Agency Profile in Agent Center

Description

This job aid describes the steps to access the Agency Profile in Agent Center and some guidelines regarding its use.

Important Notes: Here are some reminders and guidelines regarding the Agency Profile:

- **Agency Profile** is a centralized location for an Agent Center administrator to update information and preferences for the agency.
- **The Agency contact information** will allow you to update the mailing, office, phone number, and email address for your agency and guide you through the additional place at Nationwide where they may need changed.
- **Updating your phone number here has downstream impacts.** This number will appear on customer bills, Dec pages and ID cards (unless print number is changed in Policy Center per producer code). This is also the number Nationwide will use to contact your agency.
- The Bank Accounts section provides instructions for updating your agency sweep and commissions/bonus bank accounts.
- The Appointments Requests section provides details on how new producers and appointments can be added. It also links out to the Producer Profile page where you will see a list of your producers, can terminate a producer, and update producer contact information.
- The Commercial/Ag and Personal Lines preference sections allow you to adjust your agency's settings for receiving policy activity notifications, CL/Ag refund check preference, and updating your PL SA360 preferences.

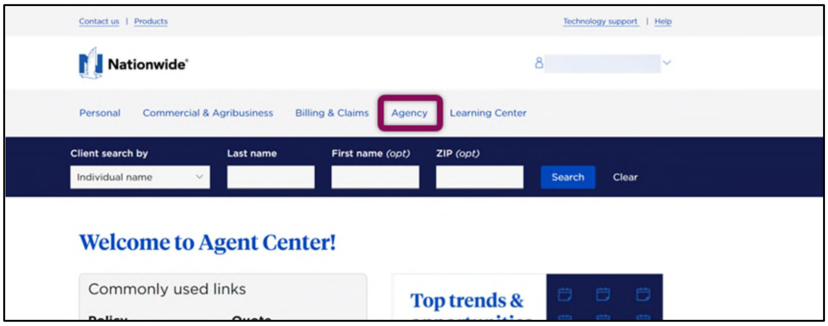
Step 1

Action

From the Agent Center Workspace:

- Select the “Agency” tab from the top menu.

Screen



Step 2

Action

From the “User & Agency Maintenance” section:

- Select “Agency profile”.

Screen

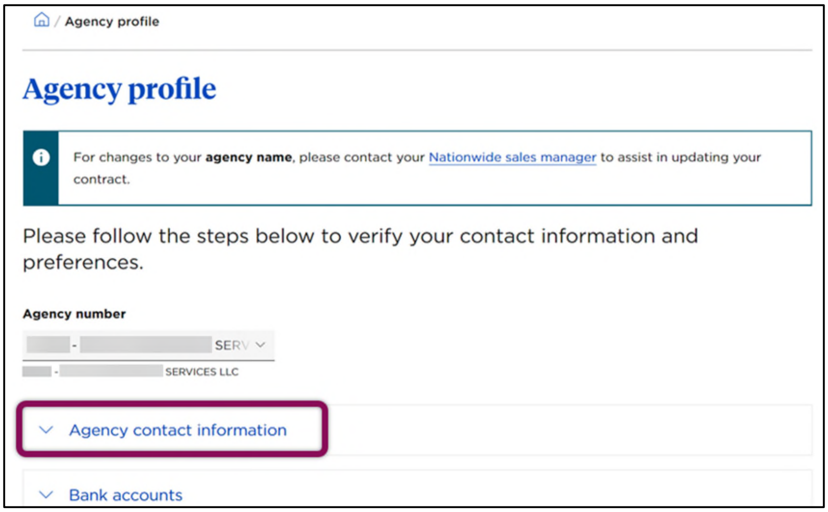
Step 3

Action

On the “Agency profile” screen:

- Select “Agency contact information”.

Screen



 03-15-2024

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Step 4

Action	Screen
On the “Agency contact information” screen: • Make any desired updates to the contact information and preferences for your agency. • Select the “Save contact changes” button.