Agent Center to PolicyCenter Cross Reference Guide

Description

The purpose of the ***Agent Center Cross-Reference Guide*** is to provide you with an easy to navigate document to help you understand how Agent Center interacts with PolicyCenter.

This guide provides you with five (5) scenarios linking you from Agent Center to PolicyCenter:

- Brand New Customer
- Existing Agent Center Customer but No PolicyCenter Account or Policy
- Existing Agent Center Customer with Existing PolicyCenter Account and Policy
- Direct Link from Agent Center to PolicyCenter Desktop
- Direct Link from Agent Center to PolicyCenter for a Policy Change

Scenario 1 – Brand New Customer

Background: Use this procedure when a prospect calls, is not an existing customer, and has neither a policy nor an account in Agent Center or PolicyCenter.

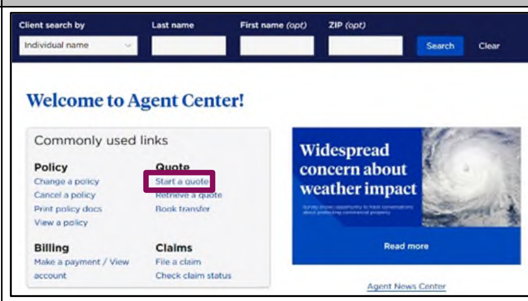
Step 1

Action

On the Agent Center Workspace home screen, “Commonly used links”:

- Select “Start a Quote”.

Screen



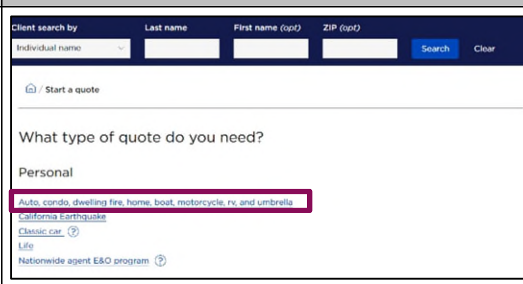
Step 2

Action

On the “Start a Quote” screen you are asked “What type of quote do you need?”

- Under the “Personal” section, select “Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella”.

Screen



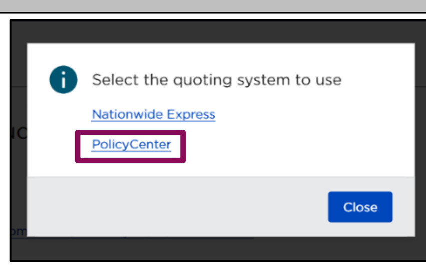
Step 3

Action

You can create the quote through Nationwide Express OR directly in the PL PolicyCenter system.

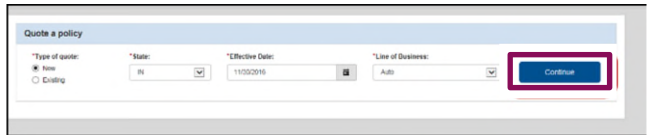
- From the pop-up box, “Select the quoting system to use”, select “PolicyCenter” (for this exercise).

Screen

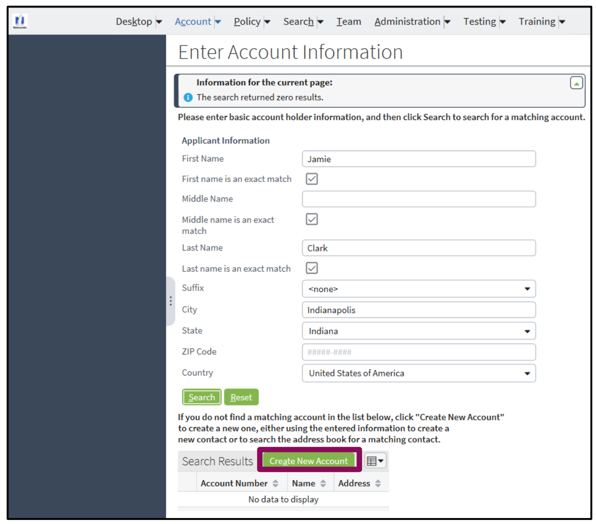


Scenario 1 – Brand New Customer (cont'd)

Step 4

Action	Screen
If the customer is not found, complete the required fields: • New • State • Effective Date • Select the "Continue" button.	

