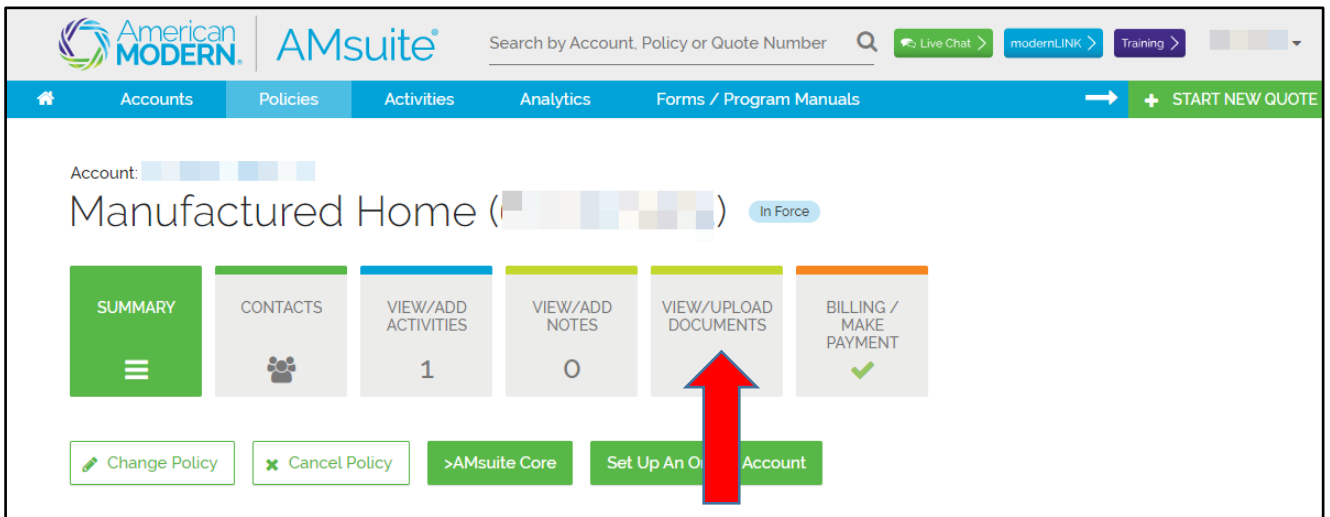


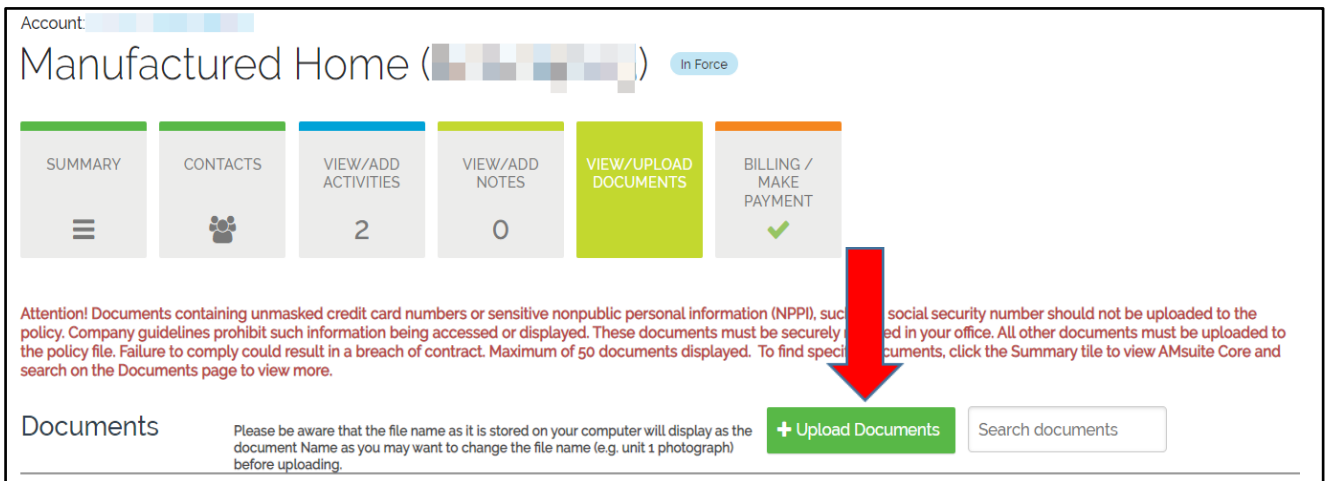
This Job Aid will show how to attach or upload a required document, file, form or photo to a quote or existing Policy in AMsuite.

