



Recreational Quote & Issue: Basic Submission Process

for Collector Vehicle

This document provides the steps to guide you to successfully create a quote and then issue a recreational policy for Collector Vehicle.

- Create and Search for a New Account
- Create and Edit a Submission
- Complete the Issuance Process

Key Benefits

AMsuite is American Modern's stateof-the-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.

Create and Search for a New Account

Before you can create a quote, you'll need to set up an account. An **account** is a person or organization with the intention to obtain a quote or hold a policy with American Modern.

Click Account. Select New Account.

Use this menu to create a new account, or search for, or select an existing account. Another way to create a new account is to click **Actions** in the top left column of your screen, then click **New Account**.

Enter First and Last Name. Click Search.

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.

3

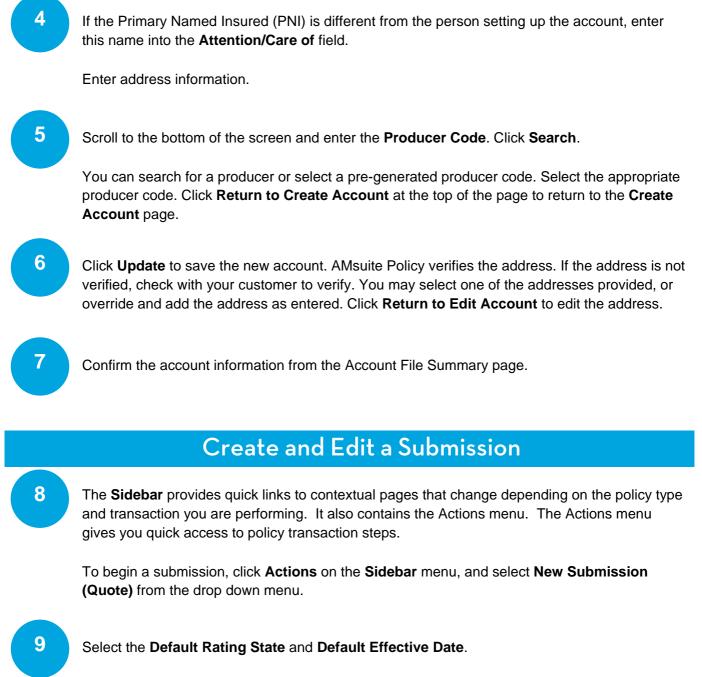
2

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

Select **Person** from the drop-down menu, and enter the customer's information in the fields. Fields with an asterisk must be completed to continue with new account creation.







Click Select to indicate the "Recreational" Product Type.





Click the **Search** icon to select the "Collector Vehicle" **Policy Type**. To help you make the appropriate selection, this page lists all vehicle types covered in the Recreational product line. Review the **Vehicle Type** column, before choosing a selection.

11

10

The **Qualification** page asks questions that, depending on your responses, will immediately let you know if a risk doesn't qualify for this policy type. However, eligibility will continue to be verified throughout the submission, so some things will come later, like looking at the applicant's driving history (MVR).

The Sidebar shows all the pages that make up the submission process.

The first three questions ask the customer whether they grant American Modern permission to obtain qualification information for the purpose of issuing the policy. If the customer agrees, click the boxes to the right of each statement.

The prequalification questions appear below the disclaimers. You'll know right away if your applicant prequalifies. If your applicant does not meet prequalification criteria, an error message will appear on your screen.

The **Policy Info** page provides a high level summary of the customer's policy information. Review the policy information. Note that certain fields are marked with an asterisk, indicating that they are required. Review the required fields to ensure accuracy.

Select "Yes" or "No" to Has the applicant moved in the last 60 days?.

Click to **Order Prefill Report**. The prefill report provides driver information that you won't have to enter when adding a driver. When a prefill report is available, **Add Driver** will have an additional option to prefill the information.

