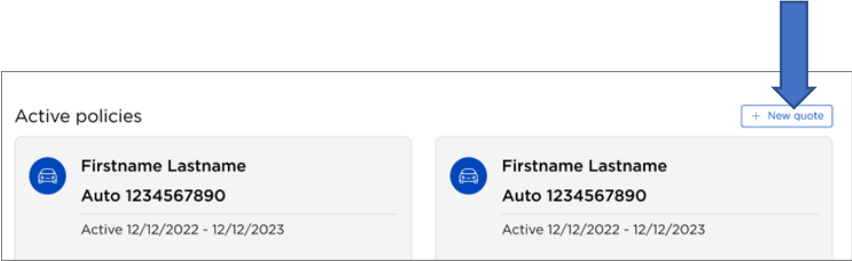
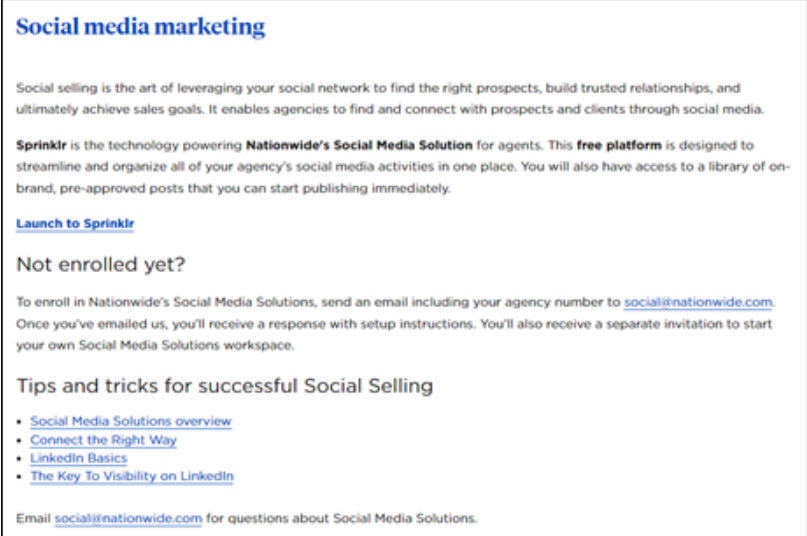




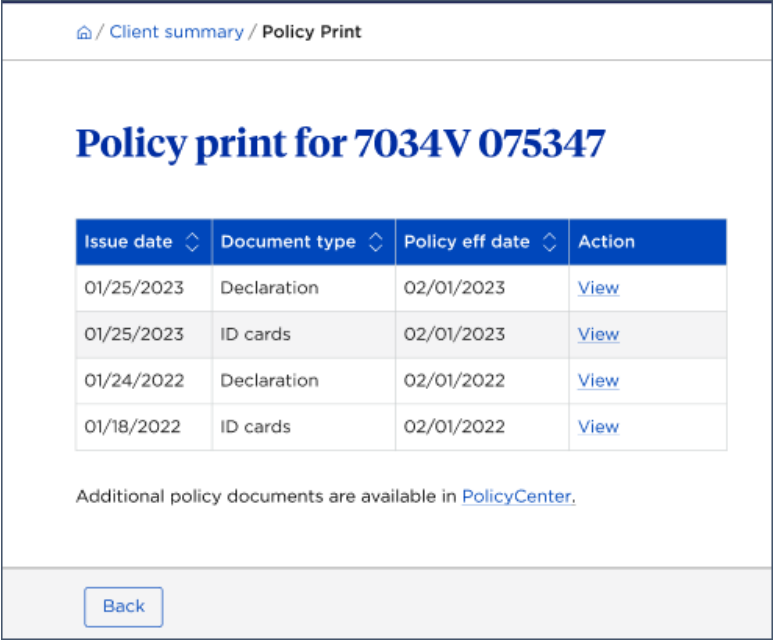
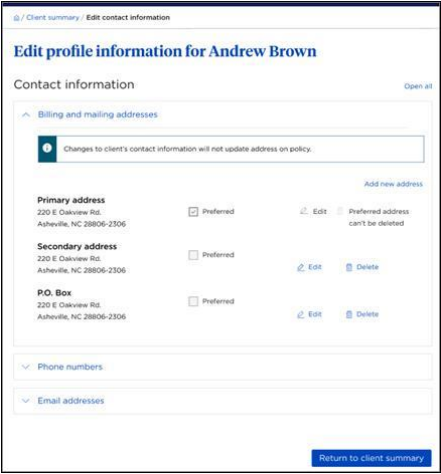
Agent Center Updates Additional Details and Visuals

