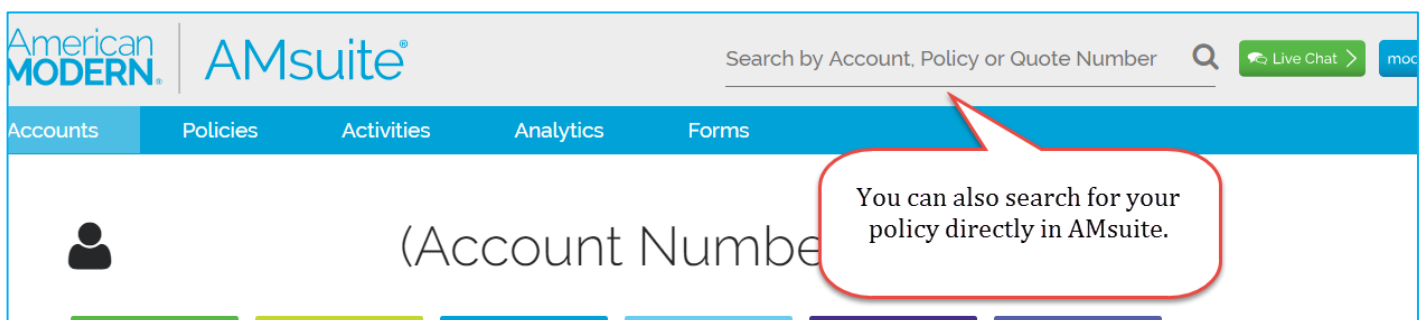
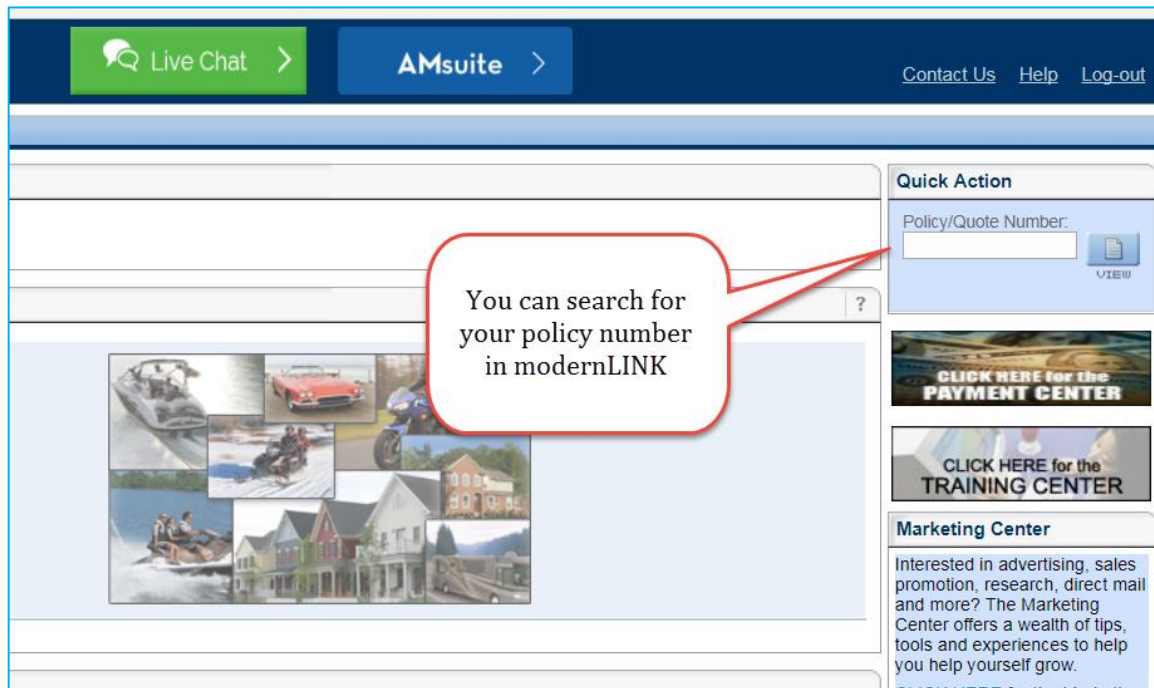
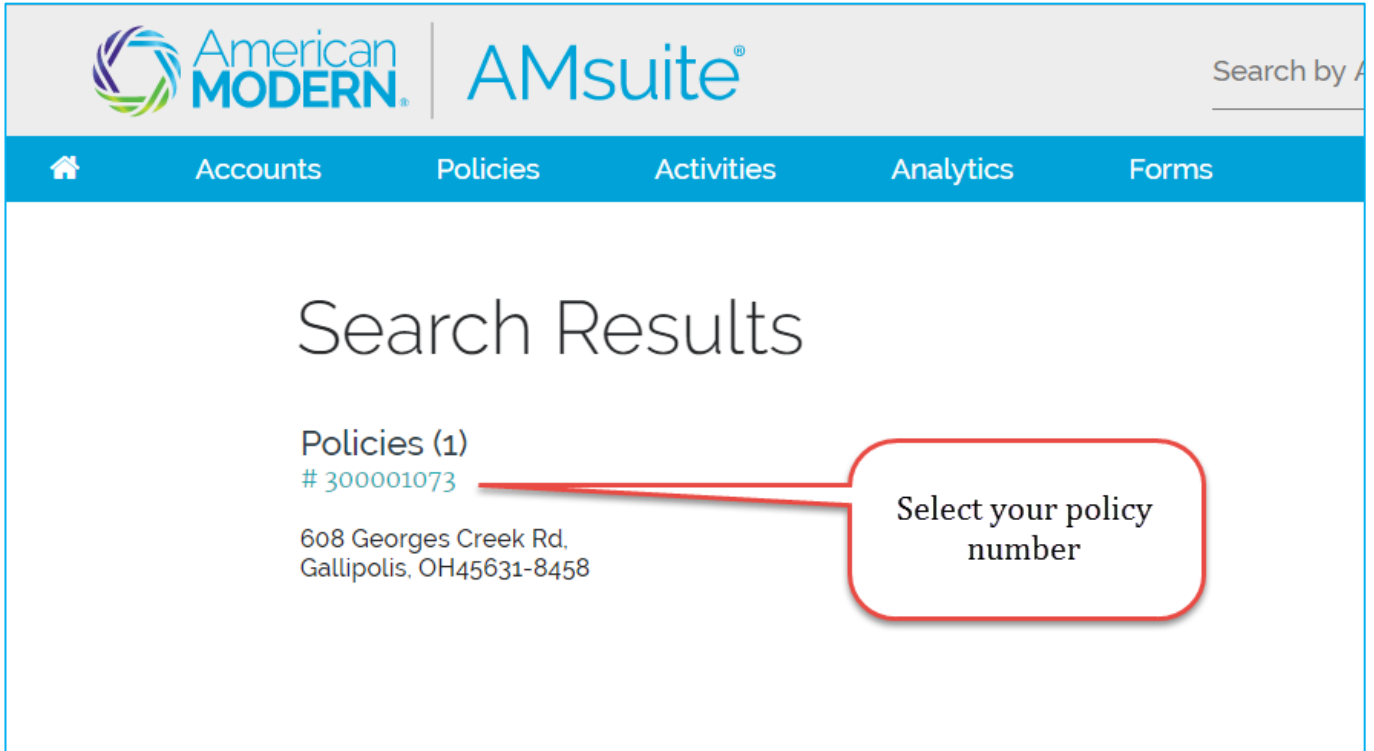


Policy changes

This job aid will provide step by step instructions for completing a policy change in the AMsuite system.



