

# AMsuite<sup>®</sup>

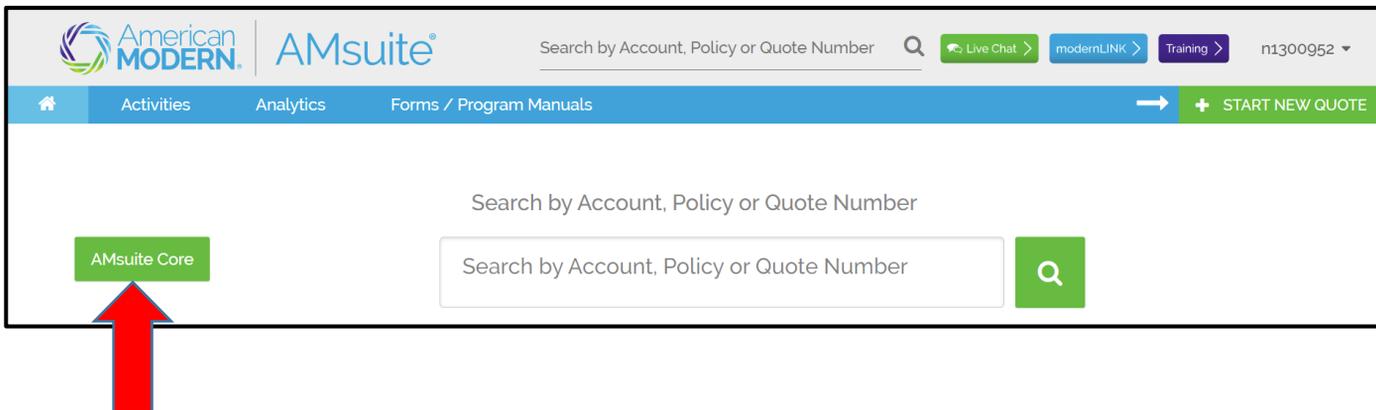
## Quoting Multiple Properties AMsuite Core

This document will provide step-by-step instructions for quoting multiple residential properties owned by the applicant. We recommend quoting in AMsuite Core if more than five (5) properties to streamline the process.

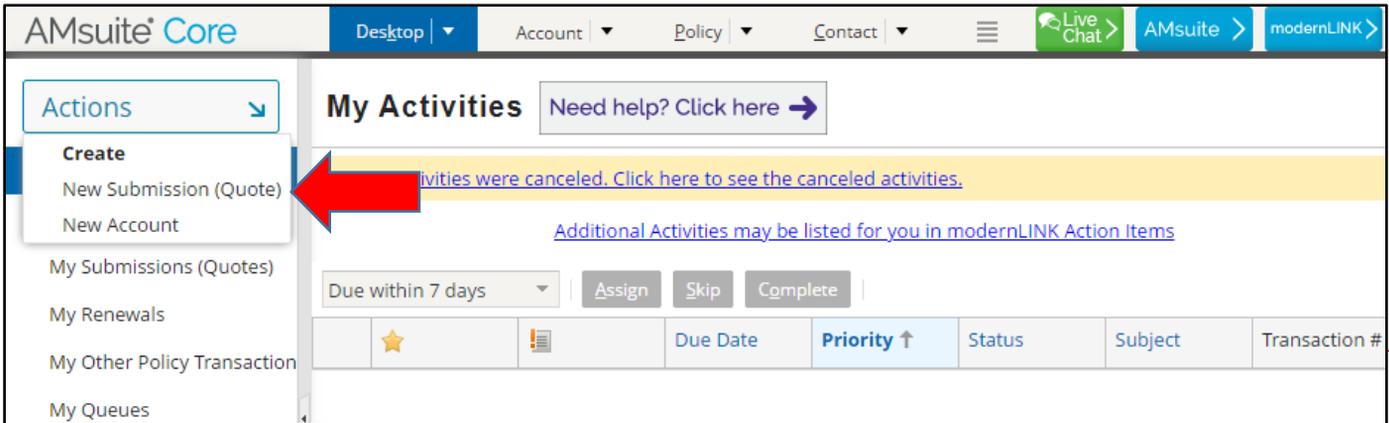
To begin the quote, select the blue **AMsuite** box from the modernLINK<sup>®</sup> home page.



Once in AMsuite select the green **AMsuite Core** box to begin quoting multiple risks.

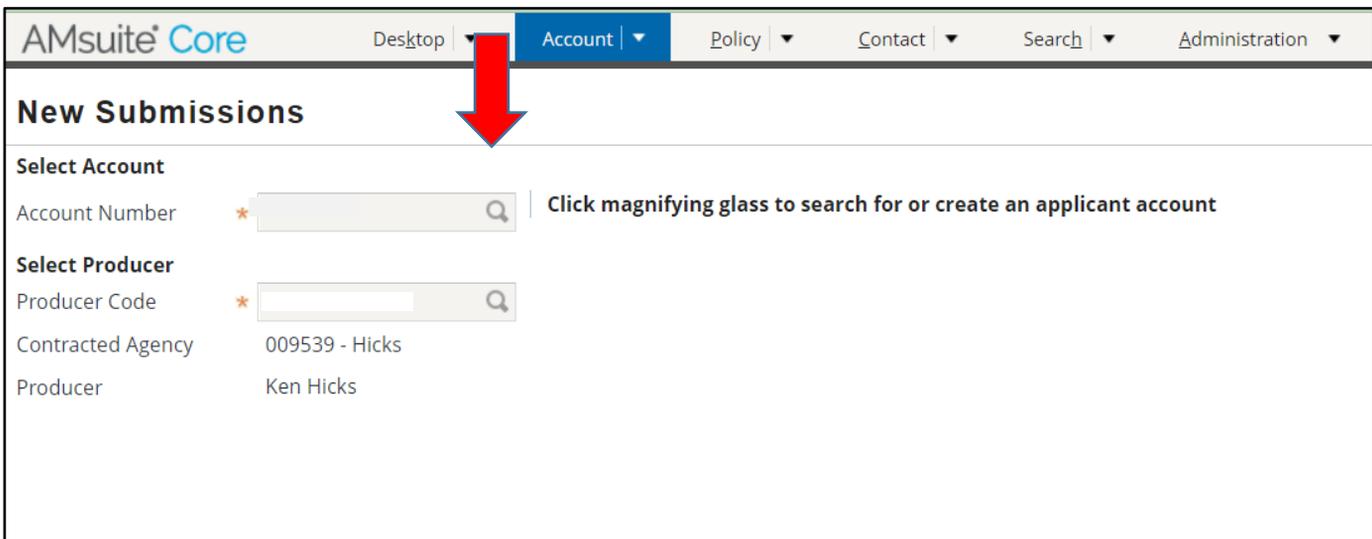


- 1 Once in AMsuite Core select **Actions** then **New Submission (Quote)** to begin quoting.



The screenshot shows the AMsuite Core interface. At the top, there are navigation tabs for Desktop, Account, Policy, Contact, Live Chat, AMsuite, and modernLINK. On the left, a sidebar menu is open under 'Actions', showing options like 'Create', 'New Submission (Quote)', 'New Account', 'My Submissions (Quotes)', 'My Renewals', 'My Other Policy Transaction', and 'My Queues'. A red arrow points to 'New Submission (Quote)'. The main content area is titled 'My Activities' and includes a search bar, a yellow warning banner, and a table with columns for Due Date, Priority, Status, Subject, and Transaction #.

- 2 If the applicant has a policy in AMsuite they will have an account number – if this is the case the Customer's **Account Number** can be entered. If you are unsure if the applicant has an **Account Number**, select search (magnifying glass).



The screenshot shows the 'New Submissions' form in AMsuite Core. The top navigation bar includes Desktop, Account, Policy, Contact, Search, and Administration. A red arrow points to the search icon in the 'Account Number' field. The form includes sections for 'Select Account' (Account Number field with search icon), 'Select Producer' (Producer Code field with search icon), and 'Contracted Agency' (009539 - Hicks) and 'Producer' (Ken Hicks).

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## Quoting Multiple Properties AMsuite Core

3 If quoting for a Company, LLC, Estate or Trust, enter the name in the **Company Name** field. For an individual, enter the applicants **First** and **Last** names in the corresponding fields. If the **City, State** or **Zip** is known, enter that to help narrow the search. Select **Search**. Scroll to the bottom to see list of accounts found. If account is found select the account to continue.

If the applicant does not have an account, select **Create New Account**, select **Company** or **Person** to continue. You must enter the **First** and **Last** name of applicant for the **Create New Account** to appear.

AMsuite Core Desktop Account Policy Contact Search Administration

**Enter Account Information** [Return to New Submissions](#) [How to get started](#) →

Please enter basic account holder information, and then click Search to search for a matching account.

**Applicant Information**

Company Name

Company name is an exact match

First name

Last name

First name is an exact match

Last name is an exact match

Country

City

State

ZIP Code

Create New Account ▾

Company

Person

4 When quoting a new applicant all questions with an asterisk are required to be completed.

- **First and Last Name**
- **Date of Birth**
- **Primary Phone**  
(recommend getting cell phone number)
- **Mailing address**
- **Producer Code**

Once all the information has been entered, scroll to the top of the page and select **Update**.

