AGENCY ZOOM TRAINING · SERVICE CENTER COMPLETE GUIDE

Service Center Operations Guide

New Hire Onboarding + CSR Day-to-Day Reference

Combines the Service Center Training Module and CSR Training Guide v2.1

Version 1.0 · June 2026 · Owner: Agency Operations (Tyler Davis)
Pipelines, stages, categories, and the completion flow were verified against the live AgencyZoom configuration on June 12, 2026.
Internal training document · artins.net

1. What the Service Center Is

The Service Center is our Pro-level workspace for handling everything that happens after the sale — policy changes, claims, renewals, late payments, ID-card requests, and every other reason a customer contacts us. It's powerful enough to be its own product: requests arrive from phone, email, the carrier, lienholders, and the customer, and the Service Center keeps all of it organized so nothing slips through the cracks.

Like the sales side, it runs on pipelines and automation. The difference is who's in them: existing customers, not prospects. This is relationship work — the thing that keeps clients renewing and referring.

Why we ticket everything

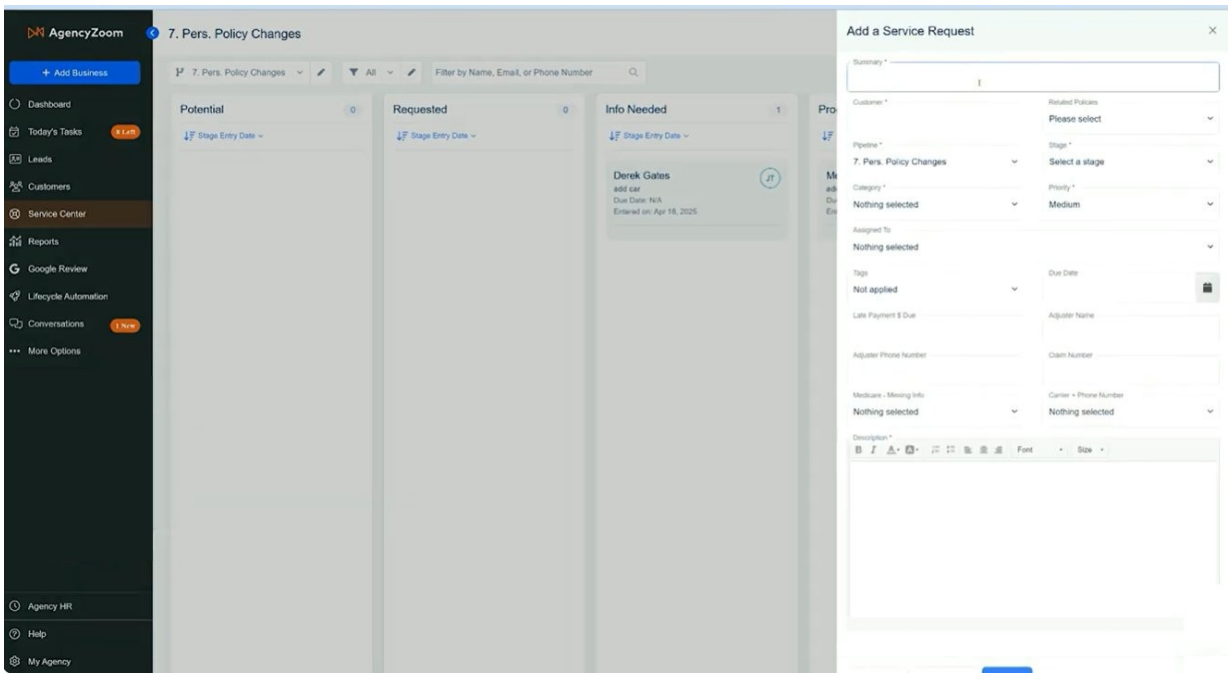
The single most important habit in this guide: create a service ticket every time you touch a customer's policy. Here's why it matters:

- **Data.** Tickets are how we see what the service team actually does all day — how much work, how long it takes, which categories are growing. No ticket means no data.
- **Tracking.** Every ticket becomes a permanent record in the customer's activities, with the full back-and-forth visible. Follow-ups, hand-offs, and status checks become instant.
- **E&O protection.** If a change is ever brought into question, the ticket is the time-stamped proof of what was requested, when, and what we did about it. Your license and the agency's depend on this record.

