

New Agency Portal

The Agency Portal has been redesigned with updated navigation and a layout focused around the most used options. This site is also mobile friendly so you can access it when you're out of the office.

FREQUENTLY ASKED QUESTIONS

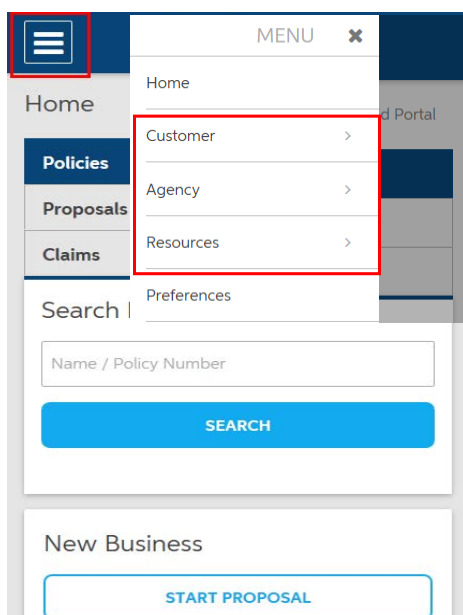
How do I navigate through the site?

The main navigation menu is now located at the top of the site. This will allow for easier access to your customer's billing information, claims status, agency production information, and other agency resources.



How do I navigate through the site on a mobile device?

The mobile menu is located in the top-left corner of the page.

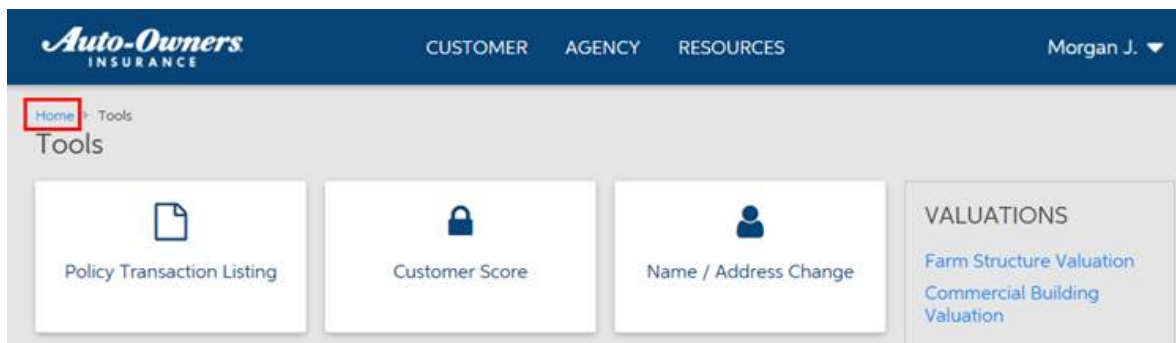
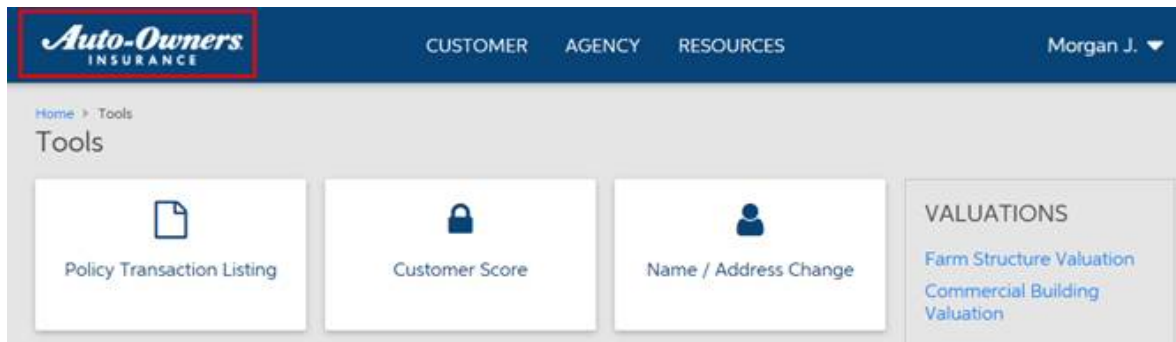


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How do I return to the home page?

You will now have the choice of either clicking on the Auto-Owners logo at the top of the page or the “Home” link.



What if I'm at a branch office or affiliate location? How can I switch my agency code?

Many pages on the portal now have a page-level agency code switch or filter. The code will default to the agency code set by your security administrator. If you need to change it to one of your affiliated locations, simply update the agency code on the page in which you are working. This will not impact your default code on the rest of the Agency Portal, so you never need to remember to switch the code back.

