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 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.

Accessing AMsuite Policy

**1** 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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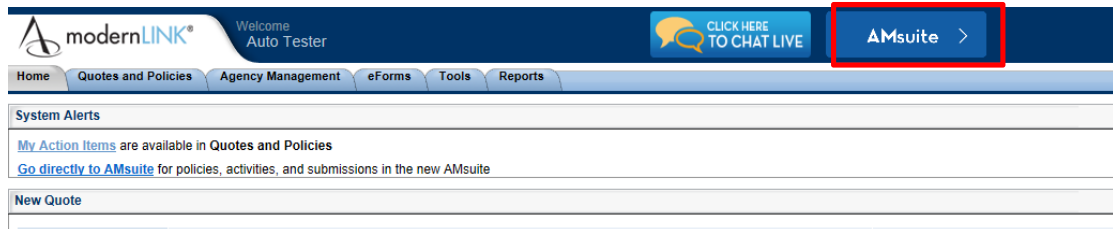
2. When searching for, or quoting policies that are located in AMsuite Policy you are automatically redirected to AMsuite Policy.

   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.

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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.

2 Click **Opened**, **Columns**, and then uncheck the boxes for columns you don't need.
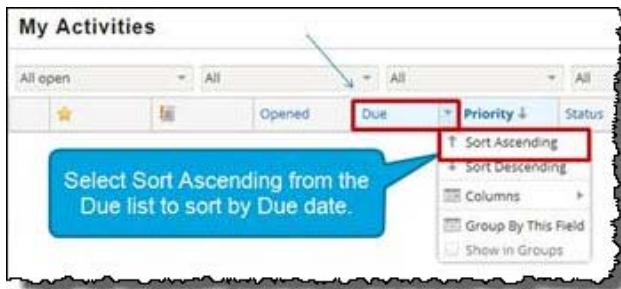
They will disappear from the view.
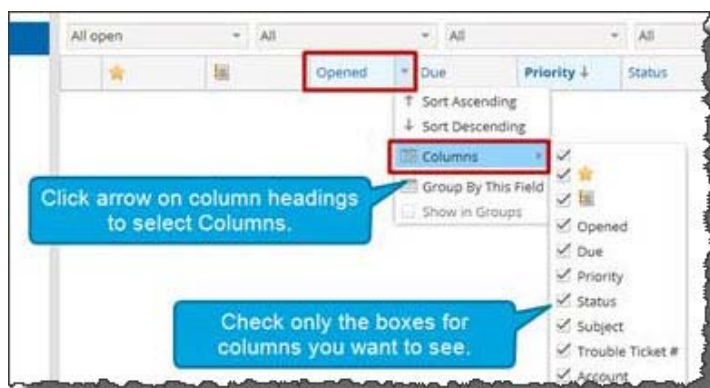
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3 Click the **Due Date** drop-down menu, and select **Sort Ascending**.
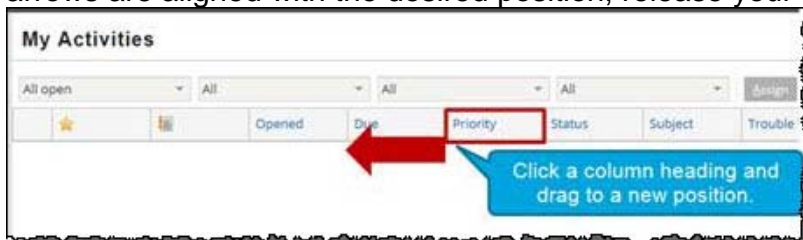

4 To group activities by status, click the **Status** drop-down menu, and select **Group by this Field.**

5 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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6   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

1   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.
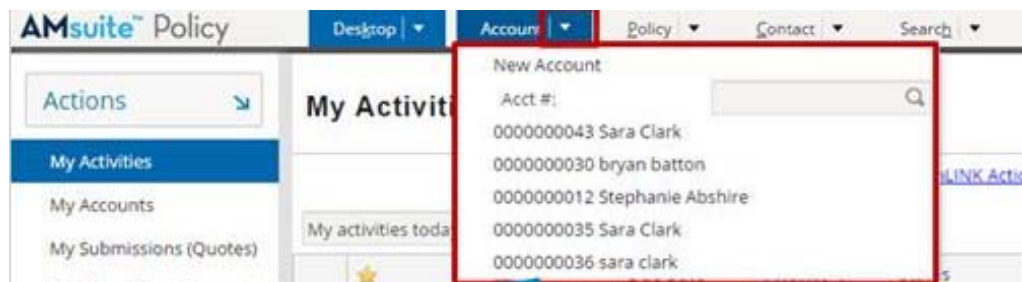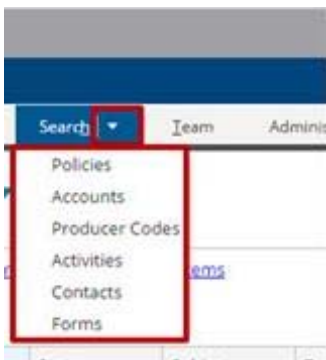
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Follow the same steps to search for a 9-digit policy # from the **Policy** tab menu.

