



This document provides the steps to guide you to navigate to reports from AMsuite.

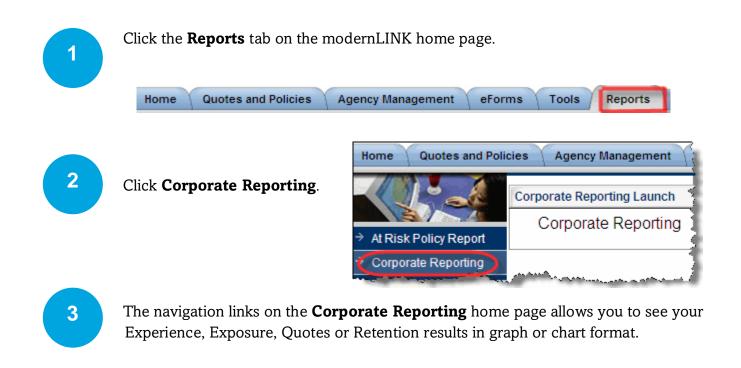
- Navigate to the portal
- Download reports
- View reports

## **Key Benefits**

AMsuite is American Modern's state-ofthe-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

## **Navigate to Portal**

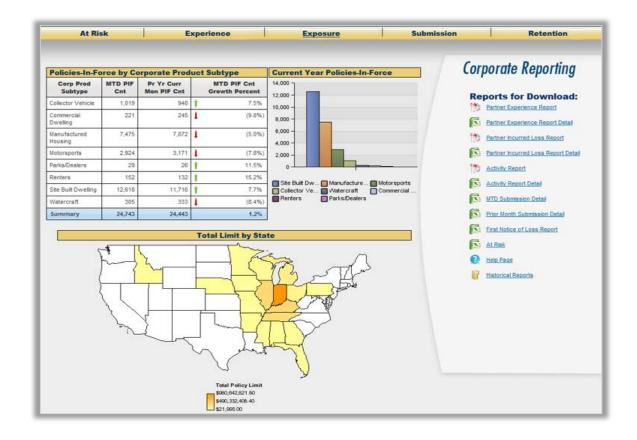






Huon and AMsuite At Risk are both viewable in the Agent Portal in the same list.

	MOD	ERN								Age	nt Profile May 19, 2016
	t Risk		Eq	perience	1.	Ex	posure	_	Submissi	on	Retention
Policies 1	heduled for C will Cancel at 1 , only Athenite Corporate Product Suffice	241 AM up	on Cancellad		Tatal Tatal William Fran	Producing Agent Assigned	Producing Agent Manue	Tarte	Amount Due	Report	ts for Download.
621/16	Baturaporta		tane DLL		Are \$1.00	terther	Jordan & Vaught Reurance Rui	Retered Business	\$17.00	10 m (5 m	ther Deservation Report Dates ther Insurred Lans Report Text Reports Lans, Report Dates Text Report
6/24/16	Collector Vatical		ABSN		304.58		Philitien Insurance Group LLC	Ranavai Rusiness	1626.59		to the Research Cardinal







## **About Graphs and Charts**

- Experience Provides a summary of Year-to-Date and Prior Year-to-Date written premium, Incurred Losses, Loss Ratio, and Growth percentage by product.
- Exposure Displays Policies-In-Force by product, and by Rating State. You can also view the Total (insured) Limit by State.
- Submissions Displays the total number of quotes for the month by product, total number of quotes issued for the month by product, and total number quoted and issued on a rolling 12 month basis.
- Retention View your agency's retention results by month, year-to-date, rolling 12 month and by product.

## **About Reports**

Monthly reports are provided on a rolling basis

- Partner Experience Report
- Partner Incurred Loss Report
- Quote Detail Report
- > Activity Report
- Security Report
- Prior Month Submission Detail

Daily reports (rolling five days)

- MTD Submission Detail
- At Risk

These reports are available on the right hand side of the page under, Reports for Download.





