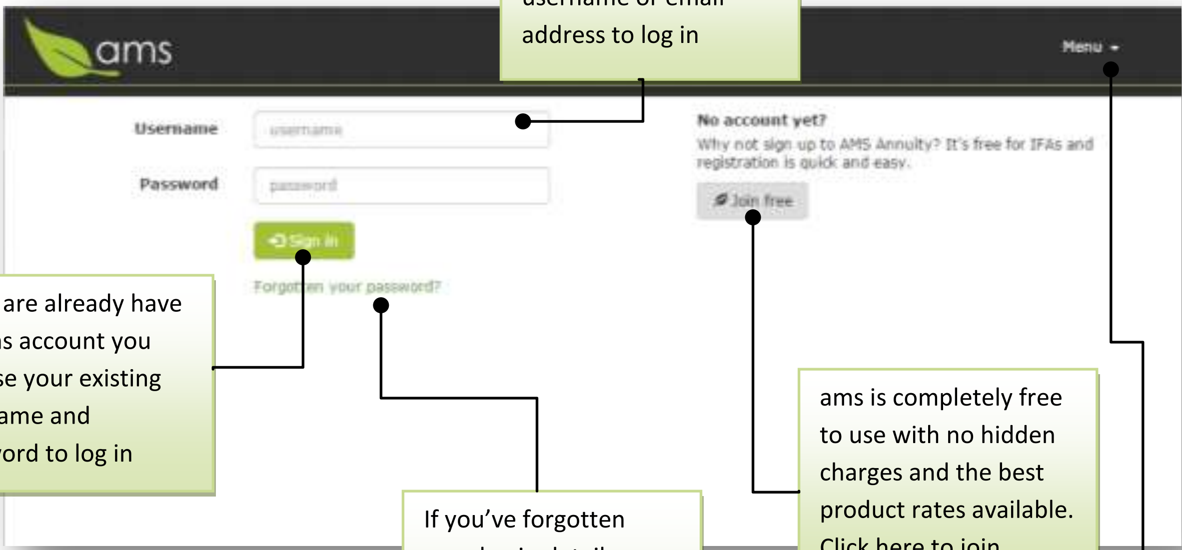
ams retirement

User guide

Registering and logging in

You can use your username or email address to log in



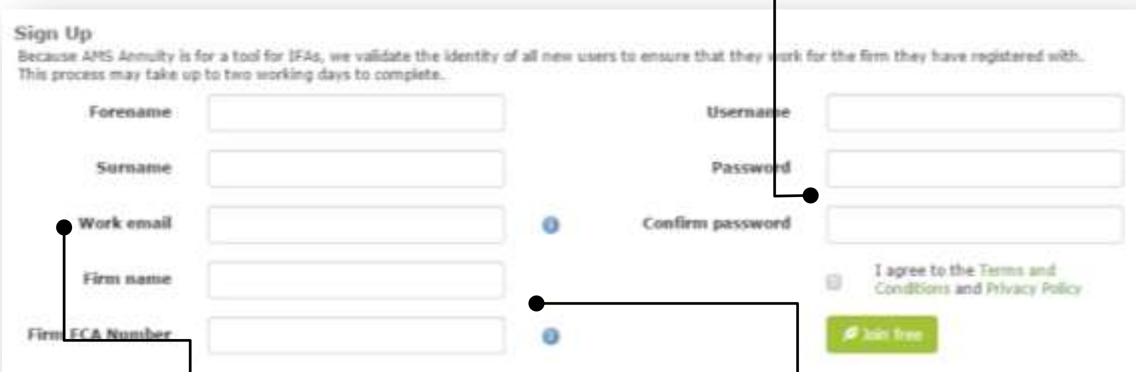
If you are already have an ams account you can use your existing username and password to log in

If you've forgotten your log in details we will email you a link allowing you to reset your password

ams is completely free to use with no hidden charges and the best product rates available. Click here to join