Policy Changes



American MODERN | AMsuite®

Search by A

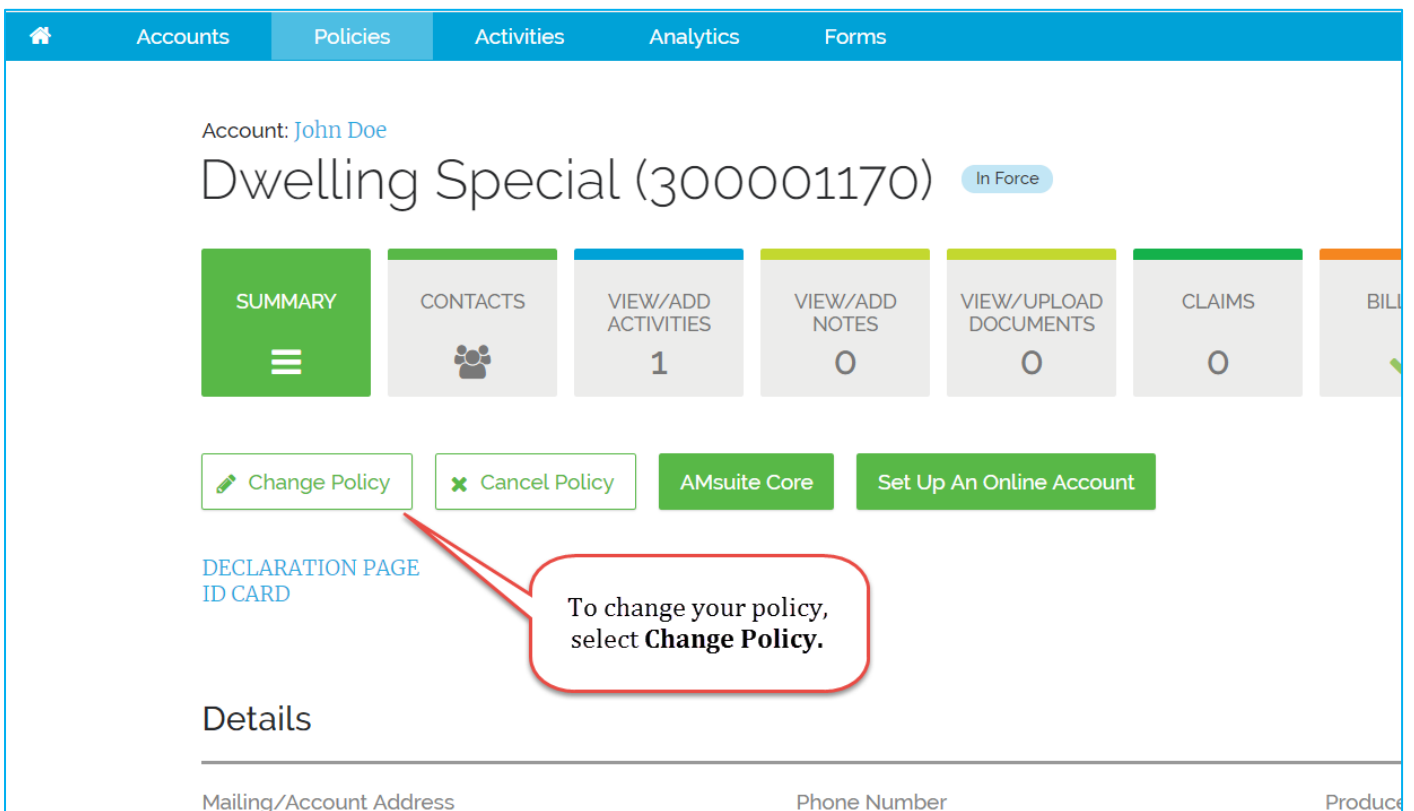
Home Accounts Policies Activities Analytics Forms

Search Results

Policies (1)
300001073

608 Georges Creek Rd.
Gallipolis, OH45631-8458

Select your policy number



Accounts Policies Activities Analytics Forms

Account: John Doe

Dwelling Special (300001170) In Force

SUMMARY	CONTACTS	VIEW/ADD ACTIVITIES 1	VIEW/ADD NOTES 0	VIEW/UPLOAD DOCUMENTS 0	CLAIMS 0	BILL
---------	----------	--------------------------	---------------------	----------------------------	-------------	------

Change Policy Cancel Policy AMsuite Core Set Up An Online Account

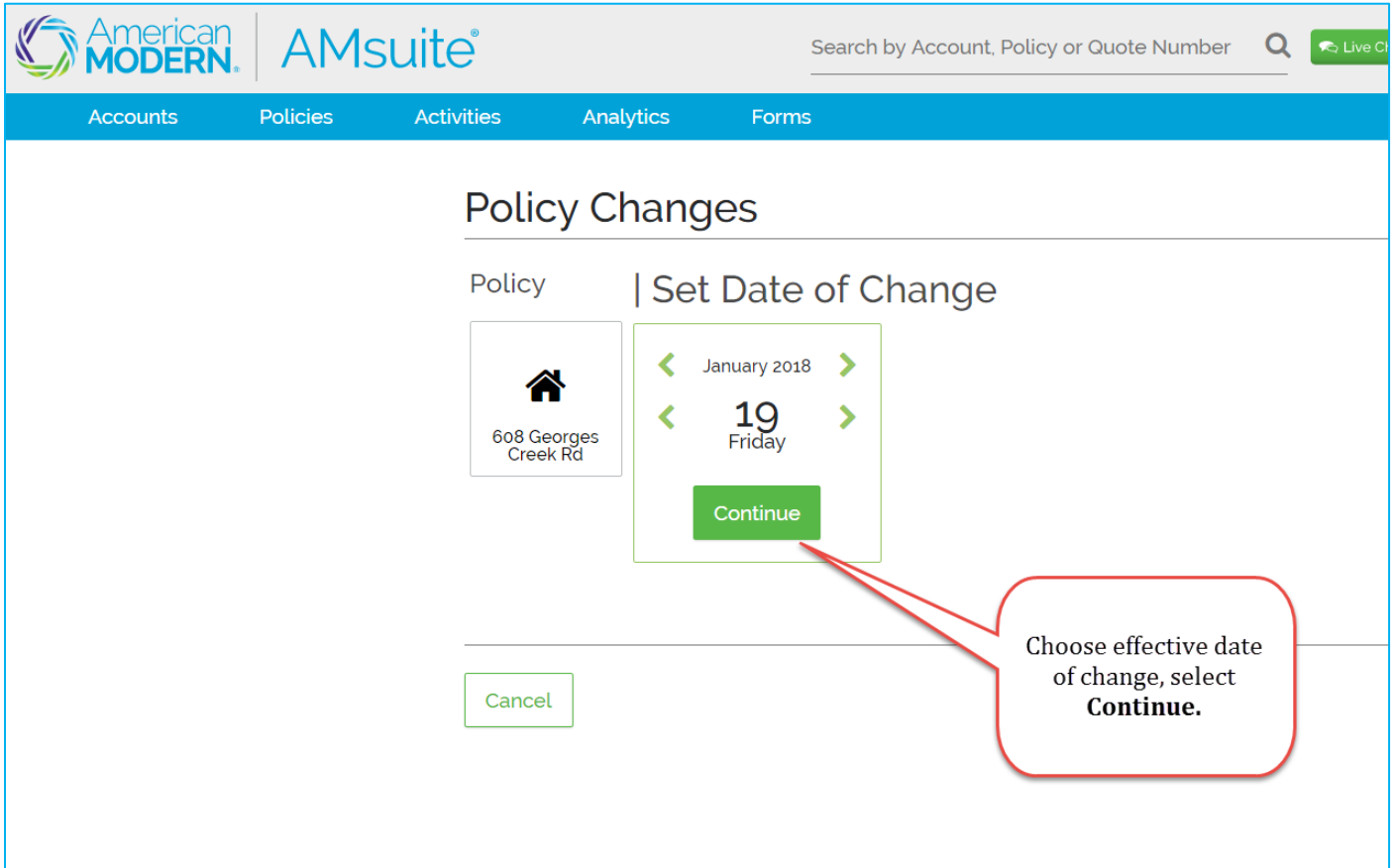
DECLARATION PAGE
ID CARD

To change your policy, select **Change Policy**.