> **The rule**
> Don't jump straight into AMS360 or the carrier portal to process a change. Create the ticket first, then process. Work done without a ticket never gets recorded — it is invisible to reports, automation, and E&O defense. Ticket first, every time.

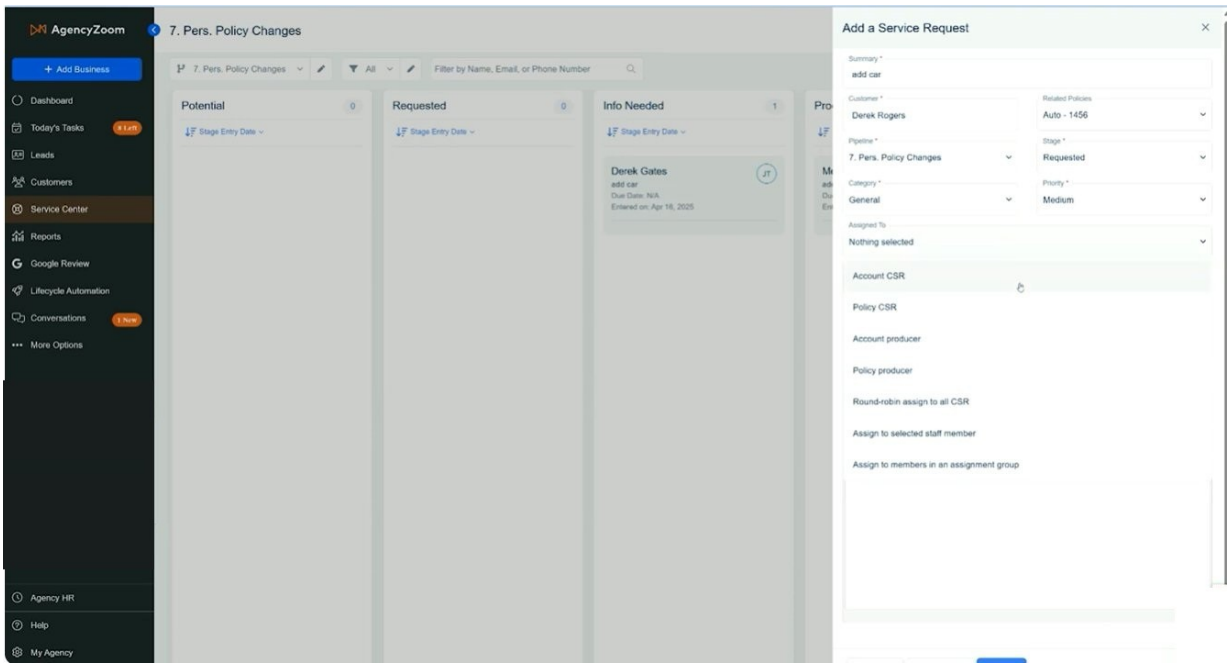
2. Creating a Ticket — The Universal Loop

Almost every service request you handle starts as a ticket you create by hand. The loop below is the same regardless of category — find the right category in Section 5, follow its specific steps, and run this loop around them.



The Add a Service Request form — customer, related policy, pipeline, stage, category, priority.

1. **Create the ticket —** Click + Add > Add a Service Request. Search and select the customer, then the related policy. Tickets only route to pipelines for customers that exist in AgencyZoom — if your customer is missing, stop and see Section 7 (Unmatched Queue).
2. **Pick the category —** The category tells the dashboard what the work was. Section 5 lists all 18 with step-by-step instructions.
3. **Pick pipeline and stage —** The pipeline determines the automation the ticket gets; the stage says where it stands right now. Use the map in Section 4.
4. **Fill the fields —** Assigned CSR (usually the account CSR), priority, due date (when it MUST be done — drives overdue tracking), tag (Service Dept), and the detailed note.
5. **Process the work —** Make the actual change in AMS360 / the carrier portal. Keep the stage honest while you work (In Progress, Need Info from Client, etc.).
6. **Complete + document —** Complete the ticket with a resolution type and description (Section 6), then confirm it shows on the customer's Services history.



Assigning the ticket — Account CSR, Policy CSR, round-robin, or an assignment group.