Use the 'Contact us' option in the menu dropdown to send us a message

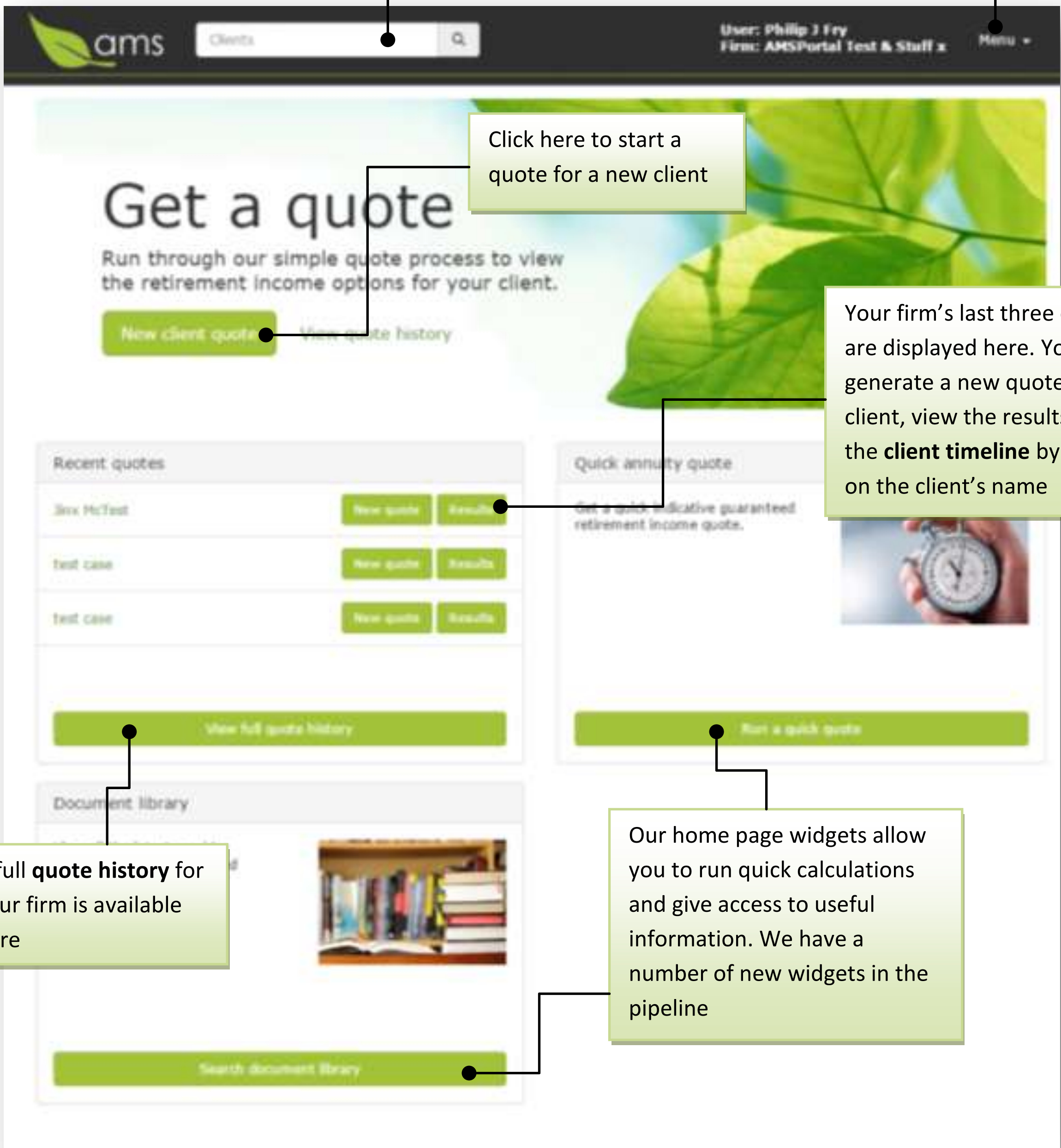
Make sure your password has at least one letter and one number in it



Sign-up is quick and easy. Once registered, we will send you an email to verify your email address

We match your firm name and FCA number with existing ams users. If your colleagues already use ams we will add you to your firm's account

