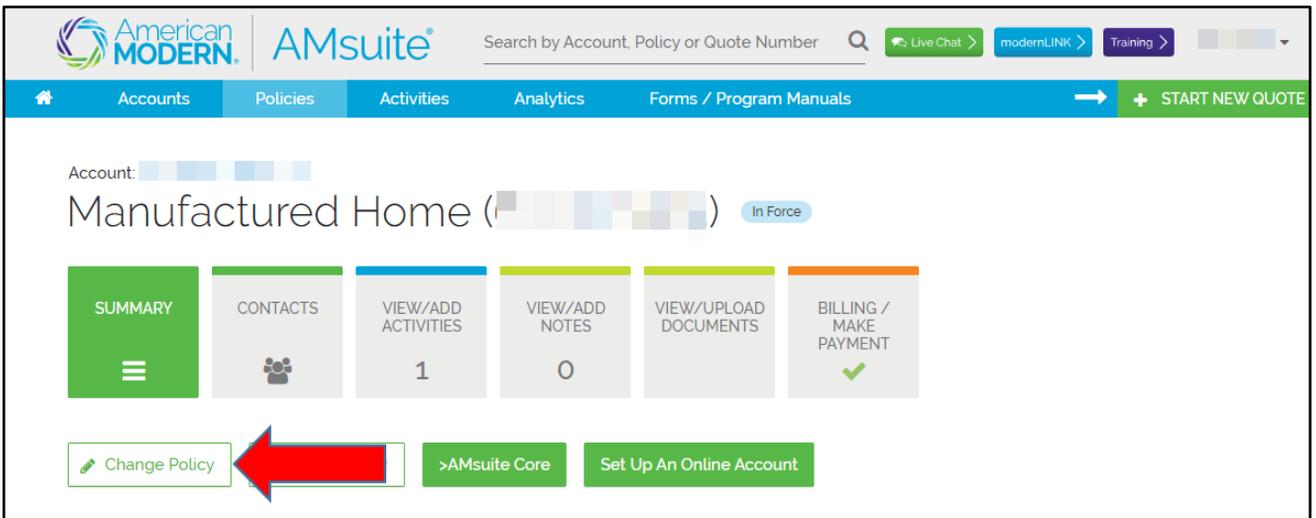


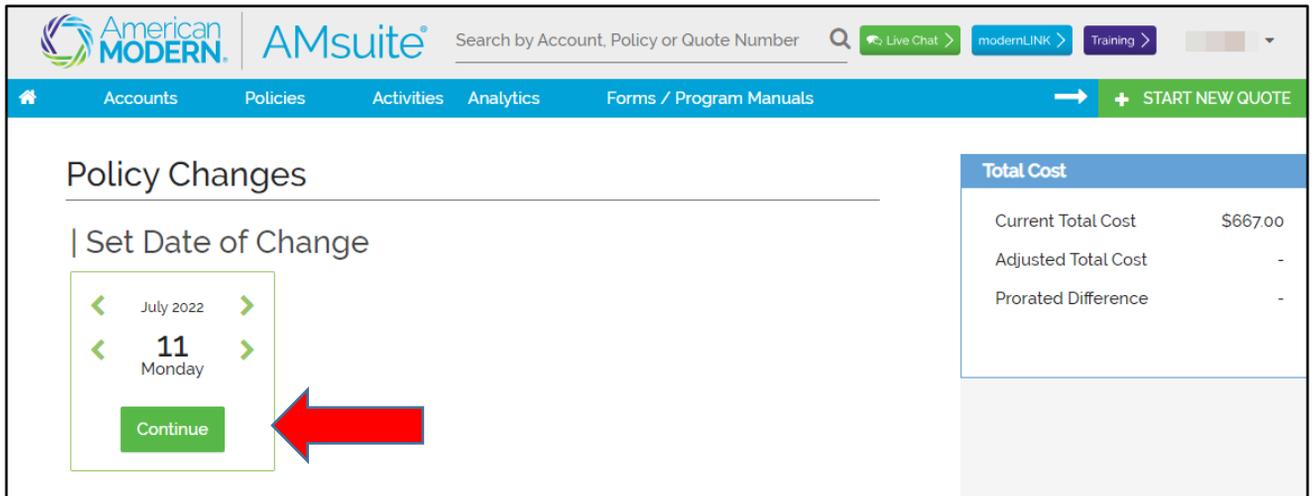
This Job Aid will show how to add a Premium Finance Company to an existing Manufactured Home Policy.

