

# Basic Navigation

## Navigate to AMsuite from modernLINK

The screenshot shows the modernLINK home page for user Ken Hicks. The navigation bar includes 'Home', 'Quotes and Policies', 'Agency Management', 'eForms', 'Tools', and 'Reports'. A 'Live Chat' button and an 'AMsuite' button are visible in the top right. A 'System Alerts' section contains a message: 'My Action Items are available in Quotes and Policies. Go directly to AMsuite for policy and quote submissions in the new AMsuite'. A callout box points to this message with the text: 'Navigate to AMsuite by clicking on the links'. Another callout box points to the 'New Quote' form with the text: 'Start a New Quote from the modernLINK Home Page or Quotes and Policies Page and the system will automatically navigate you to AMsuite'. The 'New Quote' form includes fields for Agent #, Subproducer #, Effective Date, Rating Zip Code, Rating State, and Product. A 'Marketing Center' sidebar is also visible on the right.

The screenshot shows the 'Policy/Quote Search' page in modernLINK. The search form includes fields for Last Name/Business Name, Agent Number, First Name, Risk Location City, Risk Location State, and Location Zip. There are also options for 'Search by a specific date range' and 'Search all records'. A callout box points to the search form with the text: 'Start a New Quote from the Quotes and Policies Page and the system will automatically navigate you to AMsuite'. Another callout box points to the search results table with the text: 'Retrieve an AMsuite Quote or Policy from modernLINK'. The search results table contains the following data:

Policy/Quote #	Last Modified	Agent#	Status	Name	City	State	Zip	Product	Description	Action
600001993 *	07/20/2016	006539	Cancelled	Time, Justin	Cincinnati	OH	45255	Dwelling - Special		Select
600001730 *	08/11/2016	006539	In-Force	Time, Justin	Amelia	OH	45102	Dwelling - Basic		Select
000002498 *	01/24/2017	006539	In-Force	Time, Justin	Amelia	OH	45102	Dwelling - Basic		Select
0000004511	07/14/2016	006539	Rated	Time, Justin	Cincinnati	OH	45255	Dwelling - Special		Select
000002000 *	02/07/2017	006539	In-Force	Time, Justin	Cincinnati	OH	45255	Dwelling - Special		Select
0000007255	09/05/2016	006539	New	Time, Justin		OH				Select
0000008300	10/19/2016	006539	New	Time, Justin		OH				Select
0000001192	06/07/2016	006539	New	Time, Justin		OH				Select
0000001254	06/06/2016	006539	New	Time, Justin		OH				Select
600002008 *	01/25/2017	006539	In-Force	Time, Justin	Amelia	OH	45102	Manufactured Home		Select

## Basic Navigation

This job-aid will show you Basic Navigation, AMsuite Pages, and Dashboard Tiles. The Dashboard Tiles display the individual users transactions.

The screenshot shows the AMsuite Dashboard interface. At the top, there is a search bar and navigation links for Live Chat, modernLINK, and Training. Below the search bar is a navigation menu with Accounts, Policies, Activities, Analytics, and Forms. The main content area is titled 'Dashboard' and includes a dropdown for 'Work started by me'. There are four dashboard tiles: 'START NEW QUOTE' with a plus sign, 'OPEN QUOTES' with the number 606, 'OPEN POLICY CHANGES' with the number 16, and 'OPEN CANCELLATIONS' with the number 1. Below these tiles is a section for 'Your Open Activities for the next 7 days' with a table of overdue activities. Callouts highlight the dashboard tiles and the activities table.

**Dashboard Tiles will display your individual transactions**

**Easy Access or Quick view of Open Activities on the Dashboard**

OVERDUE	Assigned To
! 18 days ago Underwriter has reviewed this job for Recreational for Athira SmokeTest	Me
! 18 days ago Submission Withdrawn for Recreational for sarah test	Me
! 11 days ago Submission Withdrawn for Recreational for Raghu RES Policy Summary	Me

### Navigate through the Launch Pad of AMsuite

1. Landing Pages
2. Search Method (numbers only – advance search available in Core AMsuite)

This screenshot shows the AMsuite Dashboard with callouts explaining navigation and search. Callout 1 points to the navigation menu (Accounts, Policies, Activities, Analytics, Forms) and says 'Click for Easy Navigation to Different Landing Pages'. Callout 2 points to the search bar and says 'Search Easily Here for Account, Policy or Quote Number'. The dashboard tiles show 'START NEW QUOTE' (+), 'OPEN QUOTES' (619), 'OPEN POLICY CHANGES' (16), and 'OPEN CANCELLATIONS' (3). Below the tiles is the 'Your Open Activities for the next 7 days' section with a table of overdue activities.

