 Important Program: Important Progra: Important Program:	Bookmarks TACHMENTS ACTIONS TRANSACTIONS D 0 - N/A Save Changes 7PQID=582 - Add	ROME / RELP SELVE LOCOU Expand Add Remove Selecter ELIVERY T-LOG Commercial Account
ULENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICINC AT uspect Name: Cookies By Design, Inc. Policy Number: Unassigned Status: Policy Number: Unassigned Status: Policy Number: MarketinG Policy Number: Unassigned Status: Policy Number: MarketinG Policy Description: List Print History MarketinG Qualifying Information: X/BOR Date: 4/1/2008 MarketinG Add New Contact(s) Buying Mode: Growth Opportunity Criteria: Contacts: Debbie Cooke Prostential 10 - \$1000 - \$2499 Contacts: Debbie Cooke Contact Role: Decision Maker Presentation to 25 - Direct Presentation to decise Prespress: 25 - Definitely will adopt new pr Prospect: 25 - Definitely will adopt new pr Opportunity Status: Total: 80 80 MarketinG MarketinG	TACHHENTS ACTIONS TRANSACTIONS D 0 - N/A Save Changes 7PQID=582 - Add	ELIVERY T-LOG Commercial Account
uspect Name: Cookies By Design, Inc. Policy Number: Unassigned Status: Policy Description:	0 - N/A	Commercial Account
Policy Description: Visit Unassigned Status: Policy Description: List Qualifying Information: X/BOR Date: 4/1/2008 Program: Image: Status: Potential 10 - \$1000 - \$2499 Profitability: 20 - less than 5 miles from ager Presentation to Personnel: 25 - Direct Presentation to decis Presentation to 25 - Definitely will adopt new protects: Opportunity Status: Total: Total:	0 - N/A Save Changes 7PQID=582 - Add Re Sure	
Policy Description: Diassigned Status: Qualifying Information: Print History Market Qualifying Information: Program: Image: Add New Contact(s) Buying Mode: Growth Growth Opportunity Criteria: Potential 10 - \$1000 - \$2499 Profitability: 10 - \$1000 - \$2499 Contacts: Prosential: 10 - \$1000 - \$2499 Contact Role: Prosimity: 20 - less than 5 miles from ager Presentation to 25 - Direct Presentation to decis Presentation to 25 - Definitely will adopt new pr Opportunity Status: Total: 80	PQID=582 - Add	
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Opportunity Criteria: Potential Profitability: Proximity: 20 - less than 5 miles from ager Presentation to Personnel: Presentation to Personnel: Contacts: Debie Cooke Contact Role: Decision Maker Decision Maker Contact Role: Decision Maker Prospect: Contact Role: Contact Role: Decision Maker Prospect: Contact Role: Contact Role:		
Potential 10 - \$1000 - \$2499 Proximity: 10 - \$1000 - \$2499 Proximity: 20 - less than 5 miles from ager Presentation to Personnel: 25 - Direct Presentation to decis Preserve on Prospect: 25 - Definitely will adopt new pro- Prospect: 25 - Direct Pro- Prospect: 25 - Direct Pro- Prospect: 25 - Direct Pro- Prospect: 25 - Direct Pro- Pro- Prospect: 25 - Direct Pro-		
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Presentation to Personnel: 25 - Direct Presentation to decis Pressure on Prospect: 25 - Definitely will adopt new pr Opportunity Status: Total: 80	¥	
Pressure on 25 - Definitely will adopt new proportional status:	Save Cancel	
Opportunity Status: Total: 80		
Total: 80		
System Grade: Silver		
User Grade: Gold		
Commission:		
Contacts:	[Add New]	
Details Contact Role		
Please click 'Add New' to insert new record(s).	Delete	

- Select the **Status** of the opportunity from the drop-down box in the Opportunity header.
- Click the Save Changes link in the navigation toolbar under the Opportunity header to save the changes.
- Clicking the OPPORTUNITIES link on the Client menu will display the saved opportunity in a summary view. The summary view for this opportunity will now display pertinent information for the opportunity that has been created.