- 1 From the Summary Page of the policy in AMsuite® select **Change Policy** to start the endorsement



The screenshot shows the AMsuite interface for a 'Manufactured Home' policy. The navigation bar includes 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms / Program Manuals'. A 'START NEW QUOTE' button is visible. The main content area shows a 'SUMMARY' tab selected, with other tabs for 'CONTACTS', 'VIEW/ADD ACTIVITIES' (1), 'VIEW/ADD NOTES' (0), 'VIEW/UPLOAD DOCUMENTS', and 'BILLING / MAKE PAYMENT'. A red arrow points to the 'Change Policy' button at the bottom left.

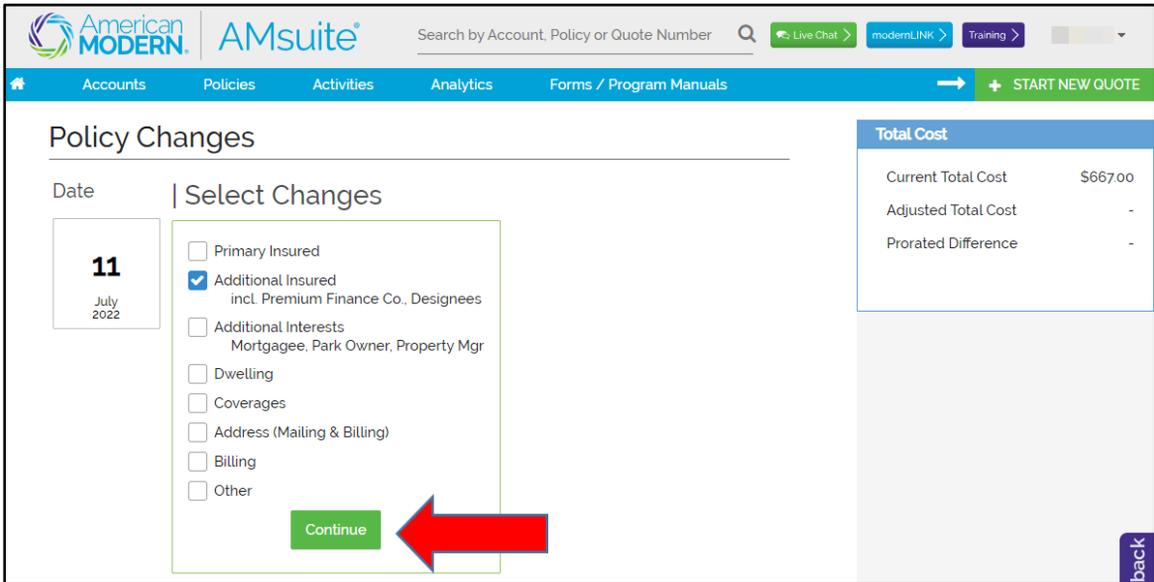
- 2 Set the Date of the Change by selecting the arrow to advance the date. Select **Continue**



The screenshot shows the 'Policy Changes' screen in AMsuite. The 'Set Date of Change' section is active, displaying a date picker for July 2022 with the 11th (Monday) selected. A red arrow points to the 'Continue' button. On the right, a 'Total Cost' table is visible.

Total Cost	
Current Total Cost	\$667.00
Adjusted Total Cost	-
Prorated Difference	-

- 3 Select the change type by checking the box: **Additional Insured incl Premium Finance Company**, select **Continue**