Home page



Search for your existing clients or quotes here

Navigate to any part of the site using the Menu dropdown

Click here to start a quote for a new client

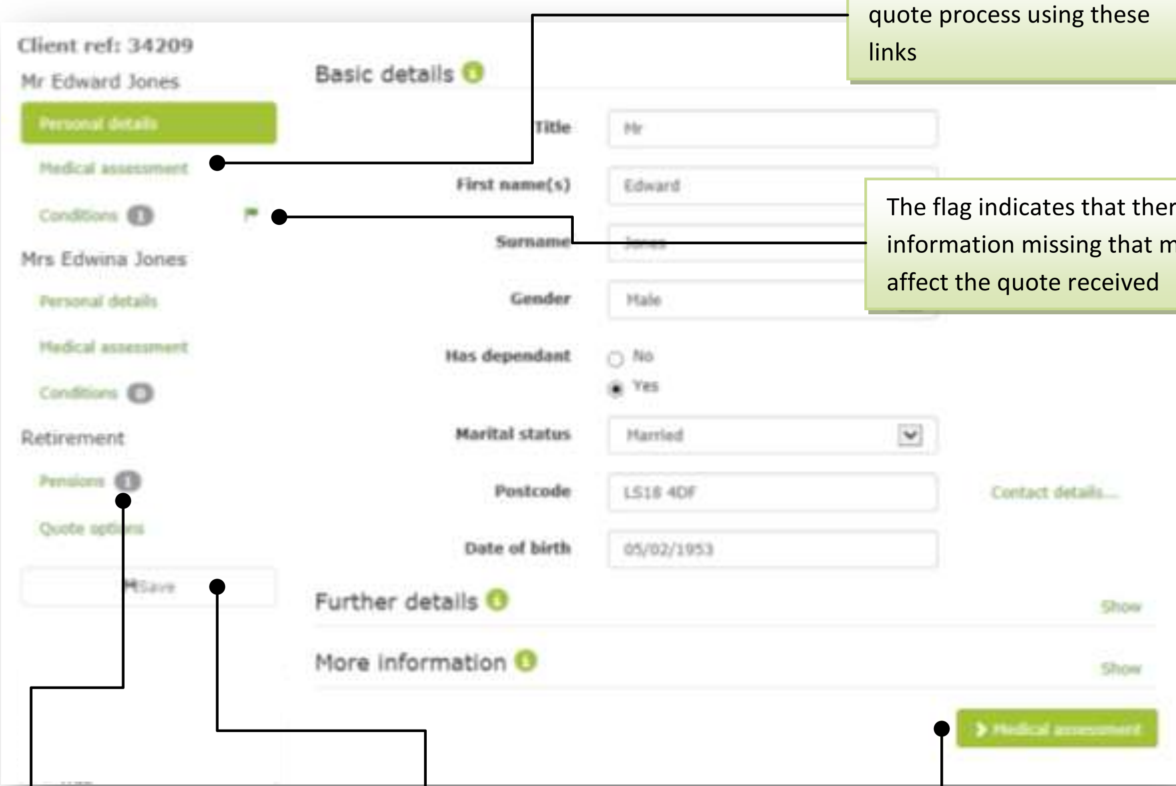
Your firm's last three quotes are displayed here. You can generate a new quote for the client, view the results or view the **client timeline** by clicking on the client's name

A full **quote history** for your firm is available here

Our home page widgets allow you to run quick calculations and give access to useful information. We have a number of new widgets in the pipeline

Quote process

Navigate to any step of the quote process using these links

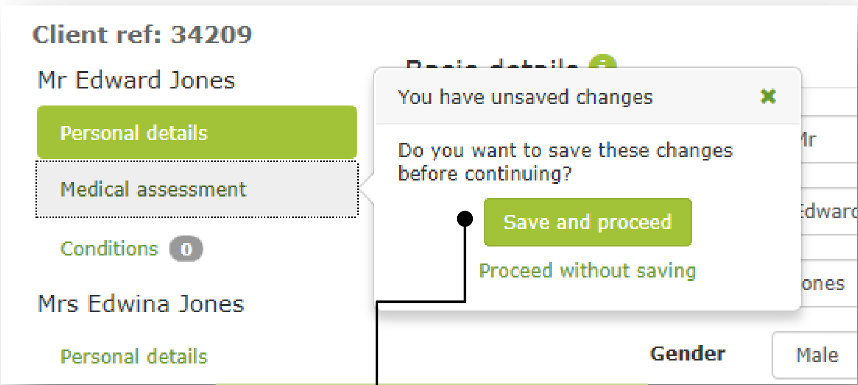


The flag indicates that there is information missing that may affect the quote received

