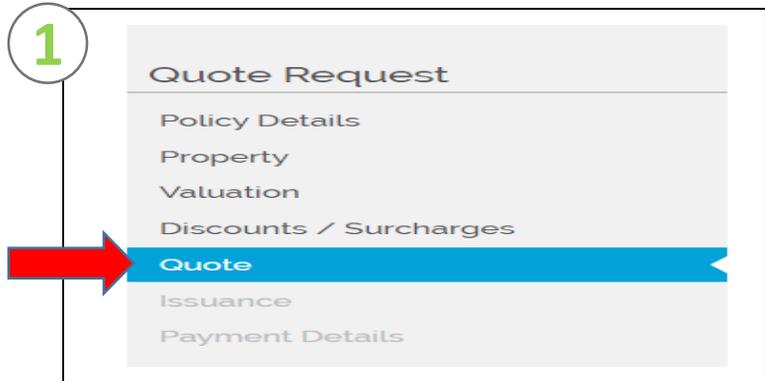


AMsuite® Adding an Additional Interest – Residential

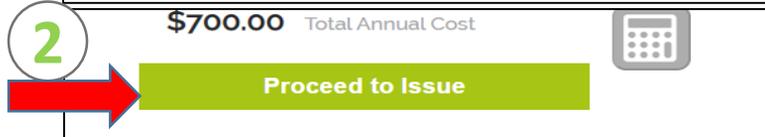
This document will aid you in adding Additional Interest such as Mortgage, Park Owner, or Property Manager in a Quote or Policy.

Adding an Additional Interest in a Quote

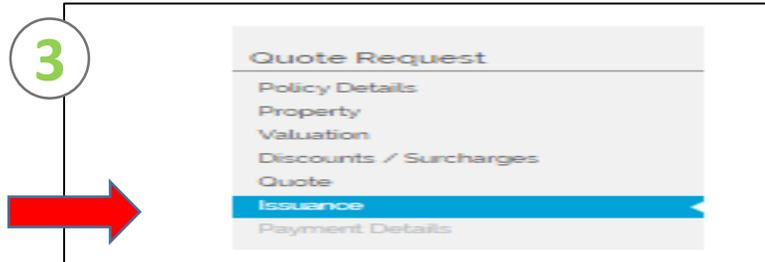
After entering the Policy Details, Property, Valuation, Discounts/Surcharges you will be on the Quote page



On this page you will Proceed to Issuance



Enter the required information on the Issuance page

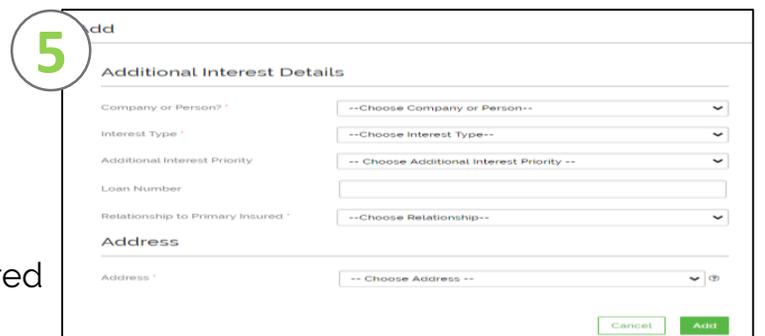


The Add Additional Interest is at the bottom of the Issuance page



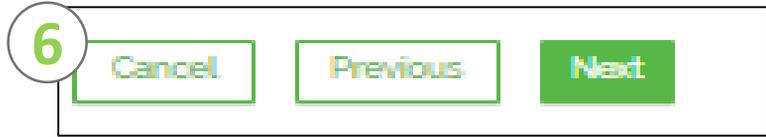
When the box opens the following information will need to be added:

- Company or Person
- Interest Type
- Additional Interest Priority
- Loan Number
- Relationship to Primary Insured
- Address