**Policy Changes**

Date: 11 July 2022

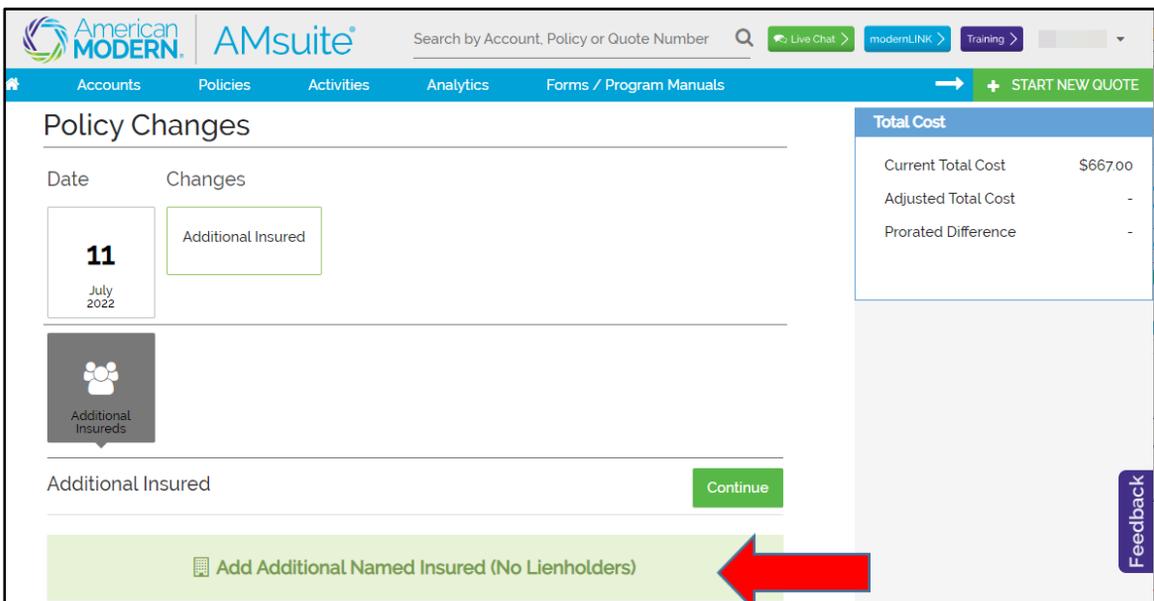
**Select Changes**

- Primary Insured
- Additional Insured incl. Premium Finance Co., Designees
- Additional Interests Mortgagee, Park Owner, Property Mgr
- Dwelling
- Coverages
- Address (Mailing & Billing)
- Billing
- Other

**Continue**

Total Cost	
Current Total Cost	\$667.00
Adjusted Total Cost	-
Prorated Difference	-

- 4 Select **Add Additional Named Insured (No Lienholders)** in the green box.



**Policy Changes**

Date: 11 July 2022

Changes: Additional Insured

**Additional Insured** **Continue**

**Add Additional Named Insured (No Lienholders)**

Total Cost	
Current Total Cost	\$667.00
Adjusted Total Cost	-
Prorated Difference	-

- 5 Enter information in all fields marked with an asterisk. Select **Continue**.

Additional Insured Continue

---

**Additional Insured Details**

Choose Additional Insured Type \*

Company Name \*

Company Type \*

Phone Number

Phone Extension

Relationship to Primary Insured \*

Address \*  ⓘ

Country

Attention/Care Of

Address Line 1 \*

Address Line 2

City \*

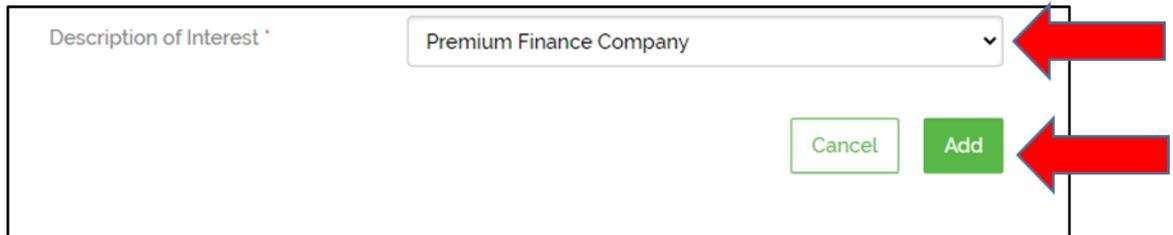
State \*

Zip \*

Continue 

## Endorsement Adding Premium Finance Company

- 6 In the **Description of Interest** field, select **Premium Finance Company**.  
Select **Add**

