X Dimensional® Technologies

Submission Suite Quick Reference Guide

1 General configuration

Prior to using the Submission Suite, the module must first be set up and then attached to the customer web site. In the **Setup Console**, navigate to **Submission Suite Configuration General**.

1. **Access Links** — Access links will become available once at least one **Program** has been added.
2. **Submission Suite Portal** — **Enable** the portal for users to view.

2 Setting up programs

Programs can be added to the Submission Suite setup in order to add LOBs and other selection fields to the Submission Suite for the customer to use. Assignments can be setup here to assign a person and a branch to the Program. In the **Setup Console**, navigate to **Submission Suite Programs**.

1. **Add New** — Add branch assignments and LOBs. Once all Program information has been entered, click **[Save]** at the top of the screen. After **[Save]** is clicked, the full Program link will be completed. This is the link that can be used to add to a web site so that customers may enter the Submission Suite.
2. **Program tabs** — Once the Program is saved, several tabs become visible for setting up the Programs.

3 Completing the tabs

Complete each of the following tabs to finish the set up of one or more Programs.

1. **Details tab** — Details specific to the Program. Complete each field as necessary. The **Terms & Conditions** and **Notable Exclusions** will be displayed on the **Application Review** page where the customer accepts and submits the application.
2. **Lines of Business** — LOBs specific to the Program. **Details** icon for each associated Program can be clicked to enable or disable applications associated with the LOB selected. On the **Form** screen, select form items from the **Nexsure Form Layout** tree to drag over to the **Submission Suite Layout** tree. If a new section is needed, enter the name in the **Section Settings** > **New custom section** box and click **[Add]** (or just press the **Return** key). The **Coverage Options** screen is used to build the Coverages matrix that the customer will use to select the coverage they want.

3. **Workflow steps**	Selection of steps customer must complete before getting a quote. Select a step in the **Available Steps** area and use the arrows to move the step into place in the **Selected Steps** area.
4. **Branding**	A logo specific to the Program can be uploaded. The Program logo added here is in addition to the logo that can be added under Color Schemes. Both logos can be present on the Submission Suite site. One specific to the Program and one for the agency. Both logos will be displayed at the Program level. Use a logo that is in .gif or .jpg format, that is under 5 kb. The recommended resolution is 100 x 100 pixels.
5. **Messages**	Various messages can be displayed during the application process.
6. **Attachments**	Listing of attachments required for the quote.