

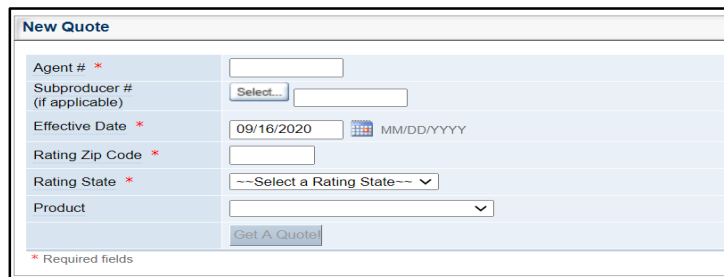
AMsuite®

Basic Navigation

This document will help you determine where to start a New Quote in modernLINK or AMsuite. Help you locate Activities, recent Accounts, Policies and Forms/Program Manuals.

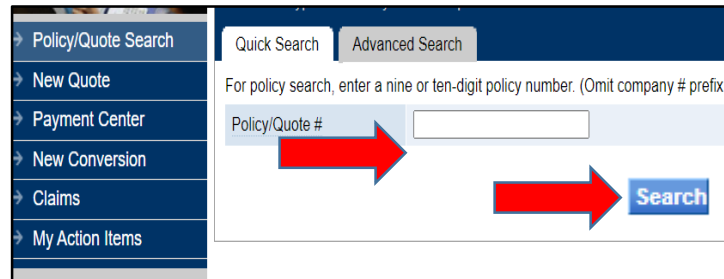
New Quote from modernLINK

Start a New Quote from the modernLINK® Home Page or Quotes and Policies Page and the system will automatically navigate you to AMsuite to complete the quote.

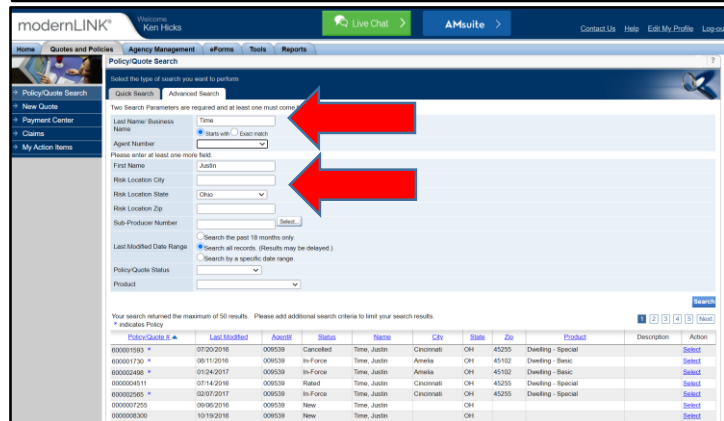


Retrieve Previous Policy/Quote from modernlink

To retrieve a previous Policy or Quote *with the policy or quote number* go to the Policy/Quote Search Page under the Quick Search tab. Enter the Policy or quote number and select search.



To retrieve a previous Policy or Quote *without the policy or quote number* go to the Policy/Quote Search Page under the Advanced Search tab. Enter Last Name, First Name and select search. The search can be narrowed by entering additional Risk information such as State, Product, Status, etc.

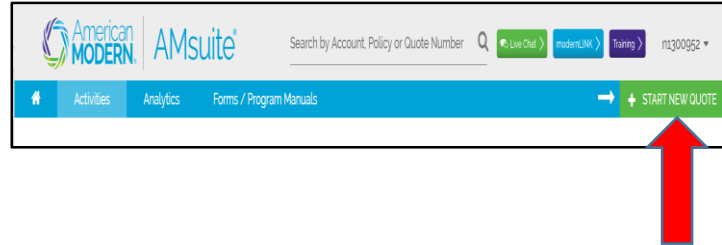


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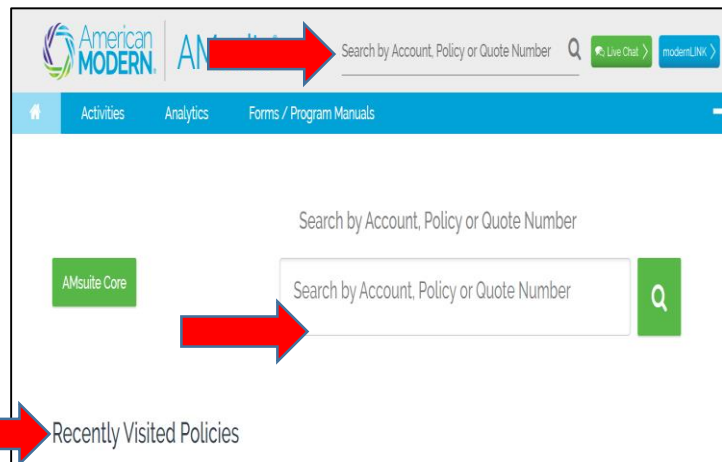
New Quote from AMsuite Portal

Start a New Quote from the home or Activities page select the green Start new Quote at the right-hand side of the page.



