Farmers.com
Reference Guide

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Section 1 – Enrolling for Manage My Policies (EasyPay, Standard, Fab)

Please refer to CSGInside

Farmers.com Online Enrollment / Registration Instructions:

http://csginside.com/wp-content/uploads/2012/08/FarmersDotCom_OnlineEnrollment_Ins.pdf

Section 2 – Look Up User Name / Reset Password

Please refer to CSGInside

Consumer Password Reset - User Look up & Password Reset Reference Guide:

http://csginside.com/wp-content/uploads/2012/11/Farmers_UserID_Password.pdf

Section 3 – eSignature

Please refer to CSGInside

eSignature Reference Guide:

http://csginside.com/wp-content/uploads/2012/07/esignature1.pdf

Section 4 – Enrolling for eBilling “Go Paperless” (EasyPay, Fab, All Billing)

Please refer to CSGInside

Farmers.com eBilling “Go Paperless” / ePolicy Reference Guide:

http://csginside.com/wp-content/uploads/2012/11/FarmersDotCom_ebilling_epolicy_paperless.pdf

Section 5 – ePolicy (paperless documents, paperless policy)

Please refer to CSGInside

Farmers.com eBilling “Go Paperless” / ePolicy Reference Guide:

http://csginside.com/wp-content/uploads/2012/11/FarmersDotCom_ebilling_epolicy_paperless.pdf

Section 6 – Making a Standard Bill Payment Online

NOTE-Standard bill policies can only be made with a check online.

1. Customer will already need to be enrolled for Manage My Policy's to make a payment online.
2. Next the customer will need to click "View/Pay My Bill" which is located to the right of the policy.
3. Have the customer press "Pay Now" They will then be directed to their current invoice.
4. Click "Continue."
5. They will then be directed to their current invoice.
6. Click Continue.
7. Enter contact information and click "Continue."
8. Enter the Banking information (Routing and Account number) Click "Continue."
9. Have them check the box to agree to the Terms and Conditions.
10. Confirm the payment and click "Submit Payment."
11. The customer will be given a Reference ID number for the payment submitted.

Section 7 – Commercial Billing

Making a Commercial Payment Online

1. Click **"Make a One Time Payment"** from Farmers.com
2. Click the green bar that says **"Pay Your Commercial Bills Online"**
3. The customer will select the pay plan they are on. (Monthly or Yearly) and click the green **"Continue"** button.
4. Enter the policy or account number (must be in CAPS) and click **"Continue"**
5. Enter the amount you want to pay.
6. Enter contact information.
7. Enter Payment information click **"Continue."**
8. Confirm payment and click **"Submit Payment."**

Credit Card Payment Through Western Union

Section 8 – Viewing Billing Statements EasyPay (Customer Walk Through)

