

Making Changes to Accounts vs. Policies

Customer information in AMSuite Policy is stored in an account file, as well as each policy file.

This document explains how and when fields sync across policies in AMSuite Policy.

Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMSuite will make it easier for you to do what you do best—serve customers.

Making Changes to Accounts versus Policies

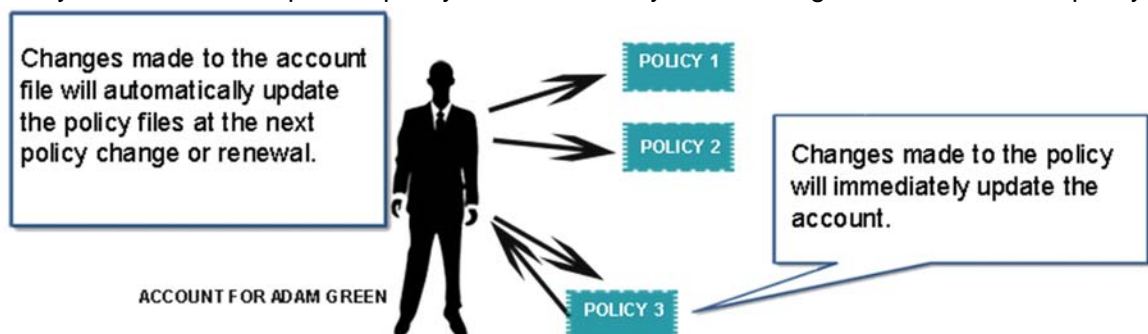
1

When correcting customer information, always begin by making the change to the customer information in the policy file. If you make the change directly to the policy, it will immediately sync to the account file.

However, some information does not sync to the account file. You will need to update some information on the account file as well, such as a phone number or producer code, in addition to the policy file.

2

Policyholders receive updated policy documents only when changes are made to the policy.



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3

The information in these fields are synced from the policy to the account file.

Entity	Field
PolicyContactRole	CompanyNameInternal
PolicyContactRole	CompanyNameKanjiInternal
PolicyContactRole	RelationPNI_Ext
PolicyContactRole	FirstName
PolicyContactRole	FirstNameKanji
PolicyContactRole	LastName
PolicyContactRole	MiddleName
PolicyContactRole	Suffix
PolicyContactRole	LastNameKanji
PolicyContactRole	Particle
PolicyContactRole	DateOfBirth
PolicyContactRole	MaritalStatus
PolicyDriver	LicenseNumber
PolicyDriver	LicenseState
PolicyDriver	Licensed_Ext
PolicyDriver	MotorcycleLicense_Ext
PolicyAddress	AddressLine1
PolicyAddress	AddressLine2
PolicyAddress	AddressLine3
PolicyAddress	City
PolicyAddress	AddressLine1Kanji
PolicyAddress	AddressLine2Kanji
PolicyAddress	CityKanji
PolicyAddress	County
PolicyAddress	PostalCode
PolicyAddress	State
PolicyAddress	Country
PolicyAddress	Description
PolicyAddress	AddressType
PolicyAddress	AddDeliverIndi_Ext
PolicyLocation	AddressLine1
PolicyLocation	AddressLine2
PolicyLocation	AddressLine3
PolicyLocation	City
PolicyLocation	AddressLine1Kanji
PolicyLocation	AddressLine2Kanji
PolicyLocation	CityKanji
PolicyLocation	County
PolicyLocation	PostalCode

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PolicyLocation	State
PolicyLocation	Country
PolicyLocation	Description
PolicyLocation	AddressType
PolicyLocation	ValidUntil

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.