



My Activities Page

1 Page Overview

The screenshot shows the 'My Activities' page interface. On the left is a navigation menu with options: My Activities (selected), My Accounts, My Submissions (Quotes), My Other Policy Transaction, and My Queues. The main content area has a header with 'My Activities' and a 'CLICK HERE TO LEARN MORE' button. Below the header is a filter dropdown set to 'All open' and buttons for 'Assign', 'Skip', and 'Complete'. A table lists activities with columns: Due Date, Priority, Status, Subject, and Transaction #. The table contains five rows of activities, all with a due date of 07/17/2015, a status of 'Open', and a subject of 'Obtain Required Signed Document(s)'. A note above the table states: 'Additional Activities may be listed for you in modernLINK Action Items'.

This page includes activities that are assigned to you individually - they require an action to be taken.

Activities will remain in your list until you complete them or re-assign them.

Note: You may have additional activities (a.k.a diaries) in modernLINK and remember to check them in the action items.

2 Filter Options

This screenshot is similar to the one above but highlights the filter options. A red box surrounds the filter dropdown menu, which is open to show options: 'All open', 'My activities today', 'Due within 7 days', 'Overdue only', and 'Closed in last 30 days'. A blue callout box with a white border points to the 'All open' option and contains the text: 'To see all activities change the filter option to "All open"'. The table below shows the same list of activities as in the previous screenshot.

Click the drop-down arrow to view filter options. You may have to select **All open** to view all activities.

3 Page Navigation Arrows

My Activities [CLICK HERE TO LEARN MORE](#)

Additional Activities may be listed for you in modernLINK Action Items

All open Assign Skip Complete Page 1 of 5

	Due Date	Priority	Status	Subject	Next Page	Insai
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)		000000180
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)		000000180
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)		000000180
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)		000000180

Use the navigation arrows to view multiple pages.

If there is more than one page, use the navigation arrows to view multiple pages.

4 How to Open and Activity

My Activities [CLICK HERE TO LEARN MORE](#)

Additional Activities may be listed for you in modernLINK Action Items

All open Assign Skip Complete Page 1 of 5

	Due Date	Priority	Status	Subject	Transaction #	Primary Insured
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	

Click the subject line to open an activity to review its details

Click the subject line to open an activity to review its details.

5 How to Close an Activity

Option 1 - Close in My Activities Page

My Activities [CLICK HERE TO LEARN MORE](#)

Additional Activities may be listed for you in modernLINK Action Items

All open Assign Skip Complete Page 1 of 5

	Due Date	Priority	Status	Subject	Transaction #	Primary Insured
<input checked="" type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	

To close an activity on 'My Activities' page, check mark the box and click 'Complete.'

Confirm that the work is complete before closing the activity. On the **My Activities** page, check the box you wish to close. Click **Complete**.

Option 2 - Close in 'My Activities Workspace'

Actions Summary **HOW TO CHANGE A POLICY** **HOW TO MAKE A PAYMENT**

Policy Contract

- Policy Info
- Drivers
- Vehicles
- CLUE Results
- Coverages
- Quote
- Forms

Date: 07/07/2015

Home Office

Account Information

Account Number: 0000000180
 Account Name: VINCENT ABRAHAM
 Address: 451 Township Road 1135, Proctorville, OH 45669-8614
 County: Lawrence
 Address Type: Other
 Address Description: [blank]

Official IDs

SSN: [blank]
 Po: [blank]

Period

Effective Date: 07/07/2015
 Expiration Date: 07/07/2016
 Term Number: 2
 Total Premium: \$1,132.00
 Taxes And Fees: -
 Total Cost: \$1,132.00

Producer of Record

Code: 999006
 Agency: Testing for Atlas Inc

Set up an Online Account

Activity

Activity Detail

OK **Complete** **Cancel** **Use Note Template** **View Notes**

Activity Info

Subject: Obtain Required Signed Docu
 Description: You are required to obtain the signed document(s) from the named insured. Once obtained, review for

New Note

Topic: <none>
 Subject: [blank]
 Related To: -- Policy : 900001424

To close an activity in the 'Activity Workspace' click 'Complete'

In the **My Activities Workspace** select **Complete**. Keep in mind that closing an activity does not ensure that the work associated with the activity has been completed. Always confirm that the work is complete before closing the activity.

6 Sorting Table

All open **Assign** **Skip** **Complete** Page 1 of 5

<input type="checkbox"/>	★	📅	Due Date	Priority ↑	Status	Subject	Transaction #	Primary Insured
<input checked="" type="checkbox"/>		📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>		📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	

List can be sorted by column

Transaction #
 Sort Ascending
 Sort Descending
 Columns
 Group By This Field
 Show in Groups

The **My Activities** table can be sorted by each column. Click the filter option next to the column title and select the option of your choice.

and

All open **Assign** **Skip** **Complete** Page 1 of 5

<input type="checkbox"/>	★	📅	Due Date	Priority ↑	Status	Subject	Transaction #	Primary Insured
<input checked="" type="checkbox"/>		📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>		📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	
<input type="checkbox"/>	★	📅	07/17/2015	High	Open	Obtain Required Signed Document(s)	0000000180	

Columns can be moved around by clicking and dragging to another area in the list.

