## Chapter 2

# The Client Portal Experience

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Access to the client portal is granted by adding security to the client's contact in Nexsure. The client's contact receives a system generated email containing the contact's Portal User Login information and the portal URL. The URL link provided in the email displays either the agency's website or the Nexsure portal login as added in the Org setup. For instructions on adding client logins and client portal setup, see "Client Access", Chapter 1.

**Note**: The first email address on the client contact's record is used for client portal user system notifications and must be accurate.

nexsure	
<b>User Login</b> Please enter your username and password below:	
Username: Username: Password: Login	
Forgot Password? Please enter your username and <u>click here</u>	

The first time the client's contact logs in to the portal, the temporary password provided in the User Login information email must be changed. After clicking the **Login** button the **Change Password** dialog box displays. A **Forgot Password?** link is provided on the login screen to use if the portal user's password is forgotten. A new temporary password is created and sent to the email address for the portal user name entered.

nexsure	
Change Password Please enter your current password and new password bel	
User ID: m Current Password:	2obe@aol.com
New Password:	

On the **Change Password** screen, the portal user must type in the **Current Password**, New **Password** and **Confirm Password**. Once login is completed by clicking the **Change Password** button, the **Home** screen is displayed. The **Change Password** screen will display each time the Portal User logs in using a temporary password.

		Logout
Currently Logged In: Christopher Park February 23, 2009	General Account Information Account: Park Meadow Development, Inc. Account Type: Commercial	Using Online Insurance Help
Online Insurance		
Home	Name: Christopher Park Location Type: General Office	
Policies	Title: CEO Address: 8405 S Park Meadows Ctr # 10	
Quotes	E-Mail: mcDobe@sloi.com City: Lone Iree State: CO Business (app. 3pp. app. app. app. 3pp. 3pp. 3pp.	
Attachments	Phone: 1303/70570000 Website: www.parkmeadows.com	
Proof of Coverage	Cell Phone: ( <u>114) 4767224</u> After hours: ( <u>012) 222-2222</u> Business	
, Hoor of Coverage	Phone: (303) 708-0000	
User Profile	Fax Number: (714) 476-7224	
Update Password		
	Your Team - We're here to help.	
	Additional Contacts	
	Representative Responsibility Branch Contact Phone Contact Email	
	Agency of <u>Carole Houde</u> Producer Colorado - Denver, <u>(714) 476-7224</u> nexsurecontact@aol.com Denver, CO	
	Agency of <u>Ralph Natale</u> Account Manager Colorado - Denver ( <u>714) 476-7224</u> nexsurecontact@aol.com Denver, CO	
	Agency of <u>Many Oberleitner</u> Client Advocate Colorado - Denver ( <u>714) 482-9531</u> maryo⊚xdti.com Denver, CO	
Your Account If you use this site, you are I under your account or passw BCopyright 2005 - 2008 <u>XDin</u>	esponsible for maintaining the confidentiality of your account and password and for restricting access to your computer, and you agree to accept resport.	nsibility for all activities that occur

The **Home** screen shows part of the client's card file information including the active links for the phone numbers, website and assignment links. Clicking the **Help** link (which is on the right side of the screen) will launch **Online Insurance Help**. The first screen displayed provides instructions for using **Online Help**.

Dimensional <sup>®</sup> Technologies		C Online Insurance He	Ip - Microsoft Internet Explorer provided by XDimensional Technologies, Inc.	
	_		www.nexsure.com/heb/Client Access/Client Access.htm	
urrently Logged In:	Genera	Ello Edit View Esur		Using Online Insuran
ebruary 23, 2009	Account: Account 1	🕆 🕸 🌈 Online Insur	ance Help Mome * 🔊 Feeds (J) * 🖨 Print * 🗗 Page + 🎯 Tools + 🍟	<ul> <li>Help</li> </ul>
		тос	🔲 🔎 🖻 🖿 🗄 🔯 🎽 🔛 🖇 🖇 🎇 😂 🛛 📈 Help	
Online Insurance	Primar	Nelcome		
Home		Online Insurance	tou are nere: welcome	
Policies		User Profile		
Quotes		Resource Center		
Attachments	Cel		Holp	
Proof of Coverage			ILGIIO	
User Profile				
Update Password			Welcome! Account information is now available at any time. Use this Web site to access general policy	
	Your Te		information.	
			Help offers several options to find information about a policy:	
	Additio			
	Repr		TOC	
	Card	🔲 ТОС		
		🖹 Index	Use the TOC to navigate TOC	
	Ral	Search	that are available. Click on	
	Mary	- ocuron	each book to view the COOMING Insurance	
		E Favorites	related topic, or click Home Screen	
			directly on a topic 😐 to 👔 Policies Screen	
		Done	√ Trusted sites 🔍 100% 👻	

On the left side of the screen are the navigation links. Clicking the **Policies** link displays all policies the agency has identified as viewable by the client's Portal Users.