3   The **Search** tab menu gives you access to additional search options, including Forms.
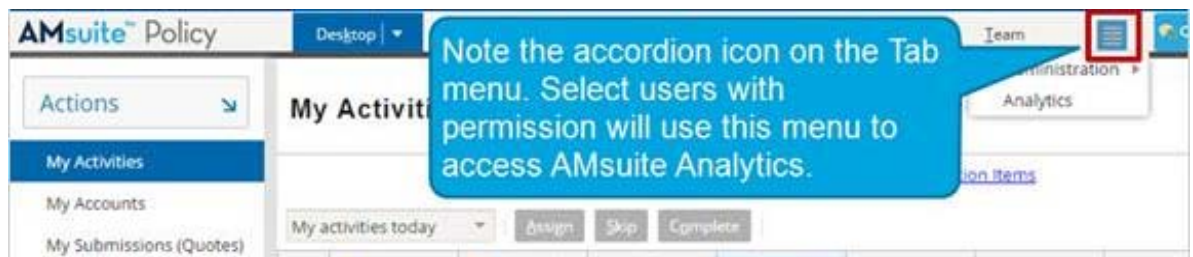
Forms is how you will access marketing bulletins, endorsements, and so much more! **Forms** is similar to e-Forms in modernLINK.

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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5 To access just-in-time training resources, click on the **Learn More Links.**

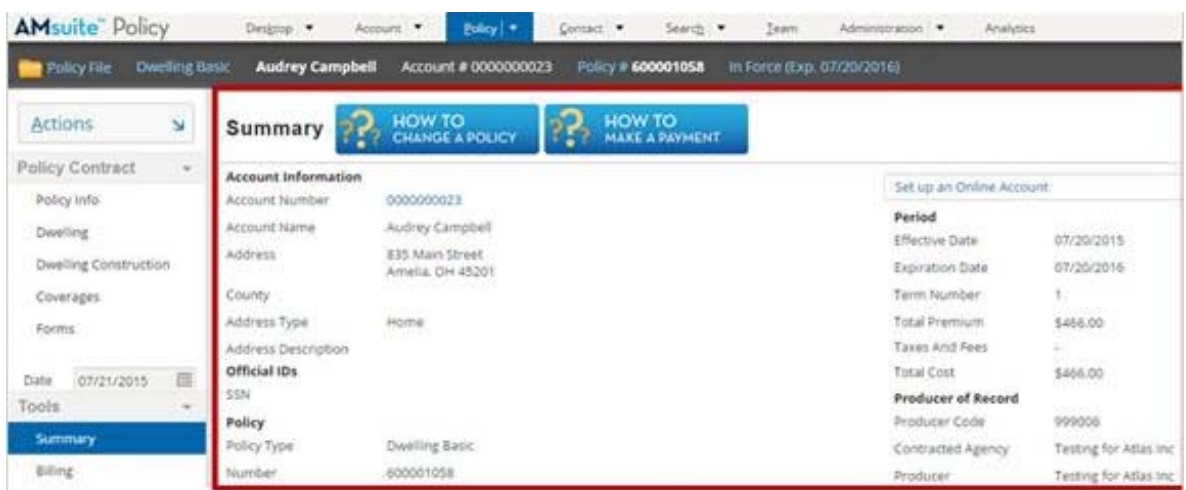**6** From the **Tab** menu, you have access to several options for help and information.

To chat with an AMsuite specialist, click **Chat.**

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

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

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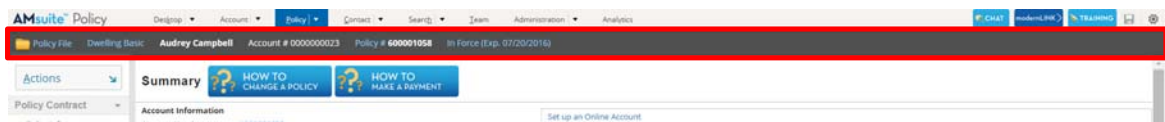

8 The **Infobar** is another universal feature of the AMsuite Policy interface. It displays the account or policy number to let you know the file type you are currently accessing.