START NEW PROPOSAL

Agency Code:

Business State:

Line of Business:

Activity Type:

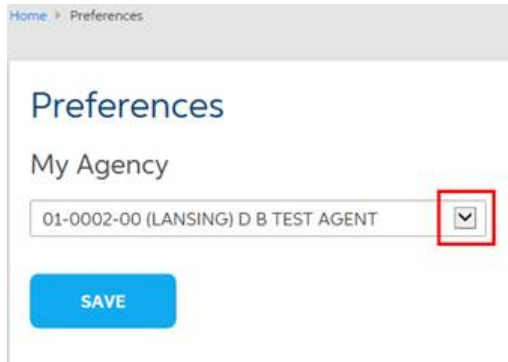
Effective Date:

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How can I switch my agency code if there isn't one on the page?

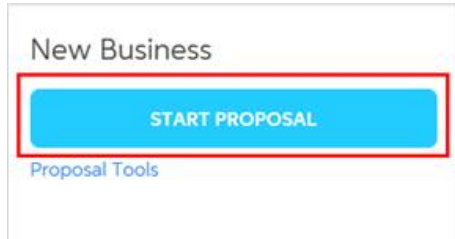
If you click on your name in the menu at the top of the page and then select "Preferences" you'll see the option to switch your agency code. If you change your agency code under Preferences, this will change your default code displayed throughout the entire Agency Portal until you logout or are timed out.



The screenshot shows the 'Preferences' page with a breadcrumb trail 'Home > Preferences'. Under the heading 'My Agency', there is a dropdown menu currently displaying '01-0002-00 (LANSING) D B TEST AGENT'. A red box highlights the dropdown arrow icon. Below the dropdown is a blue 'SAVE' button.

How do I start a proposal?

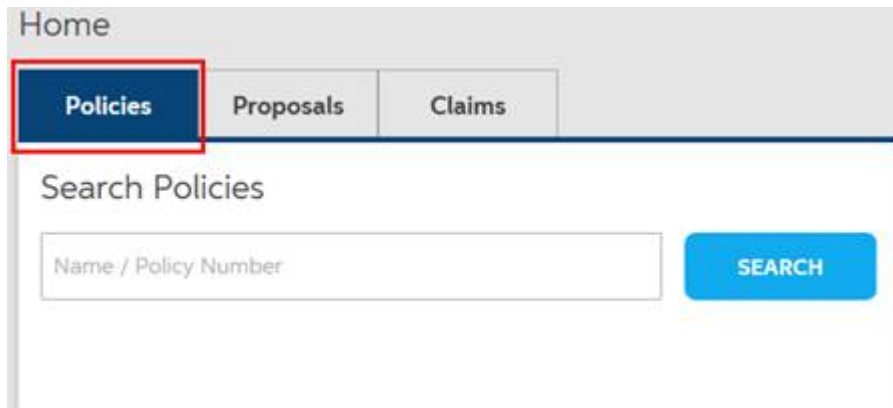
On the home page right hand side under New Business, click the "Start Proposal" button.



The screenshot shows the 'New Business' section with a blue 'START PROPOSAL' button highlighted by a red box. Below the button is a link for 'Proposal Tools'.

How do I search for a policy?

On the home page left hand side, click the first tab labeled "Policies" and enter your search criteria.



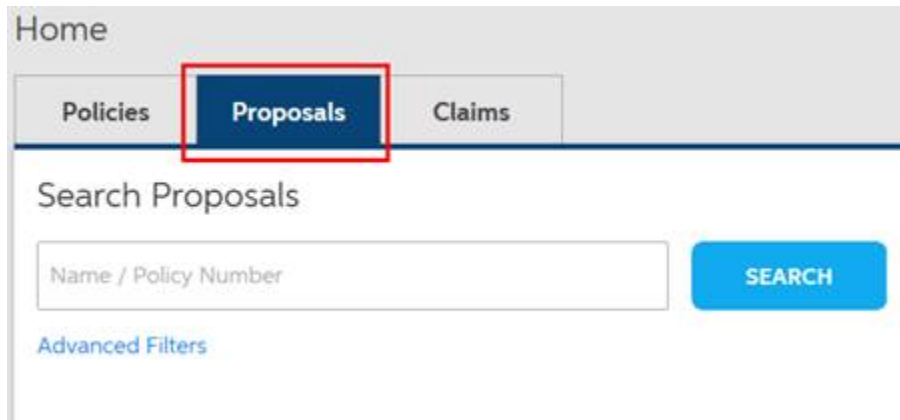
The screenshot shows the 'Home' page with three tabs: 'Policies', 'Proposals', and 'Claims'. The 'Policies' tab is selected and highlighted with a red box. Below the tabs is a 'Search Policies' section with a text input field labeled 'Name / Policy Number' and a blue 'SEARCH' button.

