Client Search & View Client Summary in Agent Center

Searching for a client in Agent Center is easier than ever before. You can search for a client directly from the Agent Center Home page. The "Client Summary" page provides a one-stop resource for your client's policies, billing accounts, claims activity and contact history.

Client Search

Action	Screen
You can search for a client several ways. To **search by individual name** (Personal Lines), select "Individual name" from the "Client Search by" drop down. Enter the individual name (last name required) and zip code and select "Search".	
To **search by company** (Commercial or Farm), select "Company name" from the drop down, enter the company name and zip code and select "Search".	
To **search by Policy number**, select "Policy number" from the drop down, enter the policy number and select "Search".	
To **search by billing account**, select "Billing Account" from the drop down, enter the Billing Account number and select "Pay Bill" or "Search."	
To **search by claim number**, select "Claim number" from the drop down, enter the claim number and select "View claim".	

View Client Summary

Step 1

Action	Screen

1. The "Client summary" page displays based on any client search. You can view either by scrolling through the client summary, or by selecting the information in which you are most interested within the "Jump to" bar.
  a. The client's "Contact information" displays in the first tile based on the name entered in the "Individual name" or "Company name" search.
  b. The "Edit profile" link is directly under the "Contact information" section.
    • Note that this link is only available on individual names/contacts.
    • Changes made in "Edit profile" do not change the PL billing & policy document email address.
  c. Selecting a different name in the "Associated clients" tile will display the client summary for that individual.	

Step 2
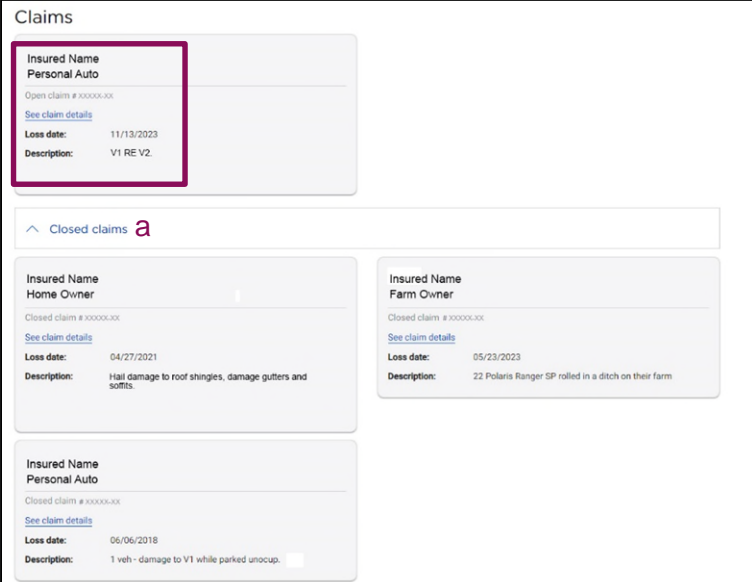
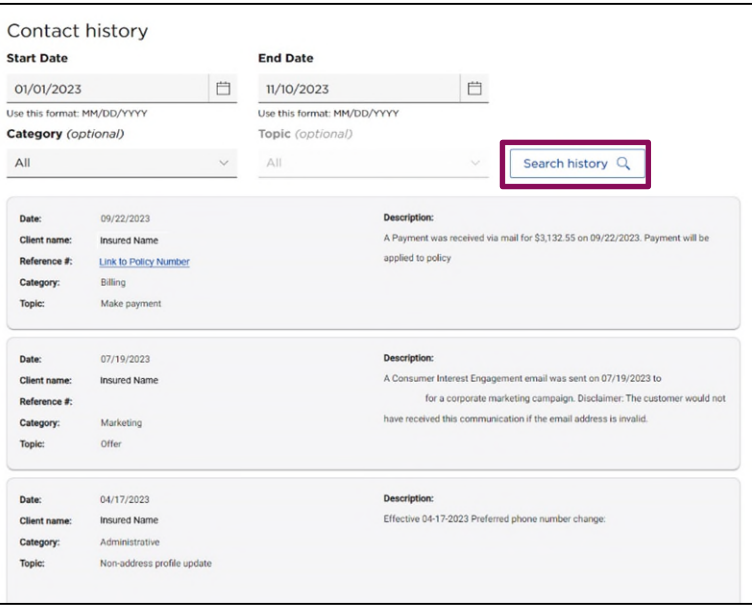| Action	Screen

2. The "Active policies" tiles will display any active policies for Personal Lines, Commercial Lines and Agribusiness. Each active policy tile will have action items that you can take on the policy such as "View policy", "Change policy", "Policy documents", and "Document uploads".
  a. Note that you can also select a dropdown for any "Inactive policies" if applicable.
  b. Note that hyperlinks are provided for any "Bond" or "Life" policies the client may have.	

Step 3

Action	Screen
3. View active "Billing accounts" by scrolling down or by selecting the "Jump to" hyperlink. Common billing actions are available via the tile such as "Make payment" and "Update payment method". Additional tasks can be accessed through the "See all billing" link. a. Note that you can also select a dropdown for any "Inactive billing accounts" if applicable.	

View Client Summary (cont'd)

Step 4

Action	Screen
4. View "Claims" by scrolling down or by selecting the "Jump to" hyperlink. You will have access to both "Open" or "Closed" claims by selecting the hyperlinks for details. Common information is viewable for the tile such as "Loss date" and "Description". Additional information can be access from the "See Claim Details" link. a. Note that you can also select a dropdown for any closed claims if applicable.	

Step 5

Action	Screen
5. The "Client Summary" screen also has a section for the most recent "Contact History" with the client. You can search and sort results by "Start date", "End date", "Category" and "Topic". To see more contacts, edit the date range and select "Search History".	