

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	Screen
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> • Select “Start a Quote”. 	

Step 2

Action	Screen
<p>On the “Start a Quote” screen you are asked “What type of quote do you need?”</p> <ul style="list-style-type: none"> • Under the “Personal” section, select “Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella”. 	

Step 3

Action	Screen
<p>You can create the quote through Nationwide Express OR directly in the PL PolicyCenter system.</p> <ul style="list-style-type: none"> • From the pop-up box, “Select the quoting system to use”, select “PolicyCenter” (for this exercise). 	

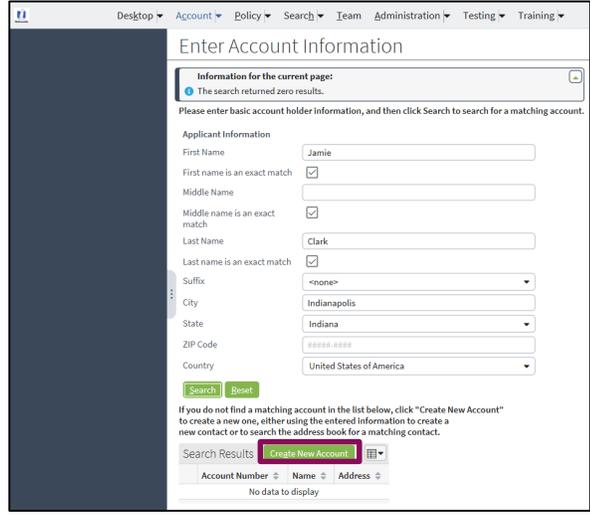


Scenario 1 – Brand New Customer (cont'd)

Step 4

Action	Screen
<p>If the customer is not found, complete the required fields:</p> <ul style="list-style-type: none"> • New • State • Effective Date <ul style="list-style-type: none"> • Select the “Continue” button. 	

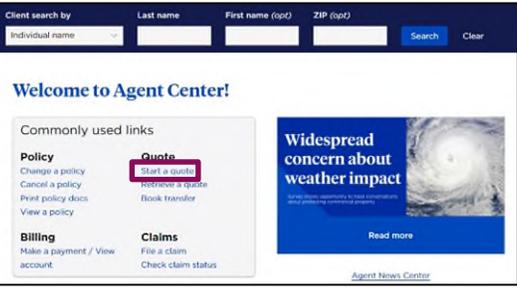
Step 5

Action	Screen
<p>The first entry point is the “Enter Account Information” screen when accessing Policy Center from Agent Center using this procedure.</p> <p>No account information is in PolicyCenter because this is a brand-new client:</p> <ul style="list-style-type: none"> • 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.

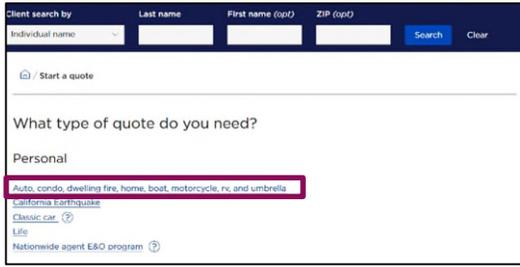
Step 1

Action	Screen
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> • Select “Start a Quote”. 	

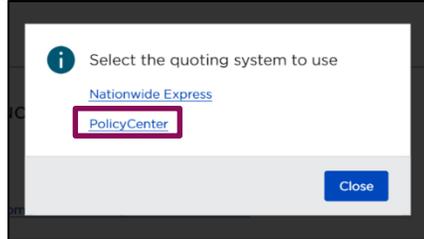


Scenario 2 – Existing Agent Center Client with No PolicyCenter Account or Policy (cont'd)

Step 2

Action	Screen
<p>On the “Start a Quote” screen you are asked “What type of quote do you need?”</p> <ul style="list-style-type: none"> Under the “Personal” section, select “Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella”. 	

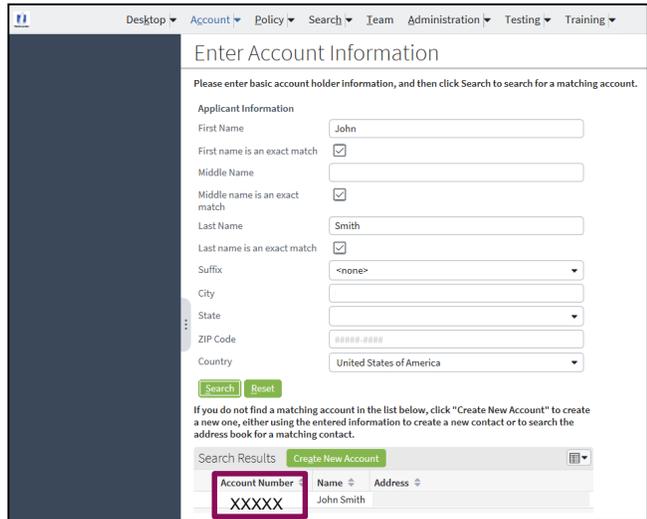
Step 3

Action	Screen
<p>A pop-up screen appears asking you to “Select the quoting system to use”.</p> <p>For this exercise, select “PolicyCenter”.</p>	

