Finding or setting up an account

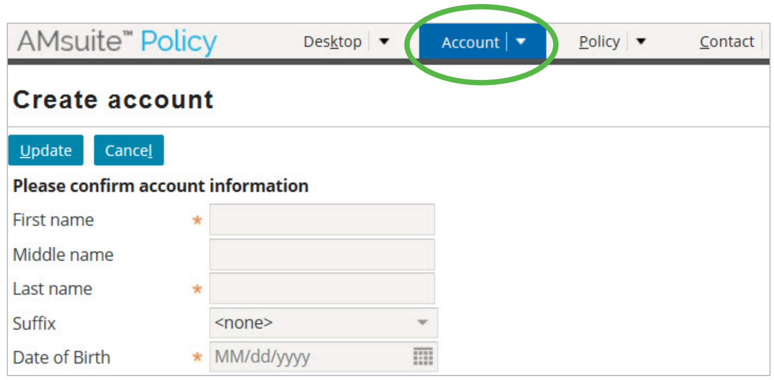
For step-by-step instructions, download a Quote & Issue job aid from within AMsuite.

There are three parts to the submission (quoting) process – finding or setting up an account (part 1), entering details about the risk to generate a rate (part 2), and binding the coverage by taking payment (part 3). The process always starts by either finding or creating an account.

Find an account already in AMsuite.

AMsuite organizes policy documents under customer accounts. To locate an account for an existing customer, click the down arrow for **Account**, then click the **search icon** to open the search window.

Enter the customer information you know, then click **Search** at the bottom left. AMsuite will also show you recently accessed customer accounts just below the search box. Once you've located the customer, be sure to check the accuracy of the records and make any corrections or additions.



Set up a new account.

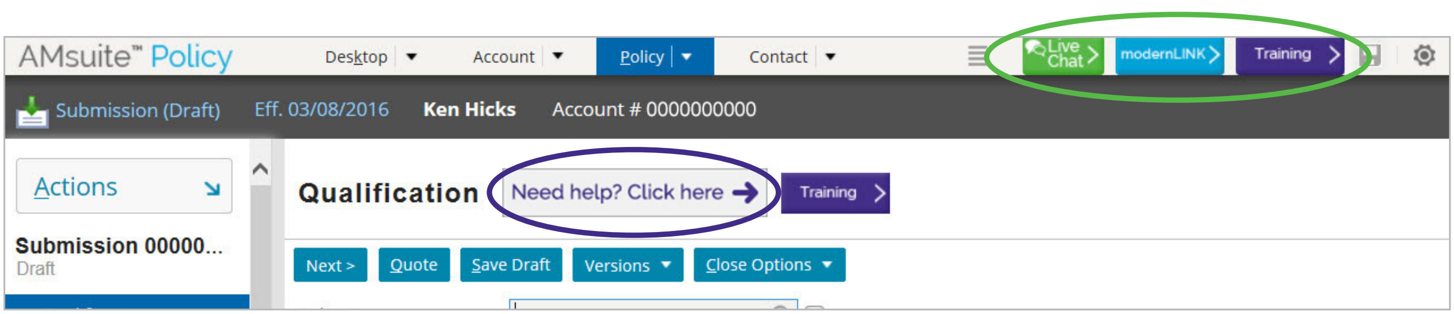
If you are quoting new business for a prospect, you need to create an account before starting the submission. Click the down arrow for **Account**, then click **New Account** from the menu. Fill in the information, then click **Search** at the bottom left. This step will check for similar information to help you avoid duplicating records for one customer. You may be asked to validate the street address.

If the information is for a new prospect, you will be asked to enter more details. Click **Update** at the top left to save the data.

Tip – Once you have found or created an account, use the navigation on the left side to view and edit all of AMsuite's details for that customer.

Need help?

Each screen of AMsuite gives you access to an agent who can help you through an online **Chat**. You can also start **training modules**. Many pages include a **Job Aid** specific to the screen you are working on.



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