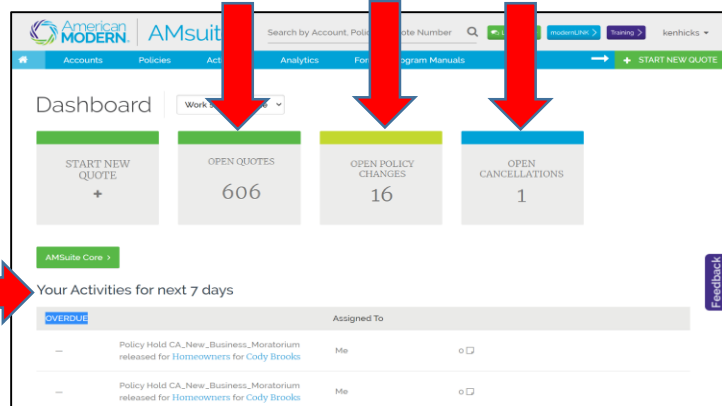
Retrieve Previous Account, Policy or Quote from AMsuite Portal

To retrieve a previous Account, Policy or Quote in AMsuite Portal there are two (2) areas you can enter the number and search. You can also go to Recently Visited Policies or scroll down to Recently Visited Accounts and select the requested Policy or Account.



AMsuite Portal Dashboard

The Dashboard Tiles display the individual user transactions such as Open Quotes, Open policy Changes, and Open Cancellations. It also provides access and quick view of open Activities that may need action within the next 7 days.



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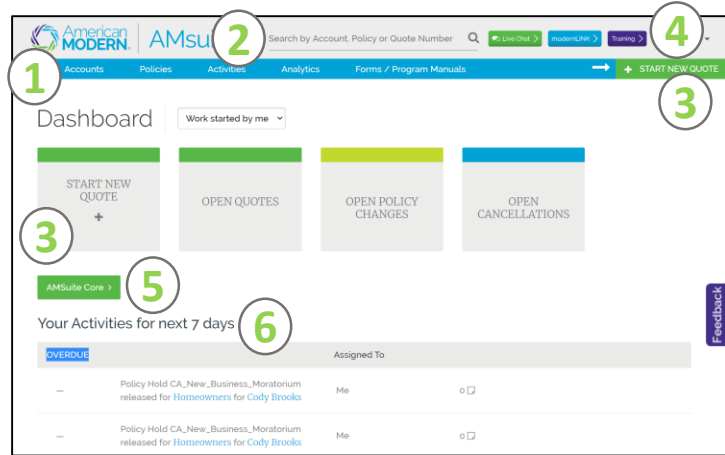
Basic Navigation

AMsuite Portal Dashboard

The Dashboard is where you can find the (1) Accounts, Policies, Activities (Upcoming in next few days (6)), and Forms/Program Manuals Tabs.

There is a search by (2) Account, Policy, or Quote Number area at the top of the page.

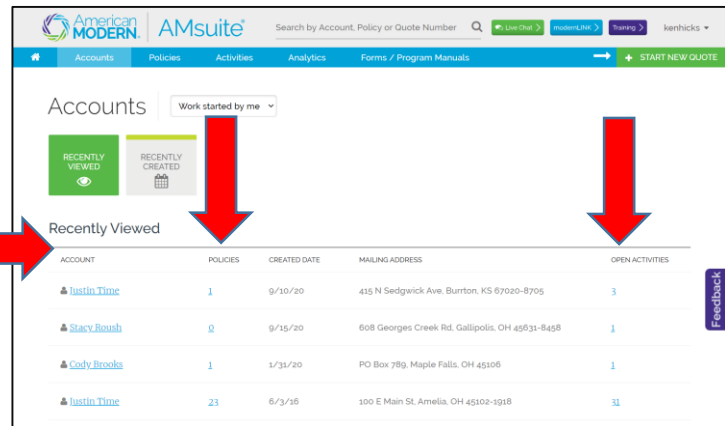
You can start a (3)New Quote, return to (4) modernLink, Training, Live Chat for assistance, and (5)AMsuite Core.



AMsuite Portal Accounts

On the Accounts page you can find and retrieve recently viewed or created accounts (Named Insured).

Under Recently Viewed you can also find the number of policies and any outstanding activities related to the Account.

