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Fields that Populate from Client Level to ACORD 125 and 130

It is important to complete client data since the information is used to populate the applications in Nexsure. This document specifically addresses what client data fields populate the Commercial ACORD 125 (Applicant Information Section) and 130 (Workers Compensation Application) when these forms are used on new opportunity or marketing records.

Client Profile Screen

Populates ACORD 125 and 130 in Applicant / Organization Group, Years in Business field.

The screenshot shows the Nexsure Client Profile screen. The 'Client Type' is set to 'Commercial'. The 'Source' is 'Current Client'. The 'Account Notes' section contains the text: 'Very good account. No losses in last 5 years according to loss runs. 4/28/2006 MO'. The 'Organization Information' section includes the following fields: 'Legal Entity Type' (Corporation), 'Years in business' (1), 'No of Employees' (15), 'No of Locations' (1), 'No of vehicles' (1), 'Estimated Annual Gross Sales (\$)' (500000), 'Estimated Commission' (2500), 'Monthly Payroll (\$)' (3000), 'No. of States/Provinces' (1), 'Home Office State/Province' (California), 'On-Line business' (Yes), and 'TV/Radio Advertisement' (Yes). Red arrows point from the 'Years in business' field to the ACORD 125 and 130 fields.

Populates ACORD 125 in Applicant / Organization Group, Members and Managers field.

Named Insured Screen

Populates the ACORD 125 and ACORD 130.

Primary Named Insured populates the ACORD 125 and ACORD 130.

The screenshot shows the 'named insureds' tab in the nexsure system. Red arrows point from callout boxes to the following fields:

- Name:** Busy Bee Crafts
- Organization Legal Entity Type:** Corporation
- FEIN:** 78-5898796
- Website:** www.busybee.com
- Is This a DBA Name?:** No
- Long named insured:** Busy Bee Crafts Store and Classes
- Nature of Business/Description of Operations:** Retail Sales (Craft Store and Classes)
- Year Started:** 2001
- Gross Receipts \$:** 30000
- Number of Employees:** 3
- NAICS/SIC:** 4539 Other Miscellaneous Store Retailers

At the bottom, it shows 'Last Updated By: Mary Oberleiner' and 'Date Updated: 10/30/2007 8:33:01 AM CST'.

Populates the ACORD 125 to Nature of Business Group / Nature of Business field.

Long named insured can be added by using **Lookup** in the Other Named Insureds on the ACORD 125 form.

Client Contact Screen

Inspection and Accounting Contact Roles populate contact info to ACORD 125 and ACORD 130. Claims Contact Roles populate contact info to ACORD 130.

Note: If a contact role is not designated, the primary contact will default to the contact section of the form.

Details	Primary		Name	Job Title	Contact Role	E-Mail	Remove
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Nancy Blue	Owner		demosuser@xdti.com	
	<input type="checkbox"/>	<input type="checkbox"/>	Franco DiAddezio		Inspection	franco.diAddezio@xdti.com	
	<input type="checkbox"/>	<input type="checkbox"/>	Clair Jones	Loss Control	Claims	cjones@aol.com	
	<input type="checkbox"/>	<input type="checkbox"/>	Susie Rivers	Manager	Accounting	maryo@xdti.com	
	<input type="checkbox"/>	<input type="checkbox"/>	Vince Vandike	Accountant	Decision Maker	Vince.Vandike	

Primary contact email address field 1 populates to ACORD 125 and ACORD 130.

Locations Summary Screen

Primary location mailing address and phone number populates to ACORD 125 and ACORD 130.

Details	Primary	Billing	Location Name	Address	City	St./Prov.	Zip/Postal	Phone Number	Fax	Remove
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Retail	1250 Boardwalk Dr.	Brea	CA	92821	(714) 672-5000		
	<input type="checkbox"/>	<input type="checkbox"/>	Distributor	1100 Hawk Dr	Brea	CA	92821	(714) 672-5811	(714) 672-8811	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Office	4500 Greg Dr	Brea	CA	92821			
	<input type="checkbox"/>	<input type="checkbox"/>	Retail	4500 Kinder Dr	Brea	CA	92821	(714) 672-8526		

ACORD 125 Applicant / Name

Populates from the Primary Named Insured detail at Client level.

Branch: Atlantic Branch

Policy Type: Monoline

Issuing Co: Unassigned

Billing Co: Unassigned

Policy Number: Unassigned

Policy Description:

Policy Term: 07/02/2008 12:01AM CST to 07/02/2009 12:01AM CST

Coverage Term:

Stage: Marketing

Mode: New

Status: Pending

Origination Date:

List Rate Bridge Print Compare Policy: [On] [Off] Save Changes

Applicant - Name [Lookup](#)

Application Date: 7/2/2008

Agency Customer ID: 1574

Applicant 'Name' (First Named Insured): Busy Bee Crafts

Mailing 'Address' - Street: 1250 Boardwalk Dr.