**Hints and Tips:**

- *Enter the mobile phone – this will be useful later in the quoting process*
- *Answer the question about automated calls on this page*

**Create Account**

**Please confirm account information**

First name \*

Middle name

Last name \*

Suffix

Date of Birth \*

The customer has the option of receiving automated calls and/or text messages from us. Do we have the customer's permission to send autodialed pre-recorded and artificial voice calls and/or text messages to the phone number provided?  Yes  No

Primary Phone \*

Home Phone

Work Phone

Mobile Phone

Fax Phone

Primary Email

Secondary Email

**Address**

Country

Attention/Care of

Address 1 \*

Address 2

City \*

State \*

ZIP Code \*

Address Type \*

Description

**Official IDs**

SSN

---

Preferred Language

**Select Producer**

Producer Code \*

Contracted Agency

5 On the **New Submissions** page select Product Name: **Residential**

**New Submissions** [Return to Submission Manager](#)

**Select Account**

Account Number \*

**Select Producer**

Producer Code \*

Contracted Agency

Producer

**Product Offers**

Default Rating State \* Ohio

Default Effective Date \* 03/09/2022

	Product Name	Product Description	Status
Select	Recreational	Recreational	Available
Select	Residential	Residential	Available

6 **Qualification**

Save and Next > Quote Save Versions Close Options

Policy Type \*

**Policy Type** [Return to Qualification](#)

	Policy Type ↑	Description
Select	Homeowners	Homeowners Flex (a modified ISO HO-3 policy form) is a flexible packaged program for dwellings in average or better condition with a well-maintained premises. Provides open peril coverage for the dwelling and other structures, with named peril coverage for personal property. Dwelling loss settlement is Replacement Cost (settlement for roof coverings may be at actual cash value depending on age), with other options available, including Extended Replacement Cost. 1-2 family owner or seasonal dwellings acceptable.
Select	Tenant	Provides named peril personal property coverage, including burglary, for tenants occupying manufactured homes in fair or better condition. Dwelling loss settlement is ACV, with Replacement Cost option available.

After selecting the **Policy Type** (Recreational or Residential), the **Policy Type** will need to be selected. Use the magnifying glass to open the Policy type menu. Select the Policy Type specific to the risk being quoted.

**Hints and Tips:**

- All risks must be the same Policy Type.
- Occupancies can vary between Rental, Seasonal, and Vacant.

- 7 On the **Qualification** page read the statements to the applicant and place checkmarks in each box indicating this has been completed. Read the questions to the applicant and place a check mark in each box based on their response to indicate this has been done. Select **Save and Next**.

## Qualification

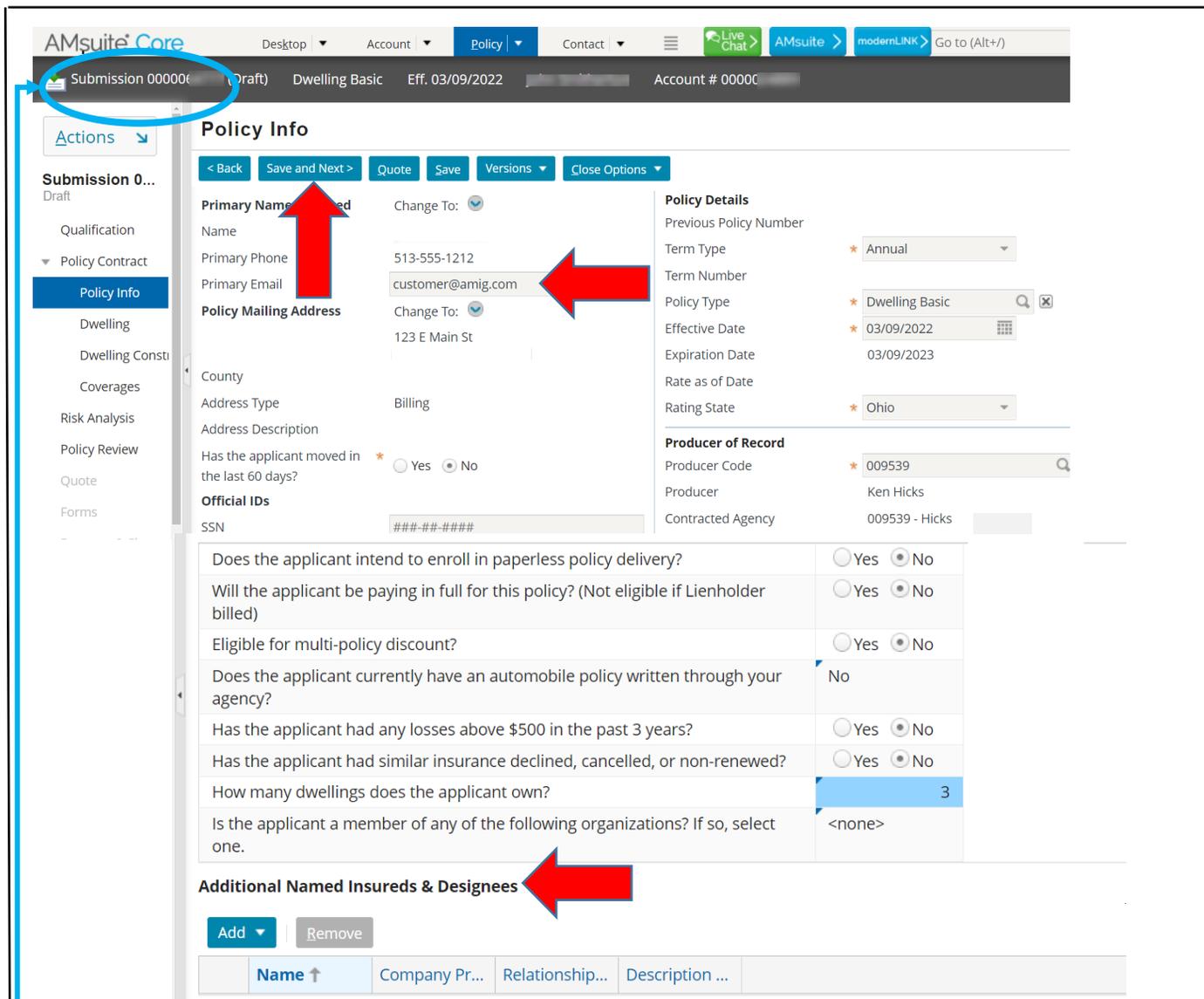
Save and Next >
Quote
Save
Versions ▾
Close Options ▾

Policy Type
★ Dwelling Basic
🔍
✕

**Please read to applicant:**

In connection with underwriting or rating this application for insurance, we may review your credit history or obtain or use a credit based insurance score based on the information contained in that credit history. We may use a third party in connection with the development of your insurance score.	<input checked="" type="checkbox"/>
In connection with this application for insurance, we may review your claims history or loss experience and may report future claims made by you to a claims history provider.	<input checked="" type="checkbox"/>
Disclaimer has been read and applicant did not object.	<input checked="" type="checkbox"/>
Is the applicant in foreclosure or currently 60 days or more past due on mortgage payments for any property?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Has the applicant been convicted of arson, fraud, or other insurance-related offenses?	<input type="radio"/> Yes <input checked="" type="radio"/> No

- 8 On the Policy Info tab enter the **Primary Email**. Answer all the questions at the bottom. If there is an **Additional Insured** (spouse or individual that appears on the deed) or Designee (POA, Trustee, etc.) enter them here. Lien Holders or Mortgage Companies **DO NOT** get entered here. Once completed, Select **Save and Next** to continue with quote.



The screenshot shows the AMsuite Core interface for a 'Policy Info' form. A blue circle highlights the submission number '00000' in the top navigation bar. A red arrow points to the 'Primary Email' field, which contains 'customer@amig.com'. Another red arrow points to the 'Save and Next >' button. A third red arrow points to the 'Additional Named Insureds & Designees' section at the bottom. Below this section is a table with columns for Name, Company Pr..., Relationship..., and Description....

**Policy Info**

< Back Save and Next > Quote Save Versions Close Options

**Primary Name** Change To:

Name

Primary Phone 513-555-1212

Primary Email customer@amig.com

**Policy Mailing Address** Change To:

123 E Main St

County

Address Type

Address Description

Has the applicant moved in the last 60 days?  Yes  No

**Official IDs**

SSN ###-##-####

**Policy Details**

Previous Policy Number

Term Type

Term Number

Policy Type

Effective Date

Expiration Date

Rate as of Date

Rating State

**Producer of Record**

Producer Code

Producer

Contracted Agency

Does the applicant intend to enroll in paperless policy delivery?  Yes  No

Will the applicant be paying in full for this policy? (Not eligible if Lienholder billed)  Yes  No

Eligible for multi-policy discount?  Yes  No

Does the applicant currently have an automobile policy written through your agency?

Has the applicant had any losses above \$500 in the past 3 years?  Yes  No

Has the applicant had similar insurance declined, cancelled, or non-renewed?  Yes  No

How many dwellings does the applicant own?

Is the applicant a member of any of the following organizations? If so, select one.

