In This Issue

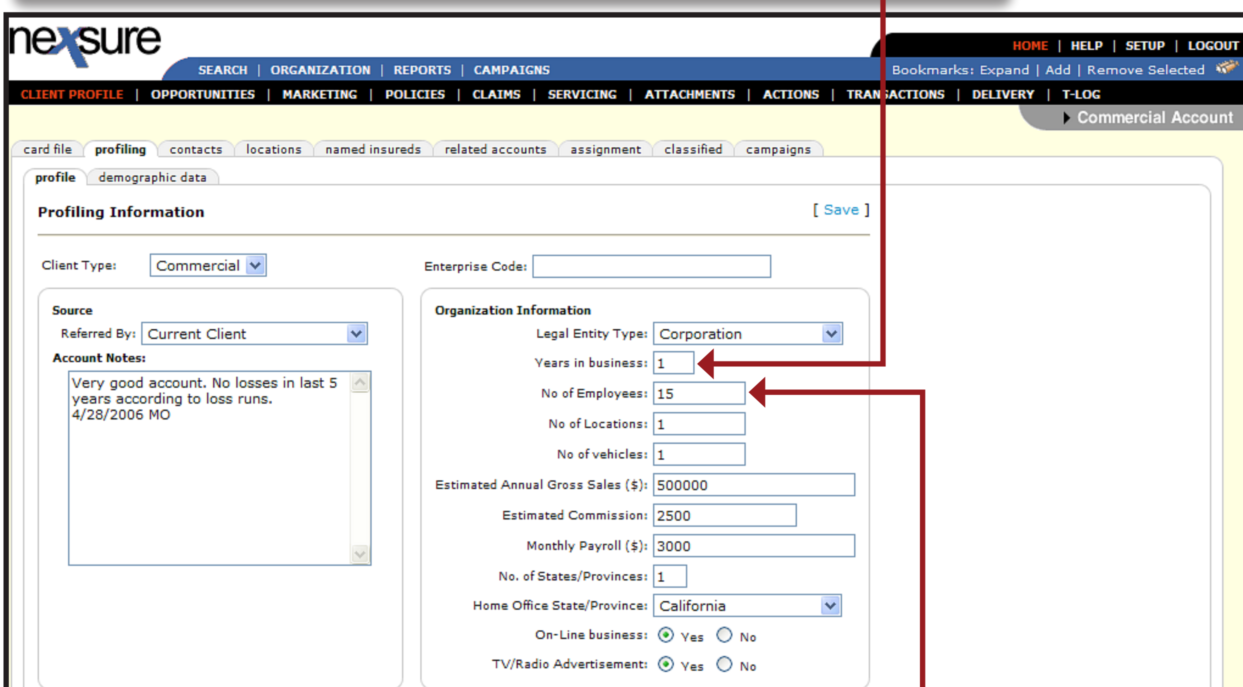
- Fields that Populate from Client Level to ACORD 125 and 130

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.