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How do I retrieve a proposal?

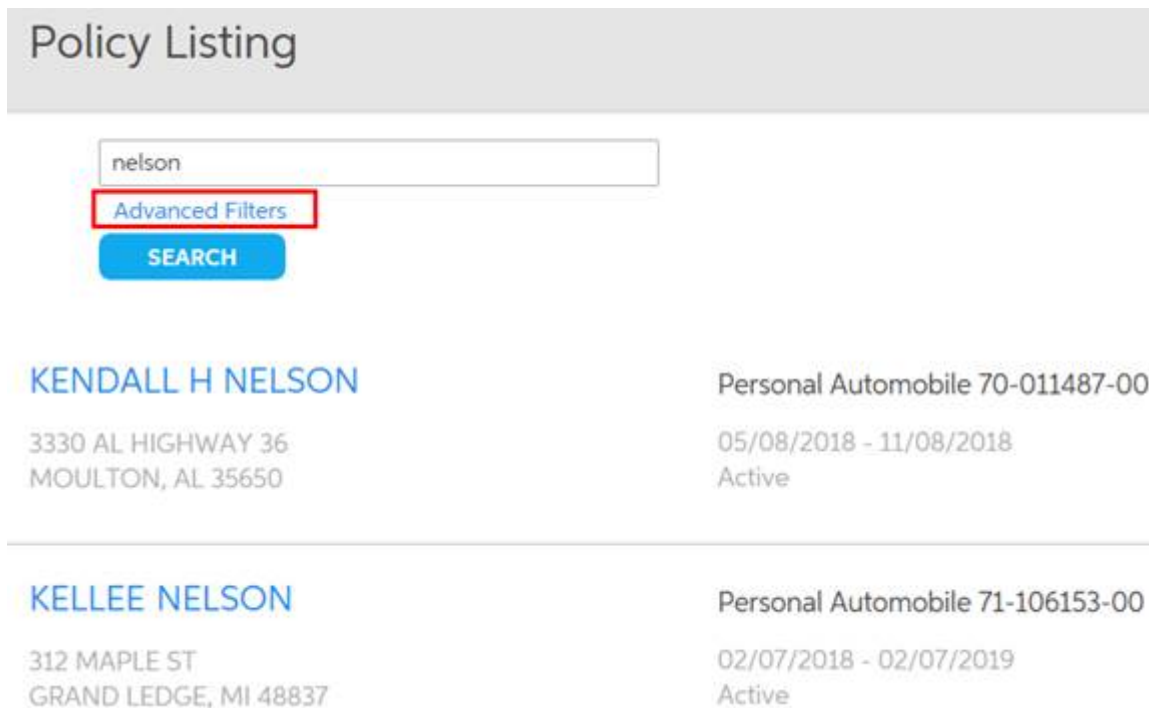
On the home page, click the second tab labeled "Proposals" and enter your search criteria.



The screenshot shows the 'Home' page of the Auto-Owners Insurance portal. At the top, there are three tabs: 'Policies', 'Proposals', and 'Claims'. The 'Proposals' tab is highlighted with a red rectangular box. Below the tabs, there is a 'Search Proposals' section. It includes a text input field labeled 'Name / Policy Number' and a blue 'SEARCH' button. Below the input field, there is a link labeled 'Advanced Filters'.

When looking for a proposal or policy, how do I filter my search results?

When you search, you'll be shown a list results. Click on the "Advanced Filters" option near the top of the page to filter your results.



The screenshot shows the 'Policy Listing' page. At the top, there is a search bar containing the text 'nelson'. Below the search bar, there is a link labeled 'Advanced Filters' which is highlighted with a red rectangular box. Below the search bar, there is a blue 'SEARCH' button. The search results are displayed in a table-like format with two rows. Each row shows the name of the policyholder, their address, and the policy details.