**Additional Named Insureds & Designees**

Add Remove

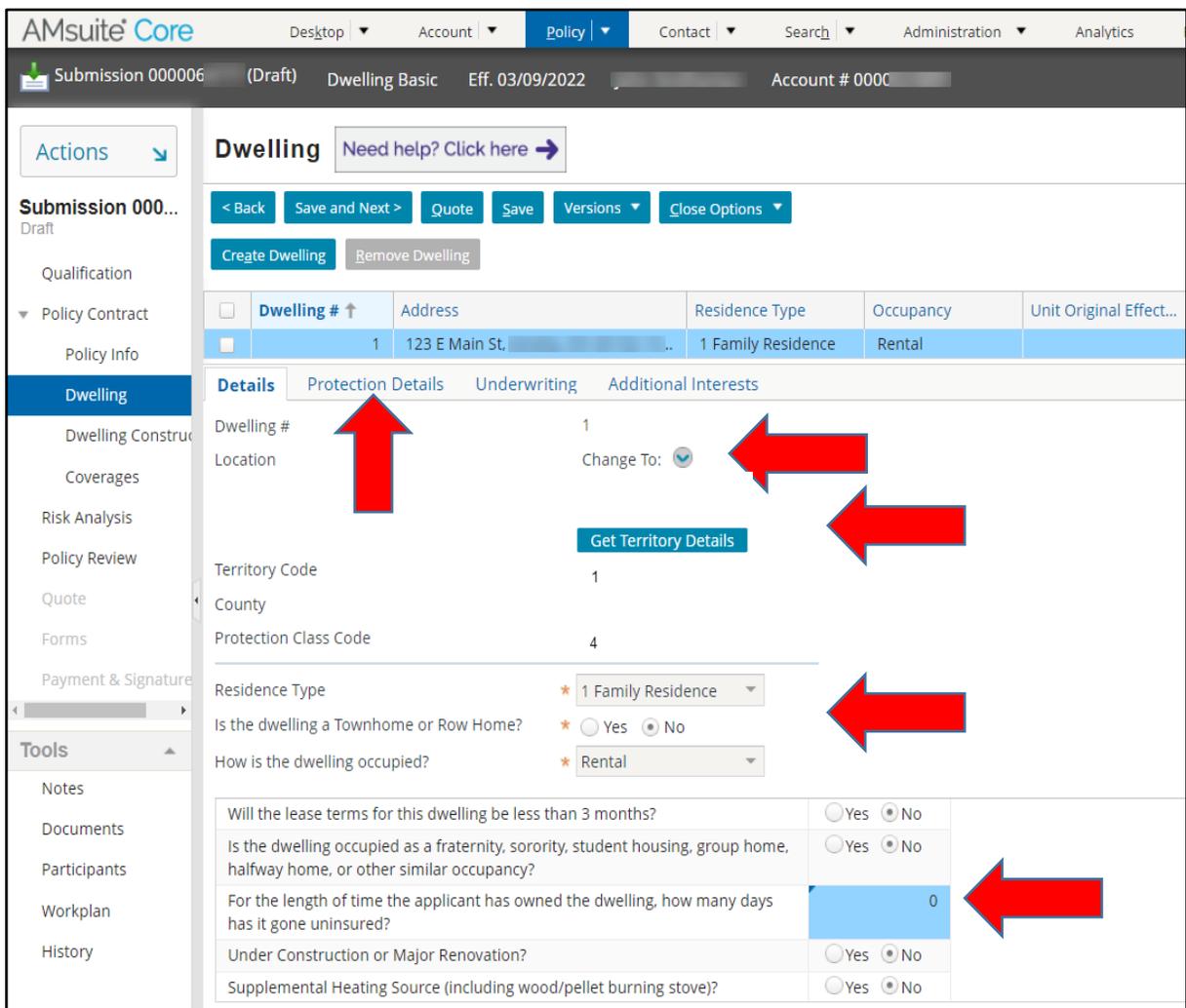
Name ↑	Company Pr...	Relationship...	Description ...
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Tips & Tricks:

- Be sure to write down the submission number

9 On the Dwelling Page select **Create Dwelling**. AMsuite pulls the entered address (mailing) as the Location. To enter the location address, select **Change to**, use drop down to select new address, then enter the risk location address.

Select **Get Territory Details**. Select **Residence Type**, answer if risk is a Townhome or Row home, then select the occupancy of the home. AMsuite defaults owner occupied. Continue to answer the questions at the bottom of the page. Once all questions are completed on the Details tab. Select the **Protection Details**. See next page.

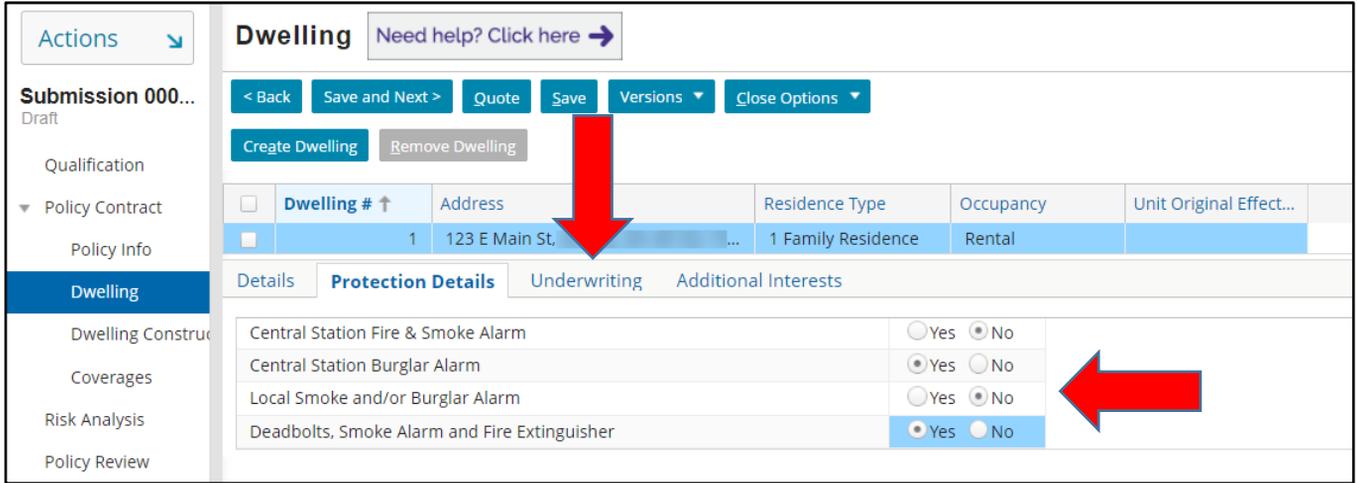


The screenshot shows the AMsuite Core interface for a Dwelling. The left sidebar contains navigation options like 'Submission 000...', 'Policy Contract', and 'Tools'. The main area is titled 'Dwelling' and shows a table with one row: Dwelling # 1, Address 123 E Main St., Residence Type 1 Family Residence, Occupancy Rental. Below the table are tabs for 'Details', 'Protection Details', 'Underwriting', and 'Additional Interests'. The 'Details' tab is active, showing fields for Dwelling #, Location (with a 'Change To' dropdown), Territory Code, County, Protection Class Code, Residence Type (1 Family Residence), and occupancy questions (Townhome/Row Home, How is the dwelling occupied?). A 'Get Territory Details' button is visible. At the bottom, there are several yes/no questions, including 'Will the lease terms for this dwelling be less than 3 months?' and 'Is the dwelling occupied as a fraternity, sorority, student housing, group home, halfway home, or other similar occupancy?'. A red arrow points to the '0' value in the 'For the length of time the applicant has owned the dwelling, how many days has it gone uninsured?' field.

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## Quoting Multiple Properties AMsuite Core

10 Answer the **Protection Details** questions, these questions will not appear for Vacant occupancies. Next, select the **Underwriting** tab.



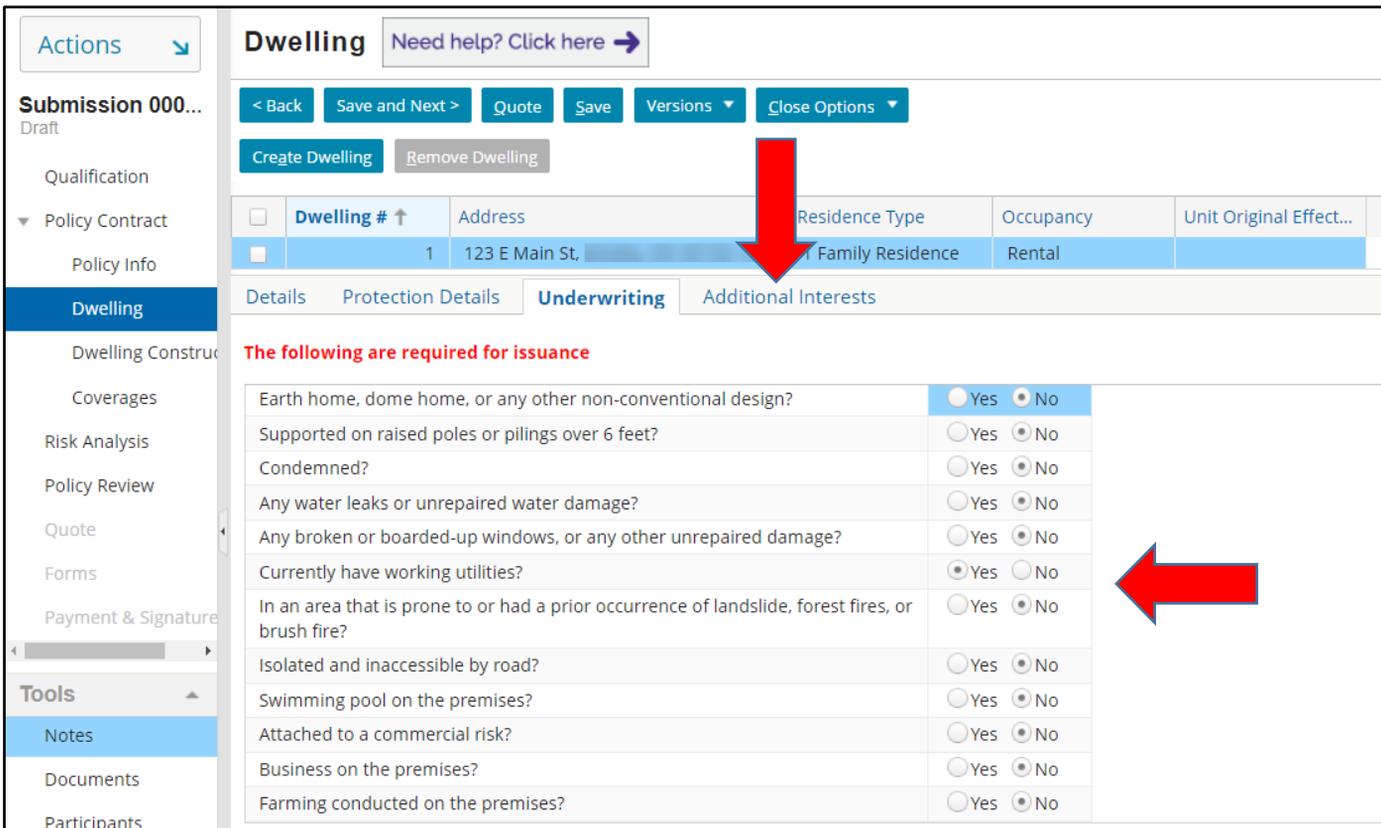
The screenshot shows the AMsuite interface for a Dwelling. The left sidebar contains navigation options: Actions, Submission 000... Draft, Qualification, Policy Contract, Policy Info, Dwelling (selected), Dwelling Construction, Coverages, Risk Analysis, and Policy Review. The main content area is titled 'Dwelling' and includes a 'Need help? Click here' link. Below this are buttons for '< Back', 'Save and Next >', 'Quote', 'Save', 'Versions', and 'Close Options'. There are also 'Create Dwelling' and 'Remove Dwelling' buttons. A table lists the dwelling details:

Dwelling #	Address	Residence Type	Occupancy	Unit Original Effect...
1	123 E Main St.	1 Family Residence	Rental	

Below the table are tabs for 'Details', 'Protection Details' (selected), 'Underwriting', and 'Additional Interests'. The 'Protection Details' section contains four questions with radio button options:

- Central Station Fire & Smoke Alarm:  Yes  No
- Central Station Burglar Alarm:  Yes  No
- Local Smoke and/or Burglar Alarm:  Yes  No
- Deadbolts, Smoke Alarm and Fire Extinguisher:  Yes  No

11 Answer the **Underwriting** questions. Underwriting questions will change dependent on the occupancy. Next, select the **Additional Interest** tab.