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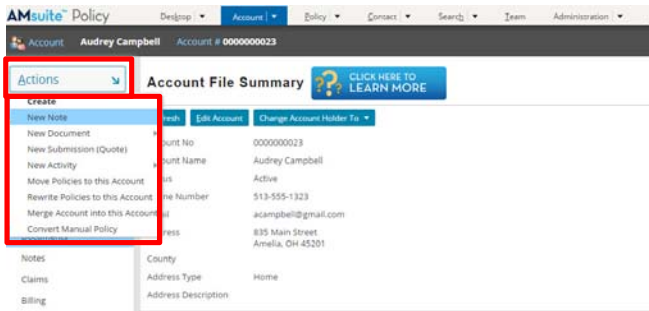
The items in the **Sidebar** menu are contextual and change depending on the transaction.
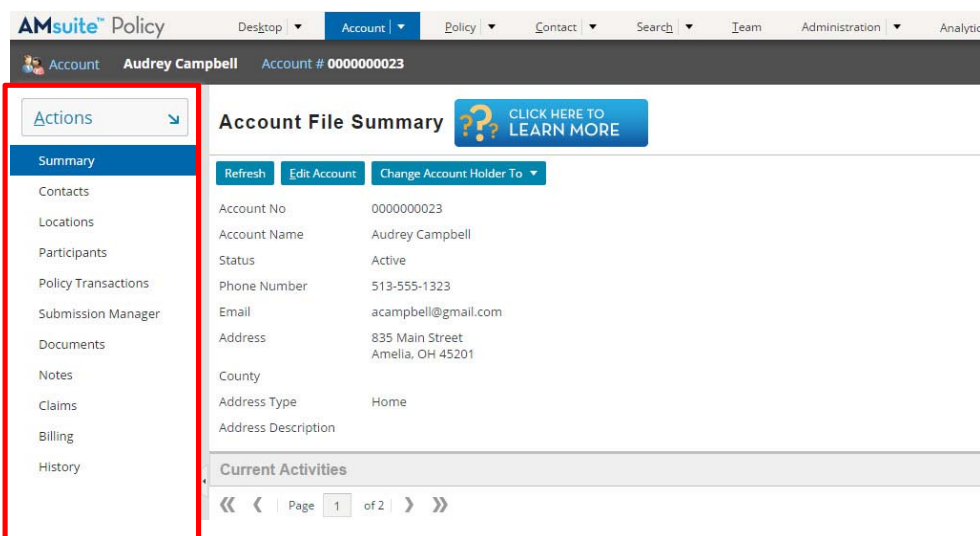

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The **Actions** menu is contextual and changes depending on which page you are viewing. Use this menu to perform account and policy-level transactions. For example, from the **Account Summary** page, you can add a **New Note** to the account.

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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.
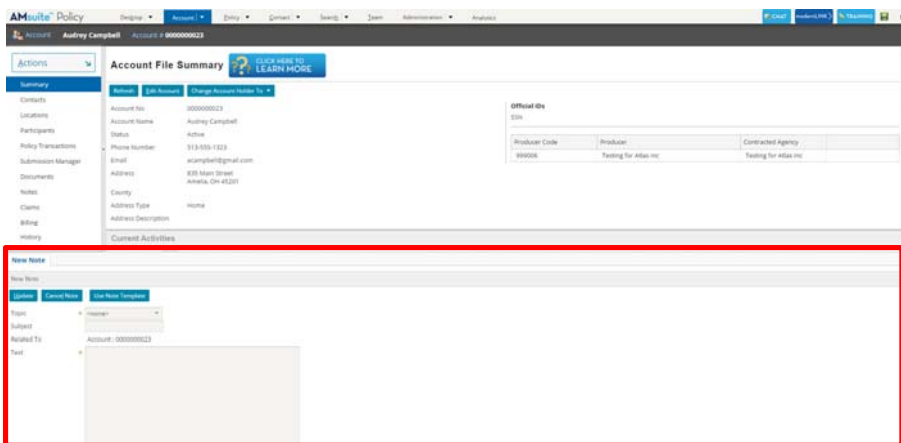
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You may start a submission from the **Actions** menu from the **My Activities** page.

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.