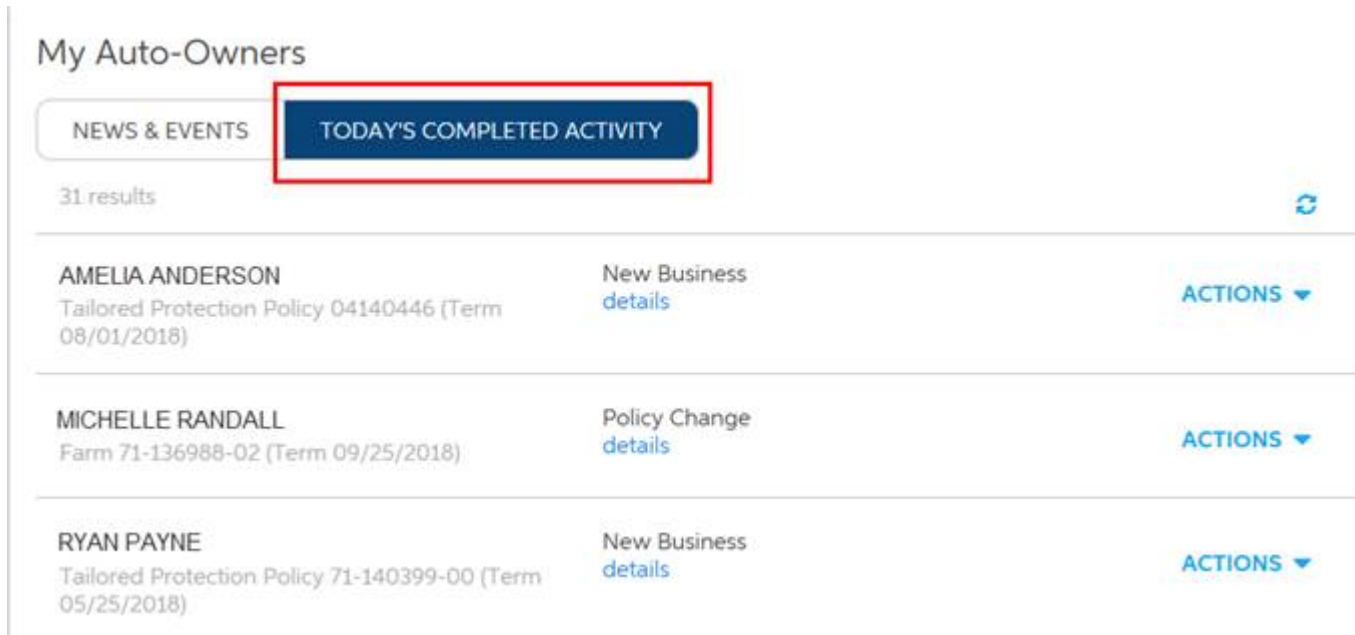
KENDALL H NELSON 3330 AL HIGHWAY 36 MOULTON, AL 35650	Personal Automobile 70-011487-00 05/08/2018 - 11/08/2018 Active
KELLEE NELSON 312 MAPLE ST GRAND LEDGE, MI 48837	Personal Automobile 71-106153-00 02/07/2018 - 02/07/2019 Active

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Where can I view Today's Completed Activity?

In the "My Auto-Owners" section on the home page, select the "Today's Completed Activity" option.