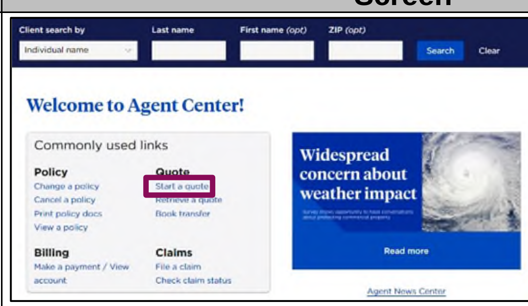
Step 5

Action	Screen
The first entry point is the "Enter Account Information" screen when accessing Policy Center from Agent Center using this procedure. No account information is in PolicyCenter because this is a brand-new client: • Select the "Create New Account" button.	

Scenario 2 – Existing Agent Center Client with No PolicyCenter Account or Policy

Background: Use this procedure when an existing Agent Center customer calls but has no PolicyCenter account or policy.

Step 1

Action	Screen
On the Agent Center Workspace home screen, "Commonly used links": • Select "Start a Quote".	

Scenario 2 – Existing Agent Center Client with No PolicyCenter Account or Policy (cont'd)

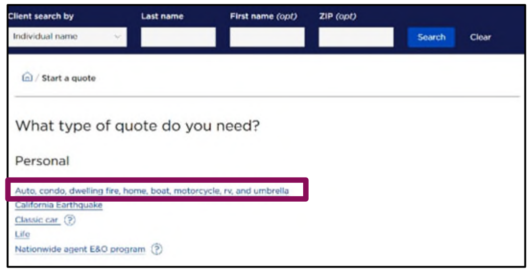
Step 2

Action

On the "Start a Quote" screen you are asked "What type of quote do you need?"

- Under the "Personal" section, select "Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella".

Screen



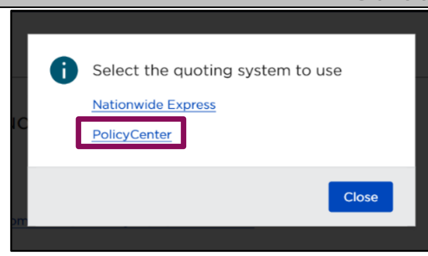
Step 3

Action

A pop-up screen appears asking you to "Select the quoting system to use".

For this exercise, select "PolicyCenter".

Screen



Step 4

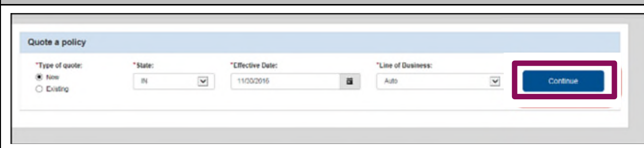
Action

If the customer is not found, complete the required fields:

- New
- State
- Effective Date

- Select the "Continue" button.

Screen



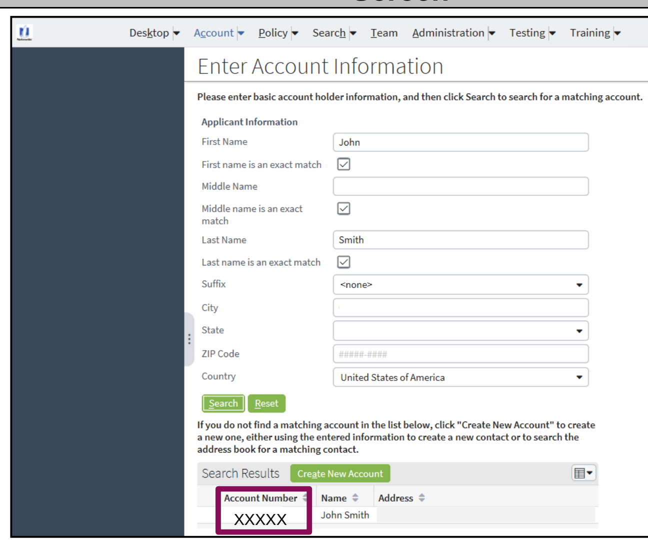
Step 5

Action

The second entry point is the "Enter Account Information" screen, when accessing PolicyCenter from Agent Center using this procedure.

