

NBC Task Workflow

AMS - NBC

When policy is sent to be bound:

- (NBC) Search Layr first to avoid duplicating accounts
- (NBC) Enters the new account in Layr (see [How to enter an account in Layr](#))

Once account is entered:

- If Binder is available attach these at the account level with accurate description.
- If no documents are available, move to the next step.
- Navigate to HubSpot
- Look up the account in HubSpot click into it.

cleaning ideas

Showing results for "cleaning ideas"

Filter by: Contacts Companies Deals

Contacts

Name	Email	Phone Number
Cleaning Service	office@thejanitorialpartner...	--
Black Tie Cleaning Services LLC	blacktielcleaningservicesllc...	352-419-9885
Interlake Window Cleaning, Inc	info@interlakecleaning.com	--
Mercedes Cleaning	mercehein@hotmail.com	2394103520
Christie Dellinger	christie.dellinger@gmail.co...	--

[See more](#)

Companies

Company Name	Domain	City	Region
Cleaning Ideas	http://cleaningideas.co...	San Antonio	Texas
Cleaning Ideas	--	--	--
Mike Dewees DBA Lo...	--	Big Sky	Montana
Foster Ideas	fosterideas.com	Atlanta	GA

- In the 'Activities tab', click on 'Tasks'
- Then 'Create Task'

Companies Actions

Premier Escrow
premierescrowllc.com
6152696626

Overview Activities

Search activities

Activity Notes Emails Calls **Tasks** Meetings

Upcoming

Create Task

- Task window pops up, (NBC) fills in the following:
 - ◆ NBC - Initial date of policy - Account Name - Policy Number (if applicable) - Broker partner name
 - ◆ Due date should be Today 8:00 AM
 - ◆ Priority = High
 - ◆ Queue = NBC Bound

- ◆ Assigned to = Specific [AMS team member](#) (<Click here for list or see last page)
- ◆ Notate:
 - Date – type of action & your full name
 - Partner
 - Account
 - Line of business
 - SIC code
 - Agent
- ◆ Associate with:
 - Add Associated Agency to be the name of the Broker partner
- ◆ Click create

Task
✕

NBC - 4/16/2024 - Premier Escrow - TBD (if applicable) - CRS

Due date ⓘ Send reminder ⓘ

Today ▼ 🔔 8:00 AM No reminder ▼

Set to repeat

Type	Priority	Queue	Assigned to
To-do ▼	● High ▼	NBC Bound ▼	Kathyliz Davila ▼

4/16/2024: Entered shell in Lavy, missing documents. Please send back when complete @Taylor May

Partner: Main Street
 Account: **The Ground You Walk On LLC**
 Policy: added WC
 SIC: 5478 (Floor Covering Installation)
 Agent: Tim Turner

B *I* U T_x More ▼ | 🔔 📧 📄 Associated with 1 record ▼

Create

Task received by AMS:

→ (AMS) - Enters the shell of the account in partners AMS systems. (*even without documents*)

If all documents & information is received:

- Task can be completed by:
- ◆ Notate: Date - type of action - Full name
 - ◆ Click check mark to complete

◆ Then save at the bottom of the task

If missing documents/information:

- Notate clearly what is needed to complete task
- Due Date = In 1 Week
- Priority = High
- Queue = NBC Bound
- Assigned to = Taylor May (NBC)

Task assigned to Taylor May Actions ▾ Overdue: Apr 16, 2024 at 8:00 AM EDT

✓ NBC - 4/16/2024 - Premier Escrow - TBD (if applicable) - CRS

Due date: Today ▾ 8:00 AM Reminder: No reminder ▾ Set to repeat

Type	Priority	Queue	Assigned to
To-do ▾	● High ▾	NBC Bound ▾	Taylor May ▾

4/16/2024: Entered shell in Epic, Missing documents. Please upload and send back once completed. @Kathyliz Davila

4/16/2024: Entered shell in Layr, missing documents. Please send back when complete @Taylor May

Partner: Main Street
Account: The Ground You Walk On LLC
Policy: added WC
SIC: 5478 (Floor Covering Installation)
Agent: Tim Turner

[Add comment](#) 1 association ▾

Once policy docs are received:

- (NBC) - Upload document to the policy line in Layr
- Document Name = YY - LOB - Type of doc
- Navigate to the Task
- Notate: Date - Type of action - Full name
- Change Due Date to today 8:00 AM
- Assign back to (AMS)

AMS to finalize task:

- (AMS) Uploads documents to partner AMS system
- Double checks all information & makes proper updates.
- Notate: Date - Type of action - Full name
- Click check mark
- Then save at the bottom

Task assigned to Taylor May

NBC ~~4/16/2024~~ Premier Escrow ~~TBD (if applicable)~~ CRS

Due date: Reminder: **No reminder** ▾

Type	Priority	Queue	Assigned to
To-do ▾	High ▾	NBC Bound ▾	Taylor May ▾

4/20/24: Uploaded documents to Epic @Kathyliz Davila

4/20/2024: Uploaded docs in Layr @Taylor May

4/16/2024: Entered shell in Epic, Missing documents. Please up

4/16/2024: Entered shell in Layr, missing documents. Please ser

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B *I* U ~~T_x~~ **More** ▾ |

For every action taken on a task, clear notation, dates and your full name is required in chronological order from bottom up.

AMS Book Assignments

Partner	Completed by
Aihara & J Morey	Margaret Ged... ▼
Henriott	Margaret Ged... ▼
Sheally	Margaret Ged... ▼
Robins	Margaret Ged... ▼
Morrow	Margaret Ged... ▼
CRS Insurance Brokerage	Cecilia Bobadilla ▼
Choice	Cecilia Bobadilla ▼
Insurica	Kellie Kolen ▼
Main Street	Kellie Kolen ▼
Homes, Murphy, Assoc (HMA)	Kellie Kolen ▼
Atlantic Shield	Tara Burnham ▼
Palmer & Cay	Tara Burnham ▼
Rhodes Risk	Tara Burnham ▼
Evarts Tremaine	Tara Burnham ▼
United Agencies	Tara Burnham ▼
The Partners Group (TPG)	Lulzime Isai ▼
Henderson Brothers	Lulzime Isai ▼
Hotaling	Lulzime Isai ▼
Insurance Of Carolina (IOC)	Lulzime Isai ▼
Swingle Collins	Lulzime Isai ▼
Lumen	Gentijana Isaki ▼
First West	Gentijana Isaki ▼
Kennedy	Gentijana Isaki ▼