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* Associate Carrier to Territory and Branch, from Carrier Name Tab

Associate Carrier to Territory and Branch, from Carrier Name Tab

Carriers must be associated with territories, branches and a commission default added in order to select the carrier at policy level for identification and billing purposes. Carrier association may be done at the organization level one territory at a time or on the **carrier name** tab for all or selected territories and branches. Perform the following steps to associate carriers at the carrier level:

o, Mary Obe	SEARCH ORG	ANIZATION R	EPORTS CAMPAIGNS ELINKS			Bookr	narks: Expand Add	Remove Select
.h							[/	Add New Record
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rier Category: All	~	Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
ier: Ch	ubb		Chubb Group of Insurance Companies	Corporate Headquarters	Warren	NJ	07059	E:
e Number:			Chubb Indemnity Insurance Company	Corporate Headquarters	Warren	NJ	07059	E:
tion Address:			Executive Risk Indemnity Inc	Corporate Headquarters	Warren	NJ	07059	E
tion City:			Federal Insurance Company	Corporate Headquarters	Warren	ΓN	07059	6
Postal:								Search Clear
must search for	a record prior to e	tering a new o	ne. After the results are returned you	I will be given the option to	add a new record.			sea
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3. Click the carrier name tab.	3.	Click the	carrier	name	tab.
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		SE	ARCH	ORGANIZ	ATION REPORTS CAMPAIGNS ELINKS		Bookmarks: Expand Add R	emove Selected
RRIER P	ROFILE	АТТАСН	MENTS					
rier Na	ame: Cl	ubb G	roup of	Insura	nce Companies		► Car	
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Carrier	Summa	EV.				1		
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etails	Parent	Billing	Issuing	Internal	Carriers Chubb Group of Insurance Companies	NAIC Code	AM Best A++	[Add New]
etails	Parent	Billing	Issuing	Internal	Chubb Group of Insurance Company	NAIC Code 12777	AM Best A++ A++	[Add New]
Details	Parent	Billing	Issuing	Internal	Carriers Chubb Group of Insurance Companies Chubb Indemnity Insurance Company Executive Risk Indemnity Inc	NAIC Code 12777 35181	AM Best A++ A++ A++	[Add New]
etails	Parent	Billing	Issuing	Internal	Carriers Chubb Group of Insurance Companies Chubb Indemnity Insurance Company Federal Insurance Company	NAIC Code 12777 35181 20281	AM Best A++ A++ A++ A++	[Add New]
etails	Parent	Billing	Issuing	Internal	Carriers Chubb Group of Insurance Companies Chubb Indemnity Insurance Company Executive Risk Indemnity Inc Federal Insurance Company	NAIC Code 12777 35181 20281	AM Best A++ A++ A++ A++ A++	(Add New)

4. To display the carrier's detail, click the carrier's **Details** icon.

5. Click [Add New Association] to add the territories and branches to be associated with the carrier.

nevsure		
SEARCH ORGANIZATION REPORTS CAMPAIGNS	ELINKS	Bookmarks: Expand Add Remove Selected
CARRIER PROFILE ATTACHMENTS		
Carrier Name: Chubb Group of Insurance Companies		Carrier
card file contacts locations carrier name commissions		
Carrier Information		[Update] [Cancel]
Carrier Name: Chubb Group of Insurance Compan	This is the current	PARENT CARRIER
Carrier Category: 📀 Traditional 🔘 Intermediary	Website:	www.chubb.com
Carrier Types: Issuing 🗹 Billing 🗌 Internal		www.chubb.com
Carrier DB Rule: 🛛 Post Direct Bill Commission to General Ledger	Contract Year:	
Carrier CD Rule: Re-run download using lenient criteria	AM Best Rating:	A++
Leastin (a)	NAIC Code:	
	Integration Code:	
Details Primary Location Type Address City St./Prov.Zip/Postal Delete Image: Corporate 15 Mountain Headquarters Warren NJ 07059	Carrier Email:	m3ober@gmail.com
	Notes:	< ×
Expand to view Associated Territories		[Add New Association]
Last Updated By: Mary Oberleitner Date Updated: 12/5/2008 1:30:12 PM F	est	

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6. In the **Select Territories and Branches** dialog box, all territories display by default. To change to one territory, select one in the **Territory** box.