The screenshot shows the AMsuite interface for a Dwelling, with the 'Underwriting' tab selected. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Dwelling' and includes the same navigation and table as above. The 'Underwriting' section contains a heading 'The following are required for issuance' followed by a list of questions with radio button options:

- Earth home, dome home, or any other non-conventional design?  Yes  No
- Supported on raised poles or pilings over 6 feet?  Yes  No
- Condemned?  Yes  No
- Any water leaks or unrepaired water damage?  Yes  No
- Any broken or boarded-up windows, or any other unrepaired damage?  Yes  No
- Currently have working utilities?  Yes  No
- In an area that is prone to or had a prior occurrence of landslide, forest fires, or brush fire?  Yes  No
- Isolated and inaccessible by road?  Yes  No
- Swimming pool on the premises?  Yes  No
- Attached to a commercial risk?  Yes  No
- Business on the premises?  Yes  No
- Farming conducted on the premises?  Yes  No

12 The **Additional Interests** tab is for Lien Holders, Mortgagee Companies, Property Managers, or Park Managers (if quoting manufactured home). Select the appropriate contact and enter the **Additional Interest** information.

After completing the: Details, Protection Details, Underwriting, and Additional Interest tabs select **Save and Next** to continue quoting the risk.

**Dwelling**

< Back Save and Next > Versions Close Options

Create Dwelling Remove Dwelling

<input type="checkbox"/>	Dwelling # ↑	Address	Residence Type	Occupancy	Unit Original Effect...
<input type="checkbox"/>	1	123 E Main St,	1 Family Residence	Rental	

Details Protection Details Underwriting **Additional Interests**

**Dwelling Additional Interest**

Add Remove

Additional I...	Description	Contract Nu...
New Company		
New Person		
Other Contacts		

**Hints and Tips:**

- Risks that are lienholder billed must be quoted separately. AMsuite will only issue to one billing contact.

**AMsuite**

Quoting Multiple Properties  
AMsuite Core

**13** To continue quoting additional risks and start back at **Step 9** and continue to **Step 12** until all risk are entered. Do not **Save and Next** until all risks have been entered.

**Hints and Tips:**

- When moving thru the quoting process always ensure you are on the correct risk. This can be done by checking the risk that is highlighted in blue and verifying the risk address at the bottom in yellow. AMsuite will always return to Dwelling 1 when moving between pages.
- Enter information on each of the tabs for all risk when quoting.

Actions

Submission 0000065...  
Bound

- Qualification
- Policy Contract
  - Policy Info
  - Dwelling**
  - Dwelling Construction
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms
- Payment & Signatures

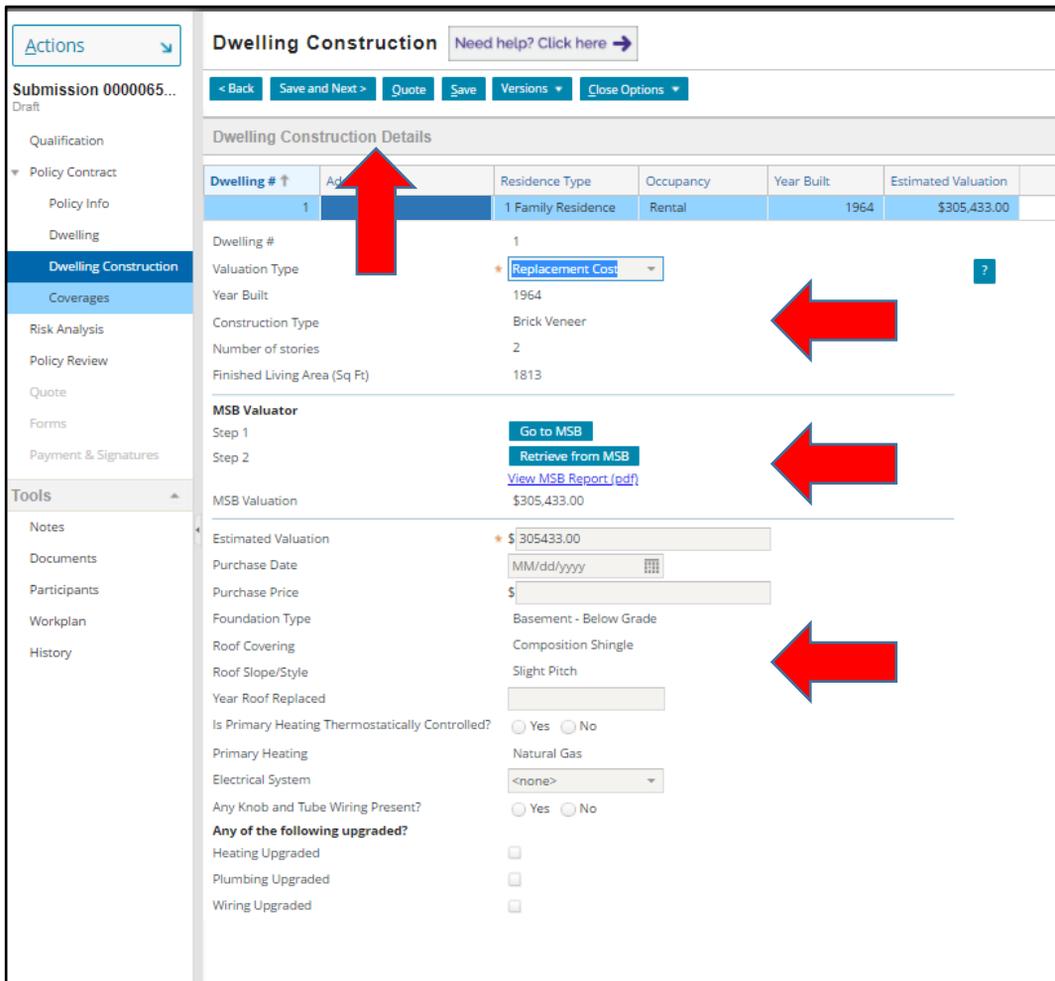
Details   Protection Details   Underwriting   **Additional Interests**

Dwelling # ↑	Value	Address	Residence Type	Occupancy
1	\$250,198.00	43 Hopkins Ave, Amelia, ...	1 Family Residence	Rental
2	\$159,623.00	32 Hopkins Ave, Amelia, ...	1 Family Residence	Rental
3	\$243,334.00	40 Hopkins Ave, Amelia, ...	1 Family Residence	Seasonal
4	\$296,382.00	74 Hopkins Ave, Amelia, ...	1 Family Residence	Vacant
5	\$220,468.00	30 Chapel Rd, Amelia, O...	1 Family Residence	Rental
6	\$312,151.00	18 Chapel Rd, Amelia, O...	1 Family Residence	Rental
7	\$316,997.00	1 Letitia Ave, Amelia, OH...	1 Family Residence	Seasonal
8	\$284,144.00	19 Letitia Ave, Amelia, O...	1 Family Residence	Vacant
9	\$267,862.00	3944 Applegate Ct, Amel...	1 Family Residence	Rental
10	\$232,309.00	97 Wooded Ridge Dr, A...	1 Family Residence	Rental

Dwelling at 3944 Applegate Ct, Amelia, OH 45102-2690

**14** Answer all the questions about the risk on the dwelling Construction page. If the Valuation Type is Replacement Cost, MSB must be visited. Select **Go to MSB** (MSB will open in a separate tab), make any adjustments needed, save and return to AMsuite. Once back in AMsuite select **Retrieve from MSB** to pull the replacement cost value into AMsuite. Select **Save and Next** to continue quote.

If logged out by AMsuite while making changes in MSB, log back in to AMsuite, search quote number and then Retrieve MSB.



**Dwelling Construction** [Need help? Click here →](#)

[< Back](#) [Save and Next >](#) [Quote](#) [Save](#) [Versions](#) [Close Options](#)

Submission 0000065...  
Draft

Qualification

Policy Contract

Policy Info

Dwelling

**Dwelling Construction**

Coverages

Risk Analysis

Policy Review

Quote

Forms

Payment & Signatures

Tools

Notes

Documents

Participants

Workplan

History

Dwelling # ↑	Apartment	Residence Type	Occupancy	Year Built	Estimated Valuation
1		1 Family Residence	Rental	1964	\$305,433.00

Dwelling # 1

Valuation Type **Replacement Cost** ?

Year Built 1964

Construction Type Brick Veneer

Number of stories 2

Finished Living Area (Sq Ft) 1813

**MSB Valuator**

Step 1 [Go to MSB](#)

Step 2 [Retrieve from MSB](#)

[View MSB Report \(.pdf\)](#)

MSB Valuation \$305,433.00

Estimated Valuation \* \$ 305433.00

Purchase Date MM/dd/yyyy

Purchase Price \$

Foundation Type Basement - Below Grade

Roof Covering Composition Shingle

Roof Slope/Style Slight Pitch

Year Roof Replaced

Is Primary Heating Thermostatically Controlled?  Yes  No

Primary Heating Natural Gas

Electrical System <none>

Any Knob and Tube Wiring Present?  Yes  No

**Any of the following upgraded?**

Heating Upgraded

Plumbing Upgraded

Wiring Upgraded

## Hints and Tips:

All questions must be answered on the Dwelling Construction page as well as visiting MSB for replacement cost to prevent errors.