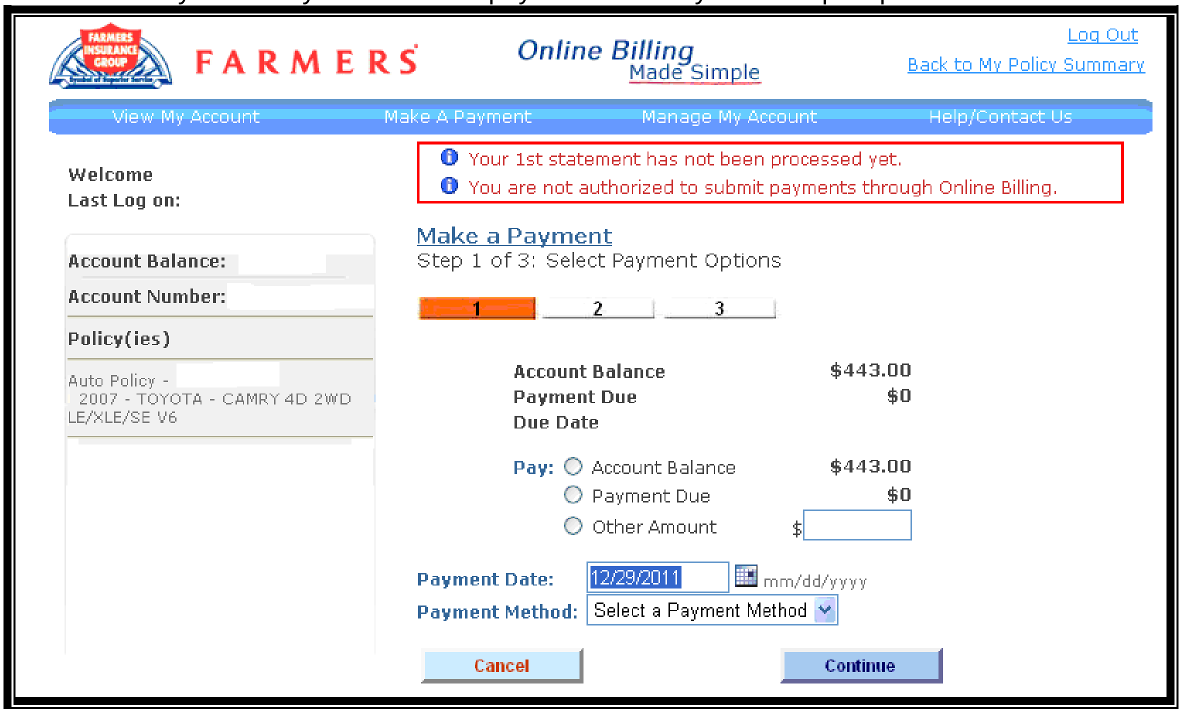
View Billing Statements online EasyPay (Customer Walk Through)

1. Customer will already need to be enrolled for Manage my Policy's to make a payment online.
2. Have the customer sign into their online account. From there it will take them to the Policy Summary screen where they will see all their policies.
3. Next the customer will need to click "View/Pay Bill" which is located on the right hand side of the screen.
4. Once there, they will need to click the "Pay Now" button in the center of the screen.
5. From there the system will take them to the customer console. This will show them the current invoice.
6. To view the statements online the customer would need to click "Statement History" on the left hand side of the screen.
7. Once clicked they will be able to view and pull up their statements.

Section 9 – Make a Payment & View Billing Statement FAB (Customer Walkthrough)

Making a Payment (FAB) (Customer Walkthrough)

1. Go to Farmers.com and log in or register.
2. Once logged in click on “View/Pay Bill” to pull up online billing.
3. One the billing screen opens, click on the red button that say’s “Pay Now”.
4. The next screen will open, select the amount you would like to pay, and then select the payment method. If you already have a saved payment method you will skip step 5. Then click Continue.



Note: To schedule a future payment, simply change the payment date.

1. Next you will input your payment method and accept the terms and agreements. Agree to the terms to continue.
2. The next screen will give you a confirmation of your payment.

View Billing Statements (FAB) (Customer Walkthrough)

1. Go to Farmers.com and log in or register.
2. From there you will be on the customer view screen. Click on “View/Pay Bill” on the right of the screen next to the policy.
3. Next it will launch a new window for your online billing. On the first screen there will be four blue buttons. Click on the one that says “Statement History”
4. Once clicked this will bring up a list of your current and past statements. Click on View Bill to download the statement you want to view. Then click save to open the statement. (To view statement once downloaded you will need a pdf reader.)***Note if the customer needs a pdf Reader you can send them to http://get.adobe.com/reader/***

