



## Create an Account

### 1 Search for the Account

An account is a person or organization with the intention to obtain a quote or hold a policy with American Modern. The purpose of an account is to see a clear overview of multiple submissions and/or policies.

It is important to note that accounts must be created **first** before being able to quote submissions.

The screenshot shows a form titled "Please enter basic account holder information, and then click Search." The form includes fields for Company Name, First name, Last name, Country, City, State, and ZIP Code. There are checkboxes for "Company name is an exact match", "First name is an exact match", and "Last name is an exact match". A "Search" button is at the bottom left. A blue callout box points to the name fields: "If you are entering a person, enter their name in the first and last name fields. If you were entering a company fill in the name in the company field. Only fill out the fields that apply to your situation." Another callout box points to the exact match checkboxes: "If you are uncertain about the exact spelling of a first or last name, unclick 'first name is an exact match' and 'last name is an exact match,' to increase search results." A third callout box at the bottom states: "AMsuite's streamlined process eliminates duplicate accounts by automatically searching for existing accounts in the new account creation process." A blue button labeled "Click Search." is positioned below the "Search" button.

- When you are creating an account you can either enter information for a company or for a person. Fill out only the one that applies to your situation.
- When searching the account, you have the option for a general search or for an exact match. If you are uncertain about the spelling, uncheck the **First name is an exact match** box or the **Last name is an exact match** box.
- Before creating an account, AMsuite is designed to search for previous accounts to avoid creating duplicates in the system. If your search does not turn up any matches, you then will be able to create a new account with the information you have already provided. If the search returns a match, you are then able to proceed with the previously created account.
- After all the information is filled in, click **Search**. This will then take you to the next page of account matches, or will allow you to create a new account.

### 2 Create the New Account

If the search finds no other accounts under this name, the **Create New Account** button appears at the bottom of your screen. Click **Create New Account**.

First name   
 Last name   
 First name is an exact match   
 Last name is an exact match   
 Country   
 City   
 County   
 State   
 Company   
 Person   
 Create New Account

Click **Create New Account** and select **Person**.

- The system stores the search information you already entered so you do not have to reenter your customer's name.
- Fields with asterisks must be completed to continue with new account creation. Enter all required information.

### 3 Search for a Producer Code

After entering the required information, scroll to the bottom of your screen. Enter the producer code in the **Producer Code** search field or click the search icon to locate one. Producer codes are six digits for direct producers and 12 digits for sub-producers. Sub-producer codes contain a hyphen.

Address 1   
 Address 2   
 City   
 County   
 State   
 ZIP Code   
 Address Type   
 Description   
**Official IDs**  
 SSN   
**Select Producer**  
 Producer Code    
 Contracted Agency   
 Producer

After entering the required information, scroll to the bottom of your screen.

Enter the producer code in the **Producer Code** search field. Click the **Search** icon.

### 4 Select a Producer Code

From the **Producer Codes** page, you can search for a producer or select a pre-generated producer code. Select the appropriate **Producer Code**.

## Producer Codes [Return to Create account](#)

Producer Code	<input type="text"/>
Producer Name	<input type="text"/>
Parent Producer Code	<input type="text"/>
Organization	Internal - American Modern Property & Casualty
Available to User	CSR   Customer Care
<input type="button" value="Search"/>	<input type="button" value="Reset"/>

**Search for a Producer Code.**

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**Search Results**

	Producer Code	Producer Name	Parent	Parent Na
<input type="button" value="Select"/>	00			
<input type="button" value="Select"/>	99		999006	Testing fo

**Select a Producer Code.**

Click **Update** to save the new account.

## 5 Begin a New Submission (Quote)

When starting a new Quote you need to start a new Submission. To do this first click **Actions** on the top left, then go down to the New Submission (Quote) page. From there you can proceed to fill out the mandatory information for a policy quote.

AMSuite Policy Desktop Account Policy Contact Search Team Administration Analytics

Account Adam Greene Account # 0000000019

**Actions**

- Create
  - New Note
  - New Document
  - New Submission (Quote)**
  - New Activity
  - Withdraw Account
  - Move Policies to this Account
  - Rewrite Policies to this Account
  - Merge Account into this Account
  - Convert Manual Policy
- Notes
- Claims
- Billing
- History

**Account File Summary** [How to create a submission \(quote\)](#)

Account No 0000000019

Official IDs  
SSN

Producer Code	Producer
999006	Testing fo

**Click here to go to the New Submissions page.**

Address 399 Smiley Avenue Cincinnati, OH 45246

County

Address Type Home

Address Description

Current Activities