**Click for Easy Navigation to Different Landing Pages**

**Search Easily Here for Account, Policy or Quote Number**

OVERDUE	Assigned To
! 14 days ago Underwriter has reviewed this job for Recreational for Athira SmokeTest	Me
! 14 days ago Submission Withdrawn for Recreational for sarah test	Me
! 17 days ago Submission Withdrawn for Recreational for Raghu	Me

# Basic Navigation

## AMsuite Pages

### 1. Accounts

**Accounts** | Policies | Activities | Analytics | Forms

Search by Account, Policy or Quote Number | Live Chat | modernLINK | Training | English (US) | deployext

**1** Accounts

RECENTLY VIEWED | RECENTLY CREATED

From the Accounts Page you can view and retrieve recently viewed and created accounts (customers)

Displays number of policies on an account (customer) with easy access hyperlink

Click on the account (customer) hyperlink to open the account

Displays Open Activities on an account (customer) with easy access hyperlink

ACCOUNT	POLICIES	CREATED DATE	MAILING ADDRESS	OPEN ACTIVITIES
<a href="#">Athita SmokeTest</a>	1	1/2/18	123 E Main St. Amelia, OH 45102-1945	3
<a href="#">DOESEL BYRON</a>	1	1/18/18	6006 Harrigstead Ave, Parma, OH 44129-3721	2
<a href="#">Stacy Roush</a>	0	12/27/17	608 Georges Creek Rd, Gallipolis, OH 45631	2
<a href="#">Eric Fisher</a>	2	12/26/17	608 Georges Creek Rd, Gallipolis, OH 45631-8458	5
<a href="#">JAMES BAKER</a>	0	1/18/18	917 S 48th Ave, Wausau, WI 54401-9376	1
<a href="#">Sarah Test</a>	0	1/3/18	123 street, Columbus, OH 45015	0
<a href="#">MARIANNE COOK</a>	0	1/19/18	PO Box 503, Austin, NV 89310-0503	0

### 2. Policies

**Accounts** | **Policies** | Activities | Analytics | Forms

Search by Account, Policy or Quote Number | Live Chat | modernLINK | Training | English (US) | deployext

**2** Policies

Switch to ADVANCED FILTER

Advance Filter allows filtering by Category and Policy Type

Tiles to view various options

Hyperlink to retrieve policy

POLICY TYPE	STATUS	POLICY NUMBER	NAMED INSURED	ISSUE DATE	EXPIRES DATE	CREATED BY
Homeowners	In Force	<a href="#">300001222</a>	www cccc	1/23/18	1/23/19	deployment external tester
Dwelling Special	Canceled	<a href="#">300001217</a>	BRL	1/23/18	1/23/19	deployment external tester
Motorsports	In Force	<a href="#">300001220</a>	FRANK ALAN	1/23/18	1/23/19	AutoTester
Motorsports	In Force	<a href="#">300001185</a>	ALYSE ABONILLA	1/20/18	1/19/19	deployment external tester

# Basic Navigation

## 3. Activities

The screenshot shows the AMsuite interface with the 'Activities' tab selected. A red circle highlights the 'Activities' tab in the top navigation bar, with a callout box stating 'View and Respond to Activites Here'. Below the navigation bar, the 'Activities' section features an 'AMSuite Core' button with a callout 'Access to AMsuite Core'. A message below the button reads: 'To access queues or re-assign/search for more activities, please go to AMsuite Core.' Below this are three summary tiles: 'MY OPEN' (0), 'MY COMPLETED' (0), and 'CREATED BY ME' (49). A callout box points to these tiles, stating 'Tiles to View My Open, My Completed, and Created By Me'. Under the 'My Open' section, it says 'No Activities found.' with a callout box stating 'Activities will be listed here'.

## 4. Forms

The screenshot shows the AMsuite interface with the 'Forms' tab selected. A red circle highlights the 'Forms' tab in the top navigation bar. A callout box points to the 'Forms' page, stating 'Forms Page to retrieve Program Manuals and Program forms'. The page content includes the heading 'AMsuite™ Forms' and a search section with dropdown menus for Company, State, Program, and Form Type. Below these is an 'OR' section with a 'Search By Form Number' field and a 'Search' button.

# Basic Navigation

Start a New Quote in a variety of places

Dashboard | Work started by me

START NEW QUOTE +	OPEN QUOTES 619	OPEN POLICY CHANGES 16	OPEN CANCELLATIONS 3
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AMSuite Core >

Your Open Activities for the next 7 days

OVERDUE	Assigned To	
! 14 days ago Underwriter has reviewed this job for Recreational for Athira SmokeTest	Me	0
! 14 days ago Submission Withdrawn for Recreational for sarah test	Me	0
! 7 days ago Submission Withdrawn for Recreational for Raghu RES Policy Summary	Me	0

Home | Quotes and Policies | Agency Management | eForms | Tools | Reports

My Account Items are available in Quotes and Policies  
Go directly to AMsuite for policies, activities, and submissions in the new AMsuite

New Quote

Agent # \* [Select] [ ]  
 Subproducer # (if applicable) [Select] [ ]  
 Effective Date \* [01/19/2018] [MM/DD/YYYY]  
 Rating Zip Code \* [ ]  
 Rating State \* [--Select a Rating State--]  
 Product [ ]  
 \* Required fields

# Navigating

Dashboard | Work started by me

START NEW QUOTE +	OPEN QUOTES 606	OPEN POLICY CHANGES 16	OPEN CANCELLATIONS 1
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AMSuite Core >

Your Open Activities for the next 7 days

OVERDUE	Assigned To	
! 18 days ago Underwriter has reviewed this job for Recreational for Athira SmokeTest	Me	0
! 18 days ago Submission Withdrawn for Recreational for sarah		

Home | Quotes and Policies | Agency Management | eForms | Tools | Reports

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