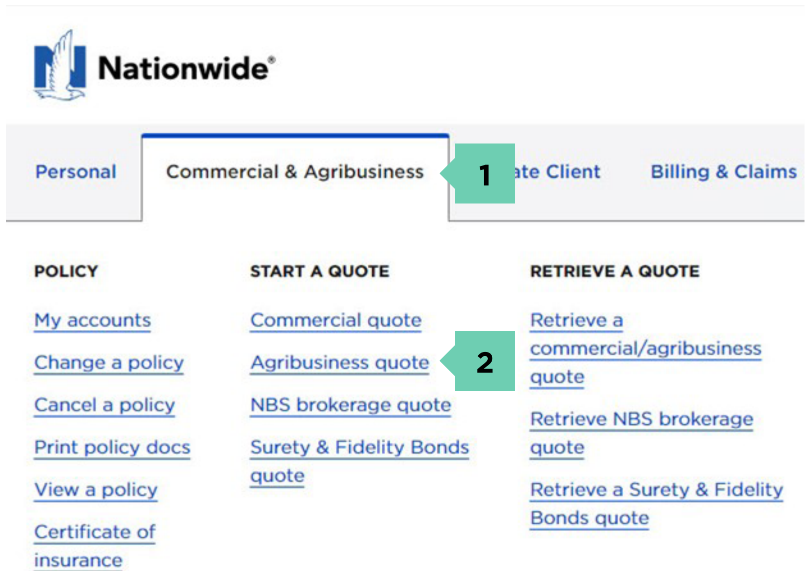
Farm account setup

Learn how to initiate a quote from Agent Center, retrieve an unissued quote, add a line of business, start a quote and view draft submissions.