Sele	ct Territories and Branch	es					
					T		
	All						
Terri	All						
	Agency of Colorado, Inc	2.					
Prev	ious a Training-Documentation	1 Territory					
To a	dd associations, select the check	box. Once all					
4550	clations are completed, click OK.	b. M					
	N Showir	ng page 1 of 1 № M P	age 1	*			
	Territory Branch	Address	City	St/Prov.	Zip/Post.	Branch Code	2
	Agency of Colorado, Inc.	1052 17th St.	Denver	со	80265		
	Agency of Colorado - Denver	1052 17th St.	Denver	со	80265		•
	Training-Documentation Territory	145 S. State College Blvd.	Brea	CA	92821		
	Ace Insurance Branch	145 S. State College Blvd.	Brea	CA	92821		•
	Documentation Branch	145 S. State College Blvd.	Brea	CA	92821		•
							_
Тір: Т	o remove associations, access th	ne entity and change the st	atus to ii	nactive			
* req	uired						
				ſ	OK	Cancel	٦

7. Clicking the check box in the gray header selects and deselects all displayed territories and branches.

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S	lect Territories and Branche	25											
-	Training-Documentation Territory												
- ''	rritory: Iraining-Documentation Territory												
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	Pevious associations appear disabled.												
т	add associations, select the check	box. Once all											
a	a sociations are completed, click OK.												
	N N Showing	page for training page	ge 1										
	Territory	Address	City	St/Prov	Zin/Post	Branch Code							
	Branch	Address	City	50,2104.	Lip/ Post	Dranen Code							
	Training-Documentation Territory	145 S. State College Blvd	Broa	CA.	02821								
	framing bocumentation remtory	The bill of the concept billion	brea	C/L	20011								
	A T Bh	MEC CHARGE BLUE		~	00004								
	Ace insurance Branch	145 S. State College Blvd.	вгеа	CA	92821	*							
	Documentation Branch	145 S. State College Blvd.	Brea	CA	92821	*							
_													
Тір	To remove associations, access th	e entity and change the sta	tus to	inactive									
۰.	awired												
l "				ſ	01/								
					UK	Cancel							

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8.	To select a spec	cific branch, cli	ick	the c	heck	box be	side the territory's name.				
Select	Scilect Territories and Branches										
Territo	T Irritory: Training-Documentation Territory										
Peviou	is associations appear disabled	ł.									
T) add a socia	associations, select the check ations are completed, click OK.	box. Once all									
	M 4 Showin	gpage 1 of 1 ▷ 🕅 Pa	ge 1	*							
4	Territory Branch	Address	City	St/Prov.	Zip/Post.	Branch Code	2				
V Tr	aining-Documentation Territory	145 S. State College Blvd.	Brea	СА	92821						
	Ace Insurance Branch	145 S. State College Blvd.	Brea	CA	92821	5500					
T	Documentation Branch	145 S. State College Blvd.	Brea	CA	92821						
Til:To	remove associations, access th ed	he entity and change the sta	tus to	inactive	• OK	Cancel					
					-						
9.	Click the check the branch's na	box beside ame.									
10.	The red * aster populated to p branches to ass	risk beside the roceed with th sociate, click th	e Bi ie a ne (ranch issoc OK bi	n Cod iatior utton	e indic n. After . The a	ates that the field must be selecting all territories and ssociation has been added.				

Note: If more than one page of territories and branches exist, after selecting territories and

Note: If more than one page of territories and branches exist, after selecting territories and branches on the first screen, use the navigation tools to navigate to the next screen and select all needed before clicking **OK**. Following this process will add all associations without the need to click the [Add New Association] link more than once.





11. The associations are now displayed at the bottom of the **Carrier Information** screen in a collapsible display. Use the **Expand / Collapse** (*) icon to expand and collapse the display. This portion of the screen will default to a collapsed view upon accessing the carrier name detail.