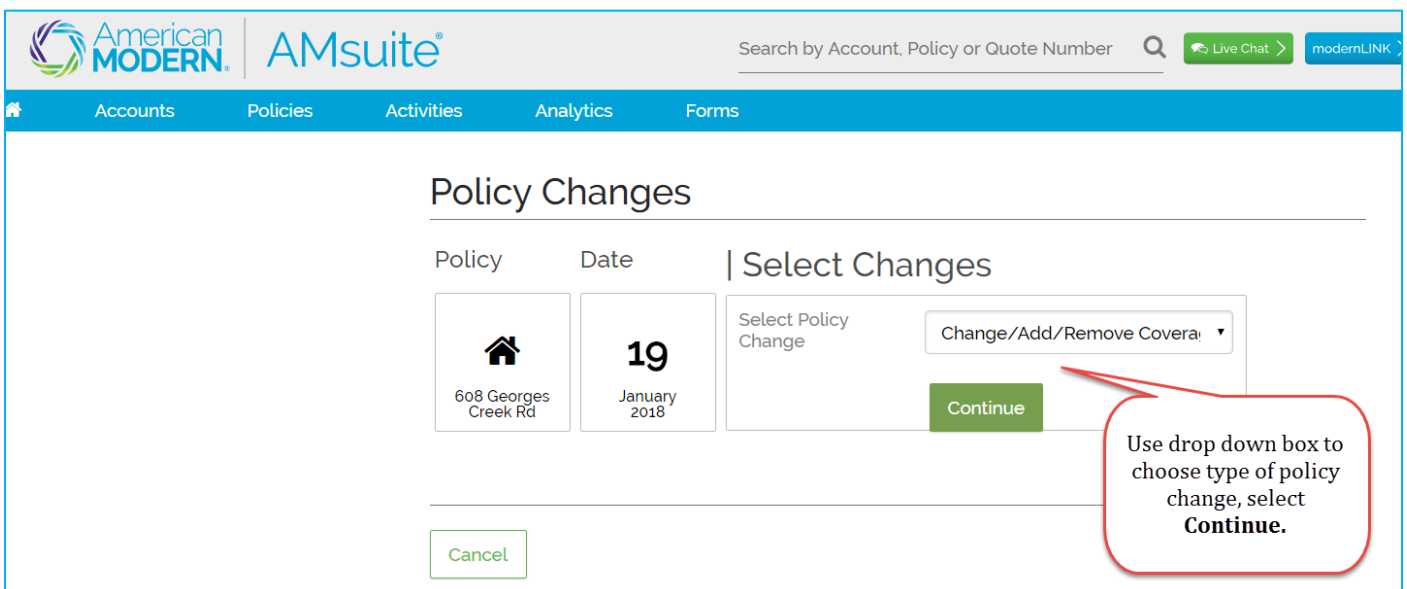
Details

Mailing/Account Address Phone Number Produce

Policy Changes



The screenshot shows the 'Set Date of Change' step in the AMsuite interface. The top navigation bar includes 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms'. A search bar is located on the right. The main content area is titled 'Policy Changes' and features a 'Policy' section with a house icon and the address '608 Georges Creek Rd'. To the right, a date selector shows 'January 2018' and '19 Friday' with left and right navigation arrows. A green 'Continue' button is positioned below the date selector. A red callout box points to the 'Continue' button with the text: 'Choose effective date of change, select **Continue.**' A 'Cancel' button is located at the bottom left of the main content area.



The screenshot shows the 'Select Changes' step in the AMsuite interface. The top navigation bar and search bar are consistent with the previous screen. The main content area is titled 'Policy Changes' and features a 'Policy' section with a house icon and the address '608 Georges Creek Rd'. To the right, a 'Date' section shows '19 January 2018'. The 'Select Changes' section includes a dropdown menu labeled 'Select Policy Change' with the selected option 'Change/Add/Remove Covera'. A green 'Continue' button is positioned below the dropdown. A red callout box points to the 'Continue' button with the text: 'Use drop down box to choose type of policy change, select **Continue.**' A 'Cancel' button is located at the bottom left of the main content area.

Policy Changes

AMsuite Core Home Live Chat AMsuite modernLINK

Policy Change 0000001285 (Draft) Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Policy Change 000000... Policy Info (Step 1 of 7)

Save and Next > Save and Exit Quote Save Versions

Primary Named Insured Change To: [v]

Name John Doe

Primary Phone 555-5555

Primary Email [v]

County [v]

Address Type [v]

Address Description [v]

Official IDs

SSN ###-##-####

Policy Type Dwelling Special

Effective Date 01/19/2018

Expiration Date 01/19/2019

Rate as of Date 01/19/2018

Rating State Ohio

Producer of Record

Producer Code 999006

Generated Agent [v]

1 To complete your policy change, you will be directed to our AMsuite core system.

2 To navigate back to AMsuite at any time, select AMsuite at the top of the page.

3 To navigate through your change, you can use **Save and Next**, or click on the pages on the left to go directly to that page.

Policy Change 000000... Dwelling (Step 2 of 7)

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Create Dwelling Remove Dwelling

<input type="checkbox"/>	Dwelling # ↑	Address	Residence Type
<input type="checkbox"/>	1	5439 Oak Ridge Dr, Will...	Primary Residence

Details Protection Details Underwriting Additional Interests

Dwelling # 1

Change To: [v]

5439 Oak Ridge Dr
Willoughby, OH 44094-3139

Get Territory Details

1

County [v]

1 **Dwelling Page**
You can add or remove dwellings on this page. If you need to add, select **Create Dwelling**.

2 Note: There are additional tabs on this page that will need to be completed.

Some information on this page has and may have changed from previous information on this page needs to be as "read-only" on this page, please make the changes there. Then click

Policy Changes

Policy Change 000001285 (Draft) Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages**
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures
 - Notes (0)
 - Documents (50)
 - Participants
 - Activities (0 open)
 - Edit Effective Date
 - History

Coverages (Step 4 of 7) [Need help? Click here →](#)

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Coverages that apply to all dwellings

Dwelling # ↑	Limit	Address	Occupancy
1	\$221,480.00	5439 Oak Ridge Dr, Will...	1 Family Residence Rental

Dwelling at 5439 Oak Ridge Dr, Willoughby, OH 44094-3139

Coverage Details Exclusions

Property Dwelling Limit Settlement Cost

All Other Deductible * 500

Other Structures Limit * 22,148

Settlement Option Replacement Cost

Liability Coverages

- Premises Liability

Additional Coverages

- Residence Burglary
- Ordinance or Law
- Equipment Breakdown
- Service Line

Coverage Page
Select coverage you wish to change. When complete, select **Quote**.

You can also add notes, activities, upload documents, or edit the effective date

Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

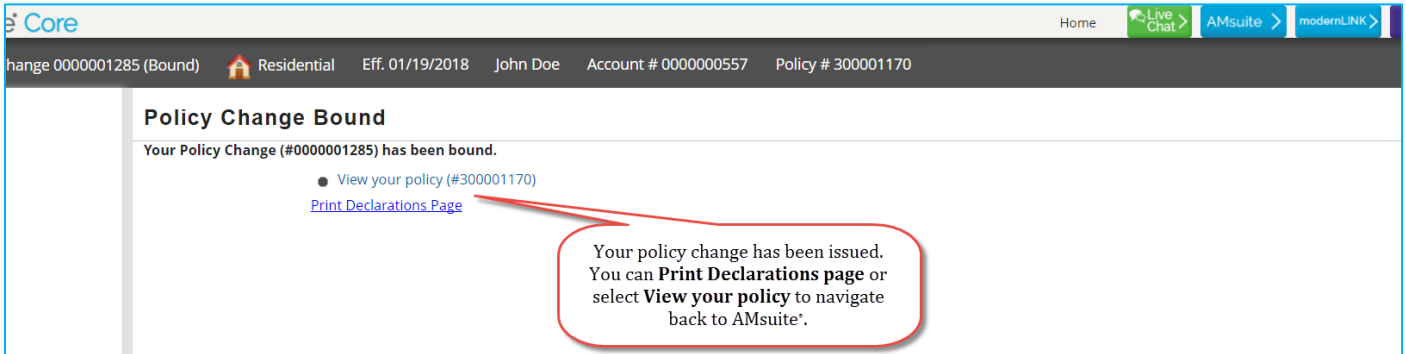
300001170	Transaction Effective Date	01/19/2018
01/19/2018 - 01/19/2019	Transaction Description	Change/Add/Remove Coverage
John Doe	Total Premium	\$732.00
608 Georges Creek Rd Gallipolis, OH 45631-8458	Total Additional Costs	-
Home	Total Cost	\$732.00
	Change in Cost	\$30.00

Your change in premium is on the right hand side of the page. To issue your policy change, select **Issue Policy.**

Cost Change Detail Discounts Applied

ing Special

Policy Changes



Core Home Live Chat AMsuite modernLINK

change 0000001285 (Bound) Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Policy Change Bound

Your Policy Change (#0000001285) has been bound.

- View your policy (#300001170)

[Print Declarations Page](#)

Your policy change has been issued. You can **Print Declarations page** or select **View your policy** to navigate back to AMsuite.

For questions about using AMsuite, please contact American Modern's Customer Service Team.

Policy changes

Changing the Billing Contact

Account: Dwelling Basic (600005343) In Force

[SUMMARY](#) | [CONTACTS](#) | [VIEW/ADD ACTIVITIES](#) (4) | [VIEW/ADD NOTES](#) (0) | [VIEW/UPLOAD DOCUMENTS](#) | [BILLING / MAKE PAYMENT](#) (✓)

[Change Policy](#) | [Cancel Policy](#) | [>AMsuite Core](#) | [Set Up An Online Account](#)

DECLARATION PAGE

Click on "Change Policy" to begin a Policy Change Request

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$1,223.00
14068 Adventure Lane, Cincinnati, OH 45242	5139476596	External (009539)	Taxes and Fees	\$0.00

Policy Changes

Policy | Set Date of Change

14068 Adventure Lane

May 2018 | 8 | Tuesday

[Continue](#)

