

Viewing Account and Policy Information

This document provides the steps to guide you to view account and policy information and billing history for an American Modern policyholder.

- Viewing Account Information
- Viewing Policy Information

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.

Viewing Account Information

Before you can create a quote, an account is created. An account is a person or organization with the intention to obtain a quote or hold a policy with American Modern.

1

Click **Account**. If you recently accessed the account, it will be listed in the window and you can click to access it. Otherwise, enter the account number and click the search icon.

If you don't know the account number, select **New Account**. Enter **First** and **Last Name** and click **Search**. Accounts that match the search criteria are displayed at the bottom of the page.

2

The **Account File Summary** page displays the basic information such as account name, address, emails, phone numbers, and official IDs.

This page displays Current Activities, Policy Terms, which lists all policy terms associated with the account, and Pending Policy Transactions.

3

To review the contacts on the account, click **Contacts**. The **Contact Detail** tab displays the highlighted contact's basic information. Click the **Roles** tab to view ore detailed information on the highlighted contact's roles. Select the row for a contact to highlight it and display that contact's information.

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Click **MVR Report Details** to view all MVR reports received for the highlighted contact.

This page displays David's driver information, such as his name and date of birth. Click the **Incidents** tab and **Additional Info** tab to view additional Motor Vehicle Records information.

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Click **Addresses** from the sidebar menu.

The page displays the addresses associated with the customer. Click **Associated Transactions** or **Associated Policies** to view associated transactions and policies for this customer.

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Click **Locations** from the sidebar menu.

The **Account File Locations** page displays all locations associated with the account. You can view specific details associated with each location.

Click the line with the address of the location you want to view and the details are displayed under the **Locations Details** tab.

Scroll down to view the **Policy Terms** and **Policy Transactions** associated with this location. Click the policy number or transaction number to view details about that policy or transaction.

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Click **Participants** from the sidebar menu.

The **Account File Participants** page displays the users that interact with the account by the role they performed on the account. You can also view the **Assigned User** and the **Assigned Group** to which the user belongs.

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Click **Policy Transactions** from the sidebar menu.

The **Account File Policy Transactions** page displays summary information about all policy transactions that have occurred on the account. Click a policy number or transaction number to jump to the associated policy transaction.

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Click **Submission Manager** from the sidebar menu.

The **Submission Manager** page contains summary information such as policy type, effective date, status of the transaction, and the total cost. You can begin actions on this page, such as starting a new submission. Click **New Submission (Quote)** to begin a new submission.

You can view multiple submissions and the **Total Cost** of all submissions on the account. Click the drop-down arrow next to All Submissions to filter the list. Select **All Submissions**, **Open Submissions**, or **Complete Submissions**.

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Click **Print Quote** or **Print Application** for bound policies from this page.

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Click **Documents** from the sidebar menu.

The **Account File Documents** page allows you to search for and view any attached documents related to the account or policies in the account.

The **Documents Requiring Signature** tab displays documents that have been generated and printed for the customer to sign.

The **Documents** tab displays documents that were uploaded into the system, such as photos.

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Click **Notes** from the sidebar menu to search for and view notes related to the account or policies in the account.

Enter key words to search for notes using the **Text Search** field. Click **Search** to apply your search criteria. You can also search for notes using the various filters. Search by Author, Topic, Related To (a certain policy) or Date.

Select Author, Date, Subject, or Topic from the Sort By drop-down menu to sort the notes.

Select “Ascending” or “Descending” from the **Sort Order** field to change the order of the notes in the list.

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Click **Claims** from the sidebar menu.

On the **Account File Claims** page, you can search for claims on the account. Search by Loss Date, Policy Period, or Policy Type using the drop-down menus.

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Click **Billing** from the sidebar menu.

The **Billing** page displays all **Owned Policies** associated with the account, along with each policy’s billing information.

The **Billing Account** field displays the billing account number. The billing sub accounts of the current account are displayed, if available.

The **Account Balances** and **Total Outstanding** amount for the account are shown. The billing information includes policy details, such as the **Total Outstanding** and **Payment Plan**.

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Click **History** from the sidebar menu. The **Account File History** page displays history events associated with the account and policies in the account.

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Click **Summary** to return to the **Account File Summary** page. Click a policy number or transaction to jump to the associated policy transaction or policy. This will take you to the **Summary** page for that policy.

Viewing Policy Information

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The **Summary** page is the default landing page and displays summary account information.

Click **Set up an Online Account** and enter the customer email address in the pop up to send an email to this customer to create a portal account. This account allows access to access policy information and documents.

View your **Completed Policy Transactions** as well as **Pending Policy Transactions** at the bottom of the **Summary** page.

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Click **Policy Info** to view information about the **Primary Named Insured**. In addition, you can also view the **Producer** information and various **Policy Details**.