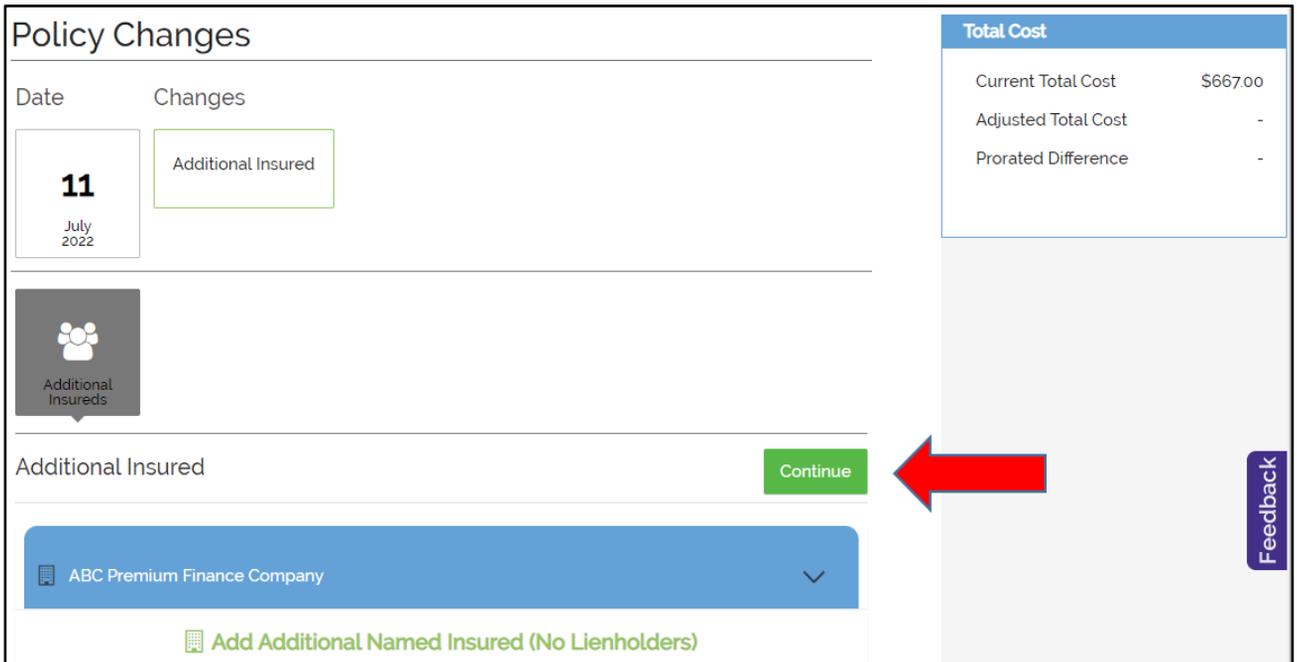


Description of Interest \* Premium Finance Company

Cancel Add

Two red arrows point to the dropdown menu and the 'Add' button.

- 7 Select **Continue**



### Policy Changes

Date	Changes
<b>11</b> July 2022	Additional Insured

Additional Insureds

Additional Insured Continue

ABC Premium Finance Company

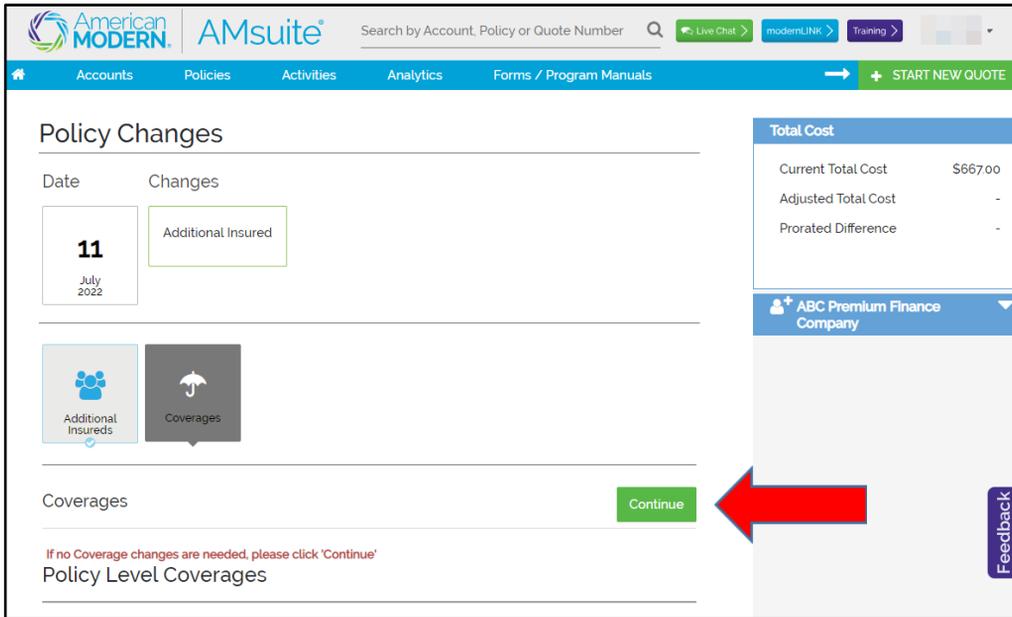
[Add Additional Named Insured \(No Lienholders\)](#)