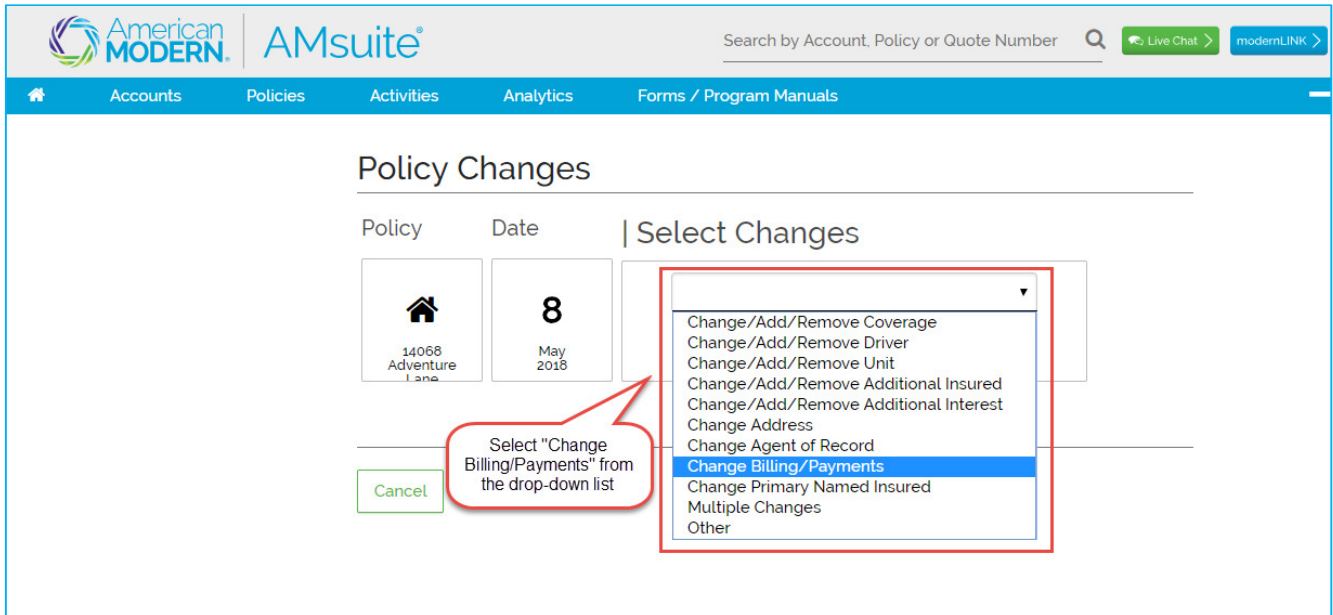
[Cancel](#)

Use the arrows to select the effective date of the Policy Change

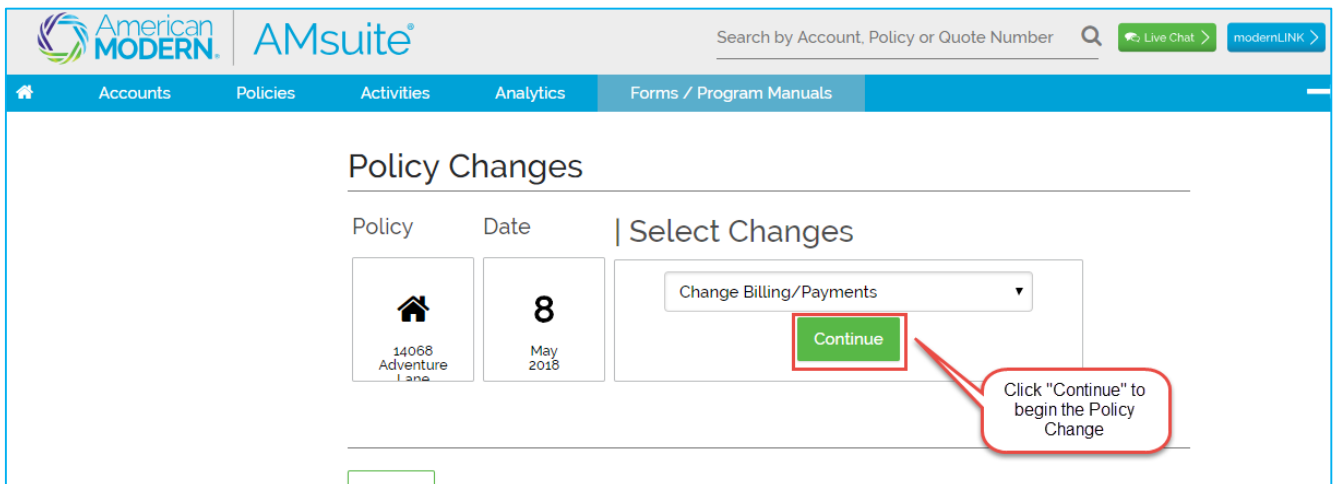
****Please Note that All Billing Changes are Effective Immediately, regardless of the date entered****

Click "Continue" to begin the Policy Change

Policy changes



The screenshot shows the AMsuite interface for Policy Changes. The top navigation bar includes 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms / Program Manuals'. The main content area is titled 'Policy Changes' and displays a policy card for '14068 Adventure Lane' with a date of '8 May 2018'. A dropdown menu is open under the 'Select Changes' section, listing various options. The option 'Change Billing/Payments' is highlighted in blue. A red callout box points to this option with the text: 'Select "Change Billing/Payments" from the drop-down list'. A 'Cancel' button is visible at the bottom left of the form area.



This screenshot shows the same AMsuite interface, but the dropdown menu is closed. The 'Change Billing/Payments' option is now selected and displayed in the dropdown field. A green 'Continue' button is highlighted with a red box. A red callout box points to this button with the text: 'Click "Continue" to begin the Policy Change'. The 'Cancel' button is still visible at the bottom left.

Policy changes

AMsuite Core Notice you are now in AMsuite® Core, processing a Policy Change Home Live Chat AMsuite modernLINK Training

Policy Change 0000024048 (Draft) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

Policy Info (Step 1 of 7) Click "Quote" to continue

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

To change policy Billing or Payment details, please click "Quote" and then go to the "Payments" page.

Note that you do not need to make changes to the dwelling or coverage screens in order to change Billing or Payment details

Primary Named Insured
 Name: [Redacted]
 Primary Phone: 513-947-6596
 Primary Email: none@amig.com

Policy Mailing Address
 Change To: [Dropdown]
 14068 Adventure Lane
 Cincinnati, OH 45242
 County: HAMILTON
 Address Type: Home
 Address Description: [Redacted]

Official IDs
 SSN: ###-##-####

Policy Details
 Previous Policy Number: [Redacted]
 Term Type: Annual
 Term Number: 2
 Policy Type: Dwelling Basic
 Effective Date: 05/02/2018
 Expiration Date: 05/02/2019
 Rate as of Date: 05/08/2018
 Rating State: Ohio

Producer of Record
 Producer Code: 009539
 Contracted Agency: Ken Hicks
 Producer: Ken Hicks

Producer of Service Agent Servicing
 Producer Code: 009539
 Contracted Agency: Ken Hicks
 Producer: [Ken Hicks](#)

AMsuite Core Home Live Chat AMsuite

Policy Change 0000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number 600005343
Policy Period 05/02/2018 - 05/02/2019
Primary Named Insured
 Address: 14068 Adventure Lane
 Cincinnati, OH 45242
 County: HAMILTON
 Address Type: Home
 Address Description: [Redacted]

Transaction Effective Date 05/08/2018
Transaction Description Change Billing/Payments
Total Premium \$1,223.00
Total Additional Costs -
Total Cost \$1,223.00
Change in Cost -

Policy Premium Cost Change Detail Discounts Applied

Policy Type Dwelling Basic

Policy Level Coverages

Description	Value	Premium
Personal Liability Cove...		\$70.00
Limit	300,000	
Damage to Property of ...	1,000	

Click "Payments & Signatures" to navigate to the billing information

Payment & Signatures

Policy changes

AMsuite Core Home Live Chat AMsuite

Policy Change 0000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures**
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)

Payment & Signatures

< Back Home Edit Policy Transaction Save Versions Issue Policy Withdraw Transaction

Payment

All changes made to billing and payment plan options are effective as of today's date

Premium Summary

Total Premium	\$1,223.00
Total Additional Costs	-
Total Cost	\$1,223.00
Change in Cost	-

Billing Options

Billing Method: Direct Bill

Billing Type: * Invoice

Billing Contact: Chase Home Finance LLC ISAOA

Payment Plan Options

Original Payment Plan: Pay in Full

New Payment Plan: * Pay in Full

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page

Click on the drop-down next to the current Billing Contact and select the new Billing Contact from the list provided

****Please Note that only Existing Contacts may be selected; if the desired contact is not listed, they will first need to be added on the appropriate page****

AMsuite Core Home Live Chat AMsuite

Policy Change 0000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures**
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)
 - Edit Effective Date

Payment & Signatures

< Back Home Edit Policy Transaction Save Versions Issue Policy Withdraw Transaction

Payment

All changes made to billing and payment plan options are effective as of today's date

Premium Summary

Total Premium	\$1,223.00
Total Additional Costs	-
Total Cost	\$1,223.00
Change in Cost	-