Click **Drivers** from the sidebar menu if this is a recreational policy.

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Click the tabs to view different information, such as the **Driver Experience** and **Motor Vehicle Record**, for each driver.

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Click **Vehicles** to view all vehicles associated with the policy along with the basic vehicle information.

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Click **CLUE Results** from the sidebar menu if this is a recreational policy.

The CLUE Results page displays any loss details returned from CLUE reporting service. On this page, you can review these details to learn more about a loss.

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For a Residential policy, the options are **Dwelling** and **Dwelling Construction**, instead of **Drivers** and **Vehicles**.

Click **Dwelling** for location information for the dwelling. The tab menu provides different information such as **Protection Details** and **Underwriting**.

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Click the **Underwriting** tab to see the underwriting details for this dwelling.

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Click **Dwelling Construction** from the sidebar for more information about the valuation and the home's characteristics.

CLUE results are not available for residential policies.

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Click **Coverages** from the sidebar menu for either Residential or Recreational policies.

The **Coverages** page displays the coverages that were selected when quoting the policy. The page shown is from a recreational policy.

At the bottom of the page, you can view the coverages applied per vehicle.

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Click **Quote** from the sidebar menu.

The **Quote** page displays total premium, taxes and surcharges, and total cost for a policy period.

Click the **Policy Premium** tab to view all coverages applied to the policy.

Click **Discounts Applied** to view all of the discounts that were applied to the policy.

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Click **Forms** from the sidebar menu to view all the forms associated with the policy.

Note the **Date** field in the sidebar menu.

Click the calendar icon to adjust the date to view the policy at a date other than today's date.

For example, if you wanted to see a policy before a change was implemented, you could choose an earlier date.

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The **Tools** pages contain information specific to this policy. Some of these pages may look familiar from when you viewed the account information, but these pages now contain information at the policy level. You have already reviewed the Summary page.

Click **Billing** from the sidebar menu.

All billing transactions for the policy are displayed under the **Transaction Details** tab.

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Click the **Payment Schedule** tab to view the payment schedule information associated with the policy.

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Click **Contacts** from the **Tools** menu. The **Contacts** page lists contacts associated with the policy.

Details are shown for the highlighted contact. To view another contact, select the row with that name and information displayed.

Use the tab menu to view information related to the **Role** and **Addresses** associated with the contact.

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Click **Participants** to see the users that interact with the policy by the role performed on the policy.

The **Assigned User** and **Assigned Group** to which the user belongs are listed.

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Click **Notes** from the Tools menu to search for and view notes related to the policy.

Search for notes using the **Text Search** field in which you can type in key words. Click Search to apply your search criteria. You can also search for notes using the various filters and search by Author, Topic, Related To (a certain policy) or Date. Click Search to apply your search criteria.

Sort the notes by selecting Author, Date, Subject, or Topic from the Sort By drop-down menu or change the order the notes appear by selecting “Ascending” or “Descending” from the **Sort Order** field.

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Click **Documents** from the **Tools** menu to search for and view any attached documents related to the policy. Note that this is different from the forms page, which just lists the forms associated with the policy.

Documents are signed versions of forms and photos that are uploaded.

The **Documents Requiring Signature** tab displays documents that we have generated and printed off for the customer to sign.

The **Documents** tab displays documents that were uploaded into the system. An example of a document is a photo of the vehicle or dwelling.

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Click **Policy Transactions** from the **Tools** menu.

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The **Policy Transactions** page displays summary information about all the transactions that have occurred on the policy. The type of policy transaction, reason, effective date, transaction status and current status of each transaction are listed.

You can compare multiple transactions by selecting the boxes next to the **Policy Types** you want to compare. Click **Compare**.

View the differences between the policy transactions. You can also view the differences at an item level.

Click the folder icon next to the item for more details. Click **Return to Policy Transaction** at the top of the page to return to that page.

Click **Risk Analysis** from the **Tools** menu to view the all risks related to the policy.

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Use the tab menu to view Prior Policies, Claims, Accidents/Violations, and Motor Vehicle Records.

Click the **Motor Vehicles Record** tab to view Motor Vehicle Records. This page displays the driver information, such as name and date of birth.

Click the **Incidents** tab and **Additional Info** tab to view additional Motor Vehicle Records information.

To return to the **Risk Analysis** page, click [Return to Risk Analysis](#) at the top of the page.

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Click **History** from the sidebar panel to view history events associated with the policy.

This is different than the **Policy Transactions** page, which displays summary information about all the transactions that have occurred on the policy.

The **History** page displays all history events associated with the policy, which is more detailed than the transaction.

You can view high-level details of each transaction history, such as the **User** and a **Description**. Scroll to the right for more information.

Click a **Policy Transaction** number to jump to the associated policy transaction.

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