Initiate a new quote from Agent Center

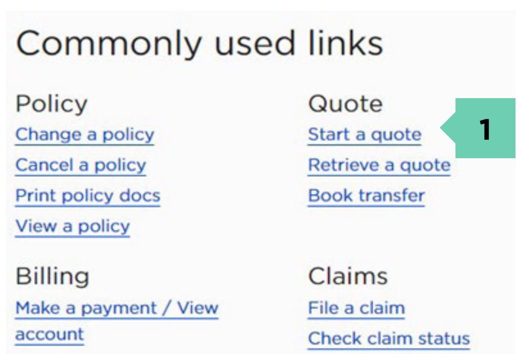
Option 1

1. From the main navigation menu, click **Commercial & Agribusiness.**
2. Then click **Agribusiness quote.**



Option 2

1. Under Commonly used links, click **Start a quote.**

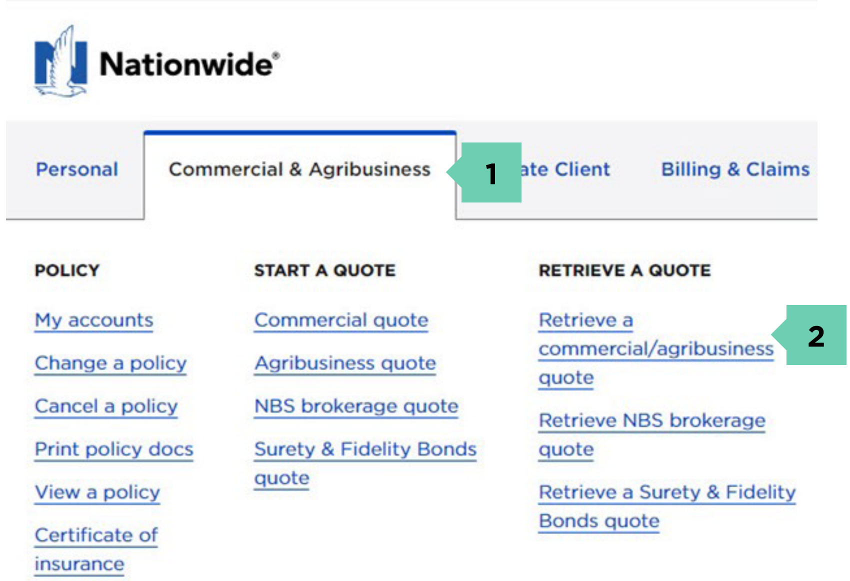


2. Then click **Farm and ranch** under Agribusiness.

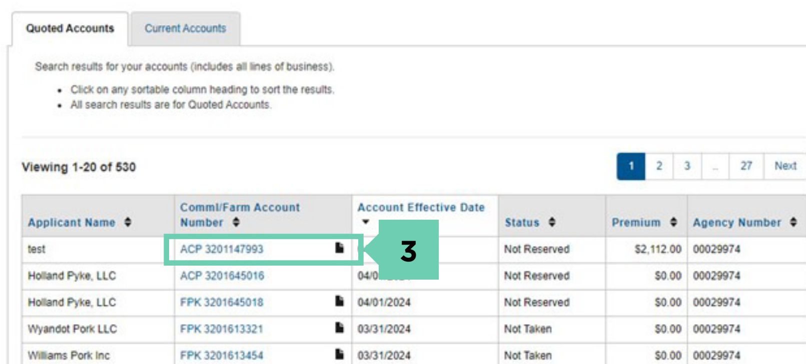
Retrieve an unissued quote

1. From the main navigation menu, click Commercial & Agribusiness.

2. Then click Retrieve commercial/agribusiness quote.



3. On the Quoted Accounts tab, click the Comml/Farm Account Number for the desired quote to retrieve it in PolicyCenter.

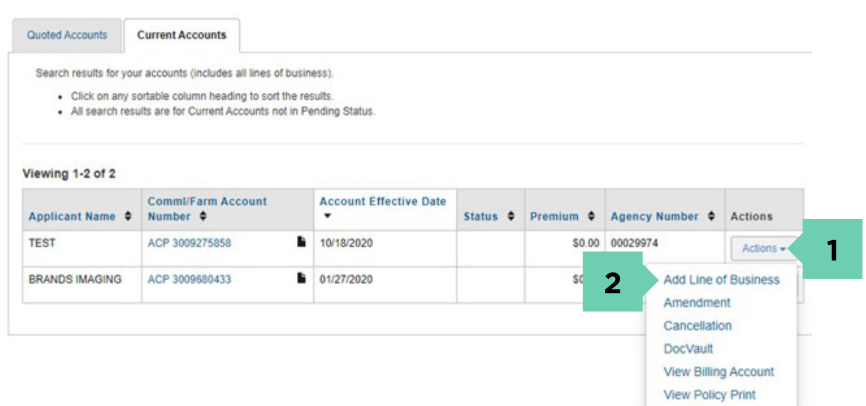


Add a line of business

You can add new lines of business to an existing account directly in PolicyCenter or follow the instructions below to start the process from Agent Center.

1. On the Current Accounts tab, click the Actions button.

2. Select Add Line of Business from the drop down.

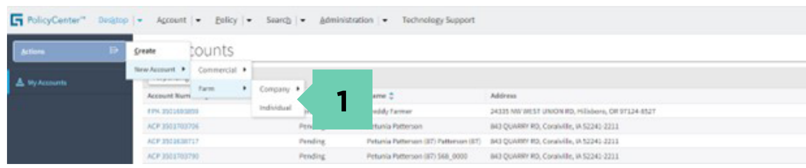


Start a quote in PolicyCenter

When you arrive in PolicyCenter from Agent Center, you should be on the **My Accounts** page where you can initiate a new quote.

Note: If you started a session in PolicyCenter earlier that day, you may land on the last screen you viewed. If this happens, click **Desktop** from the top navigation to get to **My Accounts**.