Billing Options

Billing Method: Direct Bill

Billing Type: * Invoice

Billing Contact: Chase Home Finance LLC ISAOA

Payment Plan Options

Original Payment Plan: Pay in Full

New Payment Plan: * Pay in Full

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page

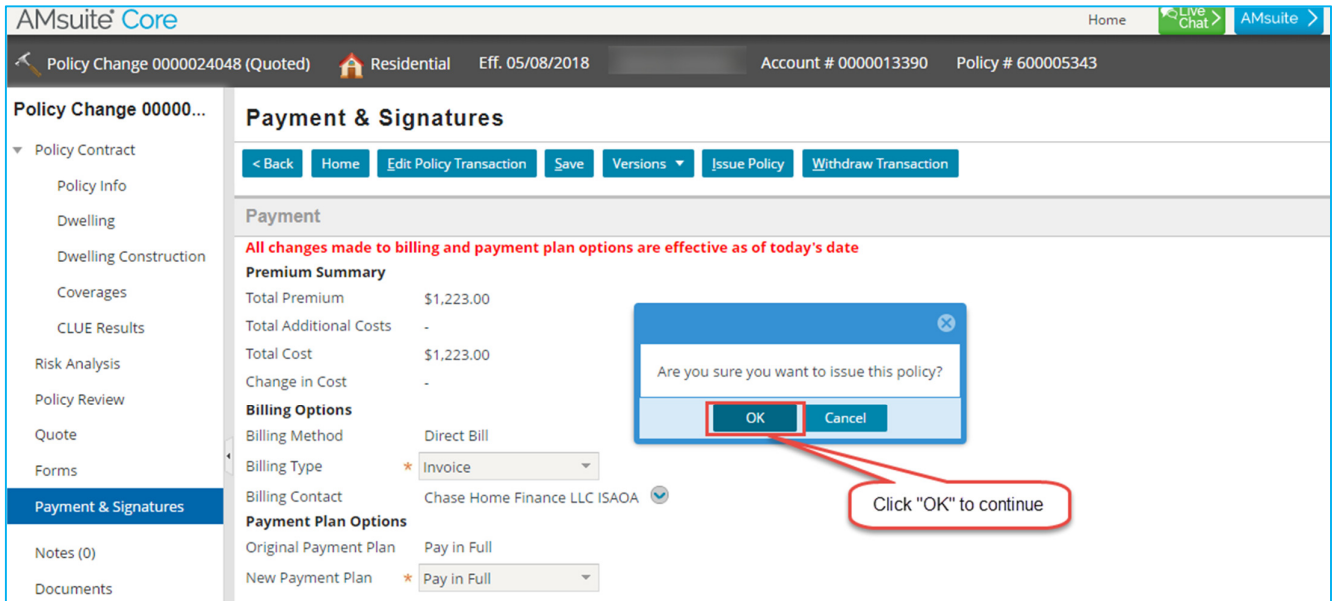
Required Signature Forms

If everything is correct, click "Issue Policy" to continue

Here you can see the billing contact has been updated

Note that if the policy is billed to the lienholder, "Pay in Full" must be selected as the payment

Policy changes



AMsuite Core Home Live Chat AMsuite

Policy Change 000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures**
 - Notes (0)
 - Documents

Payment & Signatures

< Back Home Edit Policy Transaction Save Versions Issue Policy Withdraw Transaction

Payment

All changes made to billing and payment plan options are effective as of today's date

Premium Summary

Total Premium	\$1,223.00
Total Additional Costs	-
Total Cost	\$1,223.00
Change in Cost	-

Billing Options

Billing Method: Direct Bill

Billing Type: * Invoice

Billing Contact: Chase Home Finance LLC ISAOA

Payment Plan Options

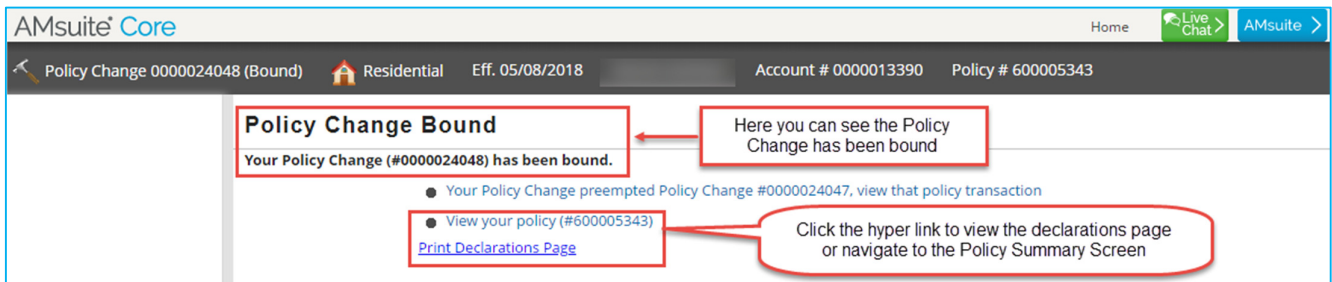
Original Payment Plan: Pay in Full

New Payment Plan: * Pay in Full

Are you sure you want to issue this policy?

OK Cancel

Click "OK" to continue



AMsuite Core Home Live Chat AMsuite

Policy Change 000024048 (Bound) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change Bound

Your Policy Change (#000024048) has been bound.

- Your Policy Change preempted Policy Change #0000024047, view that policy transaction
- View your policy (#600005343)
 - [Print Declarations Page](#)

Here you can see the Policy Change has been bound

Click the hyper link to view the declarations page or navigate to the Policy Summary Screen

Policy changes

Account: Dwelling Basic (600005343) In Force

Policy Contacts (2)

Contacts associated with this policy only

CONTACT	ROLES	INVOLVED WITH
CH Chase Home Finance LLC ISAOA	Billing Contact Additional Interest	1 Active Policy
DS	Primary Named Insured	3 Active Policies

Note that the Lienholder now shows the Role of Billing Contact

For questions about using AMsuite®, contact American Modern's Customer Service Team.

Policy Changes

Address Change to an Existing AMsuite® Policy

Retrieve and Open the Policy you are wanting to change from modernLINK

The screenshot shows the modernLINK interface with a navigation bar at the top containing 'Home', 'Quotes and Policies', 'Agency Management', 'eForms', 'Tools', and 'Reports'. A red arrow points to the 'Quotes and Policies' tab, labeled with a '2'. Another red arrow points to the 'Quick Action' link in the top right corner, labeled with a '1'. A central text box contains the following text:

There are a number of ways to Search for a Policy in modernLINK and AMsuite

1. Quick Action Link
2. Quotes and Policies Page

The interface also features a 'New Quote' form, 'My News' section with earthquake and wildfire reminders, and a 'Tips and Tools' section.

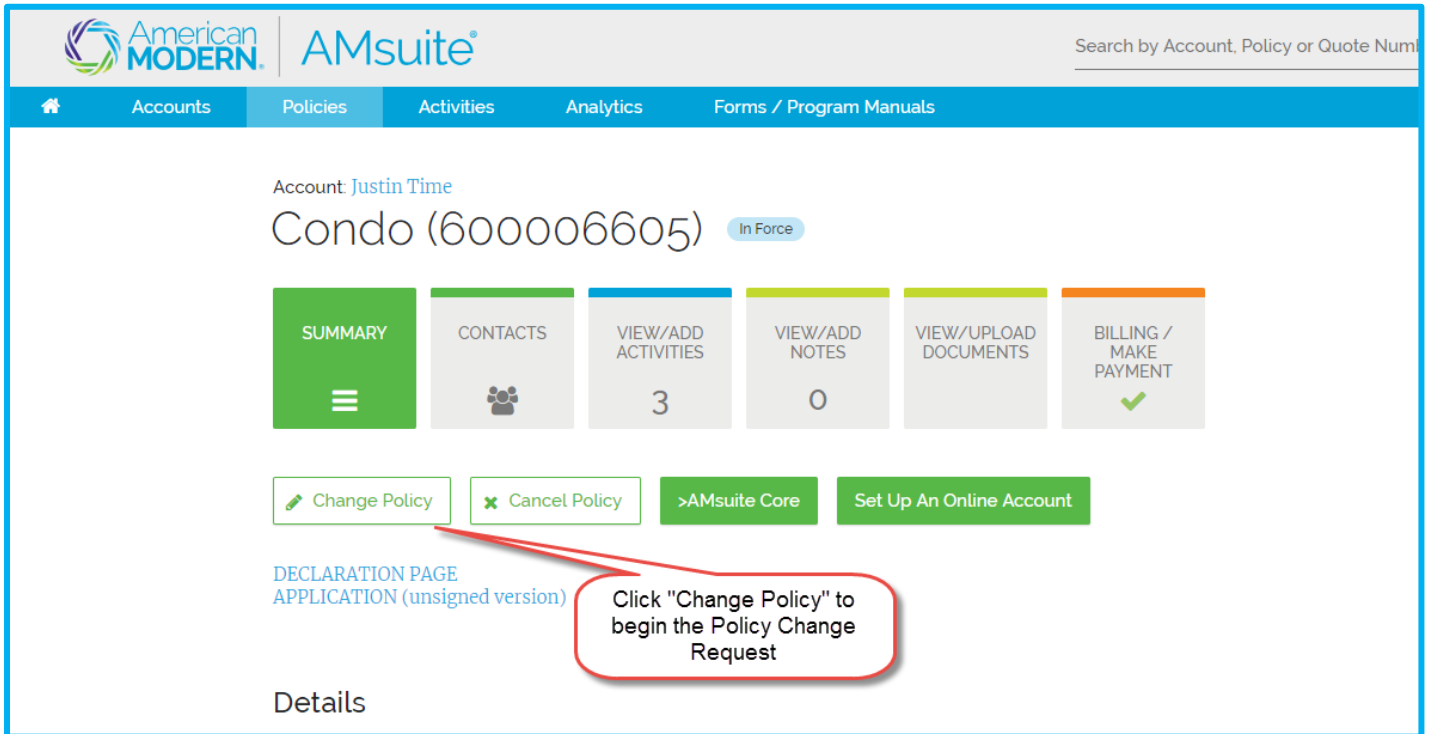
Or from within AMsuite

The screenshot shows the AMsuite interface with a navigation bar at the top containing 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms / Program Manuals'. A red arrow points to the 'Policies' tab, labeled with a '3'. Another red arrow points to the search bar at the top right, labeled with a '4'. A central text box contains the following text:

