Search in Agent Center Workspace

Instructional Guide

- **Purpose:** This instructional guide provides directions for the different search types in Agent Center Workspace.

- **Prerequisites:** None
- **Helpful Hints:** All applications that launch from this portal open in a new window.

Search in Agent Center Workspace

Search: Search for a client, policy, billing information, or claims.

1. Select a **Search Type**.
2. Enter a **Policy Number**.
   - **NOTE:** If you complete a search by policy number, click on the question mark icon to verify the policy number format.
3. Click the **Search** button to open Policy Viewer.

Search in Agent Center Workspace

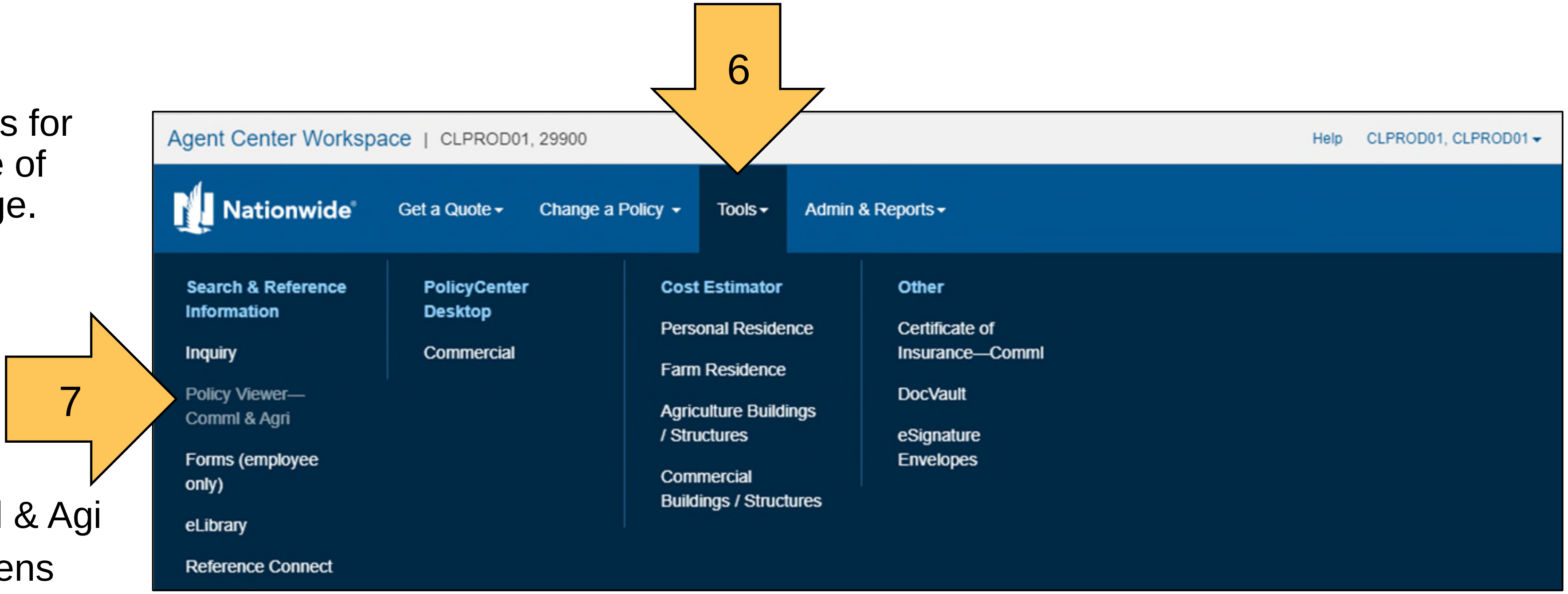
Search: Search for a client, policy, billing information, or claims.