City: Brea

State/Province: CA

Zip/Postal Code: 92821

Applicant Web Address: www.busybee.com

Phone Number: (714) 672-5000

Applicant Email Address (Optional): demouser@xdti.com

navigation **instruction**

Underwriting

- Base Requirements
 - Narrative
 - ACORD 125
 - Producer
 - Applicant**
 - Name**
 - Organization
 - Other Named Insureds
 - Contact
 - Billing
 - Nature Of Business
 - Attachments
 - Premises Info
 - General Info
 - Prior Carrier - GL
 - Prior Carrier - Auto
 - Prior Carrier - Prop
 - Prior Carrier - Other
 - Loss/Incident History
 - Remarks
 - Workers Compensation

instruction **navigation**

Populates from primary contact email address.

Populates from primary location at Client level.

ACORD 125 Applicant / Organization Group

Populates from Client Profiling screen.

Branch: Atlantic Branch
Policy Type: Monoline
Issuing Co: Unassigned
Billing Co: Unassigned
Policy Number: Unassigned
Policy Description:

Policy Term: 07/02/2008 12:01AM CST
Coverage Term: 07/02/2009 12:01AM CST
Stage: Marketing
Mode: New
Status: Pending
Origination Date:

List Rate Bridge Print Compare Policy: [On] [Off] Save Changes

Applicant - Organization

Number of Members and Managers: 15

Applicant Organization Legal Entity Type: Corporation

Credit Bureau Name:

ID Number:

Federal Employer ID Number (FEIN) or Social Security Number (SSN): 78-5898796

Date Business Started: 1/1/2007

navigation instruction

Underwriting

Base Requirements

Narrative

ACORD 125

Producer

Applicant

Name

Organization

Other Named Insureds

Contact

Billing

Nature Of Business

Attachments

Premises Info

General Info

Prior Carrier - GL

Prior Carrier - Auto

Prior Carrier - Prop

Prior Carrier - Other

Loss/Incident History

Remarks

Workers Compensation

instruction navigation

Populates from primary Named Insured detail at Client level.

ACORD 125 Contact Group

Populates from Client Contacts with the Contact Roles of Inspection and Accounting. If these contact roles are not used the primary contact information populates the fields.

The screenshot shows the nexsure web application interface. The top navigation bar includes links for HOME, HELP, SETUP, and LOGOUT. Below this is a search bar and a list of tabs: CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The main content area is titled 'Commercial Account' and contains a form for 'underwriting'. The form is divided into several sections: 'policy info', 'assignment', 'attachments', 'actions', 'qualification', 'history', 'transactions', 'claims', 'summary of insurance', 'classifieds', and 'delivery'. The 'policy info' section contains fields for Branch (Atlantic Branch), Policy Type (Monoline), Issuing Co (Unassigned), Billing Co (Unassigned), Policy Number (Unassigned), Policy Description (Unassigned), Policy Term (07/02/2008 to 07/02/2009), Coverage Term (07/02/2008 to 07/02/2009), Stage (Marketing), Mode (New), Status (Pending), and Origination Date. Below this is a 'Contact' section with a table of contact information. A red box highlights the 'Inspection Contact' and 'Accounting Record Contact' fields, which are populated with the names and contact information of Franco DiAddezio and Susie Rivers, respectively. A red arrow points from the text above to this box. The right sidebar contains a 'navigation' menu with links to various sections, including 'Underwriting', 'Base Requirements', 'Narrative', 'ACORD 125', 'Producer', 'Applicant', 'Other Named Insureds', 'Contact', 'Billing', 'Nature Of Business', 'Attachments', 'Premises Info', 'General Info', 'Prior Carrier - GL', 'Prior Carrier - Auto', 'Prior Carrier - Prop', 'Prior Carrier - Other', 'Loss/Incident History', 'Remarks', and 'Workers Compensation'.

Inspection Contact:	Accounting Record Contact:
Franco DiAddezio	Susie Rivers
(714) 672-5000	(714) 672-5000
franco.diAddezio@xdti.com	maryo@xdti.com

ACORD 125 Nature of Business Group

Populates from Primary Named Insured detail.