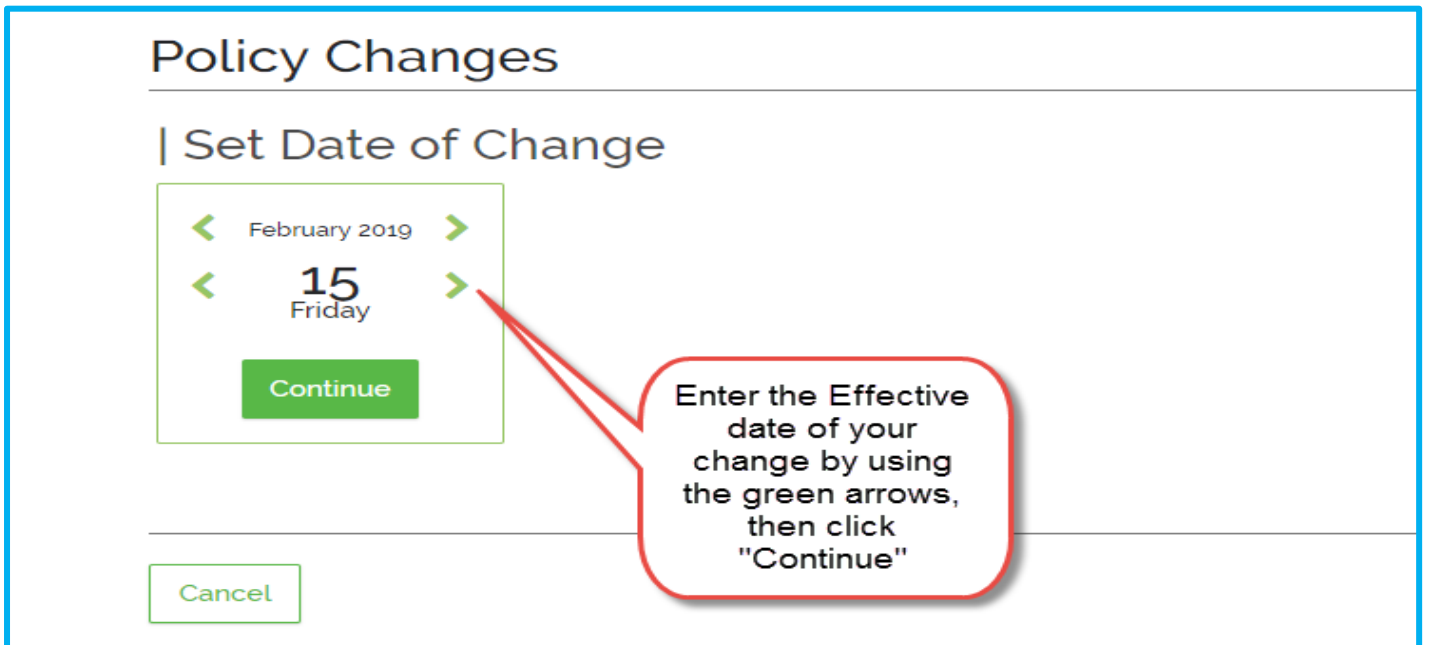
3. Policies Page in AMsuite
4. Search bar by Quote or Policy # in AMsuite

The interface also features a 'Dashboard' section with buttons for 'START NEW QUOTE', 'OPEN QUOTES', and 'OPEN POLICY CHANGES', and a 'Your Activities for next 7 days' section.

Policy Changes



The screenshot shows the AMsuite interface for a policy. At the top, there is a search bar and navigation tabs for Accounts, Policies, Activities, Analytics, and Forms / Program Manuals. The main content area displays the account name 'Justin Time' and the policy 'Condo (600006605)' with an 'In Force' status. Below this are several action buttons: 'SUMMARY', 'CONTACTS', 'VIEW/ADD ACTIVITIES' (with a count of 3), 'VIEW/ADD NOTES' (with a count of 0), 'VIEW/UPLOAD DOCUMENTS', and 'BILLING / MAKE PAYMENT' (with a green checkmark). A row of buttons includes 'Change Policy', 'Cancel Policy', '>AMsuite Core', and 'Set Up An Online Account'. A callout box points to the 'Change Policy' button with the text: 'Click "Change Policy" to begin the Policy Change Request'. Below the buttons, there is a link for 'DECLARATION PAGE APPLICATION (unsigned version)'. At the bottom, there is a 'Details' link.



The screenshot shows a 'Policy Changes' dialog box titled 'Set Date of Change'. It features a date picker for February 2019, with the 15th (Friday) selected. A green 'Continue' button is at the bottom of the date picker. A callout box points to the green arrows on the date picker with the text: 'Enter the Effective date of your change by using the green arrows, then click "Continue"'. A 'Cancel' button is located at the bottom left of the dialog box.

Policy Changes

Policy Changes

Date | Select Changes

15
February
2019

Change Address

Continue

Cancel

Use the drop down list to select the appropriate type of change. In this case - "Change Address"

Policy Changes

Date | Select Changes

15
February
2019

Change Address

Continue

Cancel

Click Continue

Policy Changes

Policy Change 00000...

You can see that you are now creating a Policy Change in AMsuite Core

For a Mailing Address Change, Click on the Primary Named Insured's Name

Primary Named Insured Justin Time

Change the Mailing Address

You may need to add or correct missing information that is required

Click Update once all required information has been entered/changed

Policy Changes

AMsuite Core Home Live Chat AMsuite >

Policy Change 0000030412 (Draft) Condo Eff. 02/15/2019 Justin Time Account # 0000015629 Policy # 600006605

Policy Change 00000...

- Policy Contract
- Policy Info**
- Dwelling
- Dwelling Construction
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms

Policy Info (Step 1 of 7)

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Primary Named Insured

Name Justin Time

Primary Phone 888-888-8888

Primary Email none@amig.com

Policy Mailing Address

Change To: 1558 Turquoise Dr Cincinnati, OH 45255-2521

County Hamilton

Address Type Home

Address Description

Policy Details

Previous Policy Number

Term Type Annual

Term Number 1

Policy Type Condo

Effective Date 02/14/2019

Expiration Date 02/14/2020

Rate as of Date 02/15/2019

Rating State Ohio

Producer of Record

After the Update, Then Click "Quote"

AMsuite Core Home Live Chat AMsuite >

Policy Change 0000030412 (Quoted) Condo Eff. 02/15/2019 Justin Time Account # 0000015629 Policy # 600006605

Policy Change 00000...

- Policy Contract
- Policy Info
- Dwelling
- Dwelling Construction
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote**
- Forms
- Payment & Signatures
- Notes (0)
- Documents
- Participants

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number 600006605

Policy Period 02/14/2019 - 02/14/2020

Primary Named Insured

Address 1558 Turquoise Dr Cincinnati, OH 45255-2521

County Hamilton

Address Type Home

Address Description

Transaction Effective 02/15/2019

Rate

Tran sa

Desc

Total P

Total A

Total Co

Rate in Cost

Click "Issue Policy" to Bind this Change

Are you sure you want to issue this policy?

OK Cancel

A message will appear to Confirm

Policy Premium Cost Change Detail Discount

Policy Type Condo

Policy Level Coverages

Description	Value	Premium

Policy Changes

AMsuite Core Home

Policy Change 0000030412 (Bound) ← Condo Eff. 02/15/2019

Policy Change Bound

Your Policy Change (#0000030412) has been bound.

