

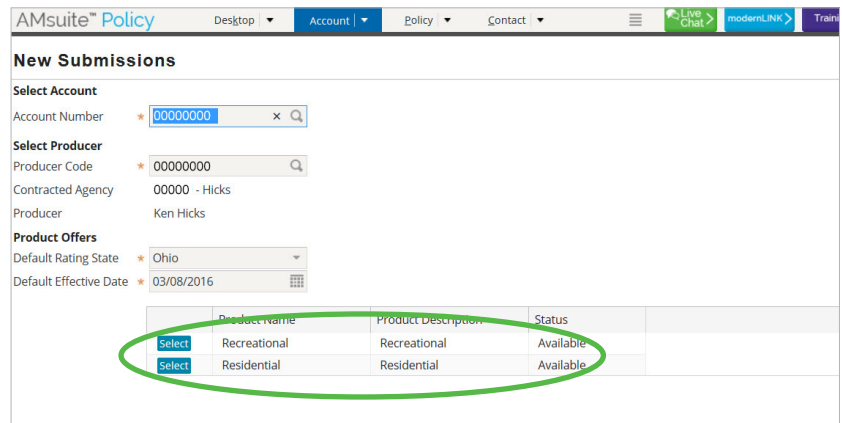
# Entering details about the risk to generate a rate

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

## Choose the product type.

After you have opened or created an account for a customer, you are ready to enter information about the risk. The **New Submissions** screen lets you choose a **Recreational or Residential** product. The rating state and effective date are selected for you. You can advance the date, but you cannot back date.

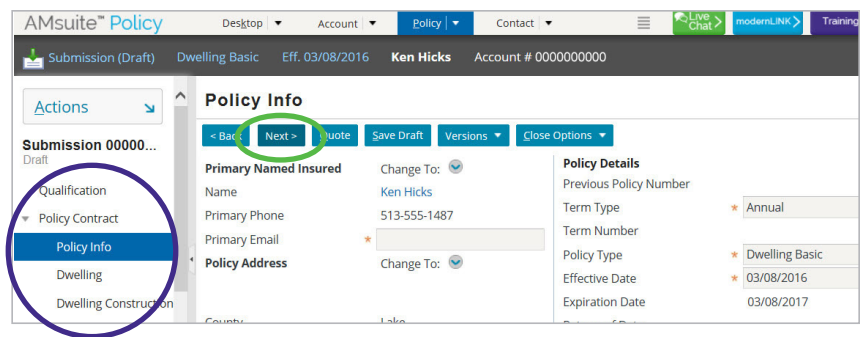
On the **Qualification** screen which follows, you will next select the specific product type (ex. Boat or Dwelling Basic). You will also be prompted to read the Insurance Score legal language and check the boxes to the right as verification when complete.



## Enter risk details and coverage selections.

Clicking **Next** at the top left will let you start entering specifics about the risk, in this example, a dwelling. To help you track where you are in the process, look at the **left side navigation**. It highlights your place and, as you progress, moves down the list.

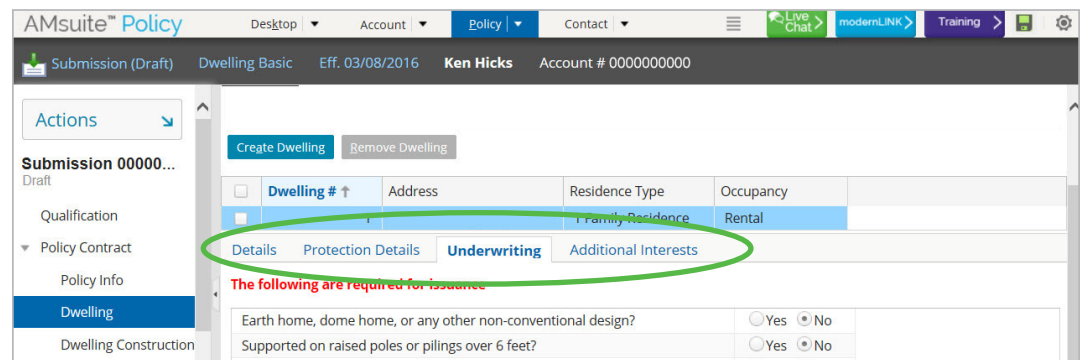
Answer all of the questions on the Policy Info screen. When you are done, click **Next** at the top left.