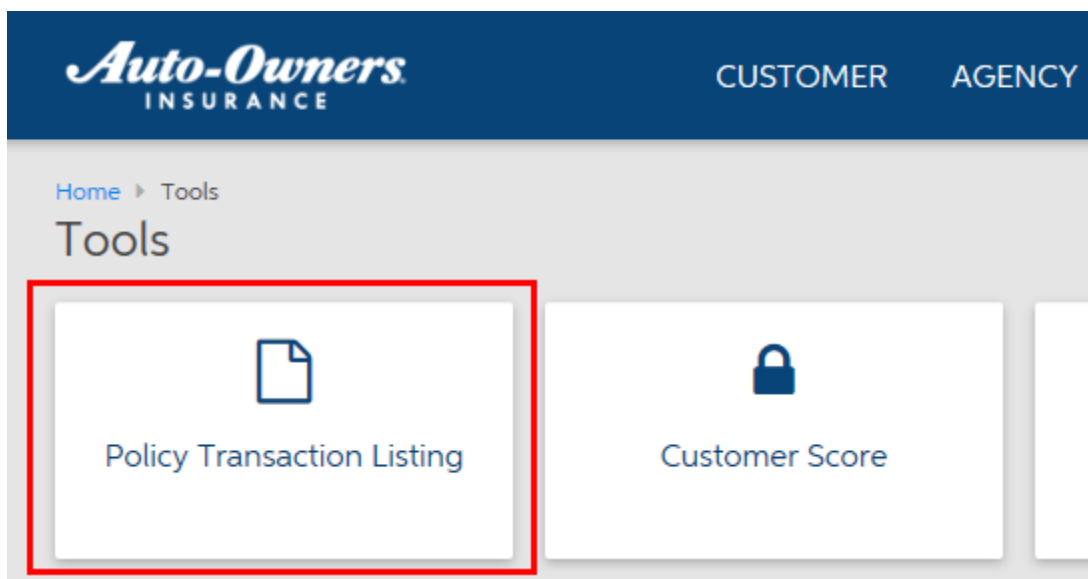


The screenshot shows the 'My Auto-Owners' section of the website. At the top, there are two buttons: 'NEWS & EVENTS' and 'TODAY'S COMPLETED ACTIVITY'. The 'TODAY'S COMPLETED ACTIVITY' button is highlighted with a red rectangular box. Below the buttons, it says '31 results' and '31 results' with a refresh icon. The main content area displays a list of three policyholders with their details and actions.

Policyholder Name	Policy Details	Action
AMELIA ANDERSON	Tailored Protection Policy 04140446 (Term 08/01/2018)	New Business details ACTIONS ▼
MICHELLE RANDALL	Farm 71-136988-02 (Term 09/25/2018)	Policy Change details ACTIONS ▼
RYAN PAYNE	Tailored Protection Policy 71-140399-00 (Term 05/25/2018)	New Business details ACTIONS ▼

Where do I find the Policy Transaction Listing (PTL)?

At the top of the page select "Customer" and choose "Tools" from the drop down menu.



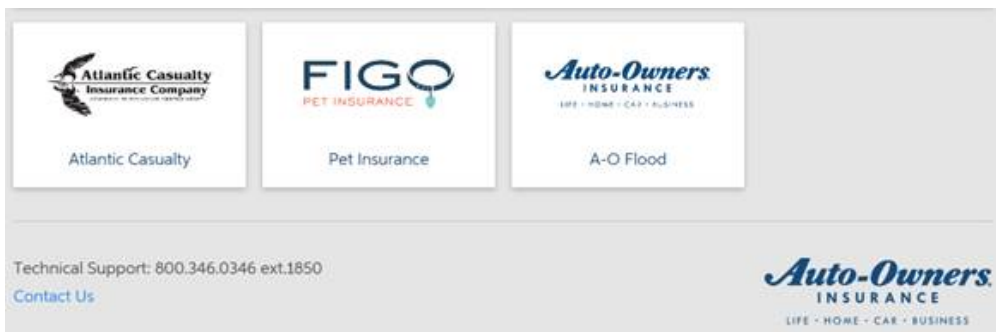
The screenshot shows the 'Tools' section of the website. At the top, there is a navigation bar with 'Auto-Owners INSURANCE' and 'CUSTOMER' and 'AGENCY' tabs. Below the navigation bar, there is a breadcrumb trail 'Home > Tools' and the title 'Tools'. The main content area displays three cards: 'Policy Transaction Listing' (highlighted with a red rectangular box), 'Customer Score', and a partially visible third card. The 'Policy Transaction Listing' card features a document icon.

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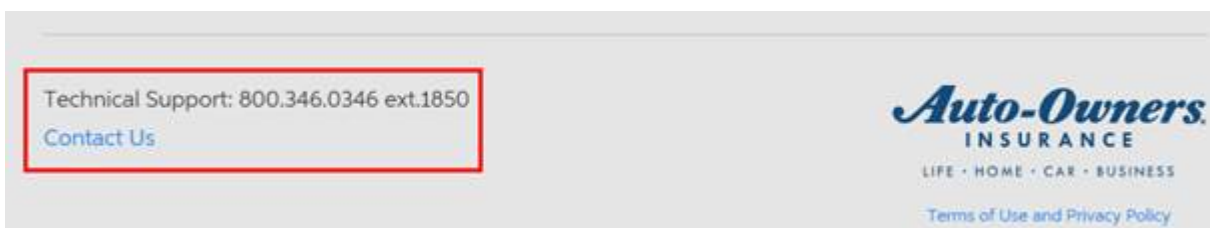
Where are the Specialty Business options located?

At the top of the page, select Customer and Specialty Business from the drop down. Here you can access links for Atlantic Casualty, FIGO, and A-O Flood. The links are also available at the bottom of the home page.



What if I need help finding something else on the site? What if I experience a system issue?

The Automation Support team is ready to help. Just call 800.346.0346 ext.1850. You can access the Automation Support phone number and contact information at the bottom of every page on the site.



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How can I access Live Technical Support?

Move your arrow with the mouse over your name in the top right corner. You can select Live Technical Support from the drop-down menu.