- 1 From the Summary Page of the policy or from the Quote page in an unsubmitted quote, select **VIEW/UPLOAD DOCUMENTS**



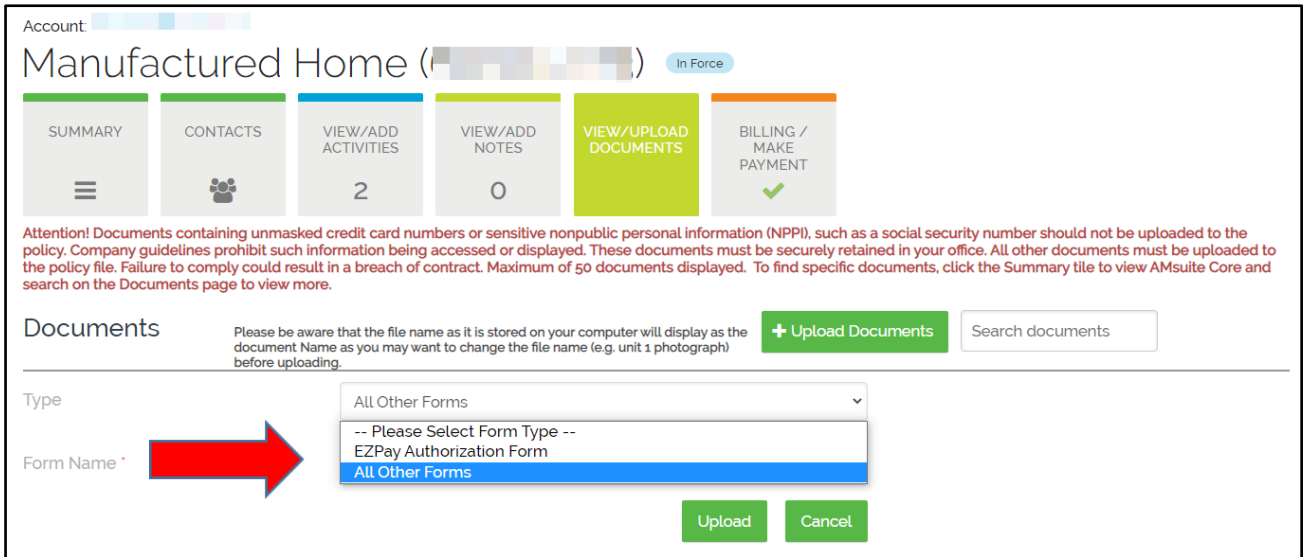
The screenshot shows the AMsuite interface for a policy titled "Manufactured Home". The navigation bar includes "Accounts", "Policies", "Activities", "Analytics", and "Forms / Program Manuals". A red arrow points to the "VIEW/UPLOAD DOCUMENTS" button in the main dashboard, which also shows counts for "VIEW/ADD ACTIVITIES" (1) and "VIEW/ADD NOTES" (0). Other buttons include "SUMMARY", "CONTACTS", "BILLING / MAKE PAYMENT", "Change Policy", "Cancel Policy", ">AMsuite Core", and "Set Up An Online Account".

- 2 Select **+ Upload Documents**



The screenshot shows the "Documents" section of the AMsuite interface. A red arrow points to the "+ Upload Documents" button. Above the button, there is a warning message: "Attention! Documents containing unmasked credit card numbers or sensitive nonpublic personal information (NPPI), such as social security number should not be uploaded to the policy. Company guidelines prohibit such information being accessed or displayed. These documents must be securely stored in your office. All other documents must be uploaded to the policy file. Failure to comply could result in a breach of contract. Maximum of 50 documents displayed. To find specific documents, click the Summary tile to view AMsuite Core and search on the Documents page to view more." Below the warning, there is a search bar labeled "Search documents" and a note: "Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading."

3 Select the form type.



Account: Manufactured Home ( ) In Force

SUMMARY CONTACTS VIEW/ADD ACTIVITIES 2 VIEW/ADD NOTES 0 VIEW/UPLOAD DOCUMENTS BILLING / MAKE PAYMENT

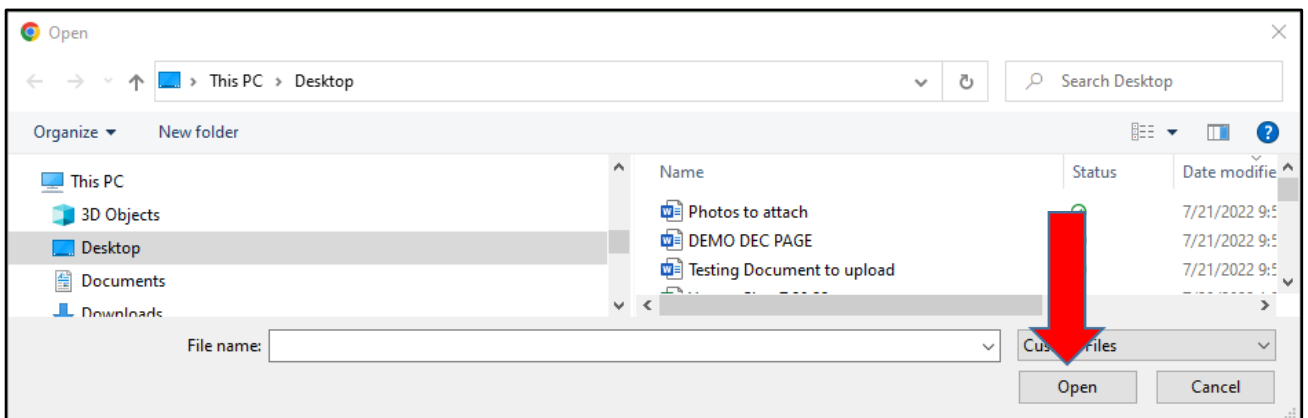
Attention! Documents containing unmasked credit card numbers or sensitive nonpublic personal information (NPPI), such as a social security number should not be uploaded to the policy. Company guidelines prohibit such information being accessed or displayed. These documents must be securely retained in your office. All other documents must be uploaded to the policy file. Failure to comply could result in a breach of contract. Maximum of 50 documents displayed. To find specific documents, click the Summary tile to view AMsuite Core and search on the Documents page to view more.