4. Click on Tools.
5. Select Inquiry.
   - Click the **Inquiry** link to open Policy Viewer.

Search in Agent Center Workspace

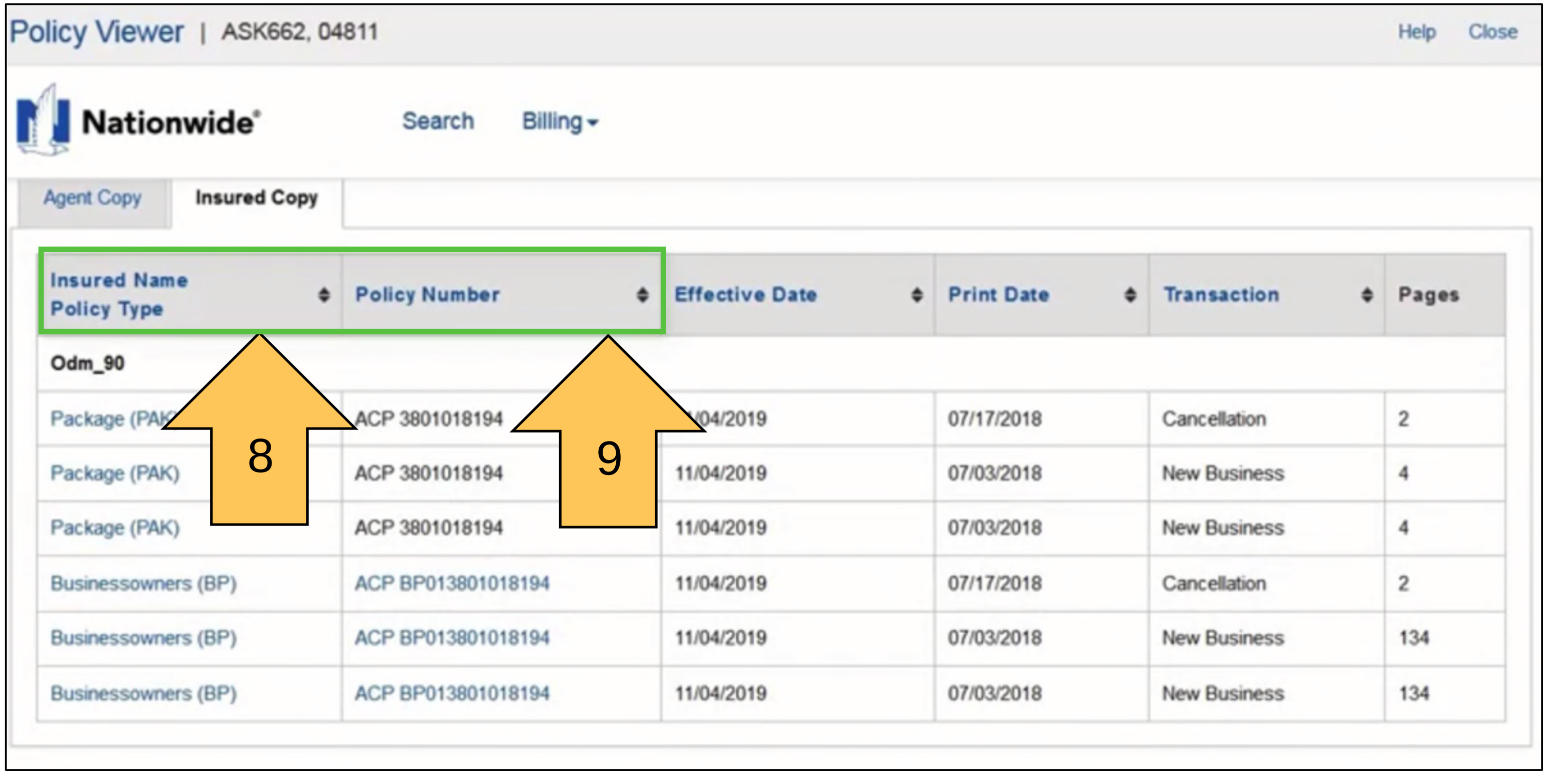
NOTE: Clicking Policy Viewer allows for you to search by insured name, line of business, transaction and date range.

6. Click on Tools.
7. Select Policy Viewer – Comml & Agi
   - Selecting **Policy Viewer** opens up the Policy Viewer window.



NOTE: Opening Policy Viewer allows you view the agent and insured's copy.