- Select the "Account Number" to go to the "Account File Summary" screen in PolicyCenter and create a new submission

Screen



Scenario 3 – Existing Agent Center Client with Existing PolicyCenter Account and Policy

Background: Use this procedure when a policyholder calls and is an existing Agent Center customer <u>and</u> has an existing PolicyCenter account and policy.

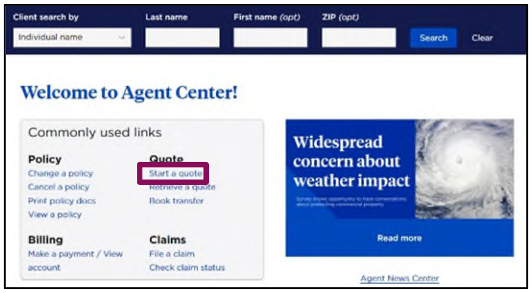
Step 1

Action

On the Agent Center Workspace home screen, “Commonly used links”:

- Select “Start a Quote”.

Screen

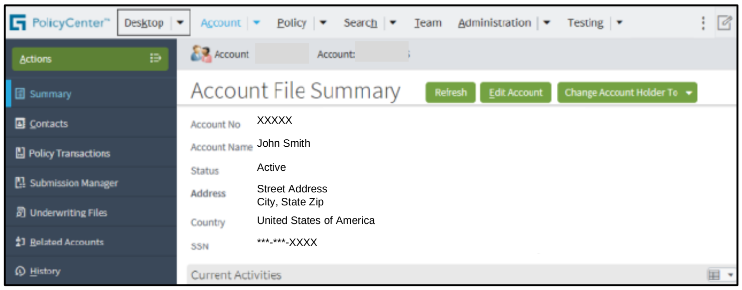


Step 2

Action

The customer’s “Account File Summary” screen in PolicyCenter displays.

Screen



Scenario 4 – Direct Link from Agent Center to PolicyCenter Desktop

Background: Use this procedure when a policyholder calls and already is an existing Agent Center customer <u>and</u> has an existing PolicyCenter account and policy.

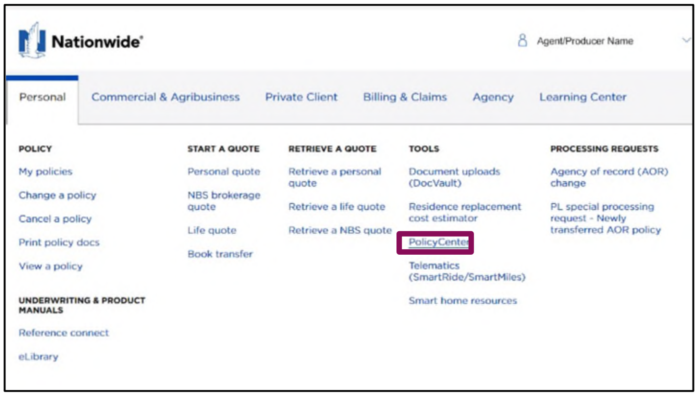
Step 1

Action

To use the direct link from Agent Center to PolicyCenter Desktop:

- Under the “Personal” tab, “Tools” section, select “PolicyCenter”.

Screen



Scenario 5– Direct Link from Agent Center to PolicyCenter for a Policy Change

Background: Use this procedure when an existing policy in PolicyCenter needs to be updated.

Step 1

Action	Screen
On the Agent Center Workspace home screen, “Commonly used links”: • Under the “Policy” section, select “Change a policy”.