Columns can also be moved around by click and dragging to another area in the list.

7 Searching Activities

The screenshot shows the AMSuite Policy interface. At the top, there are navigation tabs: Desktop, Account, Policy, Contact, Search, Team, Administration, and Analytics. The 'Search' tab is highlighted with a red box. A dropdown menu is open under 'Search', with 'Activities' selected and highlighted with a red box. A blue callout box points to the 'Activities' option in the dropdown, containing the text: 'Activities can be searched for in the search tab. Click 'Search,' then 'Activities.'

Below the navigation, there is a 'My Activities' section with a 'CLICK HERE TO LEARN MORE' button. A table of activities is displayed with columns for Subject and Transaction #. The table contains three rows of activities, all with the subject 'Obtain Required Signed Document(s)' and transaction number '0000000180'.

Subject	Transaction #
Obtain Required Signed Document(s)	0000000180
Obtain Required Signed Document(s)	0000000180
Obtain Required Signed Document(s)	0000000180

Activities can be searched for in the **Search** tab and then by **Activities**. You can view completed, open, and even cancelled activities by the user ID.

8 Assign Activities to User, Group, or Queue

The screenshot shows the AMSuite Policy interface. At the top, there are navigation tabs: Desktop, Account, Policy, Contact, Search, Team, Administration, and Analytics. The 'Search' tab is highlighted with a red box. A dropdown menu is open under 'Search', with 'Activities' selected and highlighted with a red box. A blue callout box points to the 'Activities' option in the dropdown, containing the text: 'Activities can be searched for in the search tab. Click 'Search,' then 'Activities.'

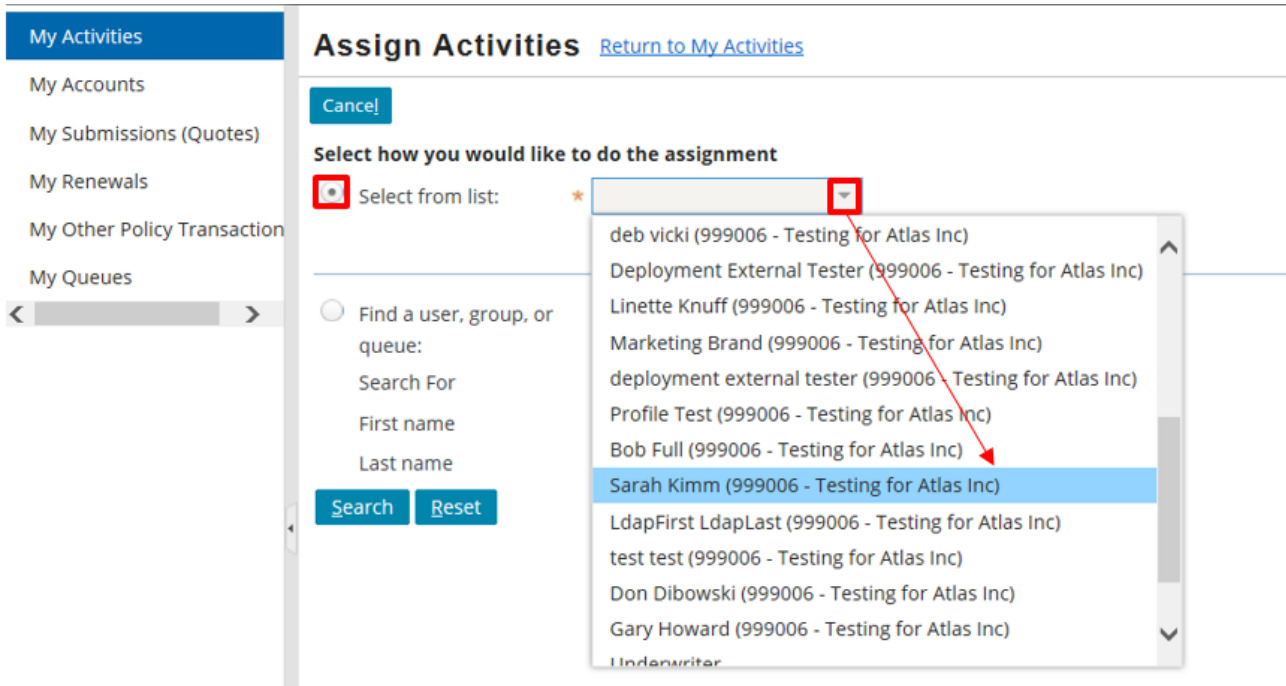
Below the navigation, there is a 'My Activities' section with a 'CLICK HERE TO LEARN MORE' button. A table of activities is displayed with columns for Due Date, Priority, Status, Subject, and Transaction #. The table contains one row of activity with the subject 'Obtain Required Signed Document(s)' and transaction number '900001'. The 'Assign' button is highlighted with a red box, and a red arrow points to the checkbox for the activity.