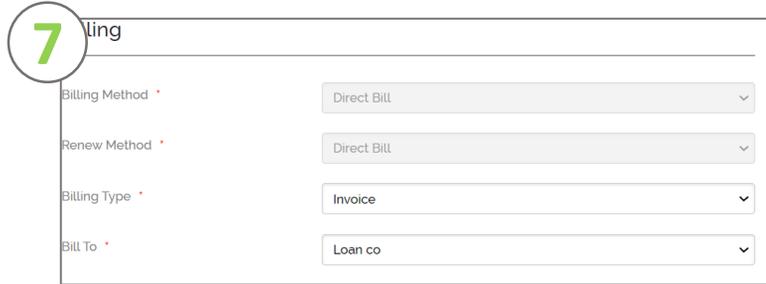


AMsuite® Adding an Additional Interest – Residential

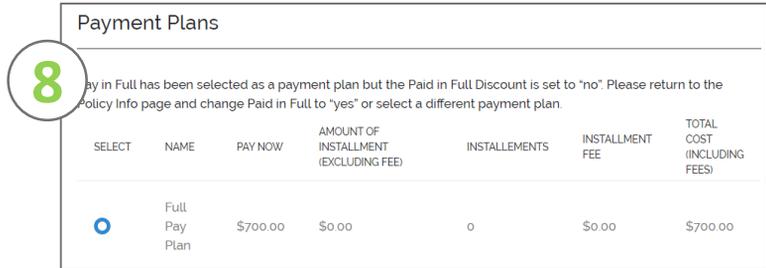
The additional interest has been added. Select the Next box to complete the quote



You are not on the Payment Details page. To Bill the Mortgagee, choose Invoice in the drop down for Billing Type

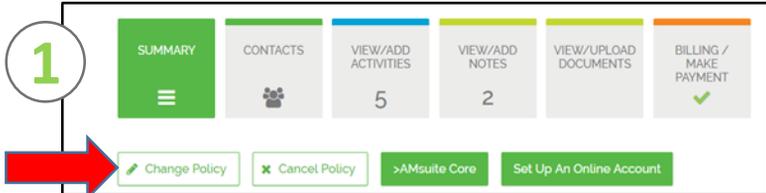


Payment Plan option will only be Full Pay Plan when adding a Mortgagee



Adding an Additional Interest on a Policy

On the Home page of the Policy Number in Portal select the Change Policy box



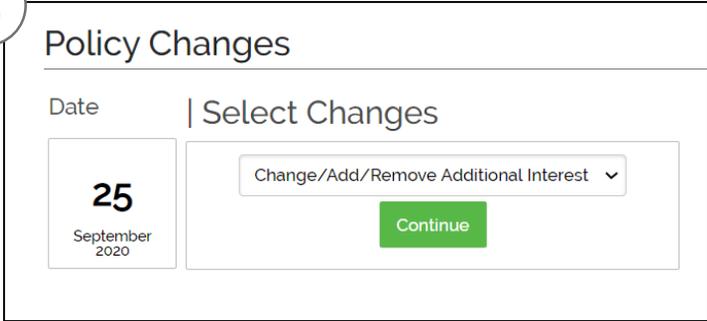
Chose the date of the policy change and select Continue



AMsuite® Adding an Additional Interest – Residential

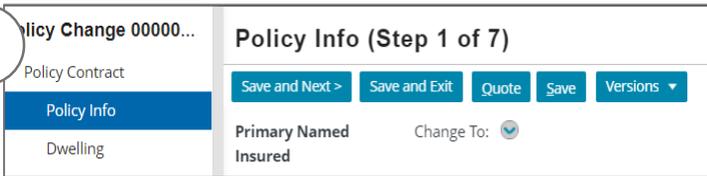
On the Policy Changes under the drop down chose Change/Add/Remove Additional Interest then select Continue

3



This will take you to the Core side of AMsuite on the Policy Info page. On this page select the Save and Next box

4



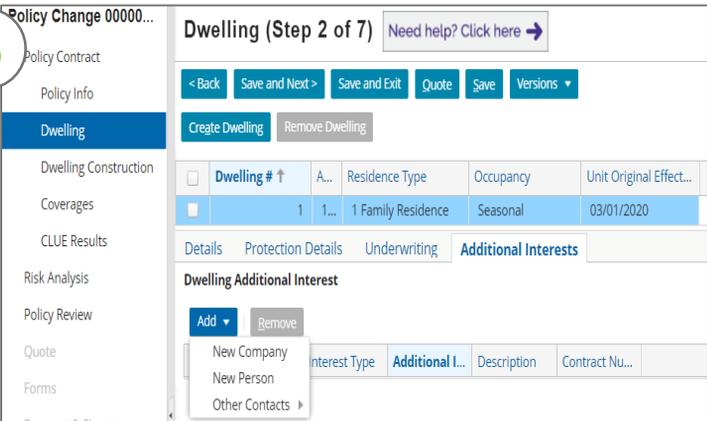
On the Dwelling Page click on Additional Interest