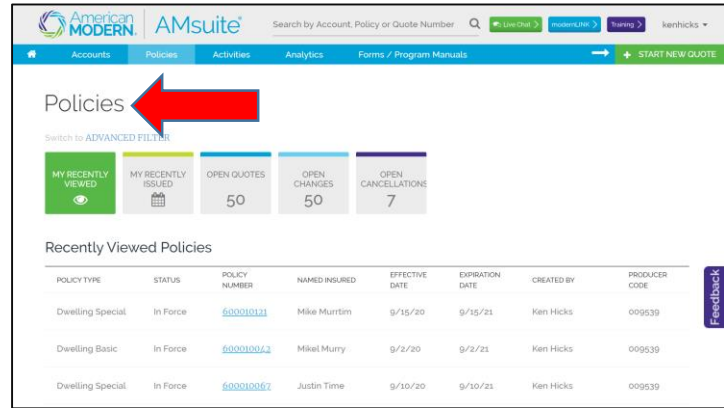


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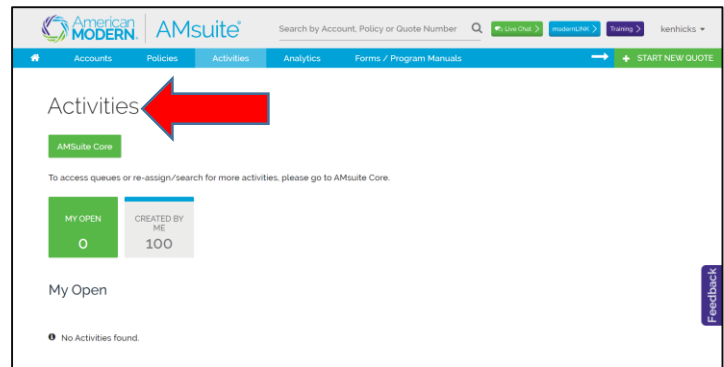
AMsuite Portal Policies

On the Policies page you can view and access any recently viewed policies. The Advanced Filter allows you to filter the policies by category and policy type.



Activities

Allows you to view and respond to created, open, or completed activities.

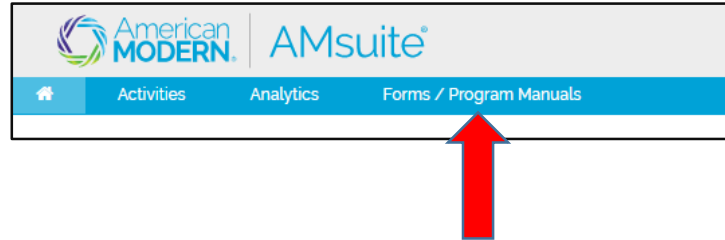


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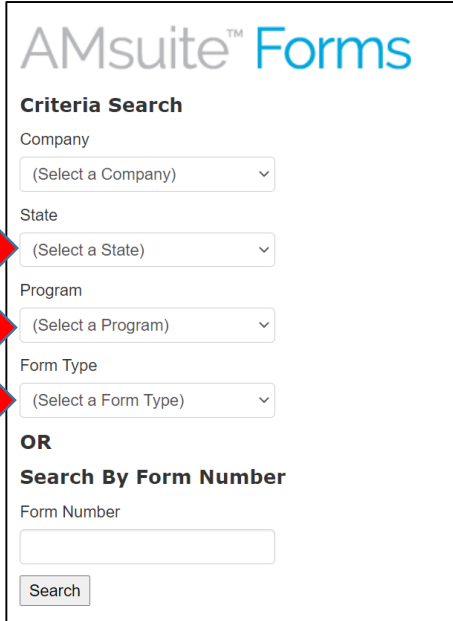
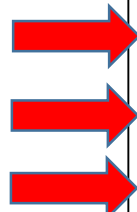
Forms/Program Manuals

To find information on the Programs such as eligibility, coverage definitions, endorsements, and the policy jackets. Choose Forms/Program Manuals to search by State, Program, and/or Form Type.



Choose specific State, Program such as Dwelling Basic, Special, etc. and the form type you would like to review.

Program Manual will give you information from program requirements, eligibility, endorsements, discounts and surcharges to coverage definitions.



A screenshot of the 'AMSuite™ Forms' search interface. It features a 'Criteria Search' section with three dropdown menus: 'Company' (Select a Company), 'State' (Select a State), and 'Program' (Select a Program). Below these is a 'Form Type' dropdown menu (Select a Form Type). An 'OR' section follows, with a 'Search By Form Number' section containing a 'Form Number' input field and a 'Search' button.

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