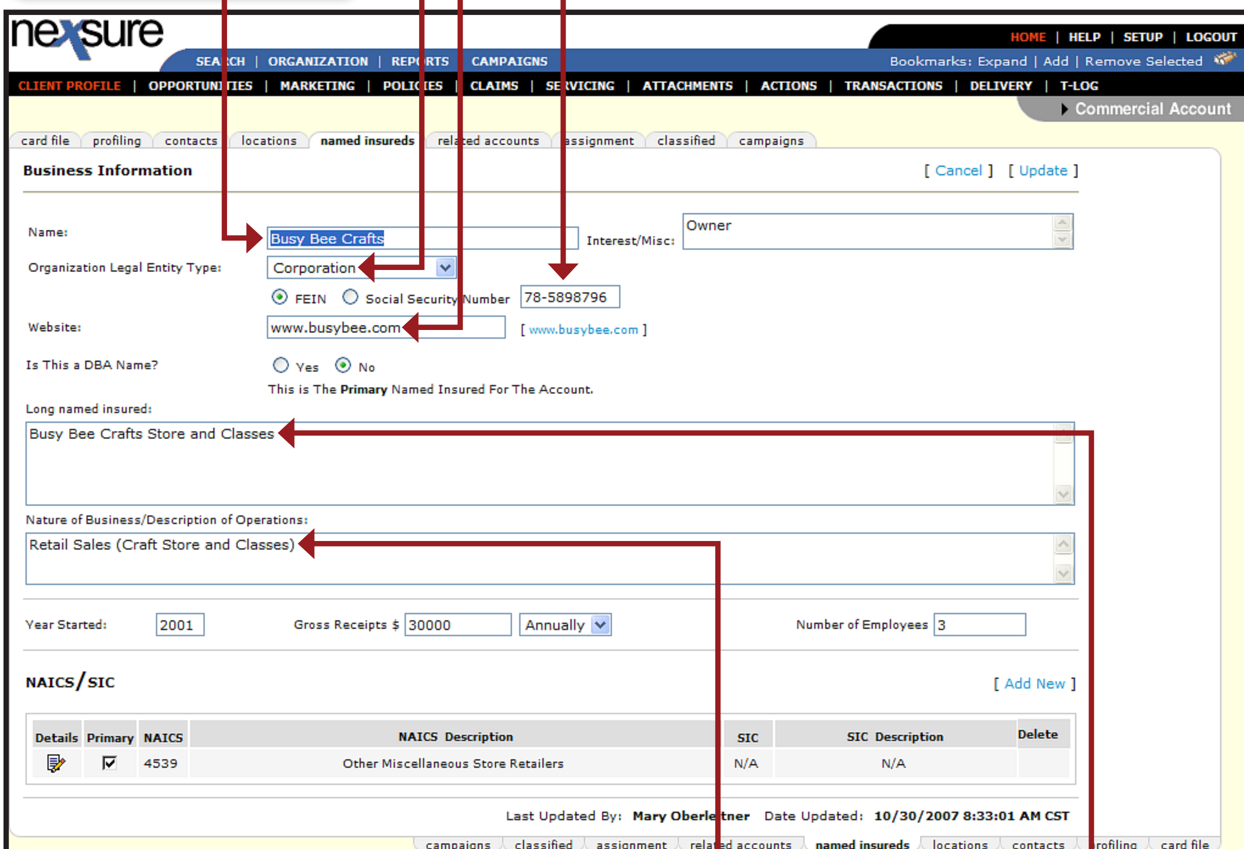


Populates ACORD 125 in Applicant / Organization Group, Members and Managers field.

Named Insured Screen

Populates the ACORD 125 and ACORD 130.

Primary Named Insured populates the ACORD 125 and ACORD 130.



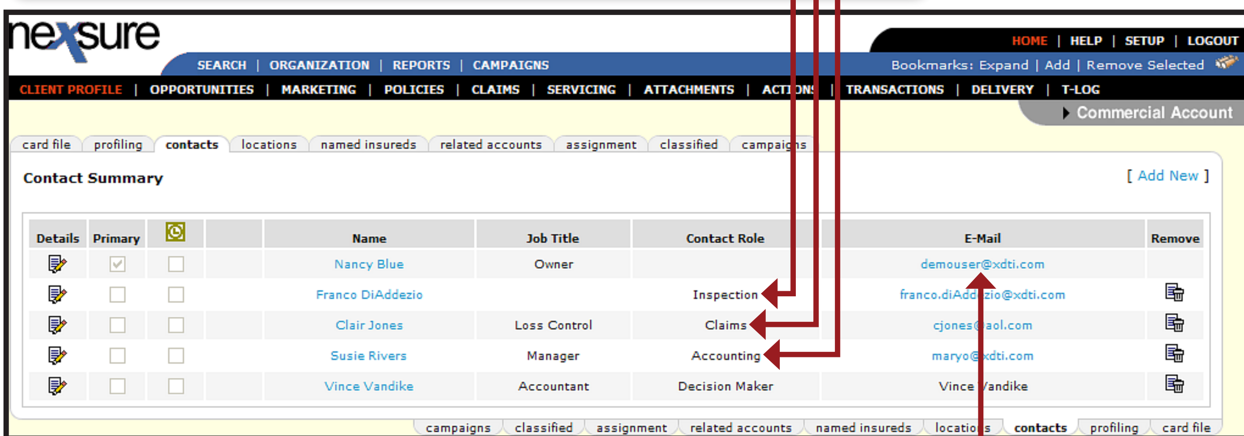
Populates the ACORD 125 to Nature of Business Group / Nature of Business field.

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.