# Quoting Multiple Properties AMsuite Core

Visiting **MSB** for risk quoted in **Dwelling Special** with the Replacement Cost settlement.

### Tips and Tricks:

- MSB will open on another page be sure to save and close MSB.
- If MSB doesn't take you to AMsuite you will need to go back to the AMsuite tab.
- If AMsuite has closed, you will need to log in and go back to the quote.

On the **Dwelling Construction** page select **Go To MSB**. Once back in AMsuite be sure to **Retrieve from MSB**.

**Actions** ▾

**Submission 0000065...**  
Bound

- Qualification
- ▾ Policy Contract
  - Policy Info
  - Dwelling
  - Dwelling Construction**
  - Coverages
  - CLUE Results
  - Risk Analysis
  - Policy Review
  - Quote
  - Forms
  - Payment & Signatures

**MSB Valuator**

Step 1 [Go to MSB](#)

Step 2 [Retrieve from MSB](#)

MSB Valuation [View MSB Report \(pdf\)](#)

\$316,997.00

<p><b>ESTIMATE-10145940</b></p> <p>Property Address: 2429 Crane Schoolhouse Rd Bethel, OH 45106</p> <p>Insured Name: Phone: Effective Date: 10/14/2021 Renewal Date: 10/14/2022 Estimate Expiration Date: 10/2/2071 Current Coverage: \$0 Appraisal Number:</p> <p style="text-align: right;"><a href="#">Edit</a></p>	<p><b>Building Information</b></p> <p>Number of Families: 1    Site Access: Flat Area/Easy Access Roads Style: Split Level</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Year Built</th> <th>Construction Type</th> <th>Stories</th> <th>Finished Living Area</th> <th>Wall</th> <th>Foundation Type</th> </tr> </thead> <tbody> <tr> <td>Main Home</td> <td>1976</td> <td>Standard</td> <td>1.5</td> <td>1980 Sq Ft</td> <td>100% 8ft</td> <td>100% Basement, Below Grade</td> </tr> </tbody> </table> <p style="text-align: right;"><a href="#">Edit</a></p>	Name	Year Built	Construction Type	Stories	Finished Living Area	Wall	Foundation Type	Main Home	1976	Standard	1.5	1980 Sq Ft	100% 8ft	100% Basement, Below Grade	<p><b>Valuation Totals</b> <span style="float: right;"><a href="#">More Info</a></span></p> <p>Reconstruction Cost w/o Debris Removal \$275,862 Debris Removal \$13,062 Reconstruction Cost with Debris Removal \$288,924 Cost Date as of 02/2022</p> <p style="text-align: right;"><a href="#">Finish</a></p>
Name	Year Built	Construction Type	Stories	Finished Living Area	Wall	Foundation Type										
Main Home	1976	Standard	1.5	1980 Sq Ft	100% 8ft	100% Basement, Below Grade										

When in **MSB** be sure to select the **Finish** button and then select **Save** in the box that opens.

⚠ Click **Save** to save your changes.

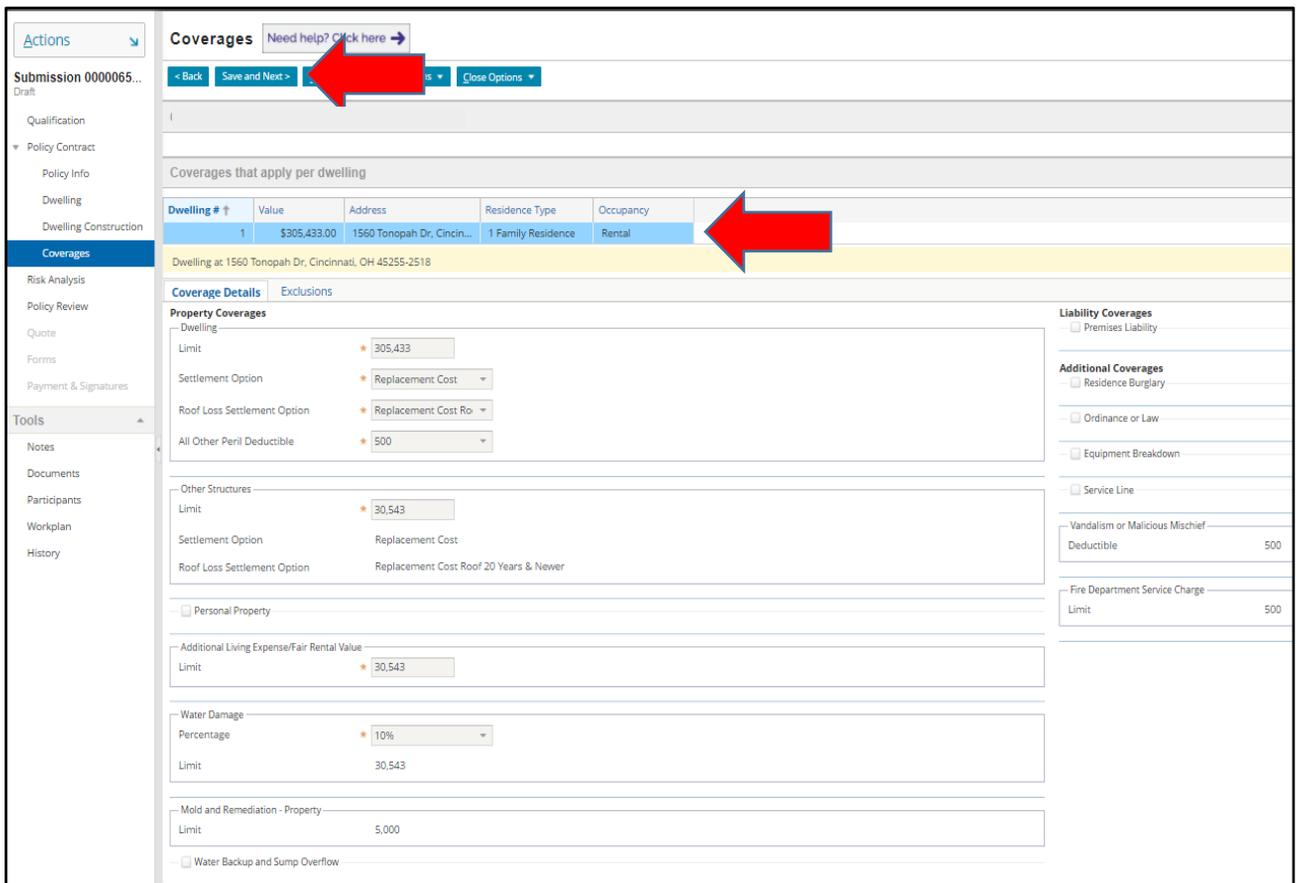
Click **Discard** to discard your changes and return to the dashboard.

Click **Close** to return to the valuation and continue editing.

➔
[Save](#)
[Discard](#)
[Close](#)

**15** After all risk have been entered on the **Dwelling Construction** page. Select **Save and Next** this will take you to the **Coverages** page.

On the **Coverages** page select the property that is being quoted, review all coverages to ensure risk is quoted appropriately. Once completed select **Save and Next** to continue quoting multiple properties.



**Coverages** [Need help? Click here →](#)

[← Back](#) [Save and Next →](#) [Close Options](#)

Coverages that apply per dwelling

Dwelling # ↑	Value	Address	Residence Type	Occupancy
1	\$305,433.00	1560 Tonopah Dr, Cincin...	1 Family Residence	Rental

Dwelling at: 1560 Tonopah Dr, Cincinnati, OH 45255-2518

**Coverage Details** Exclusions

**Property Coverages**

**Dwelling**

- Limit: 305,433
- Settlement Option: Replacement Cost
- Roof Loss Settlement Option: Replacement Cost Ro
- All Other Peril Deductible: 500

**Other Structures**

- Limit: 30,543
- Settlement Option: Replacement Cost
- Roof Loss Settlement Option: Replacement Cost Roof 20 Years & Newer