Due Date	Priority	Status	Subject	Transaction #
10/24/2015	High	Open	Obtain Required Signed Document(s)	900001

Check the box for the activity you wish to assign, then select **Assign**.

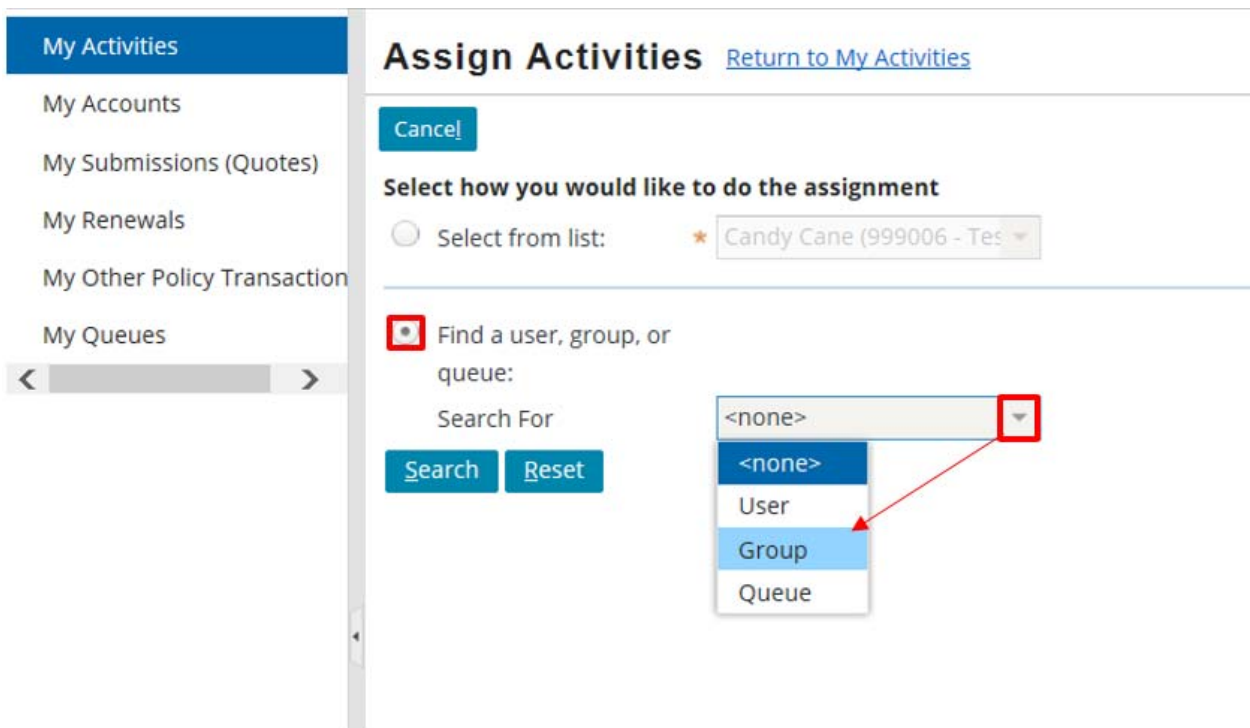
There are two options on how to assign activities.

Option 1 - Assign from List



First mark the circle for **Select from list**: Then use the drop-down tab to view all available options.

Option 2 - Find user, group, or queue.



First mark the circle for "Find a user, group, or queue:" Next use the **Search For** drop-down tab to select from which criteria you wish to choose.

Assign Activities [Return to My Activities](#)

Select how you would like to do the assignment

Select from list:

Find a user, group, or queue:

Search For:

First name:

Last name:

1. Fill out your search criteria and select "Search". Criteria will change depending if you are searching for a user, group, or

	User ↑	Group	Parent Group
<input type="button" value="Assign"/>	Candy Cane	999006 - Testing for Atla...	External
<input type="button" value="Assign"/>	Candy Davis	999006 - Testing for Atla...	External
<input type="button" value="Assign"/>	C...	302619 - IVANTAGE SELE...	External

2. From your search results click "assign" to assign activity to that user.

Next fill out your search information and select **Search**. From the results, click **Assign** to assign activity to that user.

9 The Workplan

AMSuite Policy Desktop Account Policy Contact Search Team

Renewal (Draft) Manufactured Home Eff. 07/13/2016 jeff myers MH Account # 0000000037 Policy

Policy Info Dwelling Dwelling Construction Coverages Risk Analysis Policy Review View Quote Forms Payment & Signatures Tools Notes Documents Participants **Workplan** History

Workplan

My activities today

	Due Date	Escalation D...	Priority	Subject
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Notice that the Workplan page contains a list of activities associated with that policy transaction.

Click Workplan.

You can also view activities on the Workplan associated with a specific policy transaction.

Click **Workplan** in the **Sidebar** menu. The **Workplan** page appears. Notice that the **Workplan** page contains a list of activities associated with that policy transaction.