# **Update Agency Print Output Address and Phone Number**

**PolicyCenter** 

#### Description

This step-by-step job aid demonstrates the necessary steps to update the agency print output address and/or phone number in PolicyCenter. A user must be granted the Office Manager role in PolicyCenter to be able to update the print output address and phone number.

#### Background

Official agency information (agent name, mailing address, phone numbers, etc.) is obtained by PolicyCenter from PDS (Producer Data System) and Agency Master File (AMF). You cannot change the official information in PolicyCenter; however, you can change the agency's print address and/or phone number. This is the address and phone number information which prints out from PolicyCenter on anything coming from the agency. Changes made to the agency print address and/or phone number in PolicyCenter do not update the official information in PDS or AMF.

## *IMPORTANT NOTE:* The Office Manager is the only role with system permissions to perform this update and must perform this update for each individual producer code in the agency.

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### Step 2

#### Action

On the "Producer Code Search" screen:

- Enter the Producer Code number into the "Producer Code" field.
- Select the "Search" button.



In the "Search Results" section:

• Select the "Producer Code" link from the "Producer Code" column.

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Screen

#### Step 3

#### Action Screen On the "Producer Code" screen: 🔄 PolicyCenter" Desigtop | 🔹 Account | 👻 Bolicy | 👻 Search | 👻 Team Administration | 👻 Testing | 👻 🔅 🔞 Go to (Alt+) • Select the "Edit" button to update the Producer Code: PC AgencyTraining producer # 27 "Print Address" section. Basics Roles Groups Users Licenses Participants Assignment Logic Agent Name Training Agent Sales Manager Agent State Indiana Name PC AgencyTraining producer # 27 Description Affinity Groups Phone bdiev10iei.Web.4c Mailing Address PC Training Agency Mailing Name Parent Code Address Line 1 Status Active Address Line 2 Office Address City Office Name State Address Line 1 ZIP Code Address Line 2 Print Address City Office Name State Agent First Name ZIP Code Middle Name Phone Last Name Fax Suffix Email Address Profe-Contract Addendum Address Line 1 Address Line 7 City State



#### Step 4

#### Action Screen In the "Print Address" section: 🔄 PolicyCenter" Desigtop 💌 Account 💌 Bolicy 💌 Search 💌 Ieam Administration 💌 Testing 💌 🗄 📴 🚳 Goto(At+/) • Enter the updated address and/or Producer Code: PC AgencyTraining producer # 27 phone number information. Cancel Busics Roles Groups Users Licenses • Uhre Code Participants Assignment Logic The phone number listed here will · Attributes Agent Name Training Agent Salet Manater Agent State Indiana print on customer policy documents Name ity Groups PC AgencyTraining producer # 27 Description Phone for the selected producer. vitiani Web AuthAd Mailing Address PC Training Agency Organization Mailing Name Parent Code If you wish to have a different Address Line 1 Status Active number printed on the customer Address Line 2 Office address policy documents, you can change City Office Name State it. Address Line 1 Address Line 7 Print Address CRY Customer policy documents include óffice Name State Dec pages, cover letters, & ID int First Na ZIP Code cards. Middle Name Phone Last Name Far Suffix Email Address Other customer documents, such Professional Designation Contract Addendum as billing documents and customer Address Line 1 Add Remove emails, will NOT reflect this phone Contract Addendum Name 🚊 Address Line 3 number. No data to display Óty • If you are done with your changes, select the "Update" button to save your changes. You will be returned to Copy <none selected: Copy From <none selected> the "Producer Code" screen.

• If you need to copy any of this information, continue to Step 5.



### Step 5

#### Action

You may also copy the producer code name, address, or both to another producer code.

• Select which item you want to copy from the "Copy" drop-down list. In our example, we've selected "Address".

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### Step 6

#### Action Screen From the "Copy From" drop-down list: G PolicyCen • Select where you want to copy the Producer Code: Update Cancel item from. In our example, we've Organia Mailing Address Mailing Name Status Active selected "Office Address". Address Line 1 Address Line 2 Office Address City State ZIP Code City Print Ad State Office Name 45123 78.0 Agent First N Middle Na Suffix Contract A Address Line 1 Contr e C Effective No data to displa Addres City State ZIP Cod Phone oov Ad Copy Address Address Сору • Office Address Copy From •



Step 7	
Action	Screen
<ul> <li>When the "Copy" and "Copy From" fields have been selected:</li> <li>Select the "Copy Name/Address to Producer Codes" button.</li> </ul>	Copy Address         Copy       Address         Copy From       Office Address         Copy Name/Address to Producer Codes
Step 8	
Action	Screen
<ul> <li>On the "Select ProducerCodes to Copy Address" screen:</li> <li>Select the checkbox to the left of the Producer Code number to which you wish to copy.</li> <li>Select the "Update Address to Producer" button.</li> </ul>	PolicyCenter® Desktop • Account • Bolicy • Search • Ieam Administration • Testing • • • • • • • • • • • • • • • • • • •



#### Step 9

#### Action

When the producer has been updated, the checkbox will be removed, and you may return to the original producer code.

• Select the link to "Return to Producer Code: XXXXXX".

PolicyCenter* Desktop	p • Account • Policy • Search • Ieam <u>ådministration</u> • Testing •	÷ 🖻
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#### Step 10





#### Step 11

Action	Screen				
You will be returned to the "Producer Code" main page, which will now display the information you just updated.	PolicyCenter* Desktop     Actions     Users & Security     • User Search     • Group Search     • Group Search	Account      Bolicy     Producer Co     Code     Agent Name     Agent State     Description	de:	ion V Testing V Trai Edit Participants Assignment Lo Sales Manager Name Phone	ning   • Personal Lines Support gic
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