> **Three rules that are never optional**
>
> 1) Ticket FIRST — create the ticket before you touch AMS360 or a carrier portal; work without a ticket never gets recorded. 2) The note is the permanent record — write every note so a stranger could complete the request without calling you. 3) Never delete — tickets and customers are completed and documented, never deleted. They are our E&O protection.

3. The Service Dashboard

Switch the dashboard to its Service view and you get a live read on the whole service operation at once. This is how management sees what the team is doing without hovering — the data does the reporting for us.

Metric	What it tells us
Requests by category / policy type	What kind of work is coming in, and on which lines.
Requests over the last 12 months	Our busy vs. slow months — so we can staff accordingly.
New vs. completed	Whether we're keeping up with the inbound volume.
Requests opened by team member	Who's opening and who's completing tickets — workload balance.
Overdue requests	Anything slipping past its due date that needs attention now.
Most recent requests	A live feed of what just came in.
Survey scores	A running pulse on customer satisfaction (see Section 8).

Tip: run the Service Center report (Reports > Service Center) for date-range breakdowns by category, CSR, and pipeline. If you run it same-day, use 'All Time' — Year to Date may miss tickets created today due to UTC timestamp offsets.

4. Pipeline & Stage Map (Live Configuration)

Five service pipelines are configured in AgencyZoom. These are the real stage names you will see — use them exactly. All 20 open stages were verified against the live configuration on June 12, 2026.

Pipeline	Open stages (in order)	Used for
01 - General Service	New Request > In Progress > Need Info from Client > Need Info from Carrier > Completed	Endorsements, COIs, questions, all routine service
02 - Pending Cancellations	Non-Pay / U/W Issues > In Progress > Completed	Carrier notices and client cancellations
03 - Claims	Potential Claims > Active Claims > Handle w/ Care > Completed	All claims activity
04 - PL Renewals	Renewal Approaching > Form Completed > Remarket > Move to New Carrier / Keep Current Carrier > Completed	Personal lines renewals and remarkets
05 - CL Renewals	Renewal Approaching > Form Completed > Remarket > Move to New Carrier / Keep Current Carrier > Completed	Commercial and surplus renewals

Note: older training materials used stage names Potential, Requested, Info Needed, and Processed. Those names are retired. The stages above are what is live today.

5. Category Playbook — Step by Step

Categories are grouped by the pipeline they route to. Priority and due-date values are agency defaults — tighten them whenever the customer's situation demands it.

Pipeline: 01 - General Service

General

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Medium	5 business days

When to use: Any routine service request that does not fit a more specific category. If you find yourself using this often, ask whether a better category exists.

Steps:

1. Verify the caller and pull up the customer record.
2. Create the ticket: category General, pipeline 01 - General Service, stage New Request.
3. Write a note a stranger could act on: what they want, policy affected, any deadline.
4. Set priority Medium and due date (5 business days unless the customer needs it sooner).
5. Work the request; move to In Progress while you are actively on it.
6. Complete the ticket with a resolution note (see Section 7).

Done when: Request resolved, resolution documented, ticket shows on the customer's Services history.

Service: +/- Driver

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Medium	2 business days

When to use: Adding or removing a driver on an auto policy.

Steps:

1. Verify the caller has authority on the policy.
2. Collect: driver full name, DOB, license number and state, marital status, date they need coverage.
3. For removals: confirm where the driver is now insured (E&O protection) and note it.
4. Create the ticket (category Service: +/- Driver, stage New Request) with all details in the note.
5. Process the change in AMS360 / the carrier portal; note the premium impact.
6. If waiting on the client for license info, move to Need Info from Client and chase by the due date.
7. Complete and document the new premium.

Done when: Driver added/removed at the carrier, premium change communicated and documented.

Service: +/- Insured

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Medium	2 business days

When to use: Adding or removing a named insured (spouse, co-owner, business entity) on a policy.

Steps:

1. Verify authority. Removals of a named insured often require the removed party's signature — check carrier rules.
2. Collect full legal name, DOB, and relationship/ownership interest.
3. Create the ticket (category Service: +/- Insured) and document why the change is requested.
4. Process with the carrier; obtain signed forms where required and attach them.
5. Complete with premium impact and confirmation to all named insureds.

Done when: Named insured change processed with required signatures on file.

Service: Carrier Request

Pipeline	Starting stage	Default priority	Due
01 - General Service	Need Info from Carrier	Low	7 business days

When to use: A carrier asks the agency or the insured for information, documents, or action (audit support, signed forms, updated info).