Update	
Cross-Sell Quote Button Agents communicated the need to quickly quote a new line of business for an existing customer. To address this, we added a “New Quote” button to the new Client screen. The button will launch into the PL PolicyCenter account to kick off the quoting process.	

Update	Screen
Social Media Marketing Page There is now a page in Agent Center about our free platform for promoting an agency via social media.	

Agent Center Updates Additional Details and Visuals



Update	Screen
<p>Today, agents are launched to the PL PolicyCenter documents page to access policy print information and often struggle with finding the right document on the page.</p> <p>To provide agents what they need the most, we created an Agent Center page that will allow the agent to quickly retrieve decs and ID cards.</p>	
Update	Screen
<p>Customer Profile Updates</p> <p>To update customer email, phone and address information agents had to jump between several different systems or call the service center.</p> <p>The Edit Profile feature will allow them to update phone and email information right in Agent Center. The agent will also be guided through the process to update address information in all the right places. Note that the initial release will only allow updating individuals, not organizations.</p>	

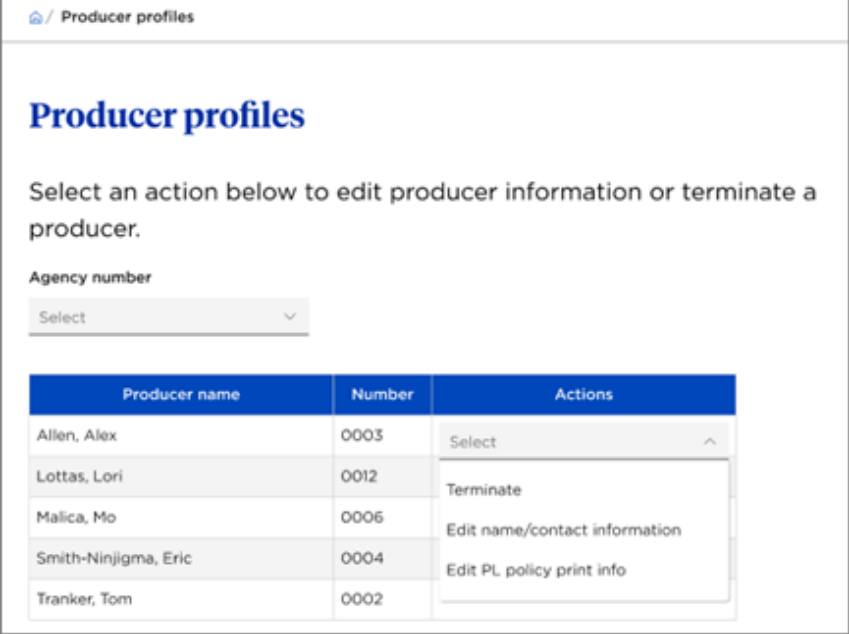
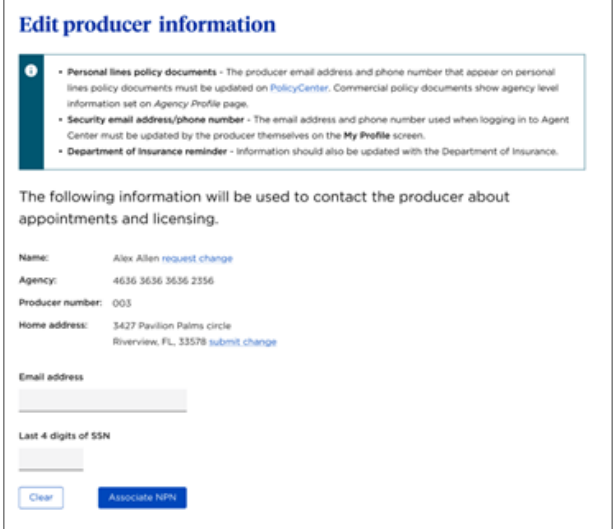