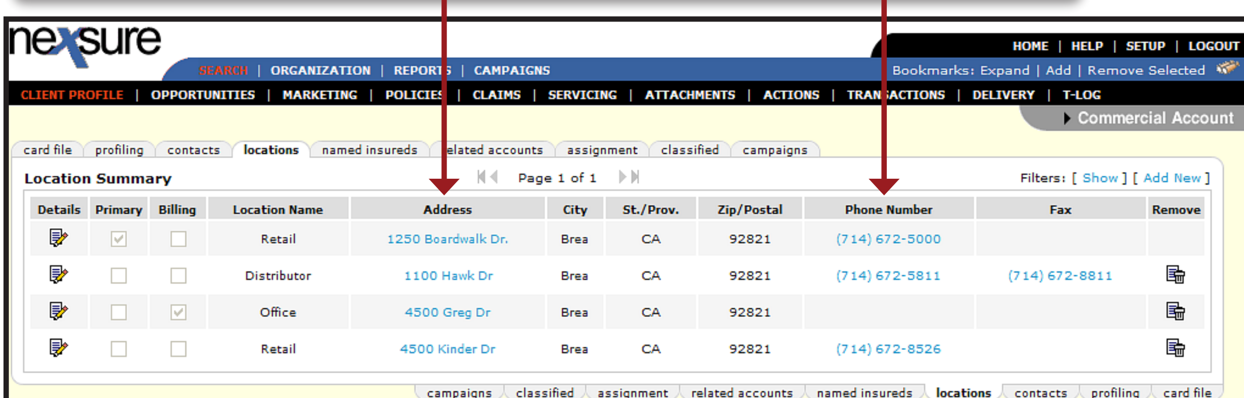
Note: If a contact role is not designated, the primary contact will default to the contact section of the form.



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

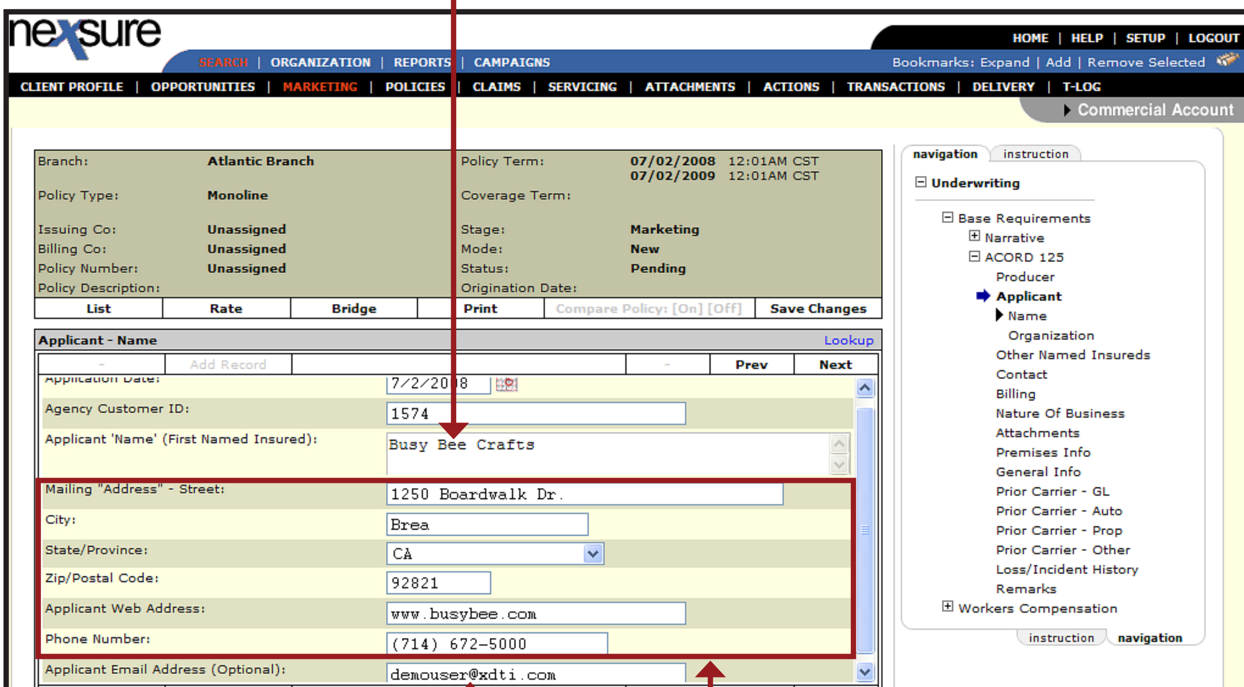
Locations Summary Screen

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



ACORD 125 Applicant / Name

Populates from the Primary Named Insured detail at Client level.