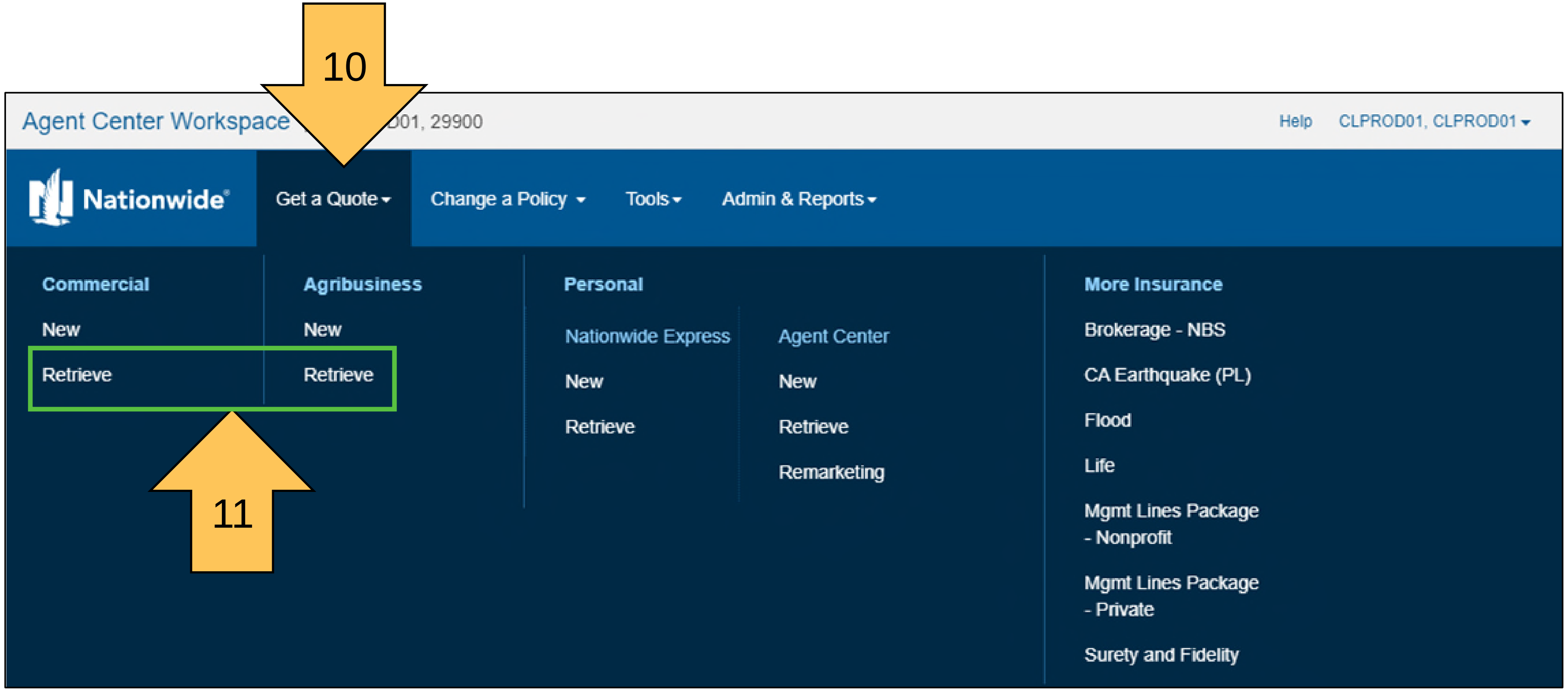
8. Clicking on the **Policy Type** link opens the policy prints.
9. Clicking on **Policy Number** takes you PolicyCenter, if the policy is CLT.