Steps:

1. Create the ticket as soon as the carrier request lands — category Service: Carrier Request.
2. Record exactly what the carrier wants, the deadline, and the consequence of missing it.
3. If the insured must supply something, contact them and move the ticket to Need Info from Client.
4. If you are waiting on the carrier, keep it in Need Info from Carrier.
5. Send the carrier what they need before their deadline; attach proof to the ticket.
6. Complete and document what was sent and when.

Done when: Carrier confirmed receipt; deadline met; proof attached.

Service: COI

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	High	Same day

When to use: A client or third party needs a certificate of insurance. COIs usually block a job, closing, or contract — treat as same-day.

Steps:

1. Confirm: certificate holder name and address, coverage/limits to show, any special wording or additional-insured status.
2. Never promise wording the policy does not support — if the request needs an endorsement, open a Coverage Change ticket first.
3. Create the ticket (category Service: COI, priority High, due today).

4. Issue the COI from the management system; verify limits against the live policy.
5. Send to the holder and the client; attach a copy to the ticket.
6. Complete the ticket same day.

Done when: COI delivered, copy on the ticket, no wording beyond actual coverage.

Service: Coverage Change

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Medium	3 business days

When to use: Changing limits, deductibles, adding/removing coverage, vehicles, equipment, or locations — any endorsement to an in-force policy.

Steps:

1. Verify authority and capture exactly what should change and the effective date.
2. Distinguish exploring vs. committed: if they are only asking 'what would it cost,' quote it first and note that no change is bound yet.
3. Create the ticket (category Service: Coverage Change) with full details: VINs, lienholders, values, requested limits.
4. Process the endorsement in AMS360 / carrier portal; move to In Progress.
5. If premium increases, communicate it BEFORE binding; document the customer's OK on the ticket.
6. Complete with the premium impact recorded.

Done when: Endorsement bound, premium impact disclosed and documented, records match the carrier.

Service: Inspection

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Low	10 business days

When to use: A carrier orders a property/vehicle inspection, or follow-up items from an inspection report need resolution.

Steps:

1. Create the ticket when the inspection is ordered or the report arrives.
2. Note the deadline and what the carrier requires (photos, repairs, access).
3. Coordinate with the insured; move to Need Info from Client while you wait on them.
4. Track carrier follow-up in Need Info from Carrier.
5. Escalate to your manager if non-compliance could trigger cancellation — that becomes a Pending Cancellation ticket.
6. Complete when the carrier closes the inspection item.

Done when: Inspection requirements satisfied and the carrier has confirmed the item is closed.

Service: Question

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Low	5 business days

When to use: Billing questions, coverage questions, document requests — anything answerable without changing the policy.

Steps:

1. Create the ticket even for 'quick questions' — the ticket is the record.
2. Answer from the policy, not from memory; link the policy number on the ticket.
3. If the answer reveals a need (gap in coverage, life change), open a lead for the cross-sell — do not bury it in the note.
4. Complete with the answer you gave recorded verbatim.

Done when: Question answered, answer documented, any sales opening routed to a lead.

UNASSIGNED

Pipeline	Starting stage	Default priority	Due
01 - General Service	New Request	Low	Recategorize same day

When to use: Intake bucket only — used when a ticket arrives without a clear category (e.g., from automation). Not a place to work tickets.

Steps:

1. Open the ticket and read the request.
2. Recategorize it to the correct category immediately — categories drive the dashboards.
3. Re-route to the correct pipeline if needed and continue under that category's steps.

Done when: Nothing stays in UNASSIGNED past the day it arrives.

Pipeline: 02 - Pending Cancellations

Service: Pending Cancellation

Pipeline	Starting stage	Default priority	Due
02 - Pending Cancellations	Non-Pay (or U/W Issues)	High	Next business day

When to use: A carrier issues a pending-cancellation notice — usually non-payment, sometimes underwriting issues.

Steps:

1. Create the ticket the day the notice arrives. Stage Non-Pay for billing, U/W Issues for underwriting causes.
2. Record the cancellation effective date prominently — everything is driven by that date.
3. Contact the insured same day by phone AND a written channel; document every attempt.
4. For non-pay: help them make the payment or set up a plan; confirm reinstatement terms with the carrier.
5. For U/W issues: identify exactly what the carrier needs and chase it (see Inspection / Carrier Request patterns).
6. Move to In Progress while actively working it; never let it sit past due.
7. Complete only when the policy is secured (paid/reinstated/resolved) or the outcome is final — document either way.