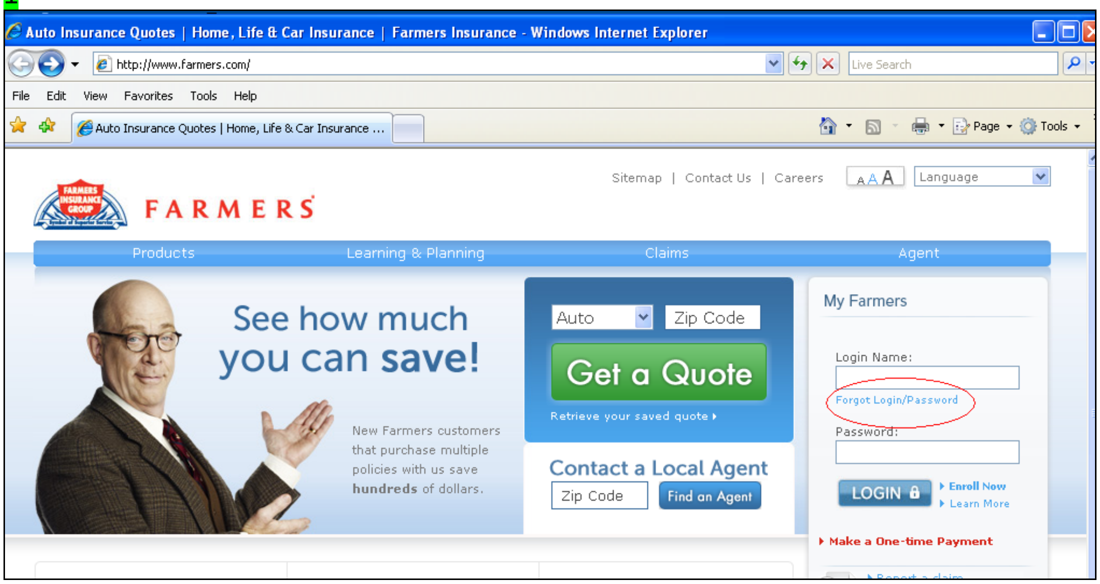
Section 10 – Deactivate Online Enrollment

Deactivation should only be done as a last resort to resolve the customer's issues and only after you attempt all 5 troubleshooting steps below.

Troubleshooting Steps

1. Verify with customer their user name.
2. Look in Billing Comments to see if the user name is listed.
3. In Billing Summary click on “Online Billing”, Click “User Name”, Hover over “Help/Contact Us”, Select “CSR View” to view User ID.
4. Search by email address in CSS Lookup tool.
5. If you are unable to locate the customer’s username using the Farmers system, you may attempt to locate the username by accessing the ‘Forgot Username’ function on Farmers.com, or assist the customer with accessing the same. Go to Farmers.com and follow the next three steps:

1



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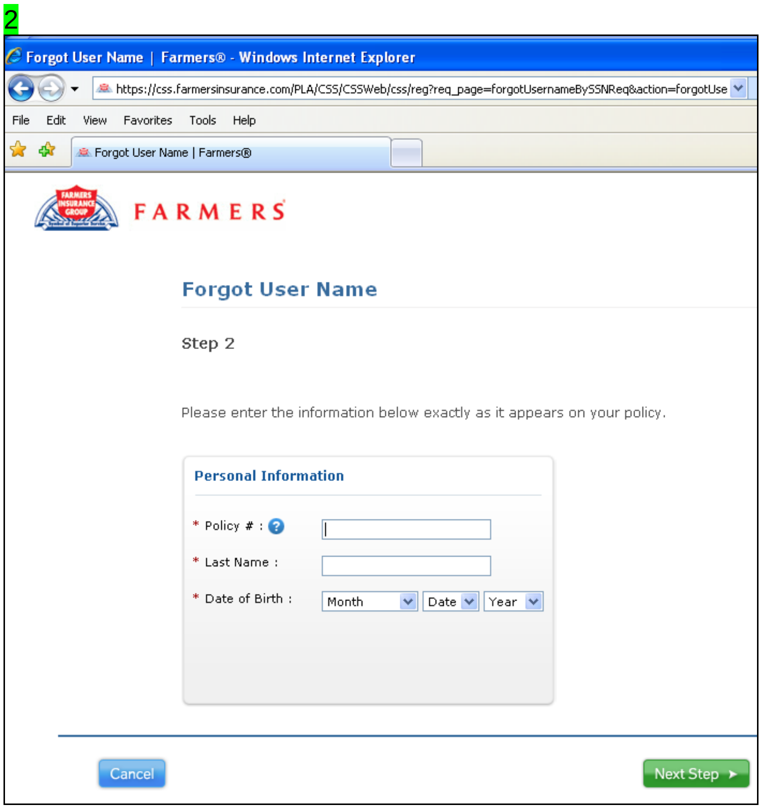