13

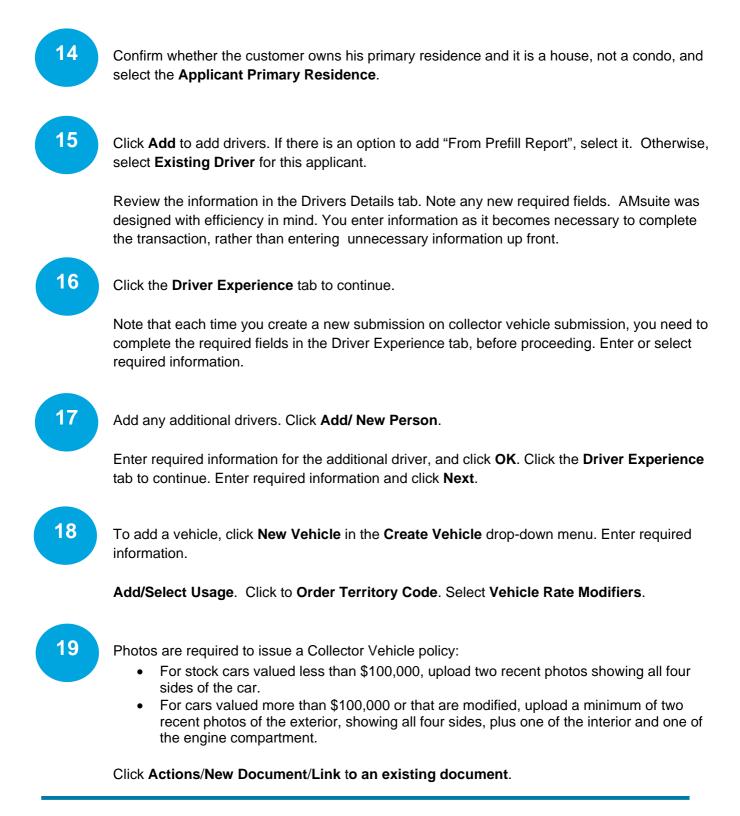
12

Scroll to the bottom of the **Policy Info** page and answer "Eligible for multi-policy discount." Also, answer ""Will the applicant be paying in full for this policy?" Finally, answer "the question, "Does the applicant intend to enroll in paperless policy delivery?

© 2016 American Modern Insurance Group











Click **Browse** for the attachment and select the photo to upload.

Choose Photo/Documentation/Appraisal from the Type drop-down menu.

Click Update.

20 Click **Next** to continue.

Select Coverages, Deductible, and Settlement Option.

Click **Next** to continue.

21 If there are "No issues identified at this time," click Quote.

Review your rating, then click **Next**.

On the Forms page, verify the correct forms are present:

CV-CW-C-0002 - Appreciation Security Endorsement CV-CW-C-0009 - Mileage Plan Endorsement CV-CW-O-0001 - Collector Vehicle Application CV-CW-P-0001 - Collector Vehicle Policy CV-OH-A-0001 - Amendment of Policy Provisions - Ohio IL-CW-G-0001 - Signature Endorsement IL-CW-N-0001 - Privacy Statement IL-CW-N-0002 - Billing Reference Information

23

22

Select Proceed to Issuance from the Bind Options drop-down menu.

If there any problems encountered with issuance, the **Issuance Checklist** will let you know where to go to resolve them.





Recreational Quote & Issue: Basic Submission Process

| Complete the Issuance Process | |
|-------------------------------|--|
| 24 | Enter required billing information. The system generates available payment plans. Select a payment option. |
| 25 | Click the arrow next to the Payment Instrument drop-down menu to select the Payment Instrument. |
| | Select 'Yes' or 'No' to Save for future use? |
| | Select Payment Method . Enter required information. If you are entering credit card information, the customer's address will prefill from the account. Verify that this is the correct billing address. |
| | Click Verify. |
| 26 | Click OK at the top of the page to return to the Payment & Signatures page. If the credit card information is not valid, an error displays at the top of the page. |
| 27 | Scroll down to select Electronic Signature , and to consent to Electronic Signature . Select Issue Policy from the Bind Options drop-down menu. Click OK to bind the |
| | submission. |
| | For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644. |
| | |
| | |

© 2016 American Modern Insurance Group