5



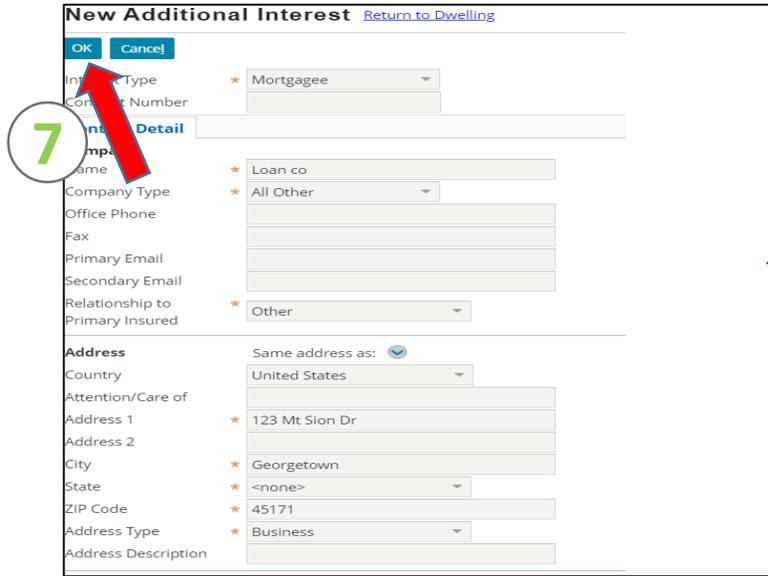
From the Add drop down chose the appropriate option to add the Additional Interest

6



AMsuite® Adding an Additional Interest – Residential

Add the Additional Interest information then select Ok at the top of the page



New Additional Interest [Return to Dwelling](#)

OK Cancel

Interest Type * Mortgagee

Contract Number

Interest Detail

Company Name

Company Type * All Other

Office Phone

Fax

Primary Email

Secondary Email

Relationship to Primary Insured * Other

Address Same address as:

Country United States

Attention/Care of

Address 1 * 123 Mt Zion Dr

Address 2

City * Georgetown

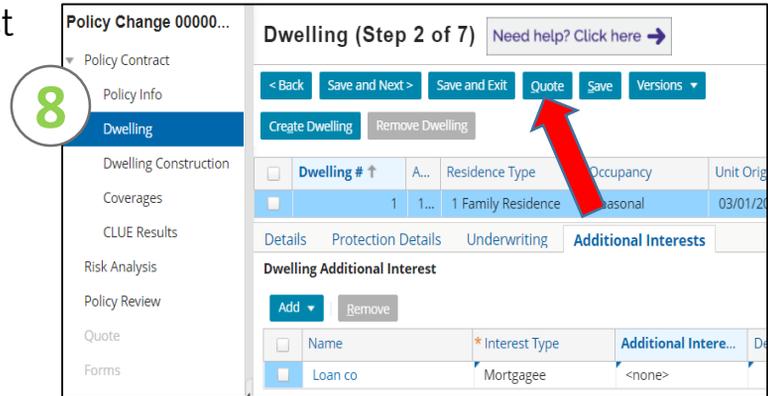
State * <none>

ZIP Code * 45171

Address Type * Business

Address Description

After adding the Additional Interest select the Quote button



Policy Change 00000... [Need help? Click here →](#)

< Back Save and Next > Save and Exit Quote Save Versions ▾

Create Dwelling Remove Dwelling

<input type="checkbox"/>	Dwelling # ↑	A...	Residence Type	Occupancy	Unit Orig
<input checked="" type="checkbox"/>	1	1...	1 Family Residence	Seasonal	03/01/20

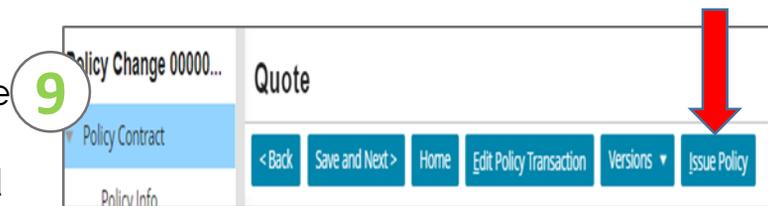
Details Protection Details Underwriting **Additional Interests**

Dwelling Additional Interest

Add ▾ Remove

<input type="checkbox"/>	Name	* Interest Type	Additional Inter...	De
<input checked="" type="checkbox"/>	Loan co	Mortgagee	<none>	

After Quoting the change the Issue Policy button must be selected to complete the endorsement to add the Additional Interest



Policy Change 00000... **Quote**

< Back Save and Next > Home Edit Policy Transaction Versions ▾ **Issue Policy**

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January 2021
Version: 2.0

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