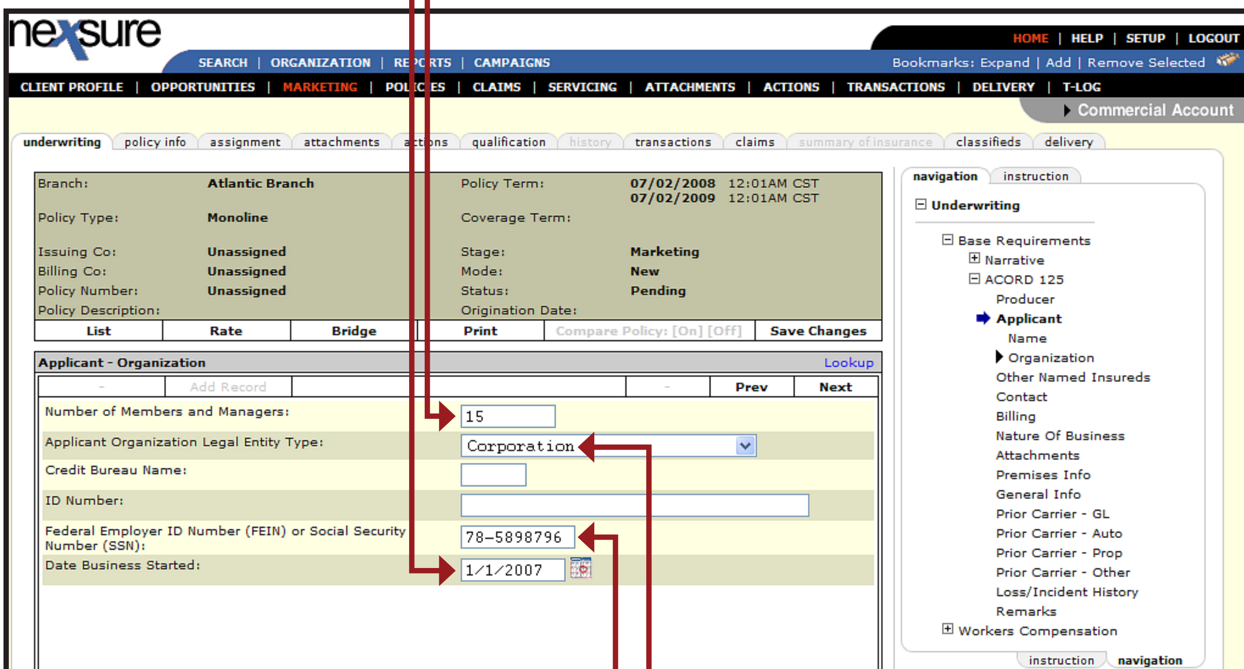


Populates from primary contact email address.

Populates from primary location at Client level.

ACORD 125 Applicant / Organization Group

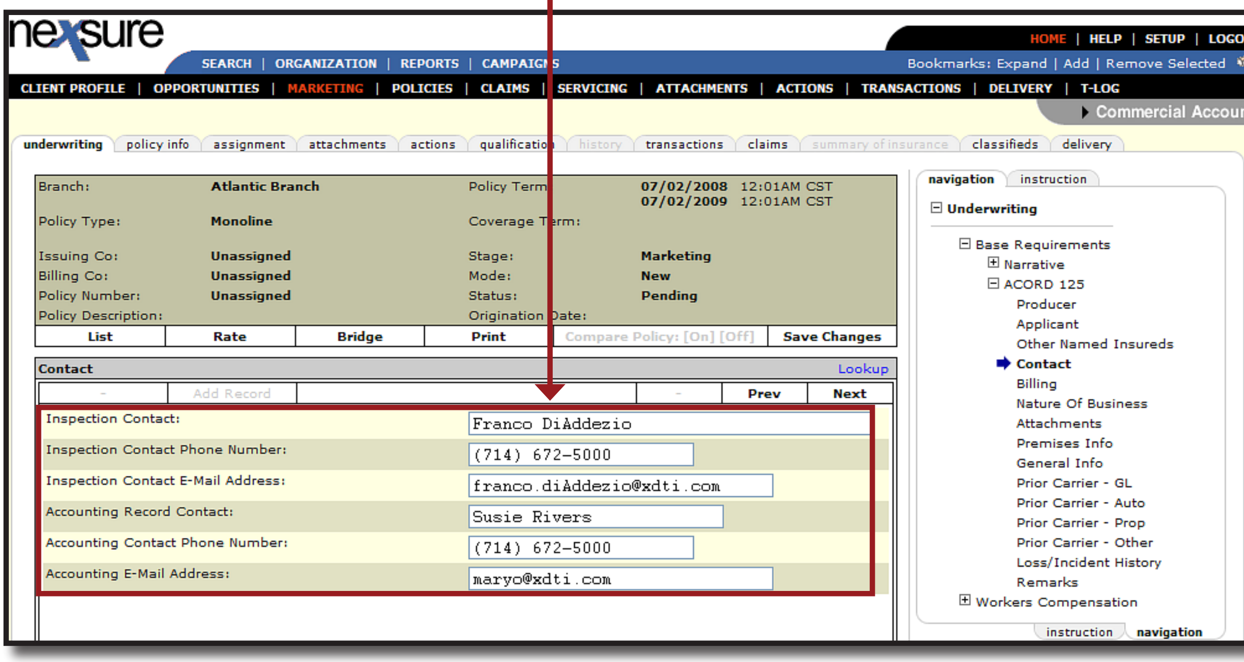
Populates from Client Profiling screen.