The numbers here indicate the number of conditions or pensions provided

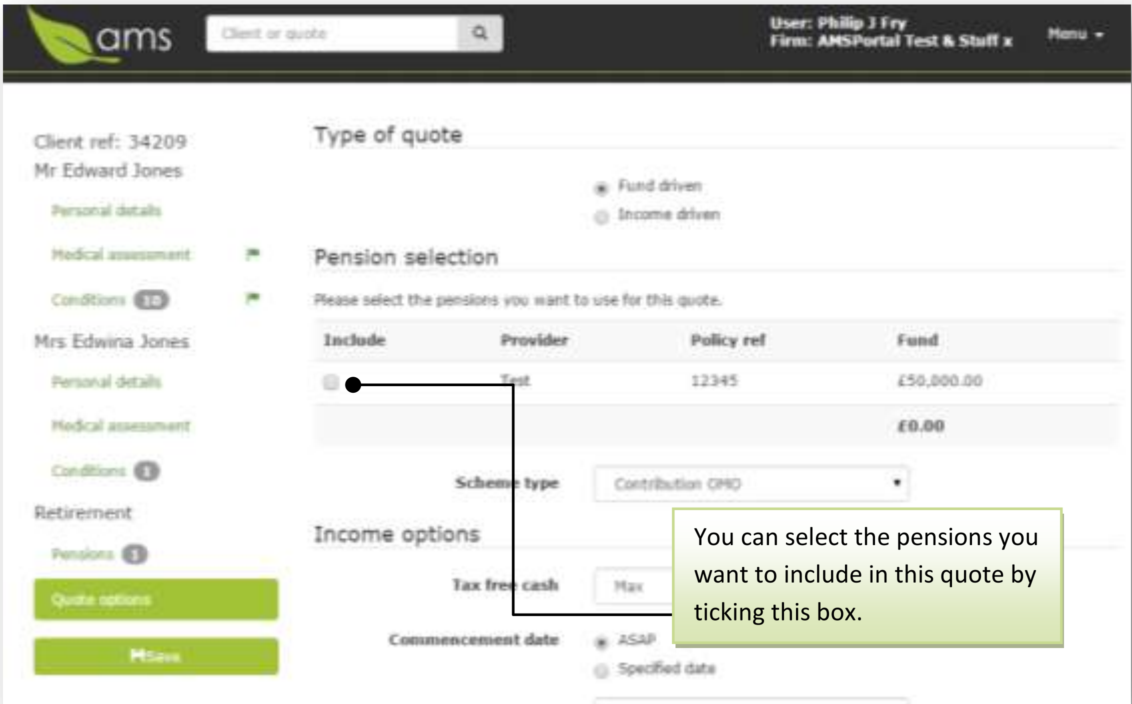
Save the form at any time by clicking the ‘Save button’