								Logou
Currently Logged In: Christopher Park February 23, 2009	General A Account: Par Account Type	CCOUNT INFORMA K Meadow Develop a: Commercial	tion ment, Inc.					Using Online Insura
Online Insurance	Policy Info	ormation for Park M	leadow Development,	Inc.		Court Filters (Chard		
<ul> <li>Home</li> <li>Policies</li> </ul>	Details	Assignment	Policy Number	Policy Term	Line of Business	Issuing Carrier		
Quotes     Attachments		2	BAP787867575	07/01/2008 07/01/2009	Auto - Commercial	Hartford Accident and Indemnity Company		
Proof of Coverage		۵	PKG202029292	07/01/2008 07/01/2009	Directors and Officers, General Liability - Commercial, Property - Commercial	ACE American Insurance Company		
User Profile		۵	WC5768791234	07/01/2008 07/01/2009	Workers Compensation	Hartford Accident and Indemnity Company		
<b>four Account</b> f you use this site, you are under your account or passwo	responsible for	maintaining the co	nfidentiality of your acc	ount and passwo	rd and for restricting access to you	ur computer, and you agre	to accept responsibilit	y for all activities that o

The [Show] link is available to search for a specific policy.

unt: Park Me unt Type: Co	ount Informati eadow Developmo ommercial	ON ent, Inc.			
olicy Informa	ation for Park Mea	adow Development, In	с.		Search Filters: [Hide
arch Filters					·
Policy	Number:		Policy Term From	то:	
Line of E	Business:		Issuing Carrie	r:	
Endors	sements: All	×			
ort Field 1:	Exp. Date	Sort Order 1: Desc	ending 💌 Sort F	ield 2: Line of Business 💌 Sort	Order 2: Ascending 💙 Search Clear
Details	Assignment	Policy Number	Policy Term	Line of Business	Issuing Carrier
<b>P</b>	2	BAP787867575	07/01/2008 07/01/2009	Auto - Commercial	Hartford Accident and Indemnity Company
<b>P</b>	20	PKG202029292	07/01/2008 07/01/2009	Directors and Officers, General Liability - Commercial, Property - Commercial	ACE American Insurance Company

When a **Details** icon is clicked the policy summary will be displayed, but **View** permissions to the policy summary must be enabled on the security template to activate the icon.

Park Meadow Development, I	nc Policy Details				<b>Comparison Comparison State</b> Technologies
Policy Number: BAP78786757	5	Issuing	Carrier: H	Hartford Accident and Inde	emnity Company
Policy Term: 07/01/2008 T	o 07/01/2009	Billing (	Carrier: H	Hartford Insurance Group	
Bill Method: Agency Bill		Prem	nium: \$	\$500.00	
Policy Status: In Force		Policy S	itage: P	Policy	
Print					Close
					0.050
Prepared for: Par	rk Meadow Develop	Summary of Insura ment, Inc.	ince		
Line of Business	Policy Number	Policy Term	Carrie	er	
Auto - Commercial	BAP787867575	07/01/2008 - 07/01/2009	Hartfo	rd Accident and Indemnit	y Company
Billing					
Company Name	H	lartford Accident and Inder	mnity-		
Effective Date	(	07/01/2008			
Expiration Date	(	07/01/2009			
Coverages - A	uto				
Liability - (1) Any A	Auto			Image: A start of the start	
Liability Type				CSL	
Limit - Liability CSI	L/BI Each Person			\$1,00	0,000
Medical Payments	- (2) All Owned Autos			$\checkmark$	
Medical Payments	- Each Person			\$10,0	000
Uninsured Motorist	- (6) Owned Autos Si	ubject to UM Law		✓	
Uninsured Motorist	Туре			CSL	
Limit - Uninsured N	Iotorist CSL/BI Each F	Person		\$1,00	0,000
Towing & Labor - (	3) Owned Private Pas	senger Autos		Image: A start of the start	
Limit - Towing & La	abor			\$50	
Comprohensive /	2) All Owned Autes				

Clicking the Quotes link displays any marketing records the agency has identified as being viewable by the client's Portal Users. On this screen the portal user can see where the agency is on the quoting process, so be sure and keep the status current and add the quote amount to the estimated premium fields on the **policy info** tab. The portal user will use the **[Show]** link to search as needed.

