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- ✘ Save Changes to Update Forms with Policy Header Detail

Populate the Term on Policy Forms

After a renewal is created, the policy status shows a **Future** status. To make sure the forms get updated with the correct carrier, policy number and policy term, check the header and update for the renewal. Whether any changes are made to the header or not, click the **Save Changes** link on the navigation toolbar. This is what updates the forms with the new carrier, policy number and policy term. If **Save Changes** is not clicked, the forms will retain the old carrier, policy number and term information.

The screenshot displays the Nexsure web application interface for a client named 'Busy Bee Crafts'. The policy header shows the following details:

Branch:	Atlantic Branch	Policy Term:	04/28/2008 12:01 AM
Policy Type:	Monoline	Coverage Term:	04/28/2009 12:01 AM
Issuing Co:	Allied Insurance Company	Stage:	Policy
Billing Co:	Allied Insurance Company	Mode:	Renew
Policy Number:	UM-786544-01	Status:	Future <input type="checkbox"/> Non-renewing

At the bottom of the header section, there are buttons for 'List', 'Print', 'History', 'In Force', and 'Save Changes'. A red arrow points from the 'Save Changes' button to the 'Future' status field. Below the header, there are sections for 'Actions' (including 'Renewal_1 Annotation'), 'Base Forms' (including 'Narrative' and 'ACORD 125'), and 'Line of Business' (including 'Umbrella - Commercial').

Note: Changing the policy term requires that the coverage term also be changed. If the policy is in **Edit Pending** status and the header information is updated, the **Save Changes** link may be clicked immediately after the update to save and update the forms on the policy.

Populate the Term on Marketing Records

Whenever information is modified in the header on the **MARKETING > underwriting** screen or a marketing record is created using the Servicing option of Market Existing (For more information, see **Re-Market an Existing Line of Business** in Chapter 13 of the Nexsure® CRM Training Manual), make sure to click the **Save Changes** link on the navigation toolbar. Clicking the **Save Changes** link will update the forms added to the marketing record with the carrier, policy number and term. If **Save Changes** is not clicked, the forms will retain the old carrier, policy number and term information.

The screenshot shows the 'Marketing' record for 'Busy Bee Crafts'. The 'Policy Term' field is highlighted with a red box and a red arrow pointing to the 'Save Changes' link in the navigation toolbar. The 'Policy Term' field contains two dates: 05/08/2006 CST and 05/08/2007 CST. The 'Save Changes' link is located in the bottom right corner of the record header.

Branch:	Atlantic Branch	Policy Term:	05/08/2006 CST 05/08/2007 CST
Policy Type:	Package	Coverage Term:	
Issuing Co:	Penn National	Stage:	Marketing
Billing Co:	Penn National	Mode:	New
Policy Number:	Unassigned	Status:	Pending

Navigation toolbar: [List](#) [Rate](#) [Bridge](#) [Print](#) [History](#) [In Force](#) [Save Changes](#)

Details	Topic	Type	Status	Memo
	Marketing	Annotation	Closed	Process new marketing application.

Base Forms:

Forms	Description	Remove
Narrative	Underwriting Narrative	
ACORD 125	Commercial Application 125	

Line of Business:

Lines of Business	Form	Description	Remove
General Liability - Commercial	ACORD 126	Commercial General Liability Section 126	
Umbrella - Commercial	ACORD 131	Commercial Umbrella Section 131	

Note: If adding an application after clicking the **Save Changes** link and selecting the option in the application helper to copy another application, make sure to click the **Save Changes** link so it will not be necessary to update the newly added application manually with the carrier, policy number, and term.