Insured Name Policy Type	Policy Number	Effective Date	Print Date	Transaction	Pages
Odm_90					
Package (PAK	ACP 3801018194	/04/2019	07/17/2018	Cancellation	2
Package (PAK)	ACP 3801018194	11/04/2019	07/03/2018	New Business	4
Package (PAK)	ACP 3801018194	11/04/2019	07/03/2018	New Business	4
Businessowners (BP)	ACP BP013801018194	11/04/2019	07/17/2018	Cancellation	2
Businessowners (BP)	ACP BP013801018194	11/04/2019	07/03/2018	New Business	134
Businessowners (BP)	ACP BP013801018194	11/04/2019	07/03/2018	New Business	134

Search in Agent Center Workspace

Search: Quoted Accounts



10. Click **Get a Quote**.
11. Click **Retrieve**.

Note: On the **Quoted Accounts** tab you can search for accounts that are both PCIO and CLT.

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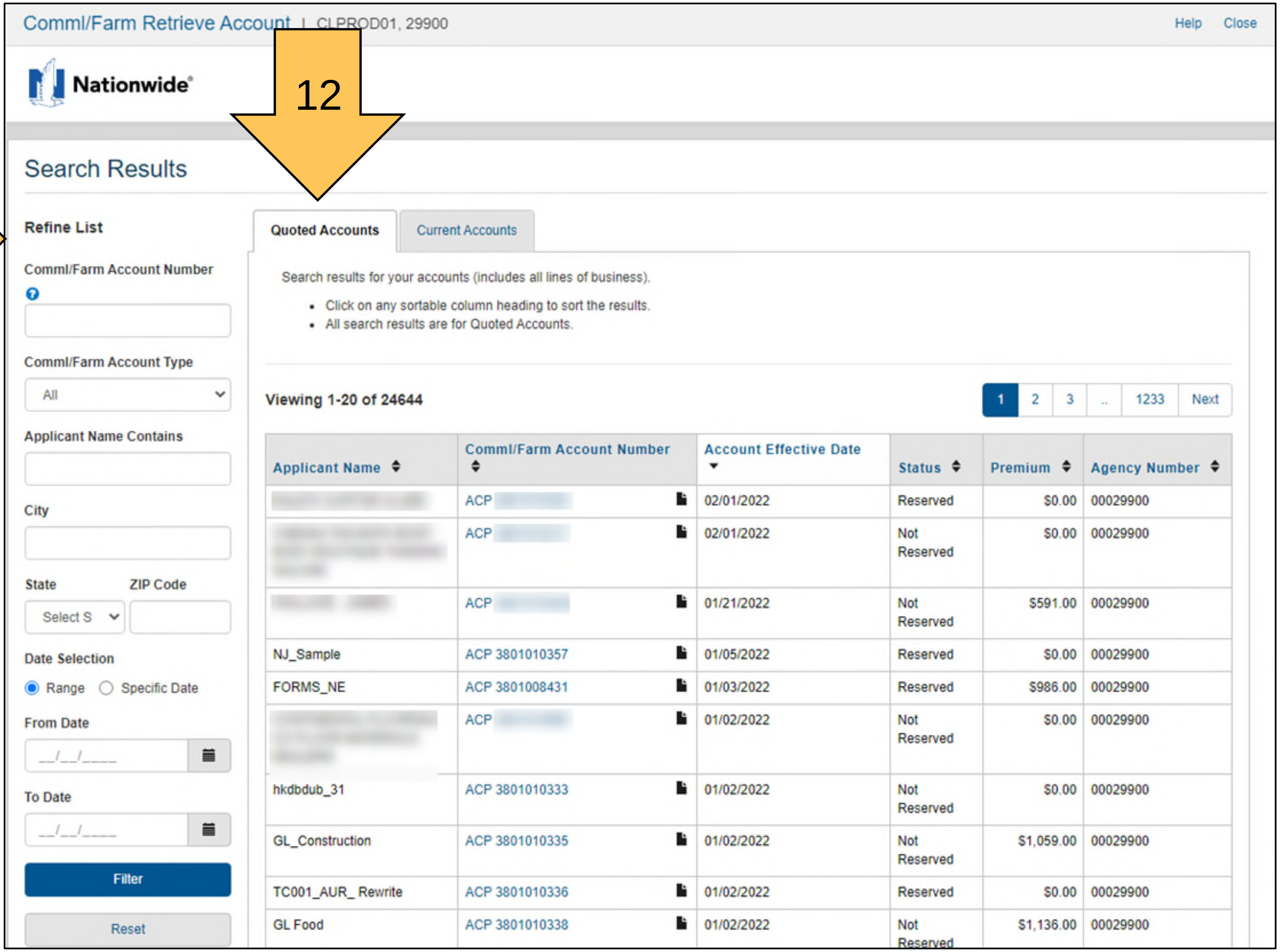
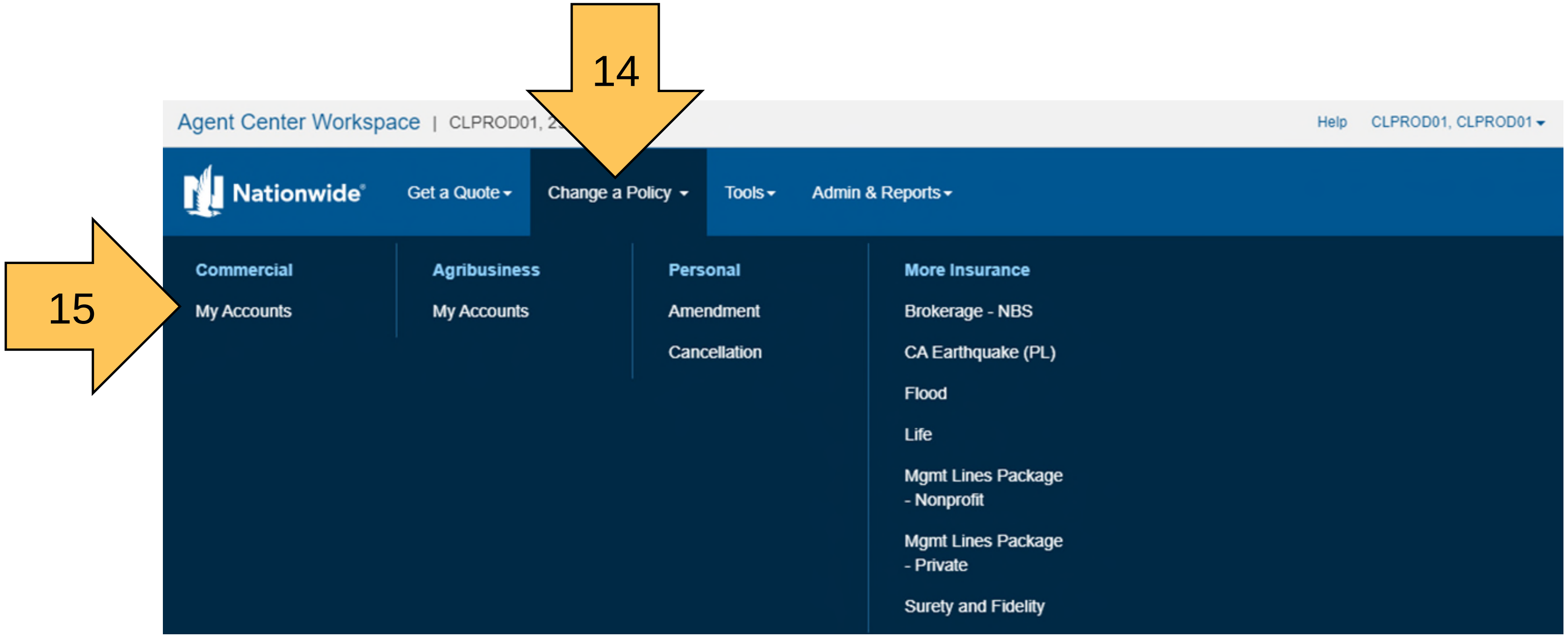


12. **Quoted Accounts** tab defaults.
13. Use the **Refine List** to search for your account.

Search in Agent Center Workspace

Search: Current Accounts



14. Click Change a Policy.
15. Click My Accounts.

Note: This search lands you on the **Current Accounts** tab. The Current Accounts tab displays accounts that have active policies that have been cancelled for no more than one year.

Depending where an account was created determines what information displays.

16. The **Current Accounts** tab defaults.
17. Use the **Refine List** to search for your account