- Your Policy Change preempted Policy Change #0000030411, view that policy transaction
- Your Policy Change preempted Policy Change #0000030410, view that policy transaction
- View your policy (#600006605)

[Print Declarations Page](#)

Documentation to collect and retain:
Copy of Insured's AAA Membership card

The Change is now Bound

Navigate back to the Policy Summary Page by Clicking Here

Print the New Declaration Page Here

American MODERN AMsuite Search by Account, Policy or Quote Number

Accounts Policies Activities Analytics Forms / Program Manuals → + START

Account: Justin Time

Condo (600006605)

Once back on the Summary Page, Scroll to the bottom of the page to view the completed Policy Change Transaction

SUMMARY CONTACTS VIEW/ADD ACTIVITIES (4) VIEW/ADD NOTES (0) VIEW/UPLOAD DOCUMENTS BILLING / MAKE PAYMENT (✓)

[Change Policy](#) [Cancel Policy](#)

DECLARATION PAGE APPLICATION (unsigned version)

Details

Mailing/Account Address
Justin Time
1558 Turquoise Dr. Cincinnati, OH
45255-2521

Policy Effective Date
February 14, 2019

Previous Policy Number Cancellation Date Cancellation Reason
Producer Ken Hicks
Producer Phone
Producer E-mail sabshire@amig.com

Property

Coverages

Policy Transactions

JOB NUMBER	TRANSACTION STATUS	TYPE	PERIOD STATUS	CREATED BY	CREATED DATE	EFFECTIVE DATE	
0000030400	Bound	Policy Change	In Force	Ken Hicks	2/14/19	2/15/19	\$664.72
0000030410	Draft	Policy Change	Draft	Ken Hicks	2/15/19	2/15/19	\$0.00
0000030411	Draft	Policy Change	Draft	Ken Hicks	2/15/19	2/15/19	\$664.72

to send autodialed pre-recorded and

Policy changes

Adding a Unit on an Existing Recreational Policy

Account: Motorsports (600005317) In Force

[SUMMARY](#) | [CONTACTS](#) | [VIEW/ADD ACTIVITIES](#) (2) | [VIEW/ADD NOTES](#) (0) | [VIEW/UPLOAD DOCUMENTS](#) | [BILLING / MAKE PAYMENT](#)

[Change Policy](#) | [Cancel Policy](#) | [>AMsuite Core](#) | [Set Up An Online Account](#)

DECLARATION PAGE ID CARD

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$790.00
1602 W Schaaf Rd, Cleveland, OH 44109-4672	5135555555	External (009539)	Taxes and Fees	\$0.00

Callout: Click "Change Policy" to begin the Policy Change Request

Policy Changes

Policy | Set Date of Change

May 2018
 4 Friday
[Continue](#)

[Cancel](#)

Callout: Use the arrows to select the effective date for the addition of the new unit, then click "Continue"

Policy changes

The screenshot shows the AMsuite interface with the 'Policy Changes' section. The policy is identified as 'HARLEY-DAVIDSON FL STC' with a date of '4 May 2018'. A dropdown menu is open under 'Select Changes', listing various options. A red callout box points to the 'Change/Add/Remove Unit' option, which is highlighted in blue.

Policy	Date	Select Changes
HARLEY-DAVIDSON FL STC	4 May 2018	<ul style="list-style-type: none"> Change/Add/Remove Coverage Change/Add/Remove Driver Change/Add/Remove Unit Change/Add/Remove Additional Insured Change/Add/Remove Additional Interest Change Address Change Agent of Record Change Billing/Payments Change Primary Named Insured Multiple Changes Other

Use the drop down list to select "Change/Add/Remove Unit"

The screenshot shows the AMsuite interface with the 'Policy Changes' section. The policy is identified as 'HARLEY-DAVIDSON FL STC' with a date of '4 May 2018'. The dropdown menu is now closed, and the selected option 'Change/Add/Remove Unit' is visible. A red callout box points to the 'Continue' button.

Policy	Date	Select Changes
HARLEY-DAVIDSON FL STC	4 May 2018	Change/Add/Remove Unit Continue

Click "Continue"

Policy changes

AMsuite Core Notice you are now in AMsuite® Core Home Live Chat AMsuite modernLINK

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 David Kessinger Account # 0000013350 Policy # 600005317

Policy Change 00000... Policy Info (Step 1 of 7) Here you can see that you are processing a Policy Change

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Primary Named Insured Change To:

Name David Kessinger **Click "Vehicles" to go to the Unit Page**

Primary Phone 513-555-5555

Primary Email david@email.com

Policy Mailing Address Change To:

1602 W Schaaf Rd
Cleveland, OH 44109-4672

County Cuyahoga

Address Type Home

Address Description

Official IDs View Prefill Report

SSN ###-##-####

Policy Details

Previous Policy Number

Term Type Annual

Term Number 1

Policy Type Motorsports

Effective Date 04/26/2018

Expiration Date 04/26/2019

Rate as of Date 05/04/2018

Rating State Ohio

Producer of Record

Producer Code 009539

Contracted Agency Ken Hicks

Producer Ken Hicks

Producer of Service

Agent Servicing

Producer Code 009539

Contracted Agency Ken Hicks

Producer [Ken Hicks](#)

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Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 David Kessinger Account # 0000013350 Policy # 600005317

Policy Change 00000... Vehicles (Step 3 of 7) Need help? Click here →

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Vehicle Details

Create Vehicle Remove Vehicle

From Prefill Report

	Vehicle Type	Model Ye...	Make	Model	VIN/HIN/Serial #
<input type="checkbox"/>	Motorcycle				1HD1JH51X7Y...

Vehicle Details Additional Interest

Basic Vehicle Information

Vehicle # 1

Vehicle Type * Motorcycle

VIN/Serial Number 1HD1JH51X7Y123456

State Assigned VIN * Yes No

Model Year * 2007

Make * HARLEY-DAVIDSON

Model * FLSTC HERITAGE SOFTAIL CLASSIC

Classic No

Custom No

Registered for Street Use * Yes No

Registration Address Change To:

Purchase Date * 04/26/2018

Engine Size (cc) * 1584

Salvaged/Rebuilt * Yes No

Modifications - Add all that apply

Add Remove

Type

Usage - Add all that apply

Add Remove

<input type="checkbox"/>	* Type	Description
<input type="checkbox"/>	Occasional Pleasure Use	

Click on "Create Vehicle" and select the appropriate option; for an existing unit, information may be available in the Prefill Report; if the unit is a new purchase, select "New Vehicle"

Policy changes

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Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

- Policy Contract
- Policy Info
- Drivers
- Vehicles**
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms
- Payment & Signatures
- Notes (0)
- Documents
- Participants
- Activities (0 open)
- Edit Effective Date
- History

Basic Vehicle Information

Vehicle # 2

Vehicle Type * Motorcycle

VIN/Serial Number 1HD1PXN1XFB952705

State Assigned VIN * Yes No

Model Year * 2015

Make * HARLEY-DAVIDSON

Model * FLHXSE CVO STREET GLIDE SPECIAL

Classic No

Custom No

Registered for Street Use * Yes No

Registration Address Change To: 1602 W Schaaf Rd, Cleveland, OH 44109-4672

Storage Address Change To: 1602 W Schaaf Rd, Cleveland, OH 44109-4672

Storage County Cuyahoga

Storage Type * Locked Garage/Building/Barn

Territory Code 4

Reorder Territory Code

Vehicle Rate Modifiers

Alarm	<none>
Disabling Device	<none>
VIN Etching	<input type="radio"/> Yes <input checked="" type="radio"/> No

Purchase Date * 05/04/2018

Engine Size (cc) * 1803

Salvaged/Rebuilt * Yes No

Modifications - Add all that apply

Add Remove

Type	Description
<input checked="" type="checkbox"/>	Occasional Pleasure Use

Usage - Add all that apply

Add Remove

Select Usage

Enter the Purchase Date, Engine Size and Salvage Status

Enter the Vehicle Type, VIN, and all other mandatory fields

Select Storage Type

AMsuite Core Home Live Chat AMsuite modernLINK

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 David Kessinger Account # 0000013350 Policy # 600005317

Policy Change 00000...

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- Documents
- Participants
- Activities (0 open)

Vehicles (Step 3 of 7) Need help? Click here →

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Vehicle Details

Create Vehicle Remove Vehicle

Vehicle # ↑	Vehicle Type	Model Ye...	Make	Model	VIN/HIN/Serial #
<input type="checkbox"/> 1	Motorcycle	2007	HARLEY-...	FLSTC HERI...	1HD1JH51X7Y...
<input checked="" type="checkbox"/> 2	Motorcycle	2015	HARLEY-...	FLHXSE CV...	1HD1PXN1XF...