## **Reports Help**

Help is always available at the bottom of the list of **Reports for Download** on the right side of the page.



**Historical Reports** are available to give you access to prior months data in the current calendar year. Simply navigate to the bottom of **Reports for Download** on the right side of the page.

## **Downloading Reports**

To download a report to your computer, right-click on the link to the report. Choose '*Save Target as*" from the menu. Then select a location on your computer to save the file.





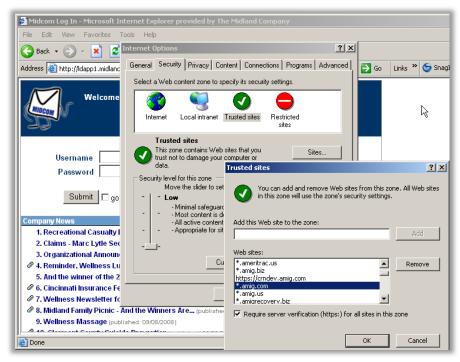
### Printing Reports with Adobe

To print reports, use the **Print** icon. File/Print does not work.



### Viewing Reports with Excel

- If you have trouble opening an **Excel** file from the portal, HOLD DOWN the Ctrl Key (found in the lower left-hand corner of their keyboard) and click on the Excel file link while continuing to hold down the Ctrl key.
- If when you are trying to open an Excel file out of the Agent Portal and it appears it is working but then fails to open Excel, you may need an entry put in your Trusted Sites in your web browser. Here are the steps:
  - 1. Open an Internet Explorer window, click **Tools**, **Trusted Sites**, and then **Sites**. You have to add "\*.amig.com" in the Add this Web site... box (highlighted below), uncheck the Require server verification and click **Add**.
  - Click **OK**, click **OK** and close all your IE Browsers.
  - 3. Open the Agent Portal and test.







### Viewing Reports with Internet Explorer

- Pop up blockers Add amig.com as a trusted site
- Different IE versions

## **Report Descriptions**

### Partner Experience Report (PER)

(PDF) Partner experience is summarized at the product level for current month, year-to-date, and rolling 12 months in a PDF format. This is a monthly report which is generally available for the previous month by the fifth business day of each month.