The screenshot displays the nexsure web application interface. The top navigation bar includes links for HOME, HELP, SETUP, and LOGOUT. Below this is a search bar and a menu with options like ORGANIZATION, REPORTS, and CAMPAIGNS. The main content area is divided into several sections. On the left, there's a 'CLIENT PROFILE' section with fields for Branch (Atlantic Branch), Policy Type (Monoline), Issuing Co (Unassigned), Billing Co (Unassigned), Policy Number (Unassigned), and Policy Description. On the right, there's a 'navigation' sidebar with a tree view showing 'Underwriting' and 'Nature Of Business' as active sections. The 'Nature Of Business' section is expanded, showing a list of categories like 'Base Requirements', 'Narrative', 'ACORD 125', 'Producer', 'Applicant', 'Other Named Insureds', 'Contact', 'Billing', 'Nature Of Business', 'Attachments', 'Premises Info', 'General Info', 'Prior Carrier - GL', 'Prior Carrier - Auto', 'Prior Carrier - Prop', 'Prior Carrier - Other', 'Loss/Incident History', 'Remarks', and 'Workers Compensation'. The 'Nature Of Business' section is highlighted with a blue arrow. The 'Nature Of Business / Description of Operations' field is highlighted with a yellow background and contains the text 'Retail Sales (Craft Store and Classes)'. A red arrow points from the 'Populates from Primary Named Insured detail.' text to this field.

ACORD 130 Applicant / Name

Populates from the Primary Named Insured detail at Client level.

Branch: Atlantic Branch Policy Term: 07/02/2008 12:01AM CST
 Policy Type: Monoline Coverage Term: 07/02/2009 12:01AM CST
 Issuing Co: Unassigned Stage: Marketing
 Billing Co: Unassigned Mode: New
 Policy Number: Unassigned Status: Pending
 Policy Description: Origination Date:

Applicant - Name

Application Date: 7/2/2008

Applicant Name (First Named Insured): Busy Bee Crafts

Agency Customer ID: 1574

Mailing Address - Street: 1250 Boardwalk Dr.

City: Brea

State/Province: CA

Zip/Postal Code: 92821

Applicant Email Address: demouser@xdti.com

Populates from primary contact email address.

Populates from primary location at Client level.

ACORD 130 Applicant / Organization Group

Populates from Primary Named Insured at Client level.

Populates from Client Profiling screen.

The screenshot shows the nexsure ACORD 130 Applicant / Organization Group form. The form is divided into several sections. The top section contains general information such as Branch, Policy Type, Issuing Co, Billing Co, Policy Number, Policy Description, Policy Term, Coverage Term, Stage, Mode, Status, and Origination Date. The middle section is titled 'Applicant - Organization' and contains fields for Applicant Web Address, SIC, Years In Business, Applicant Organization - Legal Entity Type, and If Legal Entity is Other - Please Describe. The bottom section is titled 'Inspection Contact' and contains fields for Inspection Contact Name, Inspection Contact Phone, Inspection Contact E-Mail, Accounting Record Contact Name, Accounting Record Contact Phone, Accounting Record Contact E-Mail, Claims Contact Name, Claims Contact Phone, Claims Contact E-Mail, and Loss Run Attached. A navigation pane on the right side of the form lists various sections: Underwriting, Base Requirements, Workers Compensation, ACORD 130, Producer, Applicant, Name, Organization, Identification, Billing, Premises Info, WC Rating Info, Policy Wide Coverages, Factored Premiums, Add. Cov./Endorsements, Included/Excluded, Prior Carriers, General Info, and Remarks. Red arrows point from callout boxes to specific fields: 'Populates from Primary Named Insured at Client level.' points to the 'Applicant Organization - Legal Entity Type' dropdown; 'Populates from Client Profiling screen.' points to the 'Applicant Web Address' field; and 'Populates from Client Contacts with the Contact Roles of Inspection, Claims and Accounting. If these contact roles are not used the primary contact information populates the fields.' points to the 'Inspection Contact Name' field.

Populates from Client Contacts with the Contact Roles of Inspection, Claims and Accounting. If these contact roles are not used the primary contact information populates the fields.

ACORD 130 Applicant / Identification

Populates from primary named insured detail at Client level.

The screenshot shows the nexsure web interface for the ACORD 130 Applicant / Identification form. The form is divided into several sections. The top section contains policy details: Branch (Atlantic Branch), Policy Type (Monoline), Issuing Co (Unassigned), Billing Co (Unassigned), Policy Number (Unassigned), Policy Description (Unassigned), Policy Term (07/02/2008 12:01AM CST to 07/02/2009 12:01AM CST), Coverage Term, Stage (Marketing), Mode (New), Status (Pending), and Origination Date. Below this is a table with columns for List, Rate, Bridge, Print, Compare Policy (On/Off), and Save Changes. The main section is titled 'Applicant - Identification' and contains fields for Credit Bureau Name, ID Number, Federal Employer ID Number (78-5898796), NCCI ID Number, and Other Rating Bureau ID or State Employer Registration No. A red arrow points from the text box above to the Federal Employer ID Number field. On the right side, there is a navigation menu with options like Base Requirements, Workers Compensation, ACORD 130, and Applicant.

Market Existing Assignments: Selecting the Refresh form prefill will pull the primary assignment from the client level assignments and other assignments from the policy selected. If refresh form prefill is not selected the assignments will be the same as the policy selected.

Renewal Assignments: For renewals, the assignments come from the expiring policy with or without the selection of the refresh forms prefills check box.