Total Cost	
Current Total Cost	\$667.00
Adjusted Total Cost	-
Prorated Difference	-

Feedback

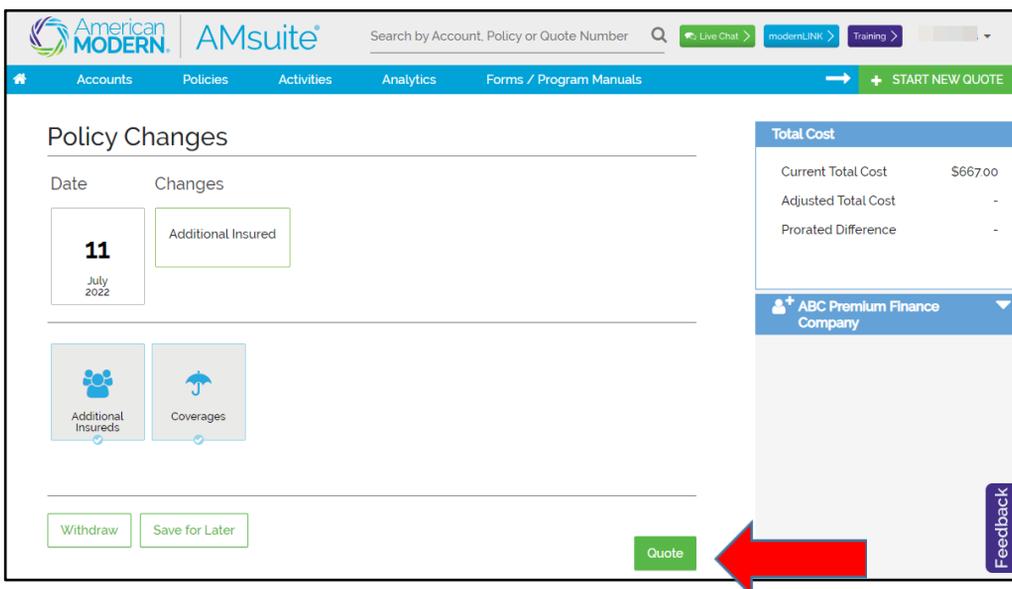
A red arrow points to the 'Continue' button.

**8** Select **Continue**.



The screenshot shows the AMsuite interface for policy changes. The 'Policy Changes' section has a date of '11 July 2022' and a change of 'Additional Insured'. Below this are two buttons: 'Additional Insureds' and 'Coverages'. The 'Coverages' section has a 'Continue' button highlighted with a red arrow. A 'Total Cost' summary is on the right, showing 'Current Total Cost' of \$667.00. Below the summary is a dropdown menu for 'ABC Premium Finance Company'. A 'Feedback' button is on the far right.

**9** Select **Quote**.



The screenshot shows the AMsuite interface for policy changes. The 'Policy Changes' section has a date of '11 July 2022' and a change of 'Additional Insured'. Below this are two buttons: 'Additional Insureds' and 'Coverages'. At the bottom of the 'Coverages' section are 'Withdraw' and 'Save for Later' buttons. The 'Quote' button is highlighted with a red arrow. The 'Total Cost' summary and 'ABC Premium Finance Company' dropdown are also visible. A 'Feedback' button is on the far right.