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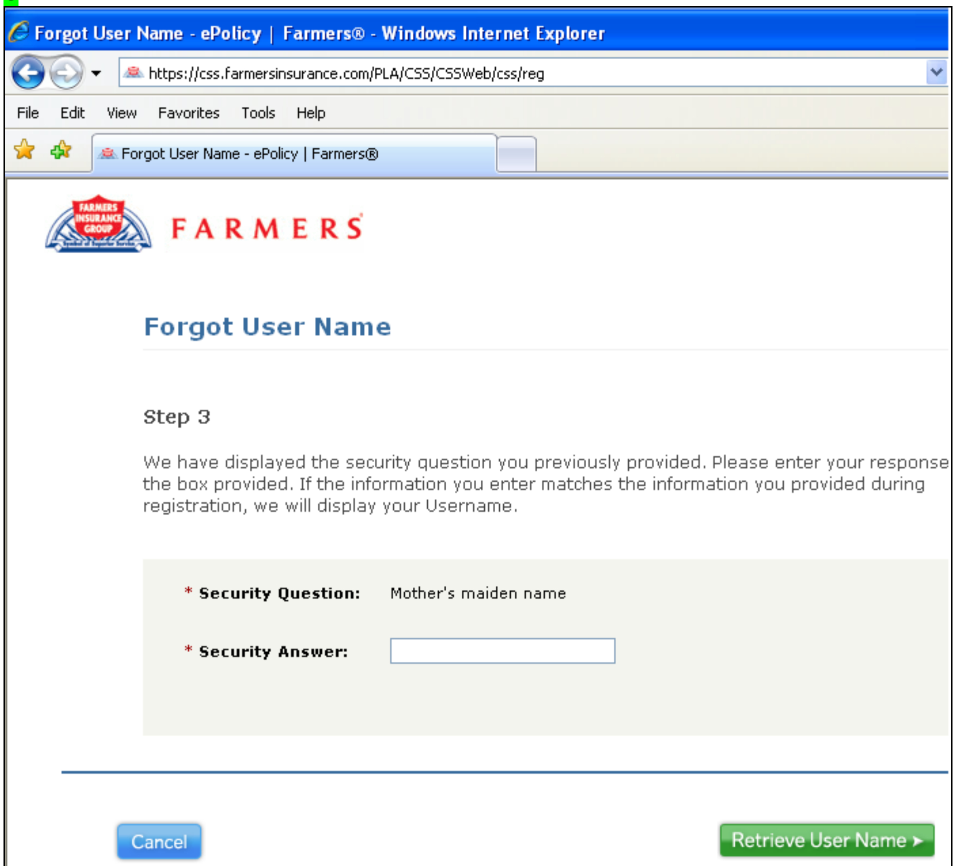


If the question is answered correctly, you should now be able to provide the customer's username.