Agent Center Updates Additional Details and Visuals

Update	Screen																																																																		
<h3>Agency Sweep Report</h3> <p>The report agents use to reconcile agency sweep payments is modernized. A key feature was added so that agents can select the agency number related to the sweep payments. This will fix a major pain point for former exclusive agencies.</p>	<div><h3>Reconcile agency sweep payments</h3><div>Agency number<div>55555 - Larry Crumb Agency</div></div><div><div>All transactions</div><div>NSF checks</div><div>Delete payments</div></div><div><div>Start date</div><div>End date</div></div><div><div>01/01/2023</div><div>01/31/2023</div></div><div><div>Use this format: MM/DD/YYYY</div></div><div><div>Billing account (optional)</div><div>Client name (optional)</div></div><div><div></div><div></div></div><div><div>Search</div></div><div><div>Export</div></div><table><thead><tr><th>Submittal date</th><th>Client name</th><th>Reference number</th><th>Amount</th><th>Bank account</th><th>Bankname</th></tr></thead><tbody><tr><td>01/22/2023</td><td>John Smith</td><td>58156156666</td><td>\$133.13</td><td>*****6399</td><td>Key Bank</td></tr><tr><td>01/22/2023</td><td>Carol Jones</td><td>536423123212</td><td>\$168.11</td><td>*****6399</td><td>Key Bank</td></tr><tr><td>01/22/2023</td><td>Tom Ham</td><td>2123123212</td><td>\$32.00</td><td>*****6399</td><td>Key Bank</td></tr><tr><td>01/22/2023</td><td>Sally Sue</td><td>189155555</td><td>\$544.22</td><td>*****6399</td><td>Key Bank</td></tr><tr><td colspan="6">Total for 01/22/2023: \$868.46</td></tr><tr><th>Submittal date</th><th>Client's name</th><th>Reference number</th><th>Amount</th><th>Bank account</th><th>Bank name</th></tr><tr><td>01/18/2023</td><td>Tom Toms</td><td>1981232</td><td>\$25.33</td><td>*****6399</td><td>Key Bank</td></tr><tr><td>01/18/2023</td><td>Lucas Sams</td><td>1851561615</td><td>\$455.55</td><td>*****6399</td><td>Key Bank</td></tr><tr><td colspan="6">Total for 01/18/2023: \$480.88</td></tr><tr><td colspan="6">Total for specified search criteria: \$1,349.34</td></tr></tbody></table></div>	Submittal date	Client name	Reference number	Amount	Bank account	Bankname	01/22/2023	John Smith	58156156666	\$133.13	*****6399	Key Bank	01/22/2023	Carol Jones	536423123212	\$168.11	*****6399	Key Bank	01/22/2023	Tom Ham	2123123212	\$32.00	*****6399	Key Bank	01/22/2023	Sally Sue	189155555	\$544.22	*****6399	Key Bank	Total for 01/22/2023: \$868.46						Submittal date	Client's name	Reference number	Amount	Bank account	Bank name	01/18/2023	Tom Toms	1981232	\$25.33	*****6399	Key Bank	01/18/2023	Lucas Sams	1851561615	\$455.55	*****6399	Key Bank	Total for 01/18/2023: \$480.88						Total for specified search criteria: \$1,349.34					
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Update	Screen																																																																		
<h3>Agency Profile Page (Agency Profile Unification)</h3> <p>The Agency Profile page was rebuilt to provide the agent a guided experience when updating information and preferences for their agency.</p>	<div><h3>Agency profile</h3><div><div>For changes to your agency name, please contact your Nationwide sales manager to assist in updating your contract.</div></div><p>Please follow the steps below to verify your contact information and preferences.</p><div>Agency number<div>54566-Best Agency Ever</div></div><div><div>Agency contact information</div></div><div><div>Agency contact information</div><div>Nationwide provides the flexibility to customize your contact information for different purposes. When you are adding or updating contact information, it may require you to update it in more than one place.</div></div><div><div>Office location</div><div>Address</div><div>555 Main St</div><div>City</div><div>Birmingham</div><div>State</div><div>AL</div><div>ZIP code</div><div>98455</div><div>Mailing address</div><div>Address</div><div>877 Straight St</div><div>City</div><div>Birmingham</div><div>State</div><div>AL</div><div>ZIP code</div><div>98455</div><div>Office phone</div><div>555-555-5555</div><div>Fax</div><div>666-666-6666</div><div>Agency email address</div><div>bestagencyever@sh.com</div><div>Website</div><div>bestagencyever.com</div></div></div>																																																																		