Done when: Policy saved (or outcome final), every contact attempt time-stamped on the ticket. This is the agency's E&O record.

Service: Client Cancelling

Pipeline	Starting stage	Default priority	Due
02 - Pending Cancellations	In Progress	High	Next business day

When to use: The client tells us they want to cancel a policy.

Steps:

1. Create the ticket immediately — category Service: Client Cancelling, stage In Progress.
2. Ask why, listen, and run the retention conversation per your manager's guidance (re-quote, adjust coverage, fix a service issue).
3. If they could be saved by remarketing, open a Service: Remarket ticket and tell them what you are doing.
4. If they still want to cancel: confirm the effective date, replacement coverage in place (E&O — document it), and obtain the signed cancellation request (LPR) where required.
5. Process with the carrier; confirm any return premium.
6. Complete with the reason for leaving recorded — that data drives retention work.

Done when: Either the client is retained, or the cancellation is processed cleanly with signatures and replacement coverage documented.

Pipeline: 03 - Claims

Claim Services

Pipeline	Starting stage	Default priority	Due
03 - Claims	Potential Claims	High	2-3 business days

When to use: General claim support: status checks, questions about the claims process, help after a claim is open, or an incident the client is deciding whether to claim.

Steps:

1. Create the ticket (category Claim Services). If the client is only considering a claim, use stage Potential Claims.
2. Capture facts only — date, what happened, parties involved. Never editorialize fault on the record.
3. If they ask 'should I file?': explain the process and their deductible; do not promise coverage outcomes.
4. If a claim is open, get status from the carrier/adjuster and relay it the same day where possible.
5. Move to Active Claims once a claim number exists.
6. Complete when the question is answered or the support task is finished; the claim itself may stay open elsewhere.

Done when: Client has accurate, documented information; no coverage promises made.

Claims: Filed Directly

Pipeline	Starting stage	Default priority	Due
03 - Claims	Active Claims	High	2-3 business days

When to use: The insured filed a claim directly with the carrier and we learned about it (carrier download, client mention).

Steps:

1. Create the ticket as soon as the agency learns of the claim — we track every claim even when we did not file it.
2. Record claim number, date of loss, carrier, adjuster contact if known.
3. Call the insured: confirm they have what they need and that the process is moving.
4. Stage Active Claims; use Handle w/ Care for sensitive situations (injury, dispute, upset client).
5. Check in at reasonable intervals until the claim resolves; log each touch.
6. Complete when the claim closes; record the outcome.

Done when: Agency has a complete record of the claim and the client felt supported throughout.

Claims: Filed w/Agency

Pipeline	Starting stage	Default priority	Due
03 - Claims	Active Claims	High	Same / next day

When to use: First notice of loss comes through the agency — we file with the carrier on the insured's behalf.

Steps:

1. Create the ticket BEFORE filing — category Claims: Filed w/Agency.
2. Take the FNOL: date/time/location of loss, description, parties and injuries, photos, police/fire report numbers.
3. Facts only in the note. Do not speculate about coverage or fault.
4. File with the carrier same day; record the claim number and adjuster on the ticket.
5. Tell the insured what happens next and give them the claim number and adjuster contact.
6. Stage Active Claims (Handle w/ Care if sensitive); follow up until resolution.
7. Complete when the claim closes, with the outcome documented.

Done when: FNOL filed same day, claim number on the ticket, insured knows next steps. Time-stamped E&O record complete.

Pipeline: 04 - PL Renewals

Renewals: Personal

Pipeline	Starting stage	Default priority	Due
04 - PL Renewals	Renewal Approaching	Medium	14 days before renewal

When to use: A personal-lines policy is approaching renewal and needs review.

Steps:

1. Tickets are created as renewals approach (automation or manual) — stage Renewal Approaching.
2. Review the renewal: premium change vs. expiring, coverage changes, carrier notes.
3. Contact the insured for the renewal review; update household/vehicle/property info. Move to Form Completed when the review form is done.
4. If the renewal is competitive: recommend staying — stage Keep Current Carrier — and confirm payment is set.
5. If premium jumped or fit is poor: move to Remarket and shop it (see Service: Remarket steps).
6. If moving: stage Move to New Carrier; bind the new policy BEFORE the old one lapses, then cancel the old one.
7. Complete with the outcome (renewed / remarketed / moved) and any cross-sell leads opened.