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Suspect Name:	Cookies By Design, I	nc.					> Cor	mmercial Account
opportunities								
			Showing I	Page 1 of 1 🕨	1 🛩	Filters:	[Show] [Add N	lew Opportunity]
Details Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BORDate	Program	Remove
>	Monoline Auto - Commercial	Gold/Silver (80)	0 - N/A	Betsy Cormier 02/01/2008	\$0.00	04/01/2008	-	😰 💼 🖄
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Adding, Editing and Removing Assignments

Assignments added on the client **assignments** tab are automatically included on the opportunities **assignment** tab. If the assignments need to be updated, removed or new ones added, click the **assignment** tab on the opportunity detail record.

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:

Assign Account Management	Definition
Branch	Select the appropriate branch. The branch on the assignment identified as the primary will be the branch that populates the form. If the primary branch is changed after the opportunity is added, update the form with the correct branch information.
Department	Select a department from the drop-down box. Departments are added by the System Administrator in Setup and only available departments for the selected branch are available.
Unit	Select a unit pertaining to the Department, if applicable. Units are not required. Units are added by the System Administrator in Setup and only available if added to the selected department in setup.
Responsibility	Select the appropriate responsibility. The responsibility defines the role for the selected name for this record. The Responsibilities appearing in the drop-down box are added by the System Administrator in Setup, Lookup Management.
Name	Select the name of the person responsible for this client. The names appearing in the drop-down box are employees that have been added at branch level in Setup by the System Administrator.
Primary	Check this box to set this Assignment as the primary responsibility for the account. The branch on the assignment identified as the primary will be the branch that populates the form. If the primary branch is changed after the opportunity is added, make sure to update the form with the correct branch information.
Save Button	Click the Save button to save the changes.
Cancel Button	Click the Cancel button to abort the change.

The first assignment entered, when adding a new entity, is designated as the primary assignment and is identified by a check mark in the **Primary** check box on the **assignment** tab. A primary assignment cannot be deleted; to change or delete a primary assignment another assignment will need to be designated as primary. This is done on the **assignment** tab by clicking the details icon of the assignment that should be designated as primary. Place a check in the **Primary** check box to designate the new primary assignment for this record and click the **Save** button. In the **assignment** 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 be displayed with an active check box in the **Remove** column on the right side of the record.

To remove selected assignment(s), click in the check box in the **Remove** column and to remove all except for the primary, place a check in the box to the right of the **Remove** heading label and click the **[remove selected]** link.

underwritin	g Y policy	info assignmen	i t Y attachi	ments $iggaee$ actions $igwedge$ qualif	ication Y history Y trans	sactions γ (ilaims Y	summary of insu	rance 🍸 cl	assifieds	delivery		
Branch:			QA Under	writing Branch	Policy Term:					07/01/2007 12:01AM PST 07/01/2008 12:01AM PST			
Policy Ty	ype/Prima	ryState:	Package /	CA	Cover	age Term:							
Issuing	Co:		Unassigne	d	Stage:					Opportunity			
Billing C	0:		Unassigne	d	Mode:					New			
Policy No	umber:		Unassigne	d	Status:				0 - N/A				
Policy D	escription	:											
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>	\checkmark	QA Underwritin	g Branch	Risk Management	Account Manager	Unassig	ined	John Suardini	Admin N	exsure	4/22/2005		
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🗖 Rest	rict policy	file access to as	signed use	rs only?									

On the popup window, click the **OK** button to complete the removal or **Cancel** to abort.



Attachments Tab

For instructions on adding attachments see the CRM training manual Chapter 17.

Classified Tab

Classified can be used to classify opportunity records. **Class Codes** and **Designations** are added by the System Administrator in Lookup Management found in **SETUP**.

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

The **classified** tab displays all code classes, descriptions and designations added for this opportunity in a summary view. To add classified information, click the **[add new]** link on the **classified** tab.

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SEARCH ORGANIZATION REPORTS CAMPAIGNS ELINKS Bookmarks: Expan	nd Add Remove Selected 💞
CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVER	Y T-LOG
Client Name: Busy Bee Crafts Company	Commercial Account
underwriting policy info assignment attachments actions qualification history transactions claims summary of insurance classifieds	delivery
Classified Summary	[Add New]

From the **Code Description** drop-down box, make a selection. From the **Code Designation** drop-down box select the appropriate corresponding designation and click the **[Save]** link. Clicking the **[Cancel]** link will abort the process.