Populates from primary Named Insured detail at Client level.

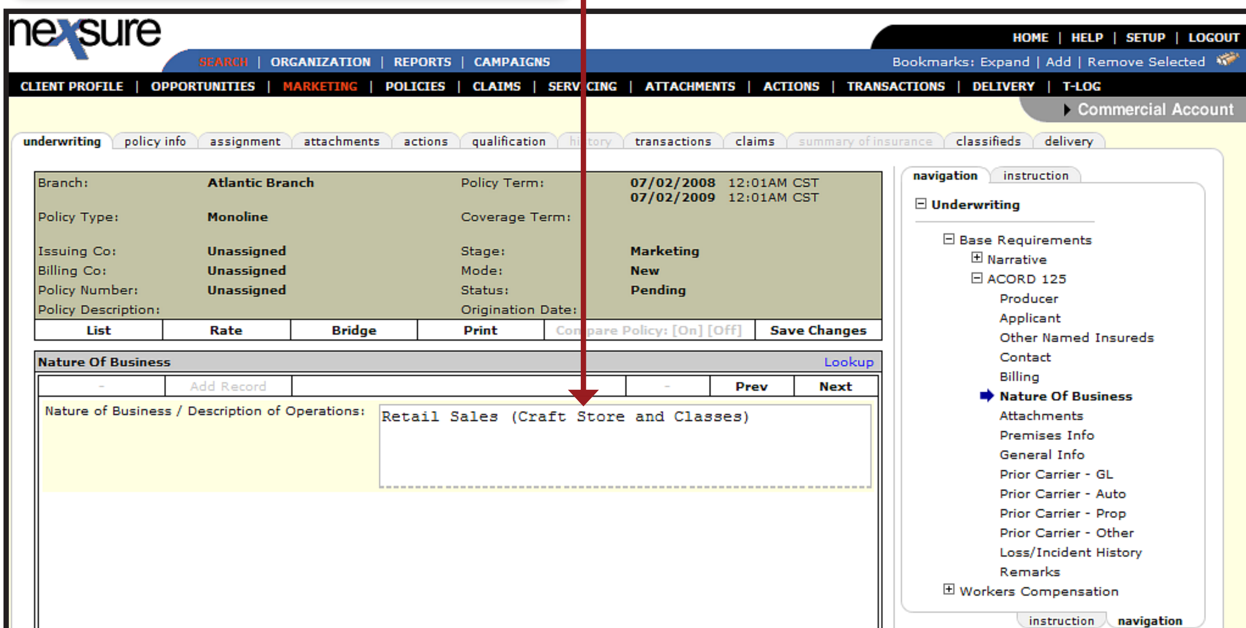
ACORD 125 Contact Group

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.