									Cur	rent Month: Au	ugust 20
Current Month								Current l	Month Prior Ye	ear	
Corp Prod Subtype	MTD NB Written Prem Amt	MTD RB Written Prem Amt	MTD Total Written Prem Amt	MTD Earned Prem Amt	MTD Net of Rec Total Case Incurred Amt	MTD Loss Ratio	MTD Unearned Prem Amt	Pr Yr Curr Mon NB Written Prem Amt	MTD NB Written Prem Amt Growth Percent	Pr Yr Curr Mon Total Written Prem Amt	MTD Total Writte Prem Amt Growt Percer
Collector Vehicle	13,421	21,192	34,613	31,968	0	0.0%	187,858	1,463	817.3%	21,511	60.99
Commercial Dwelling	46,808	139,028	185,836	178,128	0	0.0%	1,064,821	38,179	22.6%	166,354	11.79
Manufactured Housing	34,751	299,957	334,708	436,517	0	0.0%	2,522,016	56,115	(38.1%)	344,902	(3.09
Motorsports	10,582	38,472	49,054	68,637	0	0.0%	325,409	9,477	11.7%	45,250	8.49
Parks/Dealers	0	2,504	2,504	9,274	0	0.0%	39,203	1,065	(100.0%)	8,215	(69.59
Renters	1,697	3,142	4,839	4,407	0	0.0%	27,555	1,352	25.5%	2,479	95.29
Runoff	0	0	0		0			0		0	
Site Built Dwelling	311,247	651,392	962,639	991,603	0	0.0%	5,599,780	341,501	(8.9%)	854,003	12.79
Watercraft	0	7,842	7,842	8,461	0	0.0%	42,899	4,823	(100.0%)	15,432	(49.29
Summary	418,506	1,163,528	1,582,034	1,728,995	0	0.0%	9,809,541	453,975	(7.8%)	1,458,147	8.5
ear to Date								Year to Dat	e Prior Year		
Corp Prod Subtype	YTD NB Written Prem Amt	YTD RB Written Prem Amt	YTD Total Written Prem Amt	YTD Earned Prem Amt	YTD Net of Rec Total Case Incurred Amt	YTD Loss Ratio	YTD Unearned Prem Amt	Pr Yr Curr Mon YTD NB Written Prem Amt	YTD NB Written Prem Amt Growth Percent	Pr Yr Curr Mon YTD Total Written Prem Amt	YTD Total Writte Prem Amt Growt Percer
Collector Vehicle	21,624	31,090	52,714	66,858	126,575	189.3%	n/a	5,221	314.2%	38,602	36.6
Commercial Dwelling	82,903	278,802	361,705	360,326	0	0.0%	n/a	80,302	3.2%	411,220	(12.0
Manufactured Housing	69,351	598,294	667,645	874,581	0	0.0%	n/a	91,627	(24.3%)	681,300	(2.0
Motorsports	10,883	56,420	67,303	141,827	0	0.0%	n/a	14,748	(26.2%)	72,095	(6.6
Parks/Dealers	-13	3,703	3,690	19,756	0	0.0%	n/a	4,944	(100.3%)	9,089	(59.4
Renters	2,745	5,880	8,625	8,860	5,525	62.4%	n/a	3,526	(22.1%)	6,201	39.1
Runoff	0	0	0		0		n/a	0		0	
Site Built Dwelling	576,498	1,261,105	1,837,603	1,961,277	30,095	1.5%	n/a	689,651	(16.4%)	1,772,552	3.7
Watercraft	6,026	8,579	14,605	17,351	40,808	235.2%	n/a	5,244	14.9%	16,886	(13.5
Summary	770.018	2.243.872	3.013.890	3,450,836	203.003	5.9%	n/a	895.263	(14.0%)	3.007.945	0.2





### **Detail Excel**

Partner experience detail including product, state, agent # and name, and sub # and name (if applicable) for various time periods in Microsoft Excel. This is a monthly report which is generally available for the previous month by the fifth business day of each month.

1	A	В	C	D	E	F	G	H j
1	American Modern Partner Expe	rience Report - Detail						4
2	"Agent Name" Current Perio	d: August 2016						4
3	Contracted Agy Assgn ID	Contracted Agy Nm	Producing Agt Assgn ID	Producing Agt Nm	Rating State	Corp Prod Subtype	MTD NB Written Prem Amt	MTD RB Written Pre
4	00**48		00**73		CONNECTICUT	Site Built Dwelling		<
5	00**48		00**73		CONNECTICUT	Site Built Dwelling		
,	00**48		00**73		CONNECTICUT	Site Built Dwelling		1
7	00**48		00**73		CONNECTICUT	Site Built Dwelling	1	
3	00**48		00**73		CONNECTICUT	Site Built Dwelling		
0	00**48		60**73		CONNECTICUT	Site Built Dwelling		

### Partner Incurred Loss Report (PIL)

Year-to-date claim activity detail in a PDF format. This is a monthly report which is generally available for the previous month by the sixth business day of each month.