10 Select **Review Billing**.

The screenshot shows the AMsuite interface. The top navigation bar includes 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms / Program Manuals'. A search bar is present with the text 'Search by Account, Policy or Quote Number'. On the right, there are buttons for 'Live Chat', 'modernLINK', and 'Training'. Below the navigation bar, the main content area is titled 'Policy Changes'. It features a table with columns 'Date' and 'Changes'. A row shows the date '11 July 2022' and the change 'Additional Insured'. Below this table are two buttons: 'Additional Insured' and 'Coverages'. Underneath is a section for 'Underwriting Issues' with a table header 'SHORT DESCRIPTION', 'LONG DESCRIPTION', and 'STATUS'. A message states 'There are no open underwriting issues associated with this quote'. On the right side, there is a 'Total Cost' summary table with the following data:

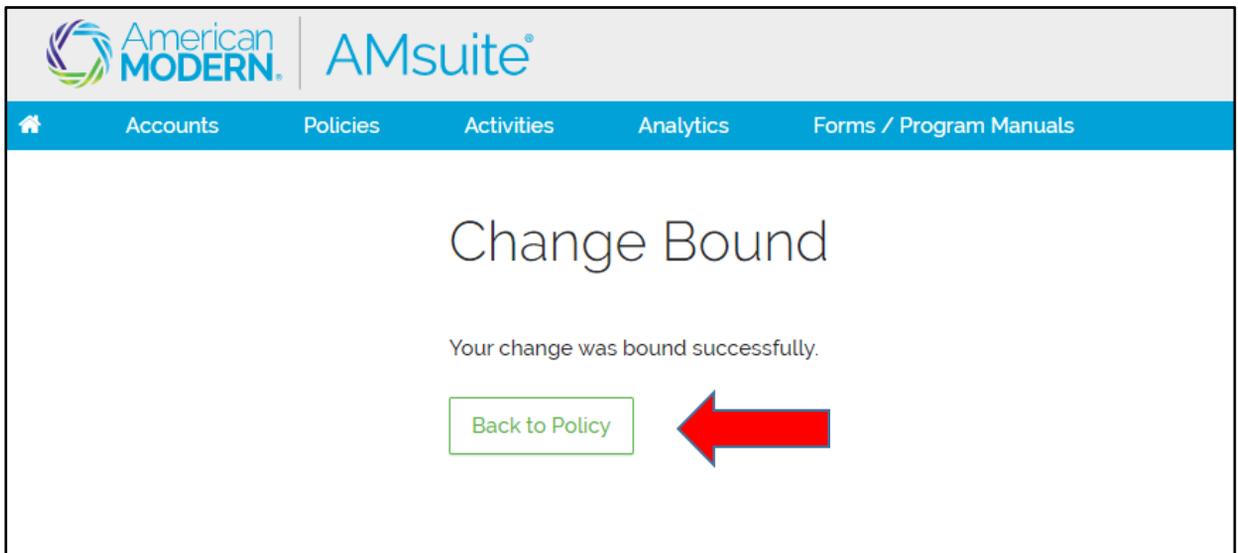
Total Cost	
Current Total Cost	\$667.00
Adjusted Total Cost	\$667.00
Prorated Difference	\$0.00

Below the table is a green button labeled 'Review Billing', which is highlighted by a red arrow. At the bottom of the right sidebar, there is a dropdown menu for 'ABC Premium Finance Company' and a 'Feedback' button.

11 Select **Complete Change**.

This screenshot is similar to the previous one, showing the 'Policy Changes' section. The table shows the same date and change. Below the 'Additional Insured' and 'Coverages' buttons, a third button labeled 'Billing & Signatures' is now visible and highlighted with a red arrow. The 'Total Cost' summary table remains the same. The green button at the bottom of the table is now labeled 'Complete Change', also highlighted by a red arrow. The 'Feedback' button is replaced by a 'OK' button.

- 12 The Change is now Bound, select **Back to Policy** for a copy of the new Declaration page



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## Change Bound

Your change was bound successfully.

[Back to Policy](#)

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