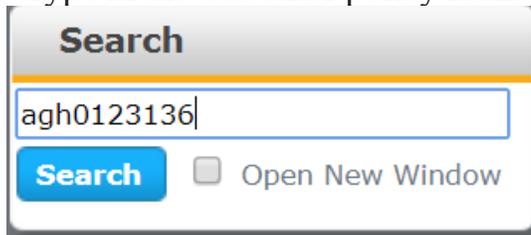


Linking Customer Accounts in SPIN

Linking the customer accounts is important to ensure that the customer receives the multi program discounts when applicable. Linking the accounts also allow you to keep all customer accounts stored in one central location.

1. Type in the customer policy number into the search box then click Search.

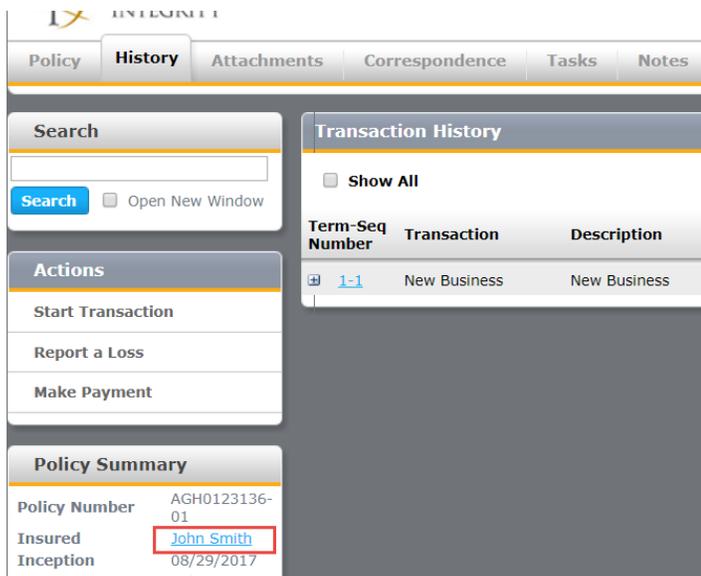


Search

agh0123136

Search Open New Window

2. When you are in the policy, click on the insured's name in the blue hyperlink to access the Customer Profile.



Policy **History** Attachments Correspondence Tasks Notes

Search

Transaction History

Show All

Term-Seq Number	Transaction	Description
1-1	New Business	New Business

Actions

Start Transaction

Report a Loss

Make Payment

Policy Summary

Policy Number AGH0123136-01

Insured [John Smith](#)

Inception 08/29/2017

3. Once you are in the Customer Profile, you will see all accounts associated with the customer. To add a new account, click *New Quote* to link a new policy to the existing customer account.



Search

Customer Policy List

Include Closed Quotes

Number	Type	Product	Description	Inception Date	Expiration Date	Status
AGH0123136	Policy	Voluntary Homeowners (HO3)	Voluntary Homeowners (HO3)	08/29/2017	08/29/2018	Active

Actions

New Quote

Policy Address Sync

[Report a Loss](#) [Make Payment](#)

4. Choose the new policy effective date.

Product Selection

Search

Search Open New Window

Actions

Product Selection

Effective Date* 08/29/2017  

State* Florida

Carrier Group* American Integrity Insurance Group

Continue Cancel

5. Select the new product that you would like to quote from the Product Selection List.

Product Selection

Search

Search Open New Window

Actions

No Actions

Customer Summary

Customer Name John Smith
Entity Type Individual
Customer Number 1357107
Tax ID

Product Selection

Effective Date* 08/29/2017 

State* Florida

Carrier Group* American Integrity Insurance Group

Continue Cancel

Product Selection List

Description



[Voluntary Homeowners \(HO3\)](#)
[Voluntary Condominium Unit Owners \(HO6\)](#)
[Voluntary Dwelling Property 1 \(DP1\)](#)
[Voluntary Dwelling Property 3 \(DP3\)](#)
[Voluntary Umbrella \(UMB\)](#)
[Golf Cart \(GOC\)](#)

6. You will then see all of your customer information bridge over into the new quote.

Copy Quote

Ask a Question

View Producer

Quote Summary

Quote Number QT-01322968
Insured [John Smith](#)
Effective 08/29/2017
Product Golf Cart (GOC)
Sub Type
Premium \$0.00
Status In Process

Individual

First* John Middle Last* Smith Suffix

Name* John Smith

Birth Date 01/01/1950  Insurance Score* Select...

Primary Phone Select... Secondary Phone Select...

Email No Email Delivery Preference No Preference

Location Information Ignore Address Validation

Lookup Address Number* Direction Street* Suffix Post Dir Type Number

3410 W Swann Ave

City* County* State* Tampa Hillsborough Florida 33609-4646 

7. When you access the Customer Profile again, you will now see all linked accounts.

Customer Policy List

Include Closed Quotes

Number	Type	Product	Description	Inception Date	Expiration Date	Status	
 QT-01322984 	Quote	Golf Cart (GOC)	New Quote	08/29/2017	08/29/2018	In Process	Copy
 AGH0123136 	Policy	Voluntary Homeowners (HO3)	Voluntary Homeowners (HO3)	08/29/2017	08/29/2018	Active	Report a Loss Make Payment