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.

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

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.
4. Choose the new policy effective date.

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

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

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