You can work your way through the quote process by clicking on this button

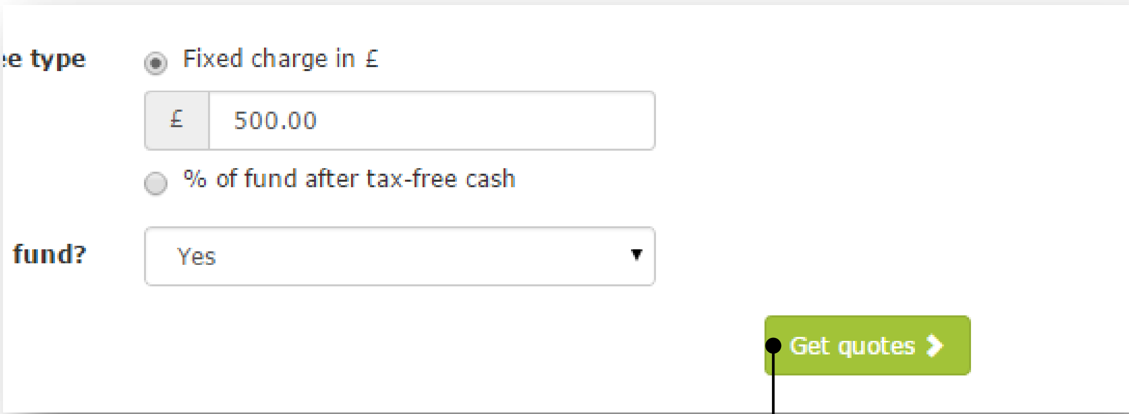


If you attempt to navigate to a page without saving, you will be asked how you want to proceed

Submitting your quote



You can select the pensions you want to include in this quote by ticking this box.

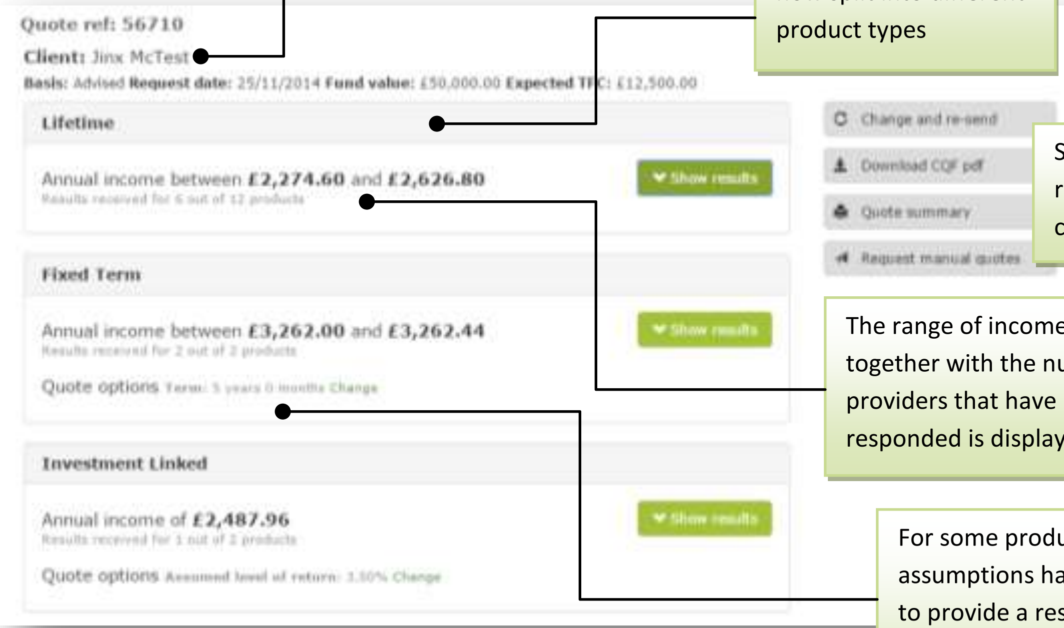


Once you have entered all you client information and their Quote options click on the 'Get quote' button to produce real-time quotes for all the providers and products supported by AMS.

Results screen

Click on the client's name to view the client timeline.

The results screen is now split into different product types



Show the quote responses by clicking here

The range of incomes together with the number of providers that have responded is displayed here