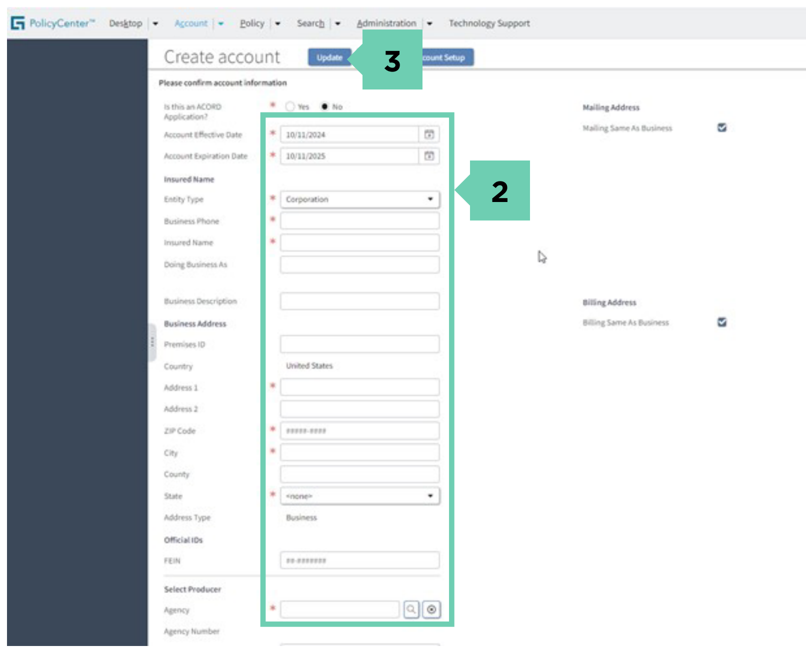
1. Create a new account from the My Accounts page by clicking Actions > New Account > Farm > Company/Individual



2. Enter account details including effective date, phone number, insured name, address and agency / producer info.

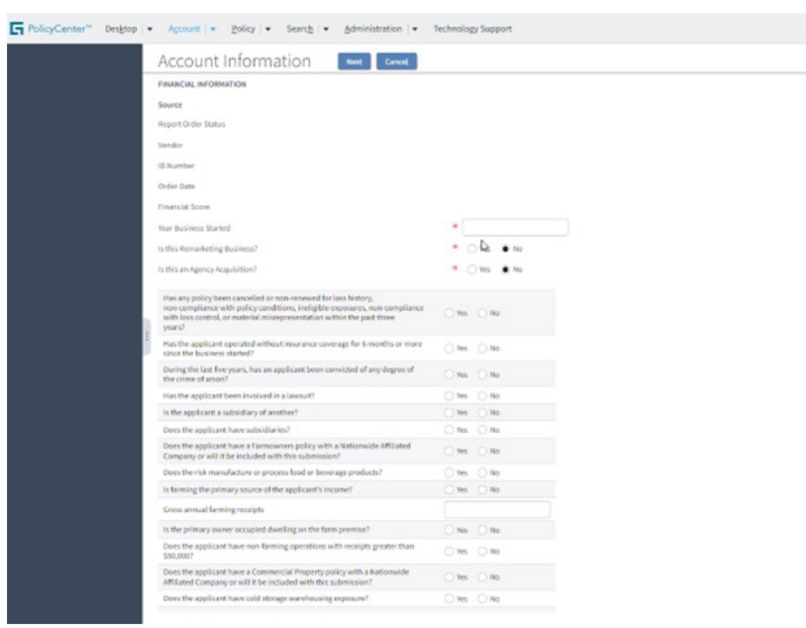
   Mailing and billing addresses can also be changed here.

3. Click Update

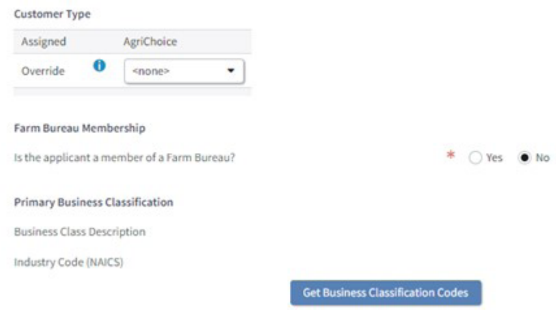


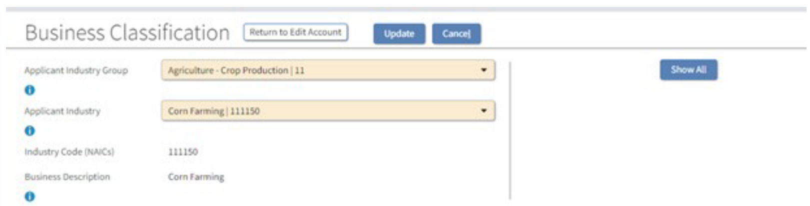
4. Once in the policy, continue entering account details including account questions and business classification.