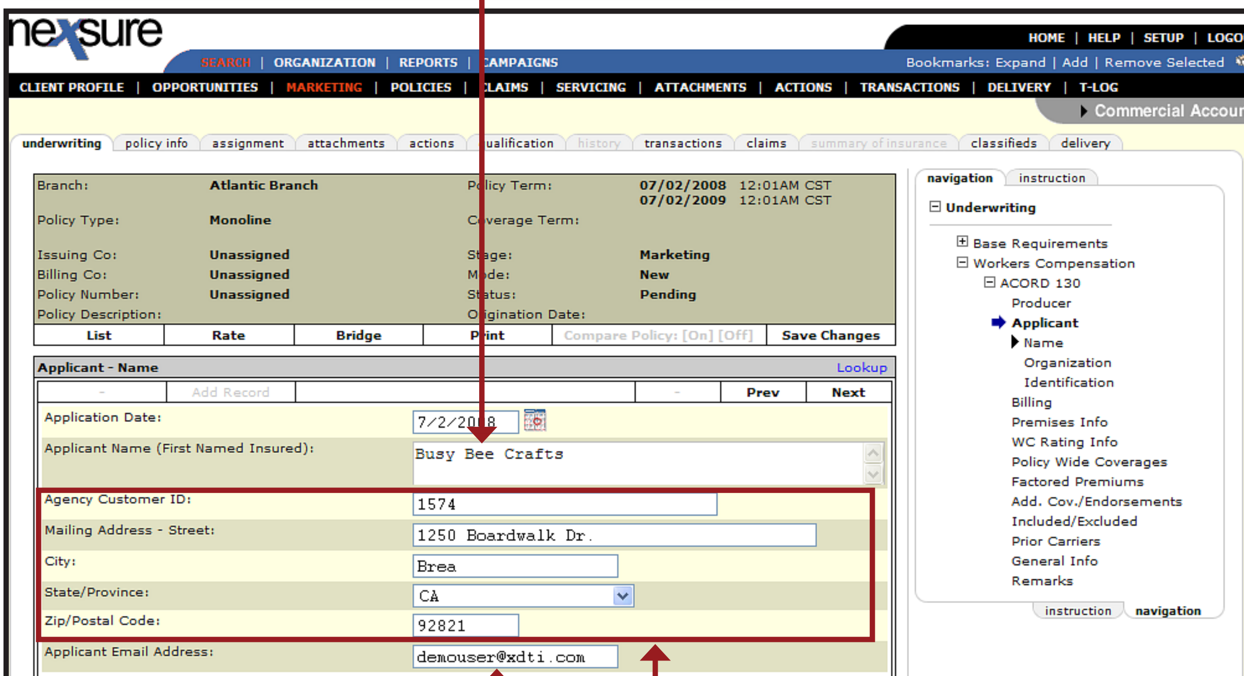
ACORD 125 Nature of Business Group

Populates from Primary Named Insured detail.



ACORD 130 Applicant / Name

Populates from the Primary Named Insured detail at Client level.



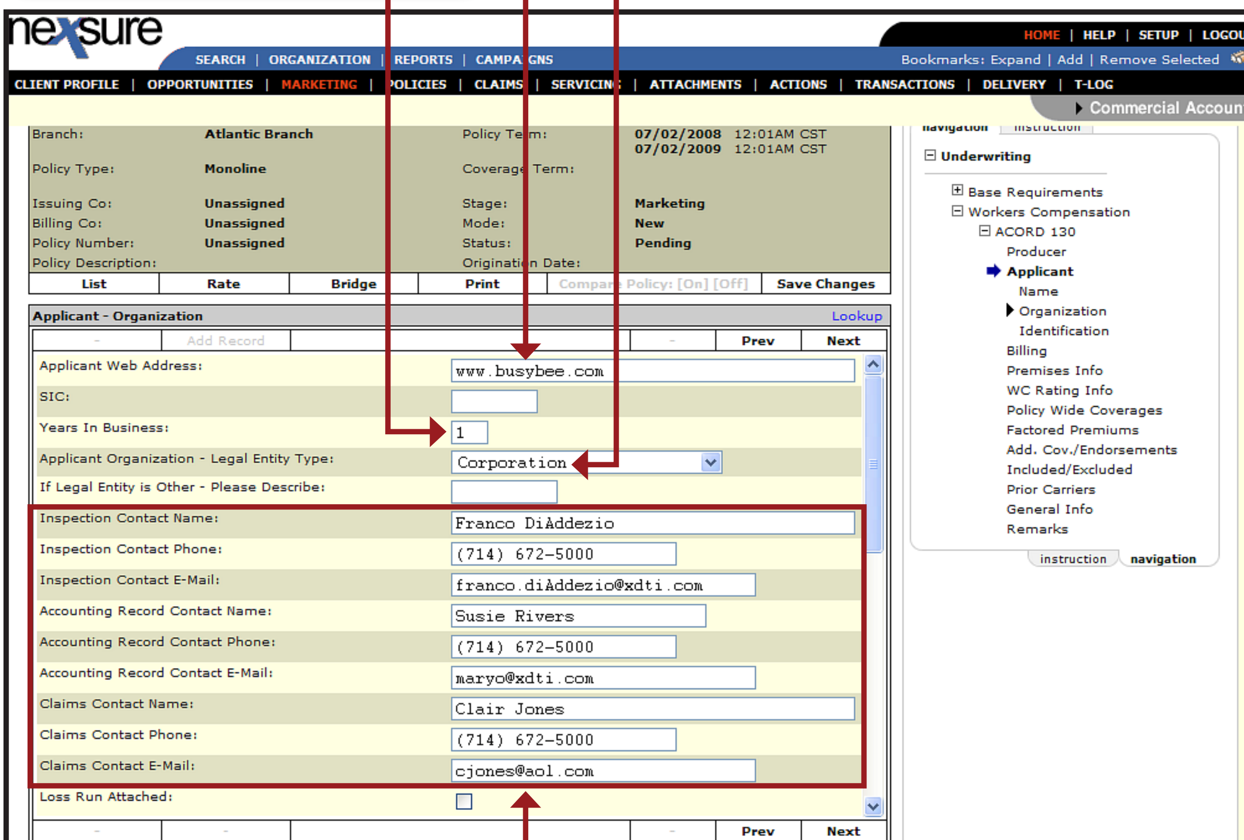
Populates from primary contact email address.