Vehicle Details Additional Interest

Basic Vehicle Information

Vehicle # 2

Vehicle Type * Motorcycle

VIN/Serial Number 1HD1PXN1XFB952705

State Assigned VIN * Yes No

Model Year * 2015

Make * HARLEY-DAVIDSON

Model * FLHXSE CVO STREET GLIDE SPECIAL

Classic No

Purchase Date * 05/04/2018

Engine Size (cc) * 1803

Salvaged/Rebuilt * Yes No

Modifications - Add all that apply

Add Remove

Type	Description
<input checked="" type="checkbox"/>	Occasional Pleasure Use

Usage - Add all that apply

When all required fields have been completed, click "Save and Next"

Policy changes

AMsuite Core | Home | Live Chat | AMsuite | modernLINK | Training

Policy Change 0000023976 (Draft) | Recreational | Eff. 05/04/2018 | Account # 0000013350 | Policy # 600005317

Policy Change 00000...

Coverages (Step 4 of 7)

When all required changes have been made, click "Quote"

< Back | Save and Next > | Save and Exit | **Quote** | Save | Versions | Withdraw Transaction

Coverages | Exclusions

You are now on the Coverage Screen

Liability - Bodily Injury and Property Damage

Limit * 100,000/300,000/50,000

Passenger Liability Included

Medical Payments

Limit * 5,000

Uninsured Motorists

Pet Protection

Limit 750

Travel Loss

Make any required changes by using the drop down menu or clicking the appropriate check box

Coverages applied per vehicle

Copy Coverages

Vehicle # ↑	Description	Comprehensive	Collision	Towing Labor	Rental
1	2007HARLEY-DAVIDSON...	250	250	Not Selected	Not Selected
2	2015HARLEY-DAVIDSON...	Not Selected	Not Selected	Not Selected	Not Selected

Coverages | Exclusions

Comprehensive

Deductible * 250

Settlement Option Actual Cash Value

Diminishing Deductible * Yes No

Collision

Deductible * 250

Settlement Option Actual Cash Value

Diminishing Deductible * Yes No

Accessories

Limit * 3,000

Settlement Option * Actual Cash Value

Personal Effects

Limit * 1,000

Deductible 200

Settlement Option * Actual Cash Value

Towing and Emergency Expense

Limit * 75

Rental Reimbursement

Breach of Warranty

Make any required changes by using the drop down menu or clicking the appropriate check box

Policy changes

Policy Change 0000023976 (Quoted) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

Quote

< Back Save and Next > Home Edit Policy Transaction Versions **Issue Policy** Withdraw Transaction

Policy Number 600005317
Policy Period 04/26/2018 - 04/26/2019
Primary Named Insured
Address 1602 W Schaaf Rd
 Cleveland, OH 44109-4672
County Cuyahoga
Address Type Home
Address Description

Transaction Effective Date 05/04/2018
Transaction Description Change/Add/Remove Unit
Total Premium \$723.48
Total Additional Costs -
Total Cost \$723.48
Change in Cost (\$66.52)

If everything is correct, click "Issue Policy"

Here, you can see the Transaction Effective Date and Description, as well as the Change in Cost associated with the Policy Change

You are now on the Quote page

Note the additional tabs which provide additional information on the change in cost and discounts applied

Coverages applied to all vehicles

Description	Value	Full Term Premium	Eff Date	Exp Date	Proration
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$260.00	04/26/2018	05/04/2018	
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$413.00	05/04/2018	04/26/2019	
Medical Payments Coverage	5,000	\$76.00	04/26/2018	05/04/2018	
Medical Payments Coverage	5,000	\$179.00	05/04/2018	04/26/2019	
Pet Protection Coverage	750	-	04/26/2018	04/26/2019	
Pet Protection Coverage	750	-	05/04/2018	04/26/2019	
Subtotal					

Here, you see a list of coverages that are applicable to all units on the policy (i.e. Liability Coverage)

Storage Address 1: 1602 W Schaaf Rd, Cleveland, OH 44109-4672

Vehicle 1

Model Year	Make	Model	VIN/HIN/5
2007	HARLEY-DAVIDSON	FLSTC HERITAGE SOFTAIL CLASSIC	

Description	Value	Full Term Premium	Eff Date	Exp Date	Proration
Comprehensive Coverage	250	\$146.00	04/26/2018	05/04/2018	
Comprehensive Coverage	250	\$42.00	05/04/2018	04/26/2019	
Collision Coverage	250	\$308.00	04/26/2018	05/04/2018	
Collision Coverage	250	\$88.00	05/04/2018	04/26/2019	
Accessories Coverage	3,000	-	04/26/2018	04/26/2019	
Personal Effects Coverage	1,000	-	04/26/2018	04/26/2019	
Towing and Emergency Expense Coverage	75	-	04/26/2018	04/26/2019	
Subtotal					

Here, you see a list of coverages that apply specifically to Vehicle 1 (i.e. Comprehensive & Collision, etc.)

Vehicle 2

Model Year	Make	Model	VIN/HIN/5
2015	HARLEY-DAVIDSON	FLHXSE CVO STREET GLIDE SPECIAL	

Description	Value	Premium
Total Premium		\$723.48
Total Additional Costs		-
Total Cost		\$723.48

Here, you see Vehicle 2, which has no additional coverage listed - i.e. has liability-only coverage; if comprehensive coverage is desired, you can go back to the Coverage page to add it

Policy changes

AMsuite Core Home AMsuite > modernLINK >

Policy Change 0000023976 (Quoted) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

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 - CLUE Results
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 - Quote**
 - Forms
 - Payment & Signatures
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)
 - Edit Effective Date
 - History

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number 600005317
Policy Period 04/26/2018 - 04/26/2019
Primary Named Insured
 Address 1602 W Schaaf Rd
 Cleveland, OH 44109-4672
 County Cuyahoga
 Address Type Home
 Address Description

Transaction Effective Date 05/04/2018
Transaction Description Change/Add/Remove L
Total Premium \$723.48
Total Additional Costs -
Total Cost \$723.48
Change in Cost (\$66.52)

Are you sure you want to issue this policy?

OK Cancel

Coverages applied to all vehicles

Description	Value	Full Term Premium	Eff Date	Ex
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$260.00	04/26/2018	0
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$413.00	05/04/2018	0
Medical Payments Coverage	5,000	\$76.00	04/26/2018	0
Medical Payments Coverage	5,000	\$179.00	05/04/2018	0
Pet Protection Coverage	750	-	04/26/2018	0
Pet Protection Coverage	750	-	05/04/2018	0

Click "OK" to continue

AMsuite Core Home

Policy Change 0000023976 (Bound) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change Bound

Your Policy Change (#0000023976) has been bound.

- View your policy (#600005317)
 - [Print ID Cards](#)
 - [Print Declarations Page](#)

You can see that the Policy Change has been bound

Click the hyperlinks to view the policy, ID Cards, or Declarations Page

Policy changes

AMsuite®

Search by Account, Policy or Quote Number
Live Chat >
modernLINK >
Training >
kenhicks ▾

Accounts
Policies
Activities
Analytics
Forms / Program Manuals
→ + START NEW QUOTE

Account Clicking the Policy Number navigates you back to AMsuite®

Motorsports (600005317) In Force

SUMMARY
☰

CONTACTS
👤

VIEW/ADD ACTIVITIES
3

VIEW/ADD NOTES
0

VIEW/UPLOAD DOCUMENTS

BILLING / MAKE PAYMENT
✓

Change Policy

Cancel Policy

>AMsuite Core

Set Up An Online Account

DECLARATION PAGE ID CARD
Updated ID Cards and Declarations Page are immediately available

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$723.48
1602 W Schaaf Rd, Cleveland, OH 44109-4672	513555555	External (009539)	Taxes and Fees	\$0.00
Do we have the customer's permission to send autodialed pre-recorded and artificial voice calls and/or text messages to the phone number provided to all policies under this account? No	Policy Inception	Producer of Service	Total Cost	\$723.48
	April 26, 2018	External (009539)		
Policy Expiration Date	Cancellation Date			
April 26, 2019				
Pre Renewal Direction	Policy Status			
	In Force			
Cancellation Reason	Previous Policy Number			

Vehicles

Vehicle Number	Vehicle Type	Year	Make	Model	VIN/HIN/Serial #	Storage Address	Show Vehicle Coverages:
2	motorcycle	2015	HARLEY-DAVIDSON	FLHXSE CVO STREET GLIDE SPECIAL	1HD1PXN1XFB952705	1602 W Schaaf Rd,Cleveland,OH,44109-4672	
1	motorcycle	2007	HARLEY-DAVIDSON	FLSTC HERITAGE SOFTAIL CLASSIC	1HD1JH51X7Y123456	1602 W Schaaf Rd,Cleveland,OH,44109-4672	

You can see that Vehicle 2 has been successfully added

Drivers

Policy Transactions

Here is the record of the Policy Change
All ▾
Search Transactions

JOB NUMBER	TRANSACTION STATUS	TYPE	PERIOD STATUS	CREATED BY	CREATED DATE	EFFECTIVE DATE
0000023976	Bound	Policy Change	In Force	Ken Hicks	5/4/18	5/4/18
0000023739	Bound	Submission	In Force	Ken Hicks	4/26/18	4/26/18