Personal Property

**Additional Living Expense/Fair Rental Value**

- Limit: 30,543

**Water Damage**

- Percentage: 10%
- Limit: 30,543

**Mold and Remediation - Property**

- Limit: 5,000

Water Backup and Sump Overflow

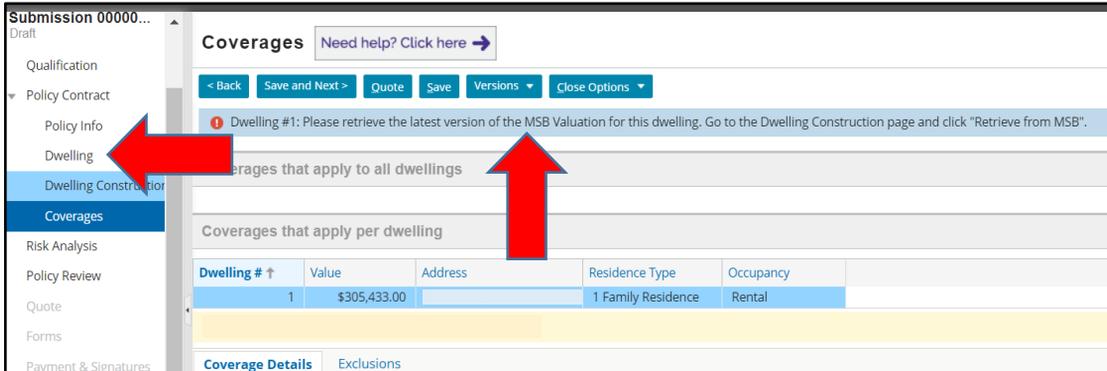
**Liability Coverages**

- Premises Liability

**Additional Coverages**

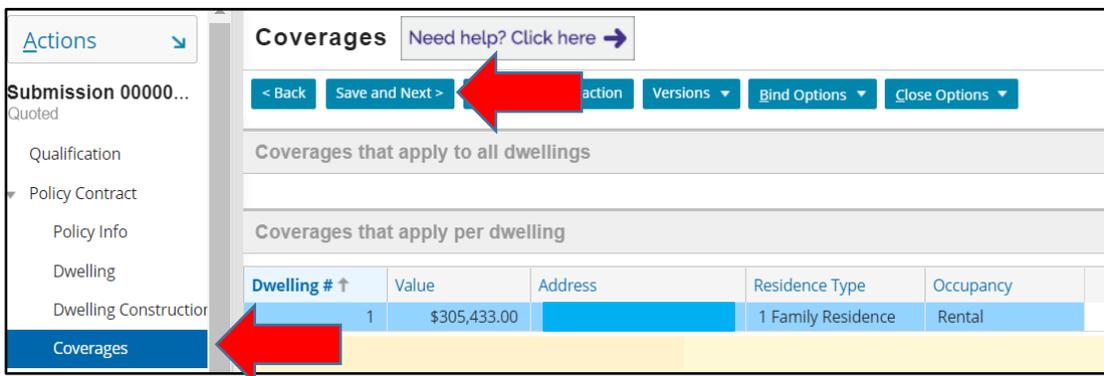
- Residence Burglary
- Ordinance or Law
- Equipment Breakdown
- Service Line
- Vandalism or Malicious Mischief Deductible: 500
- Fire Department Service Charge Limit: 500

16 Once all risk are entered and all coverages have been updated select **Quote**. If any messages appear correct the information for that dwelling.



Message: Dwelling#1 Please retrieve the latest version of the MSB Valuation for the dwelling. Go to the Dwelling Construction page and click "Retrieve from MSB"

Return to the **Dwelling** page to retrieve the value from MSB. Select **Save and Next** to return to the **Coverages** page. Select **Quote** to ensure all the messages have been addressed.



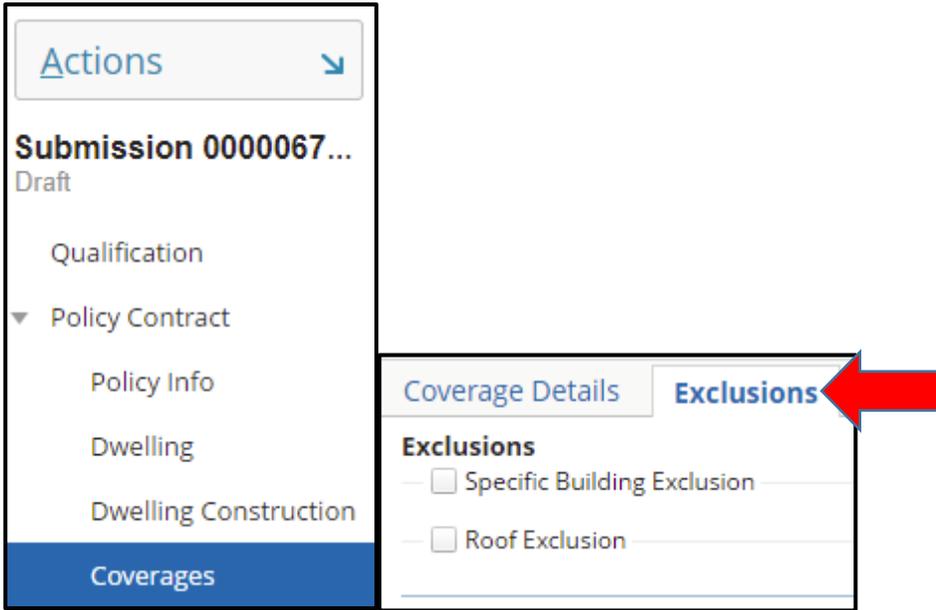
### Tips and Tricks:

- All questions must be answered on the Dwelling Construction page
- If writing with replacement cost MSB must be visited and retrieved

# AMsuite®

## Quoting Multiple Properties AMsuite Core

17 On the **Coverages** page you can add exclusions, if available.



Actions

Submission 000067...  
Draft

Qualification

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

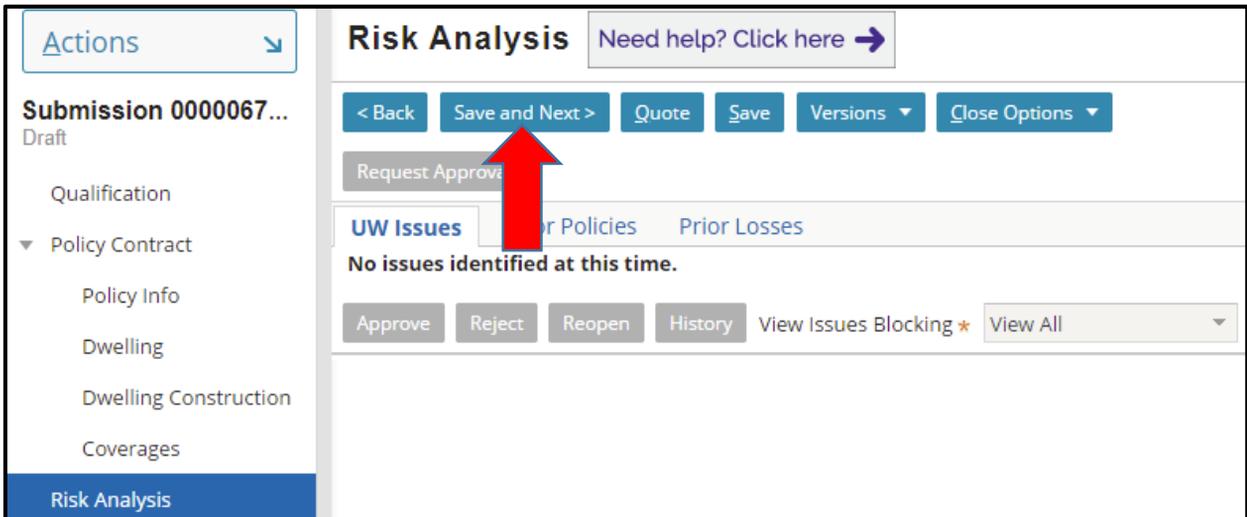
Coverage Details Exclusions

Exclusions

Specific Building Exclusion

Roof Exclusion

18 Once you have verified all coverages, select **Save** and **Next** this will take you to the **Risk Analysis** page. If there are no Underwriting referrals, select **Save** and **Next**



Actions

Submission 000067...  
Draft

Qualification

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

Risk Analysis

Risk Analysis [Need help? Click here](#)

< Back Save and Next > Quote Save Versions Close Options

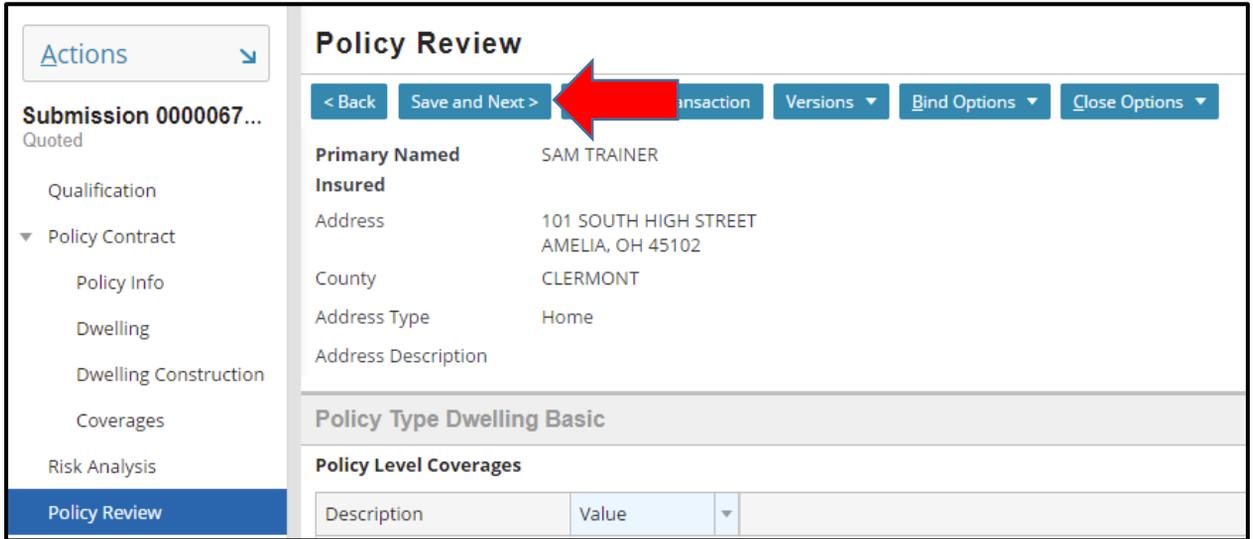
Request Approval

UW Issues for Policies Prior Losses

No issues identified at this time.

Approve Reject Reopen History View Issues Blocking ★ View All

- 19 After **Risk Analysis**, select **Save** and **Next** to move through the quoting process.