<b>X</b> Dimensional <sup>®</sup> Technologies										Logout
Currently Logged In: Christopher Park February 23, 2009	General Accou Account: Park Mea Account Type: Con	int Informat dow Developm imercial	ion ent, Inc.							Using Online Insurance Help
Online Insurance	Quotes for Park	Meadow Devel	opment, Inc.				s	earch Filters: [ <u>Show]</u>		
Policies	Assignment	Policy Number	Line of Business	Status	Updated By Updated Date	Premium	Desired Policy Term	Issuing Carrier		
Attachments     Proof of Coverage	۵	Unassigned	General Liability - Commercial, Property - Commercial	Pending	Mary Oberleitner 02/23/2009	\$15,000.00	07/01/2008 07/01/2009	Hartford Insurance Group		
User Profile  Update Password	۵	Unassigned	Casualty - International, Property - International	Pending	Mary Oberleitner 02/23/2009	\$0.00	12/22/2008 12/22/2009	ACE Insurance Company of the Midwest		
Your Account If you use this site, you are a	responsible for main	taining the conf	identiality of your acc	ount and p	assword and for res	tricting access t	to your compute	er, and you agree to	accept responsibil	ity for all activities that occu
If you use this site, you are i under your account or passwo ©Copyright 2005 - 2008 XDim	responsible for main ord. nensional Technologi	es, Inc.	identiality of your acc	ount and p	assword and for res	tricting access t	to your compute	er, and you agree to	accept responsibil	ity for all activities that oc

If the client would like contact information on someone assigned to the client, click the **Assignment** icon and any assignments added to the client profile will be displayed. Clicking the **Email** link will allow the portal user to send an email using their own email system, not Nexsure delivery.

Assignm	nent List			ne sure
	Name	Responsibility	Email	Primary Phone
	Carole Houde	Producer	nexsurecontact@aol.com	<u>(714) 476-7224</u>
	Ralph Natale	Account Manager	<u>nexsurecontact@aol.com</u>	<u>(714) 476-7224</u>
	Mary Oberleitner	Client Advocate	<u>maryo@xdti.com</u>	<u>(714) 482-9631</u>
				Close
				Close

Clicking the **Attachments** link brings up attachments that have been identified as viewable by the client's Portal Users. The portal user may add attachments, view and delete attachments only if the security template added allows this access. Removal of attachments may only be done if the portal user is granted **Delete** permissions. The portal user will click the **[Show]** link to search for specific documents.

<b>Technologies</b>		Logout
Currently Logged In: Christopher Park February 23, 2009	General Account Information Account: Park Meadow Development, Inc. Account Type: Commercial	Using Online Insurance Help
Online Insurance	Attachments for Park Meadow Development, Inc.         Search Filters: [ Show ]         Attachments: [ Add New ]           Details         Attachment Description         Type         Policy No         Created By         Date Created Remove	
Policies	📝 09 - Vehicles Vehicle Schedule 🔣 BAP787867575 Mary Oberleitner 02/23/2009 📄	
Quotes		
Attachments     Proof of Coverage		
User Profile		
Update Password		
Your Account If you use this site, you are under your account or passw ©Copyright 2005 - 2008 XDin	responsible for maintaining the confidentiality of your account and password and for restricting access to your computer, and you agree to accept respons ord. mansional Technologies, Inc.	sibility for all activities that occur

To add an attachment, the portal user will click the **[Add New]** link. **Attachment Name** and **Description** boxes will be completed by the portal user. Click the **Browse** button to locate an existing file to attach to the client's Nexsure attachments. Select the **Save** link to save the attachment to Nexsure. The document notification is delivered to agency personnel as added to **Attachment Notification Setup** in the Client Portal. For more information, see "Configuring Attachment Notifications" in Chapter 1.

New Attachment		ne sure
Attachment Name:		
Add File: Browse		
Click the Browse button to locate an existing file to attach to this client's file.		
Policy(s): None BAP787867575 (12/09/2008 to 07/01/2009) Unassigned (07/01/2008 to 07/01/2009) Unassigned (12/22/2008 to 12/22/2009)		
Note: Policy Association		
Description:		
	Save	Close

Any documents added by the client's portal user may be removed by the portal user who added it if security has been setup to grant **Delete** permissions. Notification will be sent to agency personnel as directed in

setup. The **Remove** icon will only be active if security is granted or if the attachment was added by the client's portal user.

