



Workspace and Checklist

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1 Errors in Workspace

The **workspace** is another feature of the AMSuite Billing layout. This is the window at the bottom of the page.

Many of the data entry pages accessed through the **Actions** menu are displayed in the workspace area of your screen.

The screenshot shows the AMSuite Billing interface. At the top left is an 'Actions' menu. Below it is a date range '1:06/24/2015-06/24/2016'. The main area is divided into sections: 'Summary' (with a 'Start Delinquency' button), 'Policy Basics', 'Charges', and 'Policy Totals'. A 'New Note: Policy' form is open in the workspace area, highlighted by a red box. The form includes fields for Date (06/30/2015), Author (Jamie Menkhaus), Security Type (Unrestricted), Language (English (US)), Related To (<none>), and Text. A blue callout bubble points to the workspace area with the text 'This is the workspace area.'

2 Issuance Checklist

When proceeding to issuance, the **Issuance Checklist** lists any problems, so you can resolve them before moving forward. If there are no errors on the checklist, click **Return to Payment & Signatures** to proceed with the billing process.

Issuance Checklist [Return to Payment & Signatures](#)

✓	Quoted and Rated
✓	All required info is entered
✓	Review the ordered reports (automatically)
✓	Check the Underwriting rules (automatically)
⚠	Review Payment info and Signatures
	(Please review underwriting issue on the Risk Analysis page. Consult the Underwriting Guidelines or in some cases you may request approval. Once approved, please click "Quote" and "Proceed to Issuance" again.)

Any problems are called out on the Issuance Checklist, so that you can resolve them before proceeding.

If you need to enter more information in the submission before issuing (applying payment) refer the issuance process here:



Click Here For Policy Issuance Process