Deactivation Steps

A. Access the customers' account through the **"View my Home Page "**or "**Update Online Billing"** link in dashboard.
B. Select "**Self Service Center**"
C. Click the "**Password"** link
D. Click the radio button "**I would like to change my password"**
E. Click on the **"Deactivate Enrollment"** link
F. By using the radio buttons delete the service the customer no longer wants. **Manage my Policies** , **E-Billing,** or **Both**
G. Click **Submit**

Section 11 – Y.E.S. Discount

1. To take the YES course the customer must be enrolled in Farmers.com.
2. From "**My Policy Summary"** click on the policy number desired. This will take the customer to the **"Policy Details"** page.
3. Below the Driver Information is a blue link that says **Y.E.S.**
4. Have customer following the on-screen instructions.
5. Once they have completed the course an Email will be sent to the agent with their results.

(a) The insured name must display exactly the same way that the auto & home policies display the insured name, and

(b) The insured must be selected as the Life policy *Owner*. If either (a) or (b) are *not* true, then the insured should be referred to their agent to update their info. If both (a) and (b) are true, then the customer has a defect you should submit.

Section 13 – Online Help Troubleshooting

1. If a customer cannot view an Auto policy, check for the following criteria.
- To view an Auto policy the customer must be listed as a Named Insured, Primary Insured, or Secondary Insured. (The Rated Driver and Registered Owner does not matter)
- To view a Fire policy the customer must be listed on the Dec page.
- If a customer is able to view one policy type and not the other check to see that the Names are the same (example if the name is Richard on the Auto policy it MUST have Richard not Rich on the Fire policy to view the policy.) The DOB's and SS #'s are matching as well.
- Ensure the policies are in the same Household or ensure that the Household's have been related.

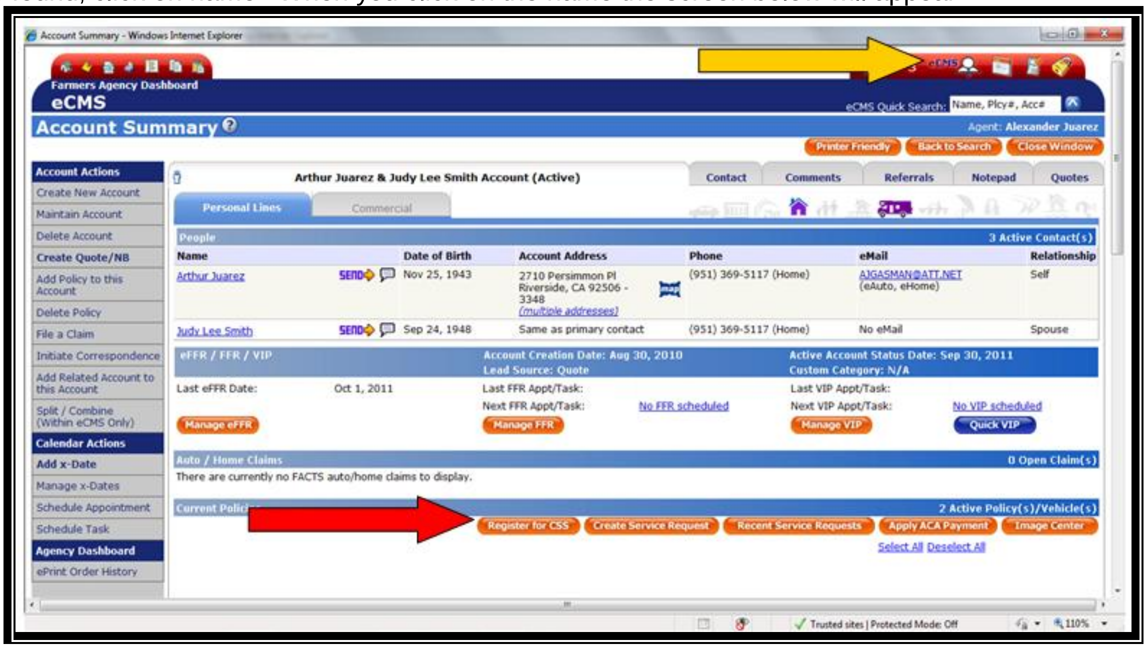
2. When accounts need to be merged or unmerged please transfer to Consumer Soutions.