<b>Dimensional</b> <sup>®</sup> Technologies										Logo
Currently Logged In: Christopher Park February 23, 2009	General Account: I Account T	Account Infor Park Meadow Deve ype: Commercial	mation elopment, Inc.						Usin H	g Online Insur elp
Online Insurance	Attachn	nents for Park Mea	adow Development, Inc.			Search Filters: [ Show ]	] Attachments: [	Add New ]		
Home	Details	Name	Attachment Description	Туре	Policy No	Created By	Date Created	Remove		
Policies	<b>*</b>	09 - Vehicles	Vehicle Schedule	X	BAP787867575	Mary Oberleitner	02/23/2009			
Quotes		09 Cert Holders	Cert Holder List	×	WC5768791234	Christopher Park	02/23/2009	En l		
Attachments										
Proof of Coverage										
User Profile										

If security access has been granted, clicking the **Proof of Coverage** link allows the portal user to view and print auto ID cards and certificates issued by the agency. Permissions must be given for the policy to be viewable by the client's Portal Users on the **assignment** tab and **View** permissions in the assigned security user rights template.

To view or print auto ID cards, click the Auto ID Cards link.

<b>Technologies</b>		Logout
Currently Logged In: Christopher Park February 23, 2009	General Account Information Account: Park Neadow Development, Inc. Account Type: Commercial	Using Online Insurance Help
Online Insurance Home Online Insurance Online Insurance Online Insurance Online Insurance Online Online Insurance Online	Park Meadow Development, Inc Proof of Coverage           AUTO         ID           CERTIFICATE         OF           ID         INSURANCE	
Your Account If you use this site, you are under your account or passw Copyright 2005 - 2008 <u>XDin</u>	responsible for maintaining the confidentiality of your account and password and for restricting access to your computer, and you agree to acce ord.	pt responsibility for all activities that occur

Any issued cards the client's portal user has policy permissions to view will be displayed. The [Show] link is available to search for a specific auto ID card.

<b>Technologies</b>										Log	gout
Currently Logged In: Christopher Park February 23, 2009	General Account: P Account Ty	Account In Park Meadow D Ppe: Commerc	formation Development, ial	Inc.						Using Online Inst	urance
Online Insurance	Park Me	adow Develop	oment, Inc I	Proof of Coverage	- Auto ID Card						
Home	Me Below is a list of your Auto ID cards. Io view of print an ID card click the View icon. Search Filters: (Show)										
Policies     Quotes	View	Year	Make	Model	VIN	Policy Number	Eff. Date	Exp. Date	Issued Date		
Attachments	্	2001	GMC	Vandura	1GTGG35K3M7508868	BAP787867575	12/09/2008	07/01/2009	12/10/2008		
Proof of Coverage	Q	2007	Ford	Ranger	1FTCR14T3HPA20226	BAP787867575	12/09/2008	07/01/2009	12/10/2008		
User Profile	Q	2001	Ford	Windstar	2FMZA5143WBD18491	BAP787867575	12/09/2008	07/01/2009	12/10/2008		
Update Password	Q	2006	Volvo	Wagon	YV1SW592662557172	BAP787867575	12/09/2008	07/01/2009	12/10/2008		
	Q	1999	GMC	Pickup	JT890485043850392	BAP787867575	12/09/2008	07/01/2009	12/10/2008		
Your Account If you use this site, you are responsible for maintaining the confidentiality of your account and password and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your account or password.											
BCopyright 2005 - 2008 XDimensional Technologies, Inc.											

To view or print an auto ID card, click the **View**  $\bigcirc$  icon. The portal user will need to have Adobe Acrobat Reader<sup>®</sup> installed on the computer in order to view the card. Click the **Print** icon if a hard copy is desired.



To view or print issued certificates, the **Certificate** link is selected and the same process is followed for viewing and printing auto ID cards.

#### CHAPTER 2

The user profile will allow the client's contact to change the password for their portal login. After clicking **User Profile**, the portal user logged in will click on the **Update Password** link and type in the **Current Password**, **New Password** and **Confrim Password**. To save the changes, click the **Save** link. To abort the change, click the **Cancel** link.

<b>Contensional</b> <sup>*</sup> Technologies <sup>*</sup>		Logout				
Currently Logged In: Christopher Park February 23, 2009	General Account Information     Using Onl       Account: Park Meadow Development, Inc.     > Heip       Account Type: Commercial     > Heip	line Insurance				
Online Insurance						
▶ Home	Update Password					
Policies						
Quotes	Ouroat Basenad					
Attachments						
Proof of Coverage	Confirm Password:					
User Profile	Sup Cord					
Update Password	Jave Cance					
Your Account If you use this site, you are responsible for maintaining the confidentiality of your account and password and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your account or password.						

Clicking displayed **Announcement** links can either display a website or a dialog box with the announcement added by the agency. Security must be granted in order for announcements to display as added to **Announcement Setup** in Nexsure. For more information, see "Adding Announcements" in Chapter 1.



Clicking displayed resource center links will bring up the website added by the agency. Security must be granted in order for the resources to be displayed.



To logout, the user will click the **Logout** button on the top right of the screen.

Note: The T-Log in Setup will log when portal users sign into the portal.

#### Notes