**Tip** – The screens have a left side and a right side. Depending on your monitor’s resolution, you may need to use the scroll bar at the bottom of the screen to show everything on the right side. Be sure to scroll all the way down as well. Just remember that the **Next** button is at the top.

## Complete these four sections

At this point you are ready to fill in details on the dwelling itself. Click on **each tab** to bring up a set of questions to answer.



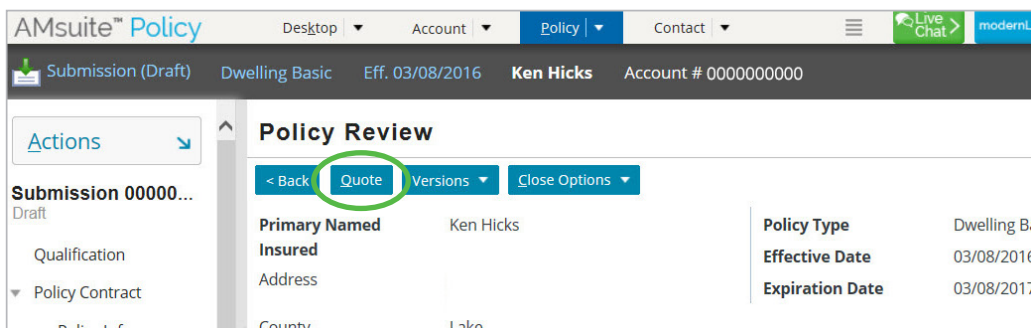
Click **Next** at the top left when you are done. AMsuite will then prompt you if any questions were not answered, or if there is an underwriting problem. If so, make any data entry corrections and again click **Next**.

You can now move on to enter details about the dwelling's construction and value. After that, complete the coverages you recommend for the customer.

**Tip** – For a Dwelling Special or Manufactured Home risk, click **Go to MSB**. The MSB page is prefilled based on common features found in the home's geographical location and county. Verify the information and click **Edit** to modify any information. Then click **Finish**. A pop-up window will appear where you will need to click **Save**. Then click **Close** to return to the **Dwelling Construction** page. Click **Retrieve from MSB**. Verify the information is correct. Fill out the remaining fields. Click **Next**.