Done when: No lapse in coverage, decision documented, renewal outcome recorded before the renewal date.

Service: Remarket

Pipeline	Starting stage	Default priority	Due
04 - PL Renewals	Remarket	Medium	7 business days

When to use: Shopping an existing personal-lines policy to other carriers — usually after a premium increase or client request.

Steps:

1. Create the ticket (category Service: Remarket, stage Remarket) noting why we are shopping (price, claims, carrier appetite).
2. Confirm current coverage details so quotes are apples-to-apples.
3. Quote with appointed carriers (Carrier Setup list); record each quote on the ticket.
4. Present options: compare premium AND coverage differences honestly.
5. If moving: stage Move to New Carrier — bind new, then cancel old, never the reverse. If staying: Keep Current Carrier.
6. Complete with the final decision and figures documented.

Done when: Client made an informed decision; if moved, zero coverage gap between policies.

Pipeline: 05 - CL Renewals

Renewals: Commercial

Pipeline	Starting stage	Default priority	Due
05 - CL Renewals	Renewal Approaching	Medium	Start 60-90 days out; ticket due 14 days

When to use: A commercial-lines policy is approaching renewal. CL renewals need more lead time than personal lines.

Steps:

1. Stage Renewal Approaching as soon as the renewal cycle starts.

2. Request updated exposures from the insured: payroll, revenue, vehicles, locations, operations changes. Move to Form Completed when received.
3. Review the carrier's renewal offer against the updated exposures.
4. If terms worsened: move to Remarket and market to other appointed carriers.
5. Present the recommendation; document the insured's decision (Keep Current Carrier or Move to New Carrier).
6. Bind before the renewal date; issue updated COIs to certificate holders.
7. Complete with outcome, premium, and any coverage changes recorded.

Done when: Bound before renewal, exposures current, certificate holders updated.

Renewals: Surplus

Pipeline	Starting stage	Default priority	Due
05 - CL Renewals	Renewal Approaching	Medium	Start 60-90 days out

When to use: Renewal of a surplus-lines (E&S) policy — non-admitted carriers, extra compliance steps.

Steps:

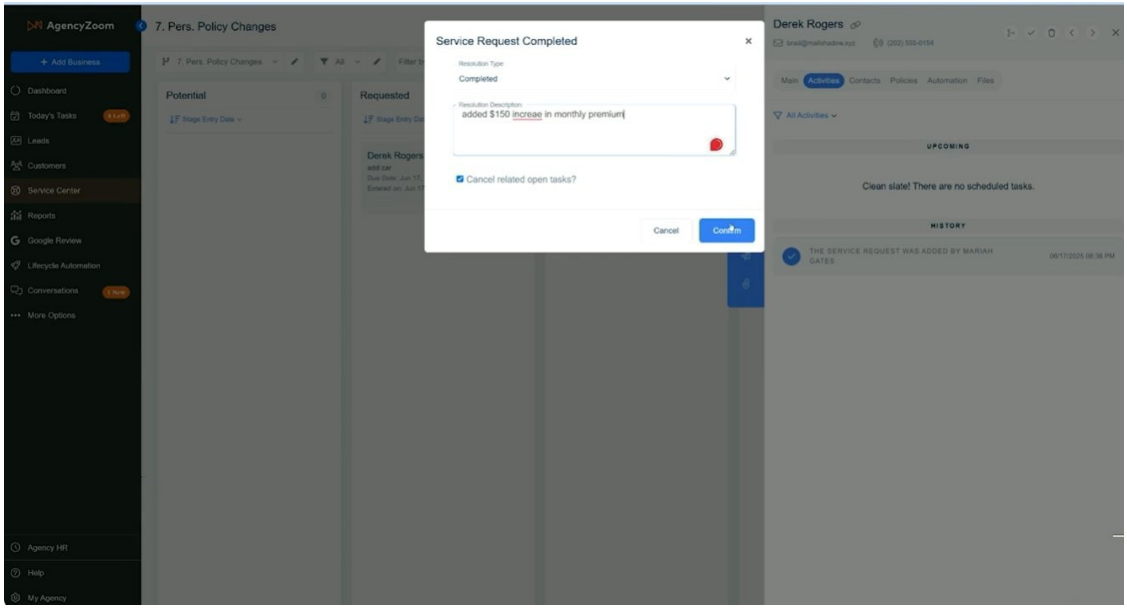
1. Stage Renewal Approaching early — surplus renewals involve wholesalers and take longer.
2. Surplus compliance is mandatory: complete the diligent search and the surplus-lines disclosure forms (Operations > Compliance Forms & Disclosures) every term.
3. Submit updated applications to the wholesaler/broker; track quotes on the ticket (stage Remarket while shopping).
4. Confirm surplus-lines taxes and fees are shown correctly on the quote.
5. Present terms; bind through the wholesaler before expiration.
6. Attach signed disclosure forms to the ticket and the policy record.
7. Complete with outcome and compliance documents attached.

