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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:

1. On the **Primary** menu, click **SEARCH**.

SEARCH RESULTS - CARRIER

4 Record(s) Found Showing Page 1 of 1 Go To Page 1

Details	Name	Location Type	City	St./Prov.	Zip/Postal	Remove
	Chubb Group of Insurance Companies	Corporate Headquarters	Warren	NJ	07059	
	Chubb Indemnity Insurance Company	Corporate Headquarters	Warren	NJ	07059	
	Executive Risk Indemnity Inc	Corporate Headquarters	Warren	NJ	07059	
	Federal Insurance Company	Corporate Headquarters	Warren	NJ	07059	

Search Clear

2. Select **Carrier** in the **Entity** box and type the carrier's name into the **Carrier** box and click **Search**. Click the **Details** to open the record.



3. Click the **carrier name** tab.

Carrier Name: **Chubb Group of Insurance Companies**

Carrier Summary | Showing page 1 of 1 | Page 1 | [Add New]

Details	Parent	Billing	Issuing	Internal	Carriers	NAIC Code	AM Best	Remove
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chubb Group of Insurance Companies		A++	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Chubb Indemnity Insurance Company	12777	A++	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Executive Risk Indemnity Inc	35181	A++	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Federal Insurance Company	20281	A++	

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.

Carrier Name: **Chubb Group of Insurance Companies**

Carrier Information | [Update] [Cancel]

Carrier Name:

Carrier Category: Traditional Intermediary

Carrier Types: Issuing Billing Internal

Carrier DB Rule: Post Direct Bill Commission to General Ledger

Carrier CD Rule: Re-run download using lenient criteria

Location(s) | [Add New]

Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Delete
	<input checked="" type="checkbox"/>	Corporate Headquarters	15 Mountain View Rd	Warren	NJ	07059	

Website:

Contract Year:

AM Best Rating:

NAIC Code:

Integration Code:

Carrier Email:

Notes:

[Add New Association]

Last Updated By: **Mary Oberleitner** Date Updated: **12/5/2008 1:30:12 PM PST**



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.

Select Territories and Branches

Territory:

Previous associations: Agency of Colorado, Inc., Training-Documentation Territory

To add associations, select the check box. Once all associations are completed, click OK.

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<input type="checkbox"/>	Territory Branch	Address	City	St/Prov.	Zip/Post.	Branch Code
<input type="checkbox"/>	Agency of Colorado, Inc.	1052 17th St.	Denver	CO	80265	
<input type="checkbox"/>	Agency of Colorado - Denver	1052 17th St.	Denver	CO	80265	
<input type="checkbox"/>	Training-Documentation Territory	145 S. State College Blvd.	Brea	CA	92821	
<input type="checkbox"/>	Ace Insurance Branch	145 S. State College Blvd.	Brea	CA	92821	
<input type="checkbox"/>	Documentation Branch	145 S. State College Blvd.	Brea	CA	92821	

Tip: To remove associations, access the entity and change the status to inactive

* required

OK Cancel

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

Select Territories and Branches

Territory:

Previous associations appear disabled.

To add associations, select the check box. Once all associations are completed, click OK.

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<input checked="" type="checkbox"/>	Territory Branch	Address	City	St/Prov.	Zip/Post.	Branch Code
<input checked="" type="checkbox"/>	Training-Documentation Territory	145 S. State College Blvd.	Brea	CA	92821	
<input checked="" type="checkbox"/>	Ace Insurance Branch	145 S. State College Blvd.	Brea	CA	92821	
<input checked="" type="checkbox"/>	Documentation Branch	145 S. State College Blvd.	Brea	CA	92821	

Tip: To remove associations, access the entity and change the status to inactive

* required

OK Cancel



8. To select a specific branch, click the check box beside the territory's name.

Select Territories and Branches

Territory: Training-Documentation Territory

Previous associations appear disabled.

To add associations, select the check box. Once all associations are completed, click OK.

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Territory Branch	Address	City	St/Prov.	Zip/Post.	Branch Code
<input checked="" type="checkbox"/> Training-Documentation Territory	145 S. State College Blvd.	Brea	CA	92821	
<input checked="" type="checkbox"/> Ace Insurance Branch	145 S. State College Blvd.	Brea	CA	92821	5500*
<input type="checkbox"/> Documentation Branch	145 S. State College Blvd.	Brea	CA	92821	

To remove associations, access the entity and change the status to inactive

* required

OK Cancel

9. Click the check box beside the branch's name.

10. The red * asterisk beside the Branch Code indicates that the field must be populated to proceed with the association. After selecting all territories and branches to associate, click the **OK** button. The association has been added.

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.

Carrier Name: Chubb Group of Insurance Compan

Carrier Category: Traditional Intermediary

Carrier Types: Issuing Billing Internal

Carrier DB Rule: Post Direct Bill Commission to General Ledger

Carrier CD Rule: Re-run download using lenient criteria

Details	Primary	Location Type	Address	City	St./Prov.	Zip/Postal	Delete
	<input checked="" type="checkbox"/>	Corporate Headquarters	15 Mountain View Rd	Warren	NJ	07059	

Association Table:

Details	Status	Territory Name	Primary Contact	Description	Update by	Updated Date	Remove
	Active	Agency of Colorado, Inc.	Chubb Contact		Betsy Cormier	11/24/2008 10:21:50 AM	
	Active	Training-Documentation Territory	Chubb Contact		Mary Oberleitner	5/7/2010 12:20:45 PM	

Last Updated By: **Mary Oberleitner** Date Updated: 5/7/2010 12:20:45 PM PST

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**.



12. To inactivate an association, click the **Details** icon in the association list.

Carrier Information [Update] [Cancel]

Carrier Name: Chubb Group of Insurance Compan

Carrier Category: Traditional Intermediary

Carrier Types: Issuing Billing Inter

Carrier DB Rule: Post Direct Bill Commission

Carrier CD Rule: Re-run download using lenient

Location(s)

Details	Primary	Location Type	Address	City
	<input checked="" type="checkbox"/>	Corporate Headquarters	15 Mountain View Rd	Warren

Association Status:

Territory: Agency of Colorado, Inc.

Description:

Primary Contact: Chubb Contact

Default Address: 15 Mountain View Rd

Save Cancel

Details	Status	Territory Name	Primary Contact	Description	Update by	Updated Date	Remove
	Active	Agency of Colorado, Inc.	Chubb Contact		Betsy Cormier	11/24/2008 10:21:50 AM	
	Active	Training-Documentation Territory	Chubb Contact		Mary Oberleitner	5/7/2010 12:20:45 PM	

Last Updated By: Mary Oberleitner Date Updated: 5/7/2010 12:20:45 PM PST

13. Deselect the **Association Status** check box and click **Save**.

14. The association's **Status** is now displayed as **Inactive**.

Note: After inactivating the association, make sure to inactivate the commission defaults from the **commissions** tab so the carrier cannot be selected at the underwriting level. For instructions on inactivating commissions see, "Carrier Commission Default Setup" in the *Accounting Training Manual* in Nexsure Help under **Supporting Documents > Training Materials**.

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	
	Active	Training-Documentation Territory	Chubb Contact		Mary Oberleitner	5/7/2010 12:20:45 PM	