Section 14 – Enrolling an insured on eCMS (Agent Walkthrough)

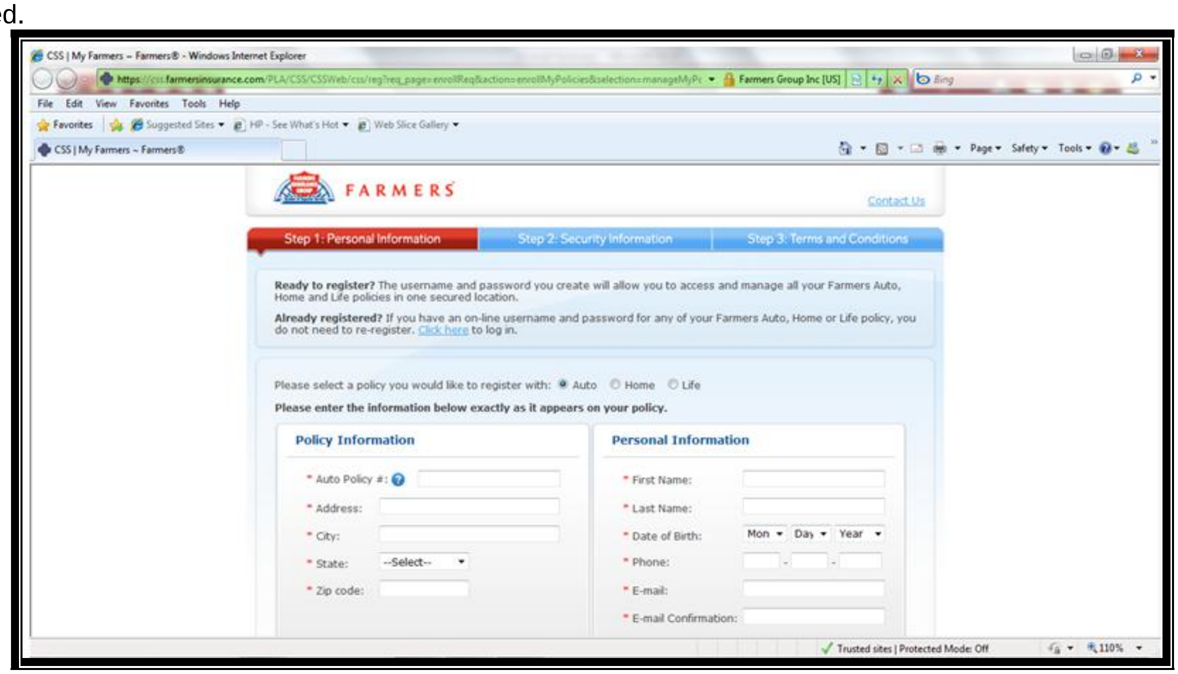
Farmers Agents have the ability to register customer themselves. We should educate the agent on this tool they have. Having the Agent process the registration themselves will removes another chance for information such as user names or emails to be entered incorrectly.

Agent Walkthrough Steps:

Click on book of business icon shown below next to the yellow arrow and enter the insured's name. Once the name is found, click on name. When you click on the name the screen below will appear.



Once you have the insured's account summary pulled up click on the orange register for CSS button next to the red arrow. You will then be taken to the next screen where you can start the registration process for your insured.



Section 15 – Unlocking an EasyPay Account ------- (Supervisors ONLY)

1. To unlock an EasyPay account:
2. From SP Info, System APPS, log into Biller Console-EasyPay
3. Click on Manage Customers then Customer Search
4. Enter the account number using all caps (This is case sensitive). Enter
5. Click on the insured's name hyperlink
6. Click on the Account tab
7. Click on **UNLOCK**
8. The Account Configuration screen will appear.
9. To unlock the account, select No in the ACCOUNT LOCKED field and click Update