Populates from primary location at Client level.

ACORD 130 Applicant / Organization Group

Populates from Primary Named Insured at Client level.

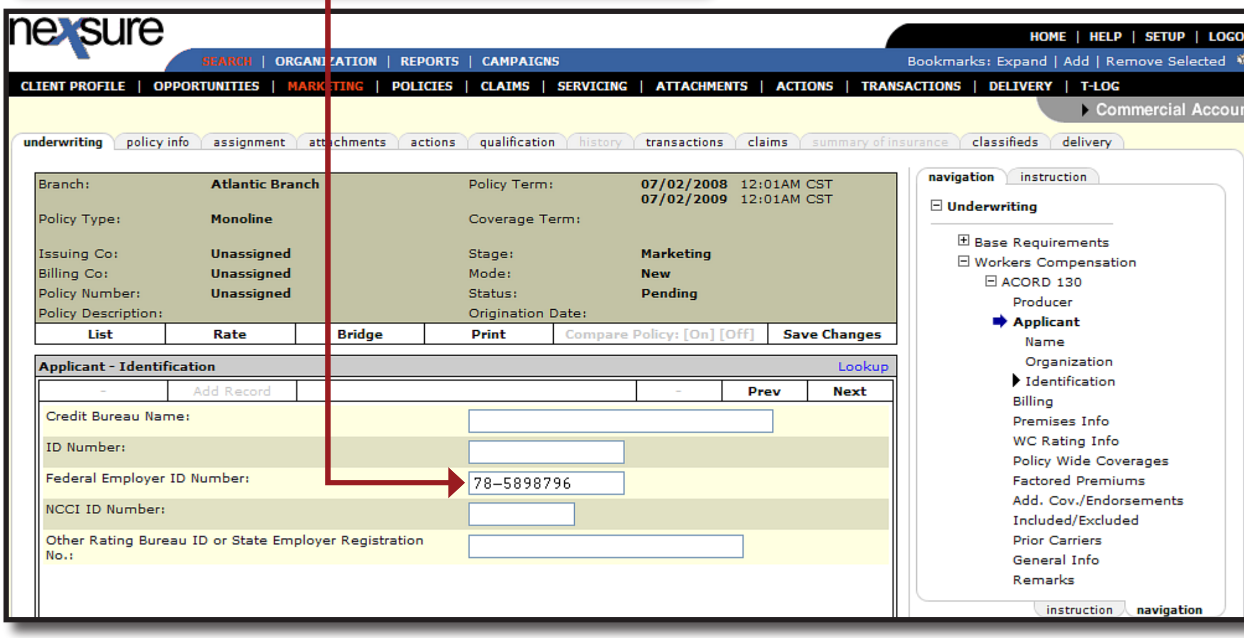
Populates from Client Profiling screen.



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.



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.