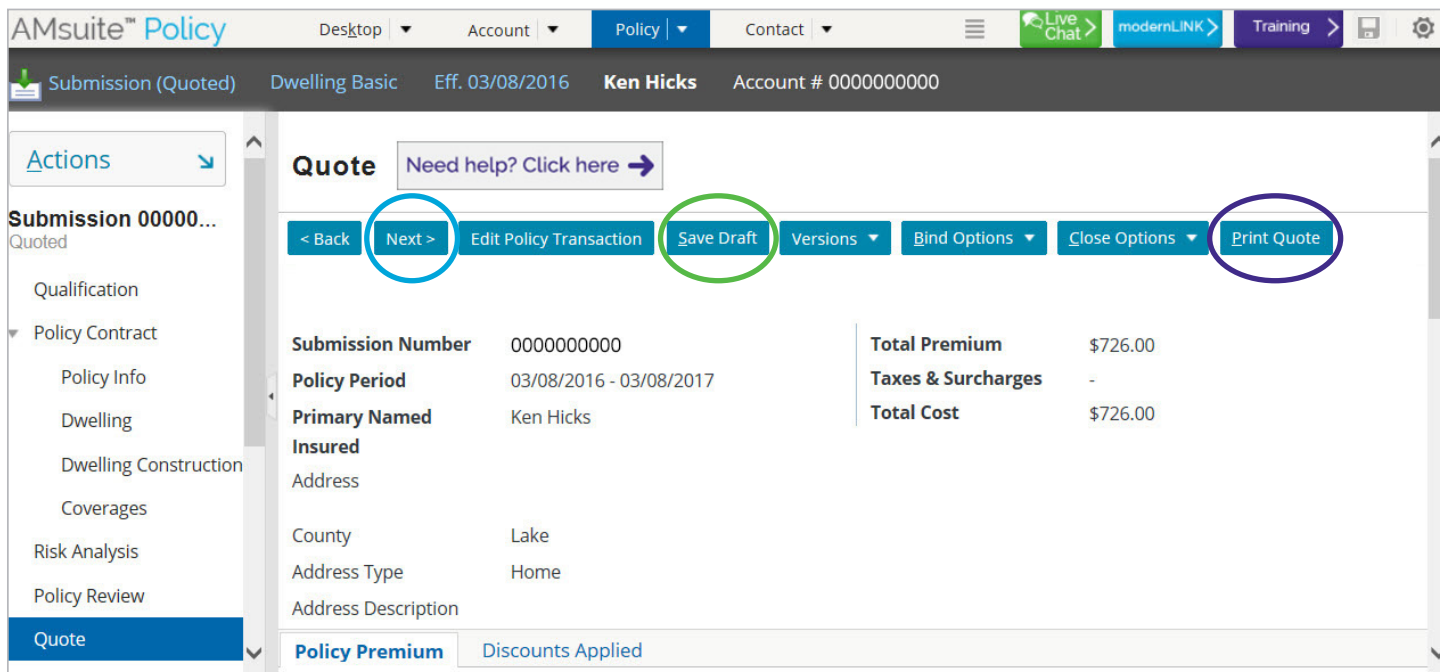
## Review the submission and get the rate.

The **Risk Analysis** and **Policy Review** screens will show any underwriting issues flagged by AMsuite, and will summarize the details and coverage you selected. If correct, click **Quote** to generate the rate.



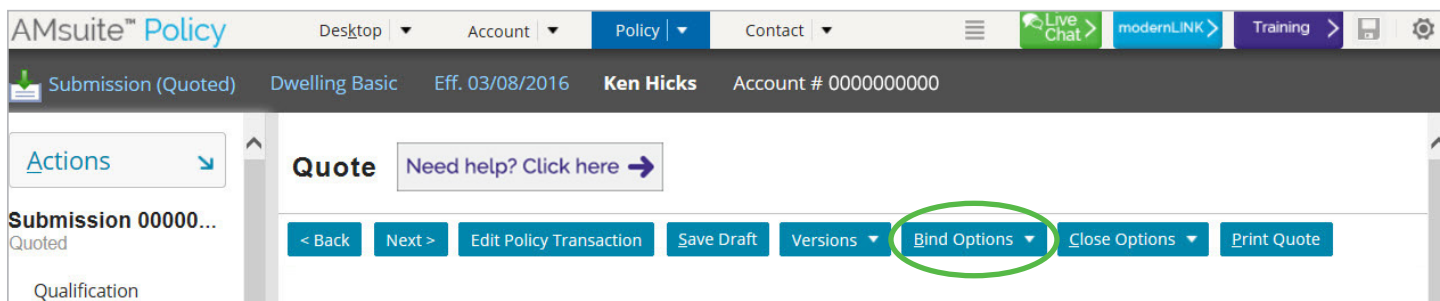
At this point you have entered all of the customer and risk information, and AMsuite has given you a rate. At mid screen you can review both the rate and the discounts. Use the scroll bar on the right to advance the view. You can take several actions.

- 1 **Save** your work. You can come back and make changes at any time.
- 2 **Print** a copy.
- 3 **Look at the forms**. The **Next** button will move you to the **Forms** screen that shows all of the documents that are included in the policy.



## Issuance checklist.

Your submission (quote) is almost done at this point, but the policy is not yet bound. Click **Bind Options** and select **Proceed to Issuance** from the menu. This launches a final validation process.



The Issuance Checklist will send you back if there is a problem to resolve, such as duplicate claims data. If not, click **Return to Payment & Signatures** at the top.

To bind the policy, see part 3 of the submission process overview.