**Policy Review**

Submission 0000067...  
Quoted

Qualification

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

Risk Analysis

Policy Review

< Back Save and Next > Transaction Versions Bind Options Close Options

Primary Named Insured SAM TRAINER

Address 101 SOUTH HIGH STREET  
AMELIA, OH 45102

County CLERMONT

Address Type Home

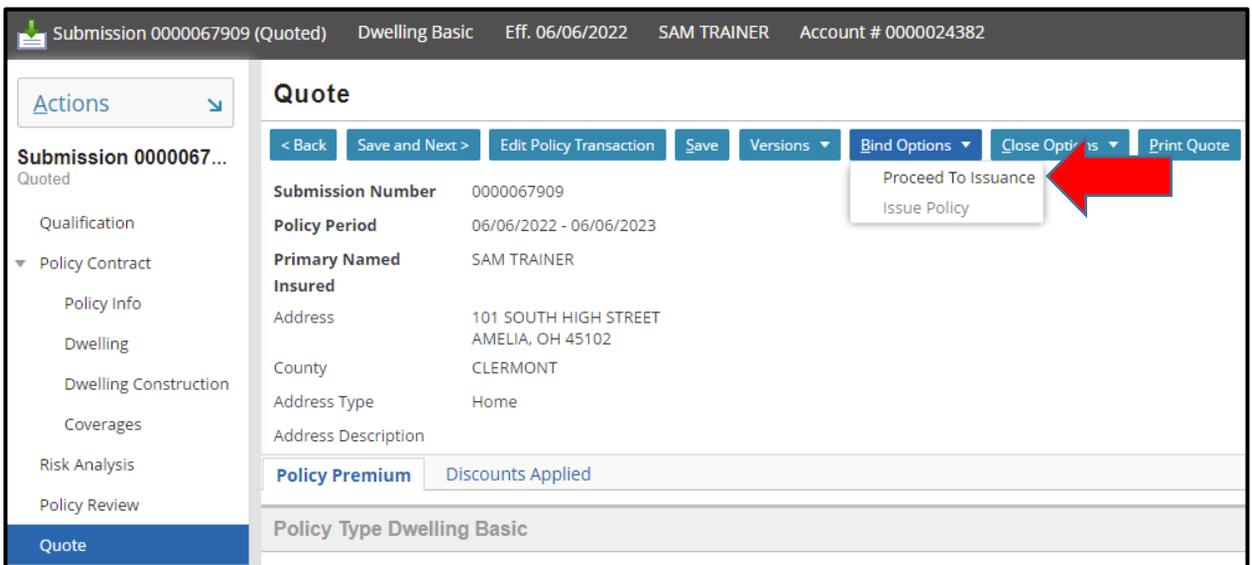
Address Description

Policy Type Dwelling Basic

Policy Level Coverages

Description	Value

- 20 Once on the **Quote** page, select **Proceed to Issuance** under **Bind Options**.



Submission 0000067909 (Quoted) Dwelling Basic Eff. 06/06/2022 SAM TRAINER Account # 0000024382

**Quote**

Submission 0000067...  
Quoted

Qualification

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

Risk Analysis

Policy Review

Quote

< Back Save and Next > Edit Policy Transaction Save Versions Bind Options Close Options Print Quote

Submission Number 0000067909

Policy Period 06/06/2022 - 06/06/2023

Primary Named Insured SAM TRAINER

Address 101 SOUTH HIGH STREET  
AMELIA, OH 45102

County CLERMONT

Address Type Home

Address Description

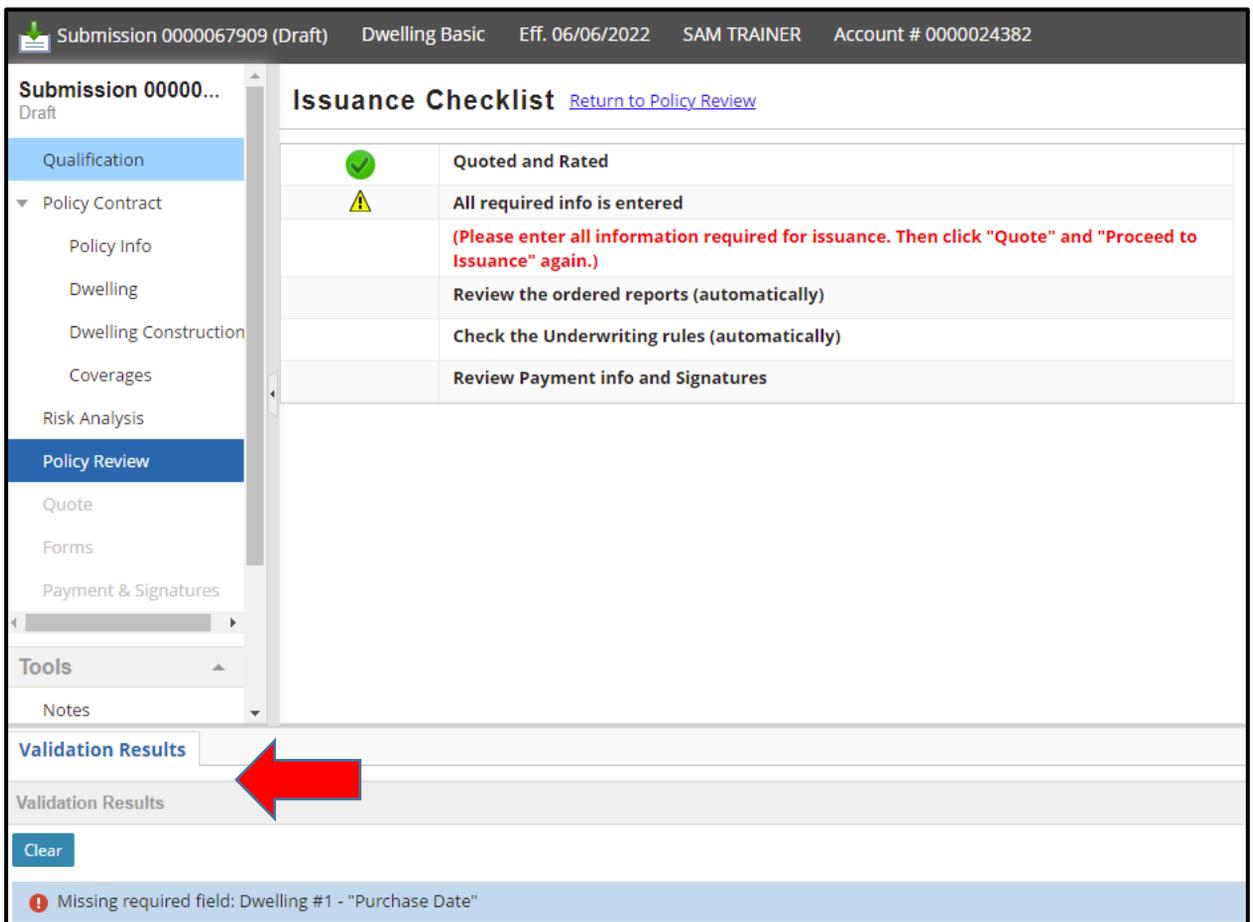
Policy Premium Discounts Applied

Policy Type Dwelling Basic

Proceed To Issuance  
Issue Policy

- 21 If there is anything that needs to be updated, you will see messages under **Validation Results**. Select **Clear** to complete the changes for any missing fields or items that need updated.

In this case, return to the **Dwelling Construction** page to update the missing fields.



Submission 0000067909 (Draft) Dwelling Basic Eff. 06/06/2022 SAM TRAINER Account # 0000024382

Submission 00000...  
Draft

**Issuance Checklist** [Return to Policy Review](#)

✔	Quoted and Rated
⚠	All required info is entered
	(Please enter all information required for issuance. Then click "Quote" and "Proceed to Issuance" again.)
	Review the ordered reports (automatically)
	Check the Underwriting rules (automatically)
	Review Payment info and Signatures

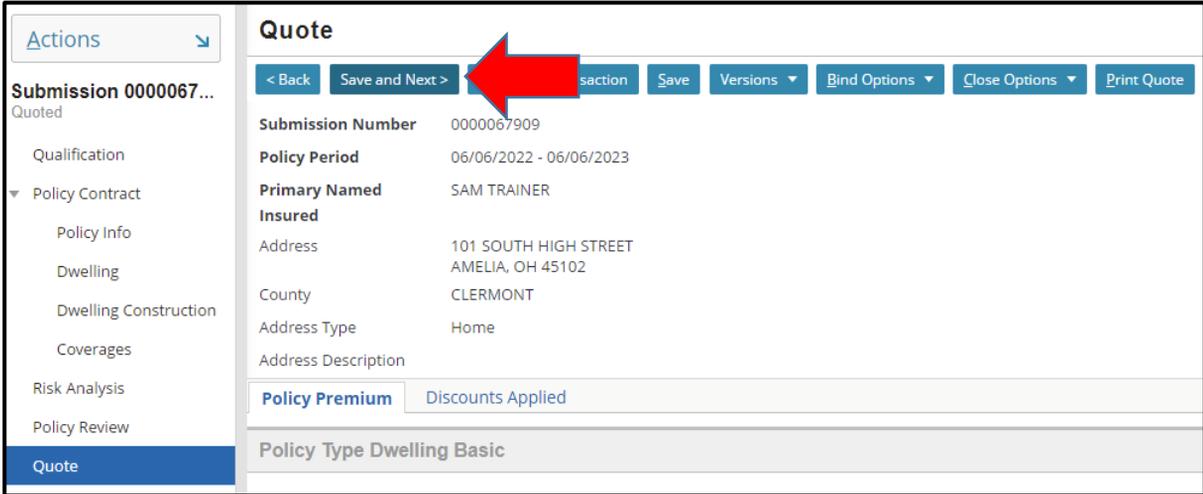
Validation Results

Validation Results

Clear

Missing required field: Dwelling #1 - "Purchase Date"

**22** Once back on the **Quote** page, select **Save** and **Next**.



**Quote**

< Back Save and Next > Action Save Versions Bind Options Close Options Print Quote