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Code Designation:	-Select Code First-	~					

To change the codes, click the **Details** P icon.

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Reselect the codes and click the [Update] link.

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underwriting policy info	assignment attachments action:	qualification history transactions claims sum	mary of insurance classifieds delivery
Policy Level Code Cla	sses & Designations	[Cancel] [Delete] [Update]	
Code Description:	Professional Liability	Code Class: PROF	
Code Designation:	-Select Code- Assigned Risk		
Note - Additional Class	Boat Class Certification Agency High Home Values Professional Liability	gh Setup under Lookup Management.	
1	Service Center Policy	Date Updated: 5/20/2011 2:03:56 PM CST	
deline	ry λ classifieds λ summary of insurance	e \downarrow claims \downarrow transactions \downarrow history \downarrow qualification \downarrow acti	ions 人 attachments 人 assignment 人 policy info 人 underwriting

To remove, click the **Remove** icon on the **classified** tab summary view and confirm removal by clicking the **OK** button on the confirmation popup.

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nderwriting Classified Su	policy info Yassignment Immary	attachments	actions	qualification	history	transactions (cla		ry of insurance Y	classifieds	delivery	[Add New]
nderwriting Classified Su Details	policy info assignment Immary Code Class	attachments	actions Code De	qualification	history	transactions Y <u>cla</u>	ims summi Des	ry of insurance	classifieds	delivery Type	[Add New]



Managing Opportunities

Pending opportunities can be tracked from the **Home** menu, which will display all pending opportunities for the agency. The **Client** menu will display only the opportunities applicable to the client selected.

Note: The defaults configured in the **[Show]** filters option will determine what is displayed in the summary view when clicking the Opportunities link on the Home menu or the Client menu.

HOW to Track Existing Opportunities from the Home Menu

The **Home** menu is accessible by clicking the **HOME** link on the **Utility** menu in the upper right hand corner of the screen. The **Home Actions** screen will be the first screen displayed. To track pending opportunities, click the **OPPORTUNITIES** link on the Home menu. The Home menu is the third menu down.

 Clicking the OPPORTUNITIES link will display all pending opportunities that fall within the search filter criteria for the agency.

nex	sure						H	ome Help	SETUP LOGOUT
		SEARCH ORGANIZA	TION REPORTS				Bookmarks: B	xpand Add	Remove Selected
ACTIONS	OPPORTUNIT	IES MARKETING BIND	ER LOG EDITS AU	DITS EXPIRATI	ONS ENDORSEMENT	S CANCELLATIONS	CLAIMS INTERF	ACE DELIVER	Ŷ
Hello,	Betsy Corn	nier					1	► Home	e
opportu	nities								~
All		*	N	Showing Pag	e 2 of 2 🕨	2 💌			Filters: [Show]
Detail	Client Name s Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BOR Date	Program	Contacts
	Cookies By	Design, Inc.							<u>^</u>
	2	Monoline Auto - Commercial (I	Gold/Silver (80)	0 - N/A	Betsy Cormier 02/01/2008	\$0.00	04/01/2008	-	2

- If the opportunity is not displayed, click the [Show] filter, change the search criteria and click the Search button to initiate a new search.
- Opportunities displayed on the Home Opportunities screen will have two Details risks
 - Clicking the first Details icon, with the dark blue border, will display the card file for the client.
 - Clicking the second **Details** icon will display the **OPPORTUNITIES** > qualification tab with the pending opportunity.

HOW to Track Existing Opportunities from the Client Menu

• Access the appropriate client through **SEARCH**.

