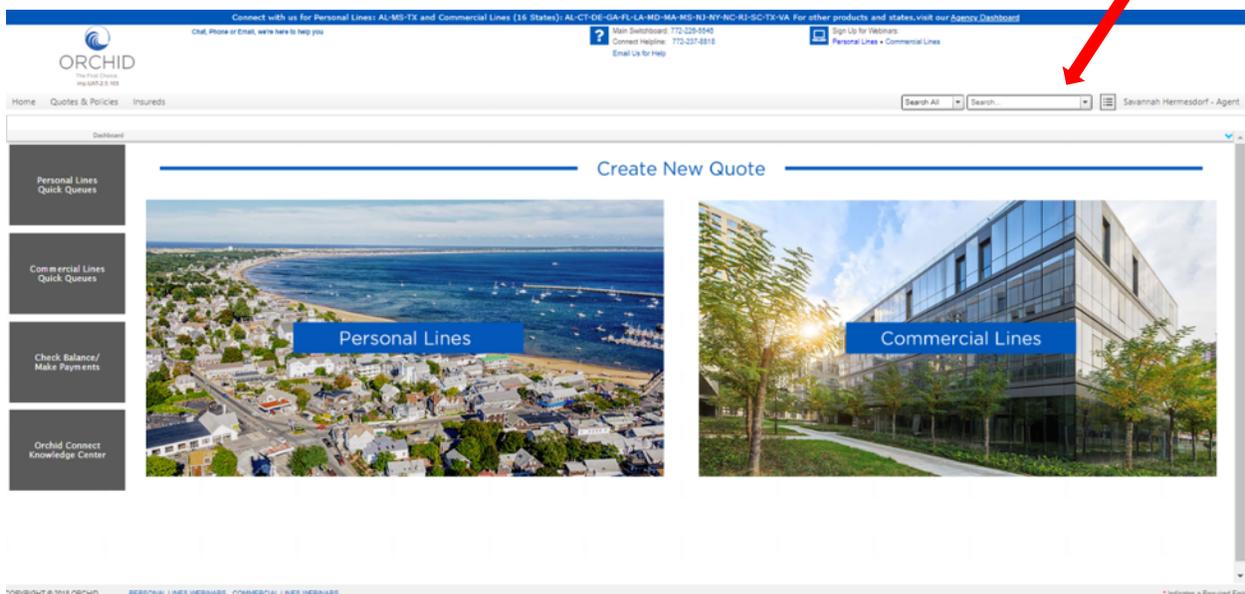


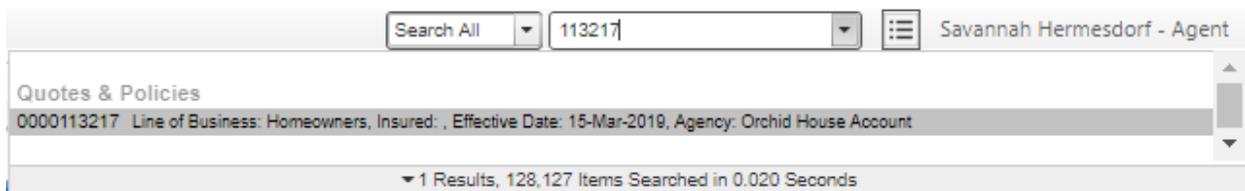
How to Search in Connect

Example 1: Using the search bar to the top right, type either the insured’s name, policy number, or submission ID (don’t hit Enter). When searching by policy number, It is often helpful to leave off the last two numbers so all policy terms are filtered

If searching by name, what you type must match our records *exactly* to get results, so it often helps to just start with part of the insured’s name (such as last name)

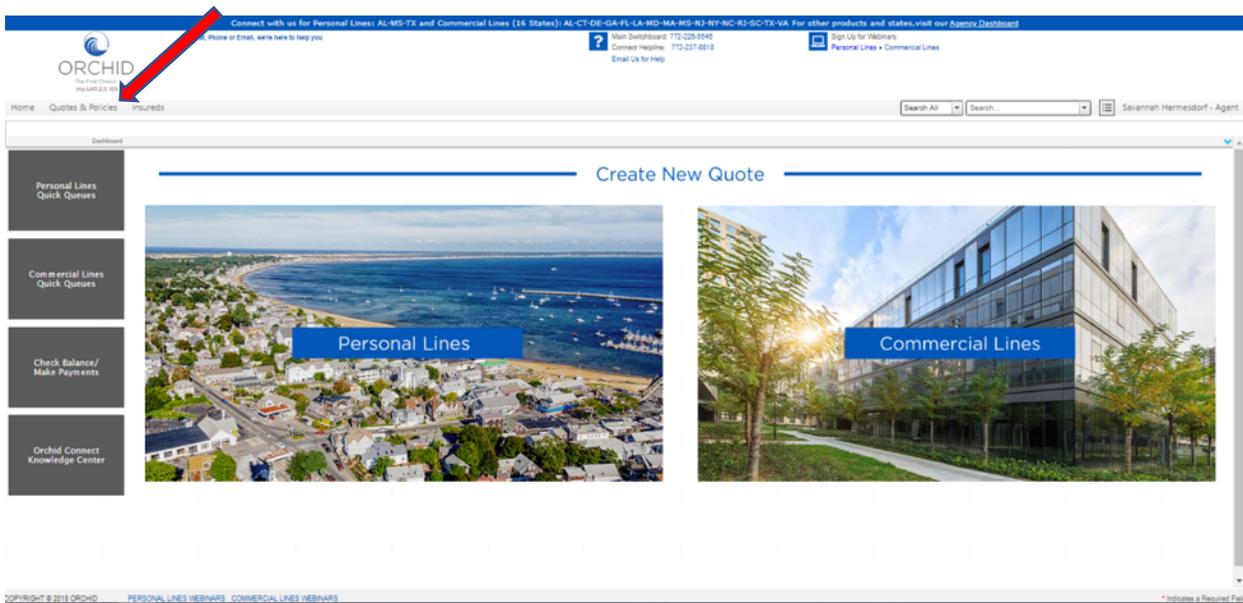


Wait for the search results to populate below the search box. Every transaction that has been processed will appear. This includes every endorsement, cancellation, and renewal.



Click on the quote/policy you are looking for, this will take you directly into it.

Example 2: From the menu bar, hover over “Quotes and Policies”. Click Search



Be sure all fields are clear before searching. We recommend using only the Submission ID/Policy field, or the Named Insured. Hit enter to search. It is often helpful to leave off the last two numbers so all policy terms are filtered

If searching by name, what you type must match our records *exactly* to get results, so it often helps to just start with part of the insured’s name (such as last name)



Click on the quote/policy you are looking for from the list, this will take you directly into it.