Agent Center Updates Additional Details and Visuals



Update	Screen
<p>Producer Profile Updates (Agency Profile Unification)</p> <p>Updating producer information today is spread across multiple places in Agent Center and involves submitting documents that get manually processed.</p> <p>The Agency Profile Unification work will create easy-to-use pages that allow an agency admin to manage their producers and update information in real-time.</p>	
Update	Screen
(continued)	



Agent Center Updates Additional Details and Visuals

Update

PL Billing Account Summary

The new page was built in collaboration with our agency user group. It will be much cleaner and provide agents a comprehensive view of the account with easily accessible links to self-service options.

Screen

Client summary / Billing account summary

Billing summary for Andrew Brown

[Billing account history](#) [Saved payment methods](#)

Billing account 70346363363

Account information
Insured information
Andrew Brown
3427 Pavilion Palms Circle,
apt 404, Tampa, FL 33578
[update](#)

Associated policies
DUC547347347
56345747377
364334764373
[Show all policies](#)
[add/remove policies](#)

Service center action ⓘ
[Transfer money to a billing account](#)
[Transfer account payment](#)

Billing information

Billing status Active update	Automatic payment Mastercard ***8909 update	Pay plan Full pay - third party update	Next invoice date ⓘ 11/14/2022 change due date
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Payment information

Unpaid balance: \$123.54	Last paid \$1252.31 on 11/10/2023	Scheduled payment \$1252.31 on 11/31/2023 view details	Current invoice ⓘ \$1272.23 due on 12/20/2023 Make a payment view premium details
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Notifications

Bill receipts Email update notifications	Bill reminders Email & text update notifications
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Update

PL Payments

The payment screen will go through a significant redesign to make it more attractive and functional. Our agents helped us with the design, and they believe it will go a long way to help guide agents through the confusion that can sometimes result from Nationwide's unique use of a billing account.

Screen

Make a payment

[Billing summary](#) [Saved payment methods](#)

Select the billing account or policy this payment should go to: [Open all](#)

^ Billing account 70470835380 (Cycle, Auto)

Where do you want to apply this payment? ⓘ

Billing account
334577453526
Last payment of \$5,221 on 01/23/2022

Motorcycle
543234523526
Last payment of \$1,521 on 03/23/2022

Auto
334577453526
Last payment of \$521 on 05/23/2022

How much would you like to pay?

PAY CURRENT AMOUNT
\$417.21
Minimum amount due by 10/11/2022

PAY REMAINING BALANCE
\$1417.21
To cover the remaining balance from 9/21/2022 - 03/21/2023

PAY OTHER AMOUNT
\$
Minimum amount to prevent cancellation of the policy is \$288.12

How do you want to pay?

Agency sweep

Credit card
Two saved cards on file

Bank account (EFT)