Done when: Bound on time with diligent-search and disclosure forms signed and filed — this is a compliance requirement, not a nicety.

6. Completing a Ticket (Verified Flow)

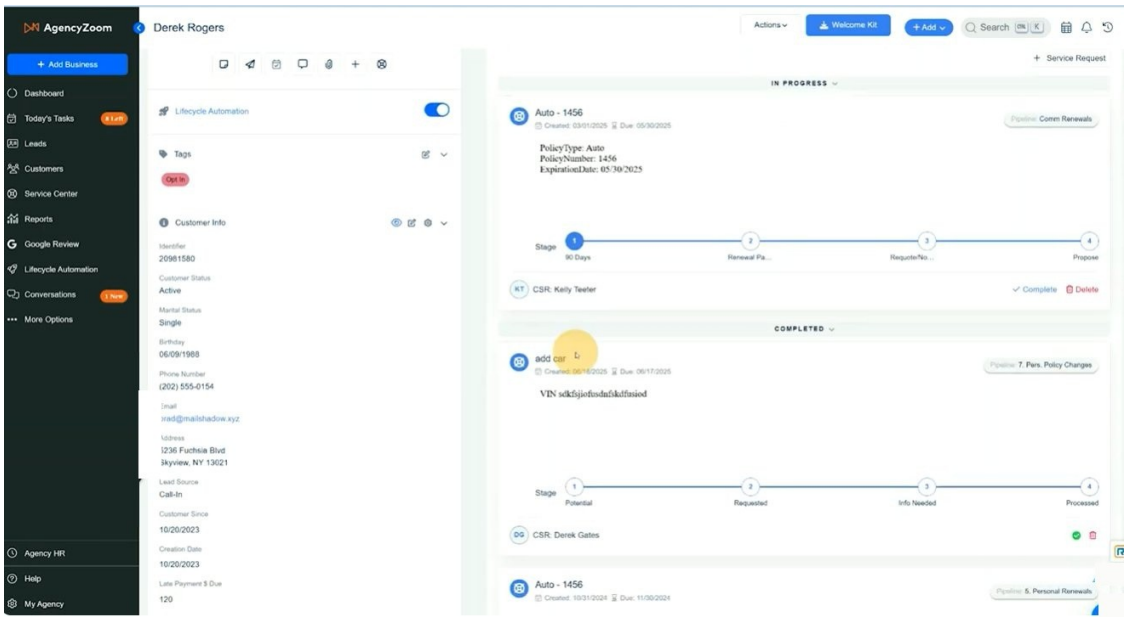
When the work is done, complete the ticket from its detail panel (the checkmark icon) or the list view. The Service Request Completed dialog asks for two things and one decision:

1. Resolution Type — pick the one that matches: Cancelled, Completed, Claims & Service: Cancelled, Claims & Service: Completed, Renewal: Accepted, or Renewal: Declined.
2. Resolution Description — what was actually done, including any premium impact. This saves permanently to the ticket's Resolution tab with the completion date.
3. Cancel related open tasks? — leave checked unless an open task still matters after this ticket closes.



The Service Request Completed dialog — resolution type, description, and related-task cleanup.

After confirming, the activity history logs 'Moved to Completed' with a timestamp and your name, and the ticket appears under the customer's Services history. Completed tickets can be reopened from the Resolution tab if needed.