Note: You can only select one business classification so choose the option most aligned with the majority of what the operation is producing.



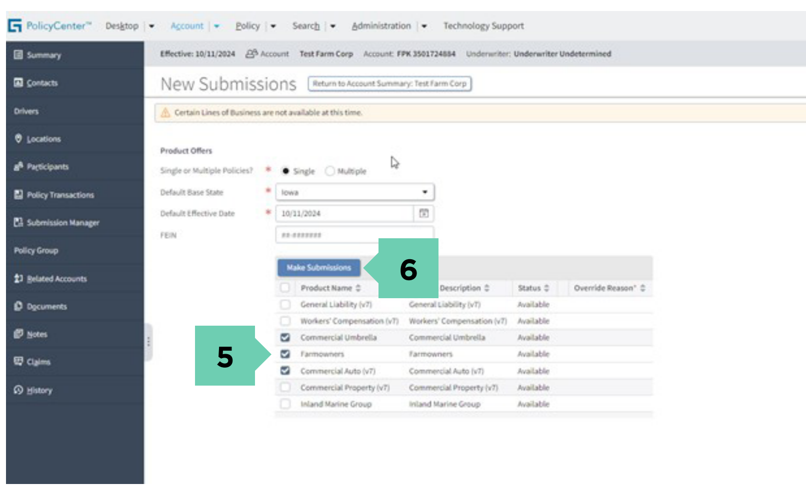
Start a quote in PolicyCenter (continued)





5. **Check the boxes** beside the lines of business you want to quote.

6. Click **Make Submissions.**



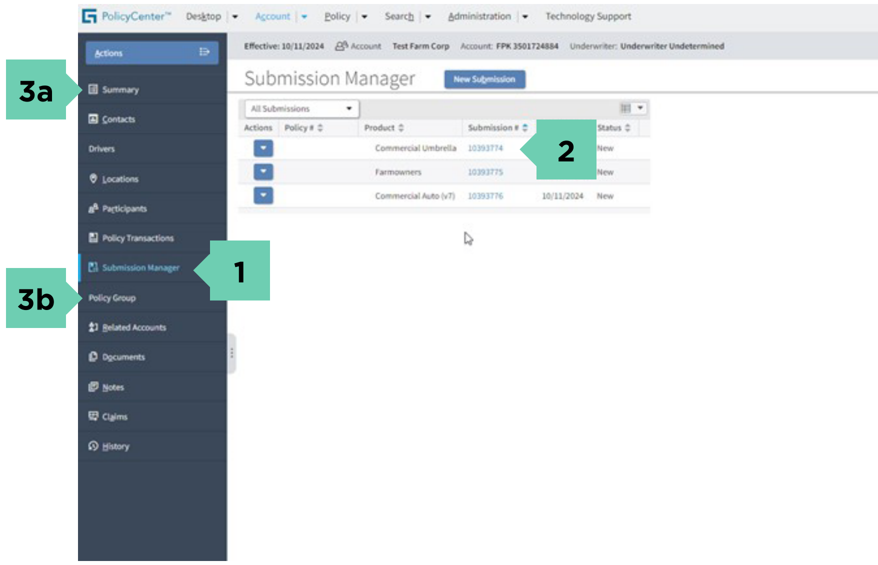
Accessing draft submissions

1. Access draft submissions and add information on the **Submission Manager** page.

2. Click the **Submission #** for the desired policy to view a draft.

3. Policies can also be accessed:
    a. on the **Account Summary** tab at the bottom of the page.
    b. on the **Policy Group** tab.

4. Once in the policy, fill in the information you're prompted to enter (e.g., policy details, property, coverages).



To get started, login to **Agent Center.**