**Submission Number** 0000067909

**Policy Period** 06/06/2022 - 06/06/2023

**Primary Named Insured** SAM TRAINER

**Address** 101 SOUTH HIGH STREET  
AMELIA, OH 45102

**County** CLERMONT

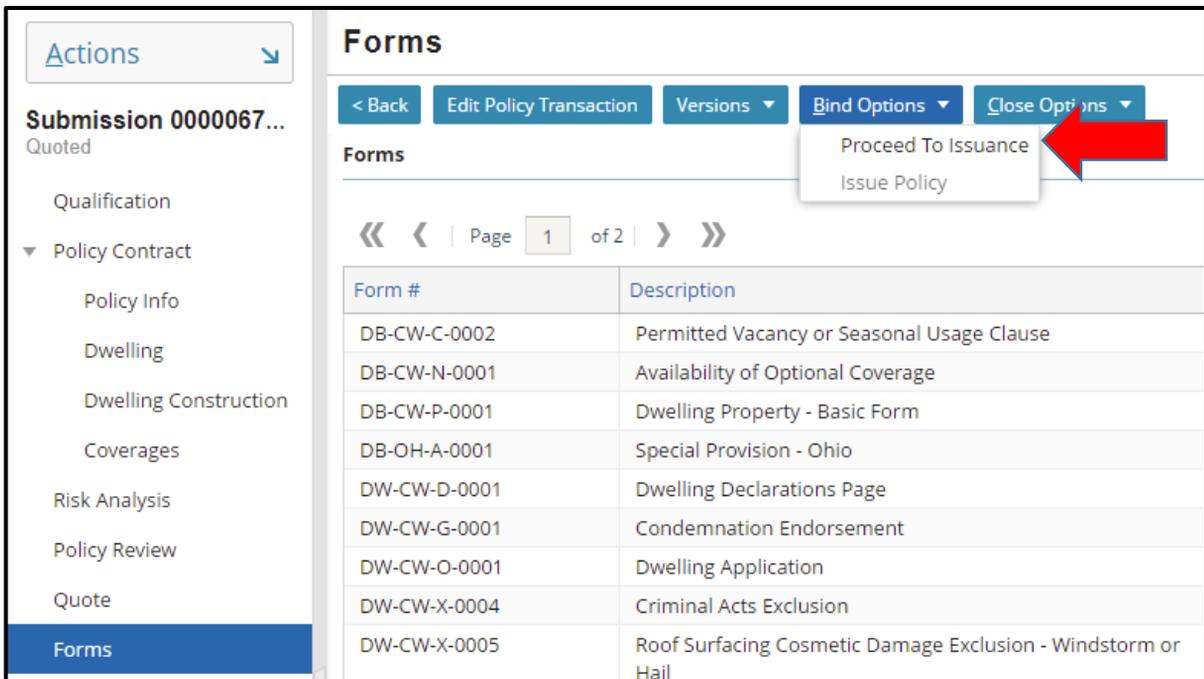
**Address Type** Home

**Address Description**

**Policy Premium** Discounts Applied

**Policy Type Dwelling Basic**

**23** Select **Bind Options**, then select **Proceed to Issuance**.



**Forms**

< Back Edit Policy Transaction Versions Bind Options Close Options

Proceed To Issuance Issue Policy

Page 1 of 2

Form #	Description
DB-CW-C-0002	Permitted Vacancy or Seasonal Usage Clause
DB-CW-N-0001	Availability of Optional Coverage
DB-CW-P-0001	Dwelling Property - Basic Form
DB-OH-A-0001	Special Provision - Ohio
DW-CW-D-0001	Dwelling Declarations Page
DW-CW-G-0001	Condemnation Endorsement
DW-CW-O-0001	Dwelling Application
DW-CW-X-0004	Criminal Acts Exclusion
DW-CW-X-0005	Roof Surfacing Cosmetic Damage Exclusion - Windstorm or Hail

- 24 Review the **Issuance Checklist**, if no updates required select **Return to Payment & Signatures** to continue issuance.

Submission 0000067909 (Quoted) Dwelling Basic Eff. 06/06/2022 SAM TRAINER Account # 0000024382

**Submission 0000067...**  
Quoted

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

Qualification	✓	Quoted and Rated
Policy Contract	✓	All required info is entered
Policy Info	✓	Review the ordered reports (automatically)
Dwelling	✓	Check the Underwriting rules (automatically)
Dwelling Construction	⚠	Review Payment info and Signatures
Coverages		(Please enter or review payment and billing information and review signature options. Then click "Issue Policy" to issue.)
CLUE Results		
Risk Analysis		
Policy Review		
Quote		
Forms		
Payment & Signatures		

- 25** Complete the **Billing** and **Renewal Billing** information, select **Payment Plan** then scroll down to complete the **Payment** and **Signatures** information.

Actions ▾

Submission 0000067...  
Quoted

- Qualification
- ▼ Policy Contract
  - Policy Info
  - Dwelling
  - Dwelling Construction
  - Coverages
  - CLUE Results
  - Risk Analysis
  - Policy Review
  - Quote
  - Forms
  - Payment & Signatures
- Tools ▴
  - Notes
  - Documents
  - Participants
  - Workplan
  - History

### Payment & Signatures

< Back
Edit Policy Transaction
Save
Versions ▾
Bind Options ▾
Close Options ▾
Print Binder

#### Payment

**Premium Summary**

Total Premium	\$908.00
Total Additional Costs	-
Total Cost	\$908.00

**Billing**

Billing Method \* Direct Bill ←

Renew To \* Direct Bill

Billing Type \* Recurring Electronic ←

Date of Payment \* 6

Billing Contact \* SAM TRAINER ▾

**Renewal Billing**

Change Billing Contact at Renewal \*  Yes  No ←

EZPay Form Signed? \* No ←

EZPay Form Version

**Available Payment Plans**

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page

* Select	Name ↑	Down Payment	Installment	Remaining Installments	Installation Fee	Estimated Total
<input type="radio"/>	Full Pay Plan	\$908.00	-	0	-	\$908.00
<input type="radio"/>	Semi-Annual Pay Plan	\$454.00	\$454.00	1	-	\$908.00
<input type="radio"/>	Quarterly Pay Plan	\$227.00	\$227.00	3	-	\$908.00
<input type="radio"/>	Bi-Monthly Pay Plan	\$181.60	\$145.28	5	-	\$908.00
<input type="radio"/>	Monthly Electronic Pay Plan	\$181.60	\$72.64	10	-	\$908.00

Payment Schedule Estimator

**26** Select the **Signature** type either **Electronic** or **Traditional Signature** and complete as required.

Required Signature Forms

Signatures on required forms can be obtained two ways 1) Emailed to Primary Named Insured for electronic signature, or 2) Printed for a traditional signature by Primary Named Insured. Please choose an option below. Note: If electronic signature is selected the electronic envelope may first be emailed to the Producer for signature before being forwarded to the Primary Named Insured.

**Electronic Signature - Mobile Device Required**

Consent to electronic delivery of required signature forms?

Producer email address for e-signature \*  ←

Mobile phone number for text message delivery\* of Personal Identification Number (PIN) \*

\* Standard message and data rates apply

[View Privacy Notice](#)

**Traditional Signature**

EZPay Enrollment and Authorization form must be printed, signed and attached to the policy. This form is available on the next screen after clicking Issue Policy.

The Agent's email address is required here for Electronic Signature.

April 2022  
Version: #1

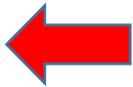
- 27 The **Dwelling Application** can be printed, and a signed copy should be kept on file. Answer the statement about automated calls and/or text messages from American Modern. The applicants email and a mobile number are required.

<input type="checkbox"/>	Form #	Description	
<input type="checkbox"/>	DW-CW-O-0001	Dwelling Application	

Primary Named Insured email address  \*

The customer has the option of receiving automated calls and/or text messages from us. Do we have the customer's permission to send autodialed pre-recorded and artificial voice calls and/or text messages to the phone number provided?  Yes  No \*

Enter text capable Mobile Phone number  \*



- 28 Scroll to the top and select **Bind Options** then select **Issue Policy**.

**Payment & Signatures** [Need help? Click here →](#)

[< Back](#) [Edit Policy Transaction](#) [Save](#) [Versions ▾](#) [Bind Options ▾](#) [Options ▾](#) [Print Binder](#)

[Proceed To Issuance](#)

[Issue Policy](#)



- 29 To continue with policy issuance, select **OK**.

Are you sure you want to bind and issue this policy?  
If applicant has provided Credit Card and/or EFT payment information, by selecting OK insurer is authorized to process payment.

[OK](#)



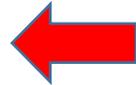
**30** The policy is now bound. The policy can be viewed by selecting the policy number.

## Submission Bound

**Your Submission (#0000067909) has been bound.**

[Set Up an Online Account for Your Customer](#)

Payment Processed Successfully - Receipt (#1000055846)

- [View your submission \(#0000067909\)](#)
- [View your policy \(#600013915\)](#) 
- [Print Declarations Page](#)
- [Go to the submission manager for this account](#)
- [Submit an application for a different account](#)
- [Go to your desktop](#)

### Required Signature Forms

**EZPay Enrollment and Authorization form must be printed, signed and attached to the policy.**

View/Print
Attached Signed EZPay Form

	Form #	Description	
<input type="checkbox"/>	EFT AUTH	EZPay Enrollment and A...	

For Agent Use Only - Not for Distribution

Coverage is subject to policy terms, conditions, limitations, exclusions, underwriting review and approval, and may not be available for all risks or in all states. Rates and discounts vary, are determined by many factors and are subject to change. Policies are written by one of the licensed insurers of American Modern Insurance Group, Inc., including but not limited to American Modern Property and Casualty Insurance Company (CA Lic. No. 6129-1).

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### State Considerations

- Not available in the following states
  - California
  - New York
  - North Carolina
- Kentucky
  - All properties must be in same city/municipality

### Property Considerations

- Multi-family & duplexes accepted
- Mixed occupancies on one policy
- Rental
  - Short term available
- Vacant
  - Dwelling
  - Manufactured Home
  - Condo
- Seasonal
  - Occasional Rental
- All properties must be deeded in the same name
  - One name per policy
  - Individuals, Trusts, & LLC
- Lienholder billed risk must be written separately
  - Can group multiple homes with same lienholder
- One policy type per policy
  - Basic or Special grouped together

### Policy Consideration

- Allows different coverage options and limits per risk
- One policy to manage
- One payment
- One effective/renewal date