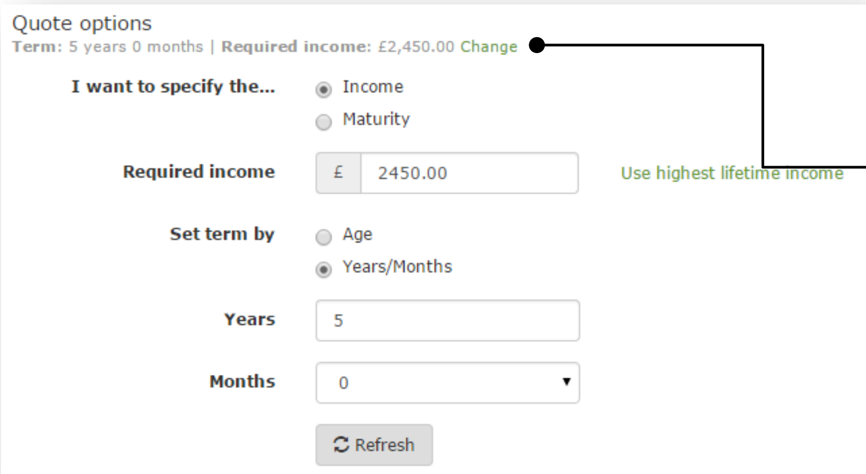
For some product types, assumptions have been made to provide a response. These assumptions can be changed if required

Annual income is displayed together with uplift from standard rate where appropriate

Responses are colour coded:

Brown = warnings
Green = success
Red = no response provided

The Details button will show more information about the quote, give access to documents and allow you to request a manual quote



Clicking on the Change link will allow you to change the options for this product.

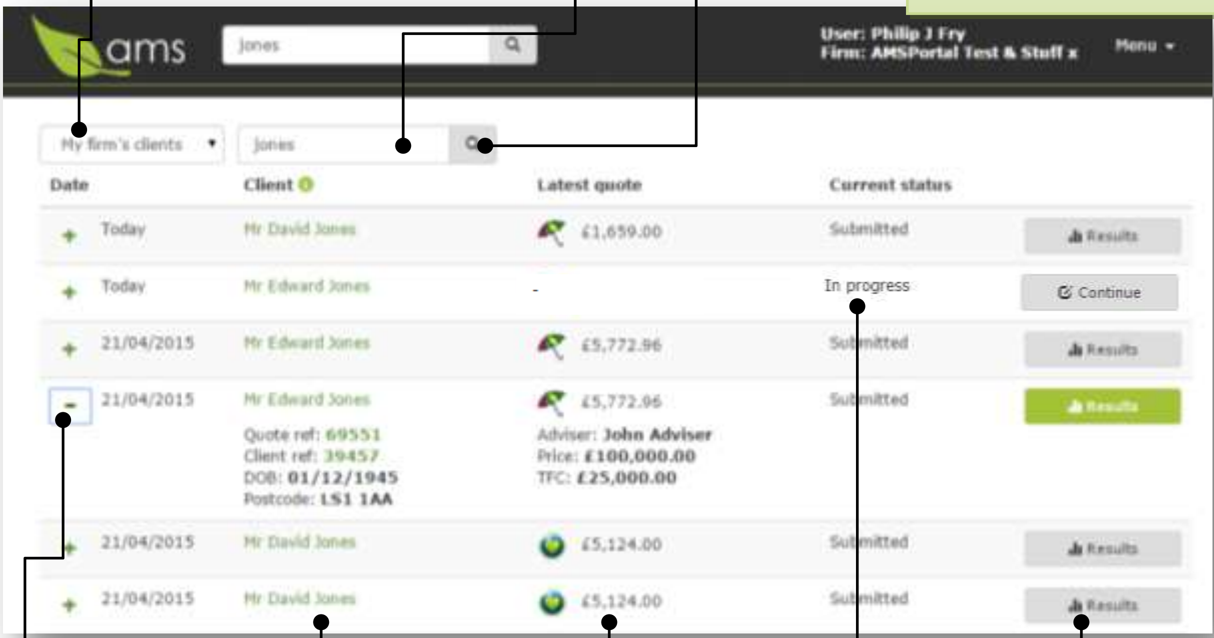
To request a requote click on the Refresh button

Client history

You can choose to view all your firm's quotes or quotes carried out by yourself

Enter a quote id, client id or client's surname or postcode here

The 'Search' button will load the list according to search criteria and filter applied



Each quote can be expanded to view more detail

The highest lifetime annuity for the client's latest quote is displayed here.

Click on the 'Results' button to view the full results for this quote or the 'Continue' button to continue with a quote that has not yet been submitted