nexsur	e							HOME	HELP SETUP LOGOU
	SE	ARCH ORGANIZATION REPORTS	CAMPAIGNS	ELINKS			Bookmarks: Ex	pand Ad	ld Remove Selected 🕷
CARRIER PROFILE	ATTACH	MENTS							
Carrier Name:	Chubb Gr	oup of Insurance Companie	5						Carrier
card file contac	ts location	s carrier name commissions							
Carrier Inform	nation								[Update] [Cancel]
Carrier Name:	Chubb	Group of Insurance Compan		This is the current	PARENT CARRIER				
Carrier Category	⊙ Tra	ditional OIntermediary		Website:	www.chubb.co	m			
Carrier Types:	Is:	suing 🗹 Billing 🔲 Internal			www.chubb.com				
Carrier DB Rule:	Po	st Direct Bill Commission to General Le	lger	Contract Year:					
Carrier CD Rule:	Re-	run download using lenient criteria		AM Best Rating:	A++				
				NAIC Code:					
Location(s)			[Add New]	Integration Code:					
Details Primary	Location Ty	pe Address City St./Prov.Zip/	Postal Delete						
	Corporate Headquarte	a 15 Mountain ars View Rd Warren NJ 07	059	Carrier Email:	m3ober@gmai	l.com			
								~	
				Notes:				~	
				·			[Add New Ass	sociation]	
Details	Status	Territory Name	Primary Contact	Description	Update by	Updated Date	Ren	nove	
	Active	Agency of Colorado, Inc.	Chubb Contact		Betsy Cormier	11/24/2008 10:21:5	0 AM	÷	
	Active	Training-Documentation Territory	Chubb Contact		Mary Operleither	5/7/2010 12:20:45	PM B	۳	
Last Updated B	y: Mary Ob	erleitner Date Updated: 5/7/201	0 12:20:45 PM P	ST					
						commissions	carrier name	locations	contacts card file

Note: When the carrier is associated to the territory and branch on the **carrier name** tab, a zero commission default is added so that users may access the carrier immediately after association. However, make sure to access the **commissions** tab and edit the zero commission as well as add other commission defaults needed for the carrier. For instructions on adding and editing commissions see, "Carrier Commission Default Setup" in the *Accounting Training Manual* which is located in Nexsure Help under **Supporting Documents** > **Training Materials**.

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rrier Info	nation				_	[Update] [Canc
						[opdato] [ound
arrier Name:	Chubb Group of Insurance Con	npan	This is the curren	t PARENT CARRIER		
arrier Category:	⊙ Traditional		Website:	www.chubb.com		
arrier Types:	🗌 Issuing 🗹 Billing 🔲 Inter	Ø				
arrier DB Rule	Post Direct Bill Commission 1					
rrier CD Rule	Re-run download using lenient			Association Status:		
cation(s)		Territory: Agency	of Colorado, Inc.			
		Description:				
Details Prima y	Location Type Address City : Corporate 15 Mountain Warren	Primary Contact: Chub	b Contact	*		
	Headquarters View Rd	Default Address: 15 M	ountain View Rd	~		
				Save		
					[Add New Associ	ation 1
Details	Status Territory Nan				Vate Remov	
	Active Agency of Colorado,	Inc. Chubb Contact		Betsy Cormier 11/24	/2008 10:21:50 AM	
3	Active framing-bocumentation	Tentory Chabb Contact		Mary Obeneicher 5/7/		
ast Updated By	/: Mary Oberleitner Date Updated:	5/7/2010 12:20:45 PM P	ST			
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.3. Desel	ect the Association Sta	itus check box ar	nd click Sav	/e.		
1 The a	ssociation's Status is no	w displayed as I	nactive			
.4. Inc u	Sociation 5 Status 15 nd		nactive.			
No	te: After inactivating th	a association m	ako suro te	a inactivate the c	commission defaults	from
th.	a commissions tob so th	association, III	ha coloctor	at the under unit	ting lovel For instruct	tions
the	e commissions tab so th	ie carrier cannot	be selected	at the under Write	ting level. For instruc	
on	inactivating commiss	ions see, "Carri	er Commi	ssion Default Se	etup in the Accou	nting
Tro	<i>aining Manual</i> in Nexsu	ire Help under Si	upporting	Documents > Tra	aining Materials.	

۲						[Add I	New Association]
Details	Status	Territory Name	Primary Contact	Description	Update by	Updated Date	Remove
🛃 🛃	Inactive	Agency of Colorado, Inc.	Chubb Contact		Betsy Cormier	11/24/2008 10:21:50 AM	En l
- Regional	Active	Training-Documentation Territory	Chubb Contact		Mary Oberleitner	5/7/2010 12:20:45 PM	E

