

Navigating Successfully in AMsuite Policy

This document provides the steps to guide you to successfully navigate in AMsuite policy, Including:

- Accessing AMsuite Policy
- Customizing Page Views
- Navigation Basics

Key Benefits

AMsuite is American Modern's stateof-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.

Accessing AMsuite Policy

To access AMsuite Policy, log into modernLINK.

Enter your Username and password.

Click LOGIN.

- 2 From the modernLINK homepage, there are four ways to access AMsuite Policy. While you are living in both worlds, we recommend you begin all transactions in modernLINK.
 - 1. To access AMsuite Policy directly from the modernLINK homepage, click **AMsuite Policy** in the **Tab** menu.

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Melcome Auto Tester		AMsuite >	
Home Quotes and Policies Agency Management eForms Tools Reports	•		
System Alerts			
My Action Items are available in Quotes and Policies			
Go directly to AMsuite for policies, activities, and submissions in the new AMsuite			
New Quote			

2. When searching for, or quoting policies that are located in AMsuite Policy you are automatically redirected to AMsuite Policy.

Enter the required information for the quote into modernLINK.

Click Get Quote.

3. Enter the policy number you want to search for in the Policy Quote # field.

Click Search.



Click **Select** next to the policy you wish to view.

4. Another way you will access AMsuite Policy from modernLINK is via the new link on the My Action Items page.





To access the My Action Items screen, click the **My Action Items** link on the modernLINK homepage.

Select the My Activities in AMsuite Policy link.

Customize Screen Views

1

AMsuite offers users the ability to customize screen views.

Select options from the drop-down arrows to filter views, and choose options from each column heading to sort transactions, show and hide columns, group lists, and arrange columns.

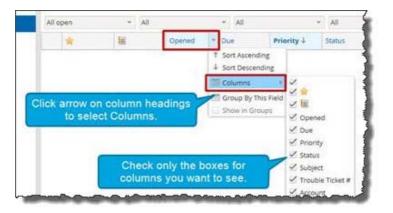
My Activities

All open	 IIA *	- ILA -	19

2

Click **Opened**, **Columns**, and then uncheck the boxes for columns you don't need.

They will disappear from the view.





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3 Click the **Due Date** drop-down menu, and select **Sort Ascending**. My Activities - All - All All open A.I Ŵ 辅 Opened DUE Priority 4 Stat Sort Ascending Select Sort Ascending from the Due list to sort by Due date. Columns Group By This Field win Gro

4

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

My Activi	ties						
All open	~ Al	1	* All		- All		
*	56	Opened	Due	Priority 4	Status	* Subject	Trout
						↑ Sort Ascend ↓ Sort Descen	- T
						IIII Columns	+
		(Select S	tatus/Group	By	Group By Th	is Field
				his Field.	S	Show in Gro	ups

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Click and drag a column heading to move it to a new position.

For example, drag **Priority** to the left of **Due** to reposition the columns. When the green arrows are aligned with the desired position, release your mouse.





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AMsuite[™]

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AMsuite Policy saves your preferences until you select the **Clear User Preferences** option in the utilities menu.

To clear your preferences and start over, click the Utility icon on the tab menu, and select **Clear User Preferences**.



Navigation Basics

As you may recall, your home page is the **My Activities** page. When you log into AMsuite Policy the **My Activities** page appears.

You can always return to this page by clicking the **Desktop** tab in the tab bar.

The My Activities page displays your activities.

Activities may be generated for you or you can create your own. The drop-down lists along the top of the page allow you to adjust the view of your activities.

2

From the **Account** tab menu, you can enter the 10-digit account number and click the magnifying glass to search for an account, or select a recent account from the drop-down list.

AMsuite" Policy	Desktop 💌	Accours - Policy -	Contact • Search	h
Actions 🖌	My Activiti	New Account Acct #: 0000000043 Sara Clark	Q	
My Activities		0000000030 bryan batton		LINK Action
My Accounts	My activities toda	0000000012 Stephanie Absh 0000000035 Sara Clark	re	
My Submissions (Quotes)		0000000036 sara clark		s

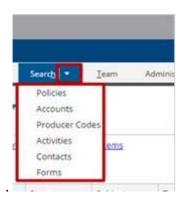




Follow the same steps to search for a 9-digit policy # from the **Policy** tab menu.