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			SEARCH ORGANIZA	TION REPORTS				Bookn	narks: Expand Ad	d Remove Selected
CLIE	NT PRO	FILE C	OPPORTUNITIES MARKET	ING POLICIES	CLAIMS SERV	ICING ATTACHMEN	TS ACTIONS	TRANSACTIONS	DELIVERY T-	LOG
Sus	pect	Name:	Cookies By Design, I	nc.					► Co	mmercial Account
oppo	rtuniti	ies								
					Showing Pa	age 1 of 1 🕨	1 🕶	Filters:	[Show] [Add	New Opportunity]
Det	tails	Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BORDate	Program	Remove
Ę	2	2	Monoline Auto - Commercial	Gold/Silver (80)	0 - N/A	Betsy Cormier 02/01/2008	\$0.00	04/01/2008	-	📚 🕞 🗠

- Click the OPPORTUNITIES link on the Client menu. All pending opportunities that fall within the search filter criteria for the client will be displayed in a summary view. Each opportunity will have its own Details view.
- Clicking the Details icon will display the OPPORTUNITIES > qualification tab with the pending opportunity.

HOW to Send an Opportunity to Market

Existing opportunities can be sent to Marketing, where the agency can complete an application and submit a quote to multiple carriers, if desired. The opportunity can be accessed from the **OPPORTUNITIES** link on the **Home** menu or from the **OPPORTUNITIES** link on the **Client** menu.

To access the opportunity from the **Home** menu:

- Click the OPPORTUNITIES link on the Home menu. All pending opportunities, which fall within the search criteria, will appear in a summary view. Each opportunity will have two Details icons.
- Click the second **Details** icon for the client with the opportunity that is being sent to marketing.



- To access the opportunity from the **Client** menu:
- Click the OPPORTUNITIES link on the Client menu. All pending opportunities, which fall within the search criteria, will appear in a summary view. Each opportunity will have its own Details icon.
- Click the **Details** icon for the opportunity that is being sent to Marketing.
- The **OPPORTUNITIES > qualification** tab is displayed.
- Click the Market link in the navigation toolbar under the Opportunity header.

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	SEARCH ORGANIZATION	REPORTS	Boo	kmarks: Expand Add Remove Selecte
IENT PROFILE OP	PORTUNITIES MARKETING	POLICIES CLAIMS	SERVICING ATTACHMENTS ACTIONS TRANSACTION	IS DELIVERY T-LOG
spect Name: Co	ookies By Design, Inc.			Commercial Account
derwriting policy in	fo assignment attachments	actions qualification		classifieds
Branch:	B C Insurance Agency, Inc.	Policy Term:	04/01/2008 12:01AM EST	
Policy Type:	Monoline	Coverage Term:	04/01/2009 12:01AM 201	
Issuing Co:	Unassigned	Stage:	Opportunity	
Billing Co:	Unassigned	Mode:	New	
Policy Number:	Unassigned	Status:	0 - N/A 💙	
Policy Description:				
list	Print	History	Market Save Changes	

- A confirmation pop-up box will be displayed.
- Click **OK** to send the opportunity to market. Click **Cancel** to abort.
- The opportunity is now in the Marketing stage and has been removed from the HOME > OPPORTUNITY page.

To send an opportunity to Marketing using Context Tools:

- Right click on the Details ricon of the opportunity that is being sent to Marketing
- Select the Market shortcut link



exsure					HOME	HELP SETUP LOGOUT
	SEARCH ORGANIZATIO	N REPORTS			Bookmarks: Expand	Add Remove Selecter
LIENT PROFILE OPPO	RTUNITIES MARKETING	POLICIES CLAIMS	SERVICING ATTACH	MENTS ACTIONS T	TRANSACTIONS DELIVERY	T-LOG
uspect Name: Coo	kies By Design, Inc.					Commercial Account
inderwriting policy info	assignment attachmer	ts actions qualificat	ion history transactio	ns claims summary	of insurance classifieds	
Branch:	B C Insurance Agency,	Inc. Policy Term	: 04/01/2008 04/01/2009	12:01AM EST 12:01AM EST		
Policy Type:	Monoline	Coverage T	erm:			
Issuing Co:	Unassigned	Stage:	Marketing			
Billing Co:	Unassigned	Mode:	New			
Policy Number:	Unassigned	Status:	Pending			
Policy Description:		Origination	Date:			
List	Print	History	Market	Save Changes		
Qualifying Information: X/BOR Date: 4/1, Program:	/2008					

Note: Marketing quotes are displayed in a wheat color. See Chapter 5, Marketing, for information regarding the Marketing process.