Documents Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading. + Upload Documents Search documents

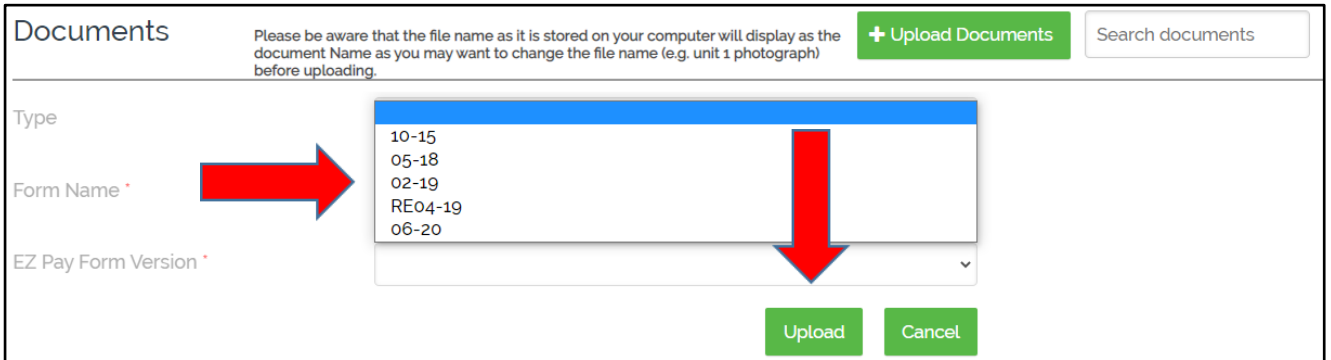
Type All Other Forms -- Please Select Form Type -- EZPay Authorization Form All Other Forms

Form Name \* Upload Cancel

4 If attaching an EZPay Authorization form, there will be an additional question to select the EZ Pay Form Version. When attaching any other form, photo or documentation select All Other Forms. Your desktop files will be displayed to choose the desired form to upload. Select the file and select **Open**.



- 5 For the EZPay Authorization form, choose the version date.  
Select **Upload**.



Documents

Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading.

+ Upload Documents

Search documents

Type

Form Name \*

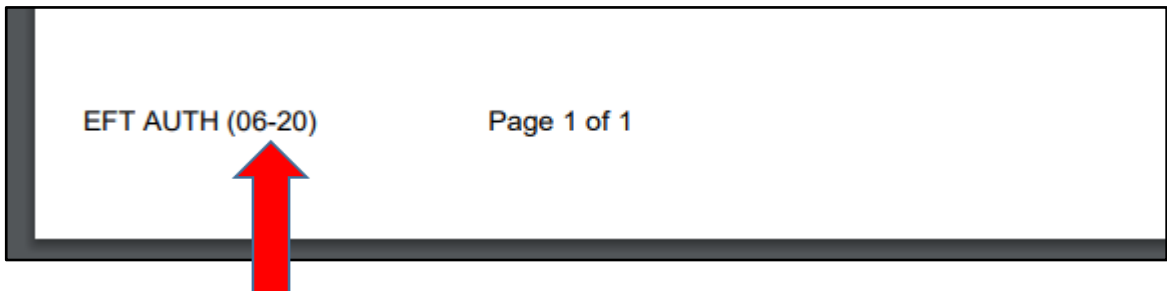
EZ Pay Form Version \*

10-15  
05-18  
02-19  
RE04-19  
06-20

Upload

Cancel

The Version for the EZPay Authorization form is in the lower left corner of the signed EZPay Authorization form. Choose the version date.  
Select **Upload**.



EFT AUTH (06-20)

Page 1 of 1

6 For all other forms, Verify Form Name. Select **Upload**.

Documents

Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading.

+ Upload Documents

Type

All Other Forms ▼

Form Name \*

Photos to attach.docx

Upload
Cancel

7 Attached item will now be displayed under **Documents..**

Documents

Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading.

+ Upload Documents

Name	Description	Type	Author	Date Uploaded
<a href="#">Photos to attach</a>	Photos to attach	Underwriting		7/21/22

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