3

The Search tab menu gives you access to additional search options, including Forms.



Forms is how you will access marketing bulletins, endorsements, and so much more! **Forms** is similar to e-Forms in modernLINK.

You may also search for policies and accounts using the **Search** drop-down menu.

4

Note the accordion icon on the Tab menu. Select users with permission will use this menu to access AMsuite Analytics.







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Actions 🛛 🖌	My Activities CLICK HERE TO	
And Artholicar		

To chat with an AMsuite specialist, click Chat.

To access training resources, click the **Training** button.

To return to modernLINK, click the **modernLINK** button.

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The **Screen Area** is another universal feature of AMsuite Policy, and displays information relative to the page.

Policy File D	welling B	asic Audrey Campbell	Account # 000000	0023 Policy # 600001058	in Force (Exp. 67/20/20	916)	
Actions	R	Summary 🛜	HOW TO CHANGE & POLICY	HOW TO			
Policy Contract	*	Account Information		<u></u>	-	In a local state of the second second	0.40
Policy Info		Account Number	000000023			Set up an Online Acco	unt.
Dwelling		Account Name	Audrey Campbell			Period Effective Date	07/20/2015
Dweiling Construct	ión	Address	835 Main Street Amelia, OH 45201			Expiration Date	07/20/2015
Coverages		County .				Term Number	1.
Forms		Address Type	Home			Total Premium	\$466.00
CONTRACTOR OF		Address Description				Taxes And Fees	÷.
Date 07/21/2015		Official IDs				Total Cost	\$466.00
Tools		SSN				Producer of Record	
and the second second		Policy				Producer Code	999006
Summary		Policy Type	Dwelling Basic			Contracted Agency	Testing for Atlas in
Billing		Number	600001058			Producer	Testing for Asias to

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The **Infobar** is another universal feature of the AMsuite Policy interface. It displays the account or policy number to let you know the file type you are currently accessing.





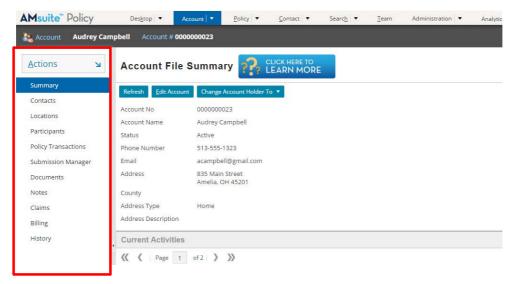
When viewing a policy, you can see the policy type, primary named insured, account, policy number, and the status of the policy.



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The **Sidebar** menu includes the **Actions** menu, and provides links that display different detailed views on the policy file and allows you to navigate from page to page.

The items in the **Sidebar** menu are contextual and change depending on the transaction.

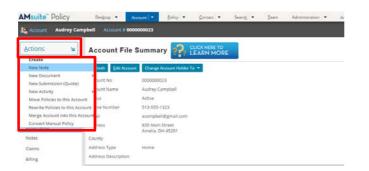


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The **Actions** menu is contextual and changes depending on which page you are viewing. Use this menu to perform account and policy-level transactions. For example, from the **Account Summary** page, you can add a **New Note** to the account.



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When you initiate certain transactions, such as creating a new note or document, your **Workspace** will appear at the bottom of your screen. Remember that required information is marked with an asterisk.

Actions w	Account File	Summary READN MORE				
Contacts Contacts Locations Participants Policy Transactions	Relinite Edit Asso Account Na Account Name Datus Phone Number	Clange Associet Maller Ver 41 200000002 Audrey Camposit Active 513-055-1223	Official IOs Sillin Producer Code Microsoft	Produce Testing for Allan rer	Contracted Agency . Tenting for edge or	
Submission Manager : Documents Techni Carms Billing Hobory	Email Address County Address Type Address Description	wiangkeitigena kann KRI Man Towe Aneria, Gre 42211 Note				
	Current Activities					
EW NOTE						
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ne Tores Jahon Carice Maine I per • main	- 10					
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You may start a submission from the **Actions** menu from the **My Activities** page.

Alternately, you can start a submission by clicking **New Submission (Quote)** in the **Policy** drop-down menu.

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