The completed ticket on the customer record under Services — permanent and reopenable.

> **Surveys — check before relying on them**
>
> The internal service survey is driven by Lifecycle Automation, not by the completion dialog. As of June 2026 no survey automation is configured, so completing a ticket does NOT automatically send a survey. Ask Operations before telling a customer to expect one.

7. The Unmatched Queue (Check It Daily)

Tickets created through integrations (Zapier, email) only reach a pipeline if AgencyZoom can match them to an existing customer by name/email. Anything it cannot match waits in Service Center > Unmatched Incoming Requests — shown as the red counter in the top bar.

Unmatched tickets do NOT appear on pipeline boards, in reports, or in API searches until linked. This means they are invisible to everyone — check the queue every morning.

1. Open the unmatched list and check both tabs (Emails and Zapier).
2. Click a request, review the suggested match, and click Link if correct.
3. If no customer exists yet, create the customer first (+ Add > Add Business), then link.
4. Never leave the queue unworked overnight — unmatched tickets are invisible to every report and automation.

8. Internal Surveys & Feedback

When survey automation is configured, completing a ticket triggers a short survey to the customer about that specific service experience. The scores feed into the dashboard metric in Section 3.

Internal vs. external — know the difference

These service surveys are INTERNAL only. They are not Google or Yelp reviews — they are tied to the specific ticket and visible only inside AgencyZoom. They are a management tool, not a public-facing rating system.

Why we use it: a string of low internal scores is an early warning that a customer is unhappy or that a particular service type has a quality problem. That's information we can act on before the customer leaves.

> **Reminder as of June 2026**
>
> Survey automation is not yet configured. Completing a ticket does not currently send a survey. When it is turned on, Operations will communicate the process. Until then, do not promise customers that they will receive a survey.

9. Quality Checklist

Before closing out a ticket, run through this list:

- Ticket is tied to the correct customer AND policy
- Category, pipeline, and stage are correct (use Sections 4 and 5)
- Assigned CSR, priority, due date, tag (Service Dept), and note all filled
- The change was actually processed in AMS360 / with the carrier
- Completed with resolution type and description documented (Section 6)
- Ticket appears on the customer's Services history

10. Common Mistakes

1. **Processing first, ticketing later.** It never gets ticketed. Ticket first, every time.
2. **Working from the wrong pipeline.** Cancellations and claims do NOT belong in General Service — they have their own pipelines and automation.
3. **Letting UNASSIGNED tickets sit.** Recategorize same day; categories drive every dashboard.
4. **Promising COI wording the policy does not support.** If they need coverage added, open a Coverage Change ticket first.
5. **Burying a sales opening in a service note.** If the customer could buy something, open a lead (see the Sales SOP).
6. **Completing without a resolution description.** An empty resolution is the same as no record — write what was done and the premium impact.
7. **Deleting to clean up.** Never. Complete and document instead.

11. Quick Reference

When a request comes in

- Create a ticket FIRST — before processing anything.

- Find the category in Section 5, pick the right pipeline and stage (Section 4).
- Fill every field: CSR, priority, due date, tag, note.
- Process the change in AMS360 / with the carrier.
- Complete the ticket with a resolution type and description, and confirm it shows in Services history.

Field cheat sheet

Field	What goes here
Customer + policy	Who it's for and which policy it affects.
Pipeline	01-General Service · 02-Pending Cancellations · 03-Claims · 04-PL Renewals · 05-CL Renewals
Stage	See Section 4 — varies by pipeline. General Service: New Request → In Progress → Need Info from Client / Carrier → Completed.
Category	The request type — powers dashboard breakdowns. All 18 categories are in Section 5.
Responsible	Usually the account CSR. Tyler Davis and Justin Miller are the two service CSRs.
Due date	When it must be done — drives overdue tracking and automation.
Note	Details the processor needs; becomes part of the permanent record.
Resolution type	Cancelled · Completed · Claims & Service: Cancelled · Claims & Service: Completed · Renewal: Accepted · Renewal: Declined

Remember

- Ticket every customer touch. No ticket means no data, no tracking, and no E&O record.
- Process in AMS360, but document in AgencyZoom. The ticket is the record of what was requested and done.
- Never delete a customer or a ticket's history. Complete and document instead.
- Questions go to your manager first; Operations (Tyler) for pipeline or automation issues.