

## Web Enabled Help

- On your internet browser, type in: <https://ami.selfservice.anywhere.telus.com/ami>
- Log in with your User ID & Password  
**USER ID:** \_\_\_\_\_ **PASSWORD:** \_\_\_\_\_

### **PROCESSING ADDRESS CHANGES**

- Along the left hand side of the site click on SEARCH POLICY
- Type in the policy number
- Scroll down to the bottom of the screen and click on PERFORM AN ENDORSEMENT
- Type in the information required. For effective date, you can use the drop down boxes.
- Next, you must select a PAYMENT METHOD for all transactions. *(Even if transaction is a zero premium, select cash or cheque)*
- Next, type in your name where it reads YOUR NAME *(This is in the event we need to contact you in the event of a question or concern)*
- Hit VALIDATE. This makes sure there are no errors or missed information.
- If you do not see a red box, there are no errors. Scroll back down and click on the SUBMIT button.
- This will bring you back to the screen that will have the policy information showing.
- There is a box located directly beneath the vehicle description (scroll down) which says 'Forms for this Transaction'. In the box there will be 'Endorsement Form'. You can print this form for your records and the insured. You do not have to send anything to us- we automatically get a copy through the site.
- Once you have printed all that you need to, log out on the left hand side.

### **PROCESSING VEHICLE SUBSTITUTIONS**

- Along the left hand side of the site click on SEARCH POLICY
- Type in the policy number

- Scroll down to the bottom of the screen and click on PERFORM AN ENDORSEMENT
- Type in the information required. For effective date, you can use the drop down boxes.
- To enter the new vehicle information, use drop down boxes and once completed, hit ADD VEHICLE
- Once added, scroll down where in view, you can now see both vehicles. On the vehicle you would like deleted (to complete the substitution), click on the REMOVE box next to the vehicle you would like gone.
- Next, you must select a PAYMENT METHOD for all transactions. *(Even if transaction is a zero premium, select cash or cheque)*
- Next, type in your name where it reads YOUR NAME *(This is in the event we need to contact you in the event of a question or concern)*
- Hit VALIDATE. This makes sure there are no errors or missed information.
- If you do not see a red box, there are no errors. Scroll back down and click on the SUBMIT button.
- This will bring you back to the screen that will have the policy information showing.
- Scroll down to the vehicle information. There is a box directly underneath which says 'Forms for this Transaction'. In the box there will be 'Endorsement Form'. You can print this form for your records and the insured. You do not have to send anything to us- we automatically get a copy through the site.
- Once you have printed all that you need to, log out on the left hand side.

### **ADDING ADDITIONAL VEHICLES TO AN EXISTING POLICY MID-TERM**

- Along the left hand side of the site click on SEARCH POLICY
- Type in the policy number
- Scroll down to the bottom of the screen and click on PERFORM AN ENDORSEMENT
- Type in the information required. For effective date, you can use the drop down boxes.
- To enter the new vehicle information, use drop down boxes and once completed, hit ADD VEHICLE
- Once added, scroll down where in view, you can now see both vehicles.

- Next, you must select a PAYMENT METHOD for all transactions.
- Next, type in your name where it reads YOUR NAME *(This is in the event we need to contact you in the event of a question or concern)*
- Hit VALIDATE. This makes sure there are no errors or missed information.
- If you do not see a red box, there are no errors. Scroll back down and click on the SUBMIT button.
- This will bring you back to the screen that will have the policy information showing.
- Scroll down to the vehicle information. There is a box directly underneath which says 'Forms for this Transaction'. In the box there will be 'Endorsement Form'. You can print this form for your records and the insured. You do not have to send anything to us- we automatically get a copy through the site.
- Once you have printed all that you need to, log out on the left hand side.

## **PROCESSING NEW POLICIES**

- Along the left hand side, under NEW POLICIES, click on 'AutoGlass'
- Follow the form along and use the drop down boxes where prompted to fill in the policy information. Some of the information will need to be typed in by yourself.
- When you're adding a vehicle to the policy, please make sure to hit "Add Vehicle" once you've typed in the VIN no. *(If you do not add each vehicle, it will not appear on the policy)*
- Next, you must select a PAYMENT METHOD for all transactions. *(If a client decides to change their payment method, please contact our office as we can amend the payment method immediately. Performing an endorsement does not change the payment method of the policy.)*
- Next, type in your name where it reads YOUR NAME *(This is in the event we need to contact you in the event of a question or concern)*
- Hit VALIDATE. This makes sure there are no errors or missed information.
- If you do not see a red box, there are no errors. Scroll down & click ADD NEW POLICY.
- This will bring you back to the screen that will have the policy information showing.
- Scroll down to the vehicle information. There is a box directly underneath which says 'Forms for this Transaction'. In the box there will be 'New Policy Form'. You can print this form for your records and the insured. Also available is the 'policy wording and conditions' and 'claim procedures' for you to print and give to the

insured along with their policy. You do not have to send anything to us- we automatically get a copy through the site.

- **PLEASE DO NOT HIT THE BACK OR FORWARD BUTTON** at anytime while entering new policy information. This will cause the system to lose any information you have already entered. If you've made a mistake, you can always change the information BEFORE hitting 'Add New Policy' button. Or, simply call our office for instructions.
- The **ONLY** thing you would have to send to us is either the completed credit card or monthly payment plan form should they chose to pay with either of those methods. Those completed and signed forms should be mailed to our office. You may also fax these forms but please note our fax is fairly busy during the day.

### **PRINTING RENEWALS**

- Again, along the left hand side, under REPORTS, click on 'Monthly Renewals'
- The next screen will allow you to choose the month and the year of the renewals you wish to view / print.
- Next click on the button "Get Report"
- By doing this, you generate the renewal documents, if any. The first screen shows you the 'renewal report' with a list below of the policies set to renew for that specific month. You can print this report if you want. To print the renewal documents, click on each policy number (one at a time) and it will open up another window which you can go up to 'file' and 'print'.
- Simply 'close' out of each window and continue on. Once you are done printing the documents, 'close out' of the 'renewal report' screen.
- Then, if you are done in the system, you can 'log out' – this is located on the left hand side.
- Contact our office at any time if you require further assistance.

### **Need to change payment type/method ?**

**DO** call our office the same day, before 4:30pm and we can amend immediately.

**DON'T** complete an endorsement to change payment methods. All entries are separate transactions, so you can't amend a payment method by creating another transaction.

### **Unsure what to enter in your name a/o comments ?**

**DO** enter in your name as agent/broker and a direct phone line if possible. This way we know whom to should contact in the event of a question or concern.

**DO** enter pertinent information in comments such as "glass is free of damage/ vehicle inspected"

**DON'T** enter credit card or banking information in the comments area.