Step 4

Action	Screen
<p>If the customer is not found, complete the required fields:</p> <ul style="list-style-type: none"> New State Effective Date <ul style="list-style-type: none"> Select the “Continue” button. 	

Step 5

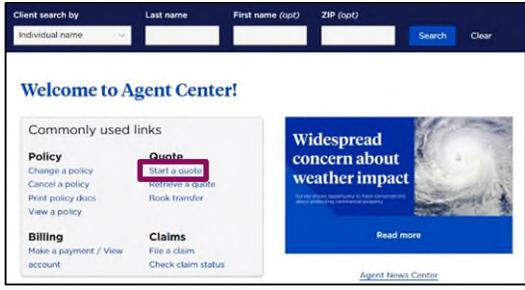
Action	Screen
<p>The second entry point is the “Enter Account Information” screen, when accessing PolicyCenter from Agent Center using this procedure.</p> <ul style="list-style-type: none"> Select the “Account Number” to go to the “Account File Summary” screen in PolicyCenter and create a new submission 	



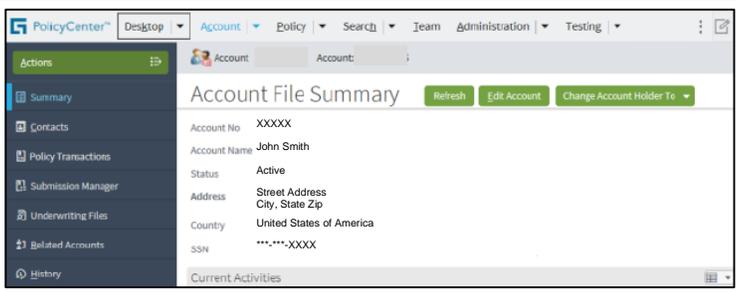
Scenario 3 – Existing Agent Center Client with Existing PolicyCenter Account and Policy

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

Step 1

Action	Screen
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> Select “Start a Quote”. 	

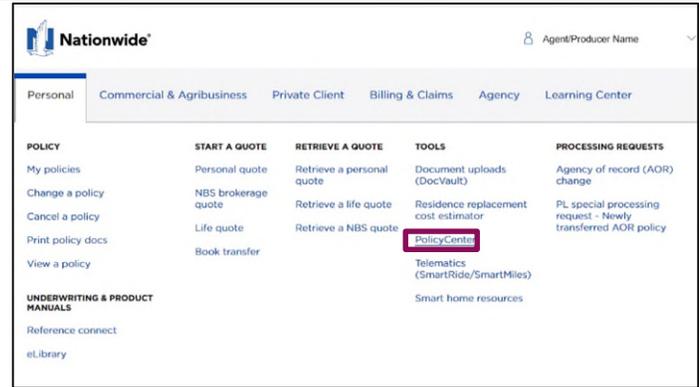
Step 2

Action	Screen
<p>The customer’s “Account File Summary” screen in PolicyCenter displays.</p>	

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 and has an existing PolicyCenter account and policy.

Step 1

Action	Screen
<p>To use the direct link from Agent Center to PolicyCenter Desktop:</p> <ul style="list-style-type: none"> Under the “Personal” tab, “Tools” section, select “PolicyCenter”. 	



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
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> Under the “Policy” section, select “Change a policy”. 	 <p>The screenshot shows the Agent Center home screen. At the top, there is a search bar with fields for 'Last name', 'First name (opt)', and 'ZIP (opt)', along with 'Search' and 'Clear' buttons. Below the search bar is a 'Welcome to Agent Center!' message. Underneath, there is a 'Commonly used links' section with three columns of links: 'Policy' (Change a policy, Cancel a policy, Print policy docs, View a policy), 'Quote' (Start a quote, Retrieve a quote, Book transfer), and 'Billing' (Make a payment / View account, File a claim, Check claim status). A 'Read more' link is also present. The 'Change a policy' link is highlighted with a red box.</p>

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