	NOD	rican ERN <sub>*</sub>	Report Displa	iys incurred Li	oss Data for	1) Any Open C	laim(s), 2) Cl	osed Claims	with a Repo	rted Date in th	e Current Ye	nar or 3) C	losed Cl	aims with Y	ear-to-Date Inco	med or Year- Date Expens
Loss Adjust	ment Expens	and the second second	counting Year	to Closed Mor	nth Net of R	ec Total Case I	ncurred Amt I	nduding Cor	tracted Age	ncy Overhead	Expense Ex	timated A			rve Amount 174,133.00	
laim Stat	us Code:	OPEN														
Accounting Closed Month New Claim Indicator	Corp Pred Subtype	PCS Catastrophe Code	Loss Location State Postal Abbreviation	Cause of Loss Description	Named Insured Name	Underwriting Company Number	Contracted Agy Assgn ID	Producing Agt Assign ID	Producing Agt Nm	Claim Number	Policy Number	Loss Date	Claim First Close Date	Reported Date	Accounting Year to Closed Month Net of Reo Total Case Incurred Amt Including Contracted Agency Overhead Estimated Amount	Case Reserve Amount
	Collector Vehicle		он	Theft	alice harned	071				000024AA		4/2/16		4/7/10	\$20,625.00	\$20,625.00
	Collector Vehicle		ОН	Thet	alice hamed	071				000025AA		4/4/18		4/7/18	\$105,950.00	\$105,950.00
	Site Built Dwelling		D	Fire	rhonda billie	071				00002944		3/20/16		4/16/16	\$28,325.00	\$1,225.00
	Watercraft		D	Injury with no physical damage to property/ vehicle or vetsel	scott parker	071				000018AA		3/26/16		4/1/16	\$40,808.00	\$40,808.00
	Renters		он	Appliance/ Plumbing Failure with ensuing water damage	silvia borthwick	071				000015AA		3/25/16		4/1/16	\$5,525.00	\$5,525.00





### **Detail Excel**

Year-to-date claim activity detail (does not include summary box at top) in Microsoft Excel. This is a monthly report which is generally available for the previous month by the sixth business day of each month.

Managing Gravitor	Claim Blatus Carle	Accounting Closed Month New Claim Indicator	Carp Prod Bulleype	FCS Calasitophe Code	Lore Location Blats Poetal Alternation	Cause of Loss Description	Named Insured Nam
1000	GL08ED		<b>Dis Bull Dealing</b>		OH	Extrant Lockin Ext. revenues	yane smith
	(0.09ED		Die Duit Dealing		OH	Gamage to Property of Others	jare and?
and a second	0,0880		Site Duit Dealing		0	Extraine Ladole - Extrainment	monda talle
100.00	0.0860		Site Bult Dealing		0	Impry or Demoge caused by Animal	monda talke
	ores		Colector Vehicle		OH .	Traff.	alca harted
4444 14444 14444	OPEN OPEN		Collector Vallacte		6H	That	alice harred
	OPEN		<b>Die Huit Doeling</b>		6	Fm	monte latie
	OPEN OPEN		Watercraft		0	legary with no physical damage to property/whicle of second	acut parter
( and a local data	OPEN		Ration		OH	Applance/Punking Falure with ensuing water damage	and bothack

### modernLINK Reports

#### **MTD Submission Activity PDF**

Current month-to-date total submission and issued counts by product in a PDF format.

This is a daily report which is updated each morning by 10:00 AM.

#### Detail Excel

Total submission and issued count by product, state, agent # and name, and sub # and name (if applicable) for month and year to date in Microsoft Excel. This is a monthly report which is generally available for the previous month by the third business day of each month.

Managing Grp Nm	UW Co No	Contracted Agy Assgn ID	Corp Pol Type	Corp Prod Subtype	Rating State	Producing Agt Nm	Producing Agt Asgn ID						
ARLINGTON			Collector Vehicle	Collector Vehicle	OH								
ARLINGTON			Yacht	Watercraft	D								
Summary													
MTD Submission Detail - Excel													
ARLINGTON													
Submission records b	etween: and												





### Activity PDF

modernLINK issued quote activity detail by agent and subproducer in a PDF format. This is a monthly report which is generally available for the previous month by the third business day of each month.

Submission Activit	ubmission Activity by Producing Agent Managing Group Name: TEST Current Month: Aug 2016														
Contracted Agy Ass	gn ID Contracted Agy N	m Producing Agt Assgn ID	Producing Agt Nm	Rating State	Corp Prod Subtype	Total Subm Count	Policy Bound Count	% Subm Issue							
			_	_											
and a state of the	and the to	the second second	a ser a more	Constant Constant	Constraint Constraints	and the second s	a star and a star								

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644