

Using the Desktop to Manage Activities

This document provides the steps to successfully customize your desktop, and to view, assign, and complete activities:

1. Customizing Your Desktop and Viewing Activities
2. Reviewing Activities and Performing Related Actions
3. Assigning Activities from My Queues
4. Completing Activities

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.

Customizing Your Desktop and Viewing Activities

The **My Activities** page is the first page you access in AMsuite Policy. You can always return to this page by clicking the **Desktop** button in the Tab bar.

1 To sort your activities, click the drop-down arrow in the first filter menu on the My Activities page.

Click on any of the drop-down arrows and select your desired sort option.

2 For example, click the **Due Date** drop-down arrow, and hover over **Sort Ascending**; then **Columns**; then uncheck the boxes next to **Transaction #** and **Subject**.

To group activities by **Due Date**, click the **Due Date** drop-down menu, and select **Group by this Field**.

3 Click and hold the **Priority** column heading and drag it to the position in front of **Due**.

When the green arrows are aligned with the desired position, release your mouse.

Using the Desktop to Manage Activities

Activities are associated with an account, a policy, or a policy transaction.

- 1** To view all “open” activities associated with an account (not just those due today), start by searching for that account.

To search for activities associated with a specific account from the **My Activities** page, click the **Account** drop-down arrow, enter the Account #, and click the magnifying glass search icon.
- 2** The **Account Summary** page appears. Scroll to the **Current Activities** section.

Click the **Search** tab in the Tab bar. Select **Activities**. The **Search Activities** page appears. Click **Desktop** to return to the homepage.
- 3** To search for a policy from the **My Activities** page, click the **Policy** drop-down arrow, enter the policy number into the **Policy #** field, and click the magnifying glass search icon.

Scroll to the **Current Activities** section of the **Account Summary** page. From the **Summary** page, click **Policy Transactions** in the Sidebar menu.
- 4** Select a specific policy transaction by checking box or double-clicking the row. The **Policy Transactions** page appears.

Click the “View Policy Transaction” link.

Reviewing Activities/Performing Related Actions

The **Activity Escalation Date** is the particular day the activity will escalate if not closed or completed.

- 1** To review an activity, click the **Subject** link of the activity to open the activity detail workspace. This shows all the details related to this activity, such as Description, Status, and Target Date for completion.

The **Activity Escalation Date** varies by type of activity. To avoid escalation of the activity, you will need to review it and mark it as Complete. Make sure you have completed all requirements before marking an activity complete.
- 2** To mark an activity as complete, click **Complete** in the workspace window.

The **My Activities** page appears, and your completed task is no longer listed in the ‘Open’ list.

Using the Desktop to Manage Activities

Assigning Activities from My Queues

My Queues includes all activities related to you. From My Queues, you can manage your activities or assign activities to others. Only authorized users are able to assign activities to specific users or groups, but all users can make assignments to themselves.

- 1** To assign a reminder activity to yourself, click the **Actions** menu and select **Notification**. The **New Activity** window appears.
 - Enter “Reminder” in the **Subject** field, along with other relevant details.
 - Select “Normal” from the **Priority** drop-down menu.
- 2** Click the magnifying glass next to the **Assigned to** drop-down menu to search for a user, group, or queue.

Enter your name into the search fields and click **Search**.
- 3** Click **Assign**. The **New Activity** page appears with the assignment pre-selected in the **Assigned to** drop-down menu.

From the **New Activity** page, click **Update**.

Assign Activity to Another User

- 1** From the **My Activities** page, click the checkbox next to the activity you want to assign.

Click **Assign**. You will then be taken to the **Assign Activities** page, where you select how you would like to do the assignment.
- 2** From the **Assign Activities** page, you can select an option from the **Select from list** drop-down menu, or search for a user, group, or queue using the **Find a user or a group or a queue** fields.

Using one of these two methods, select the appropriate user.
- 3** Click **Assign**. Note that you will only be able to make assignments to specific people or groups for which you are authorized.

© 2015

Using the Desktop to Manage Activities

Completing Activities

1 From the **My Activities** page, click the **Subject** link of the activity to review the details. Make sure all requirements for the activity are complete.

2 To mark an activity as complete, click **Complete** in the workspace window.

When you complete an activity, it is likely you might want to add a note to the policy.

Notes are free form text entries related to a policy/transaction that are viewable and searchable within AMsuite. Notes cannot be deleted.

Non-Public Personal Information should never be stored in note fields. Notes become part of the official record and cannot be deleted. Therefore, personal or unprofessional comments should never be entered.

3 To add a note, click **Actions** from the **Summary** page, then select **New Note**.

The **New Note** tab in the **Workspace** window appears.

To attach a note to the current account file (rather than the Policy), click the **Actions** menu from either the **Policy** or account **Summary** page.

4 Select "General" in the **Topic** drop-down menu.

Add a subject in the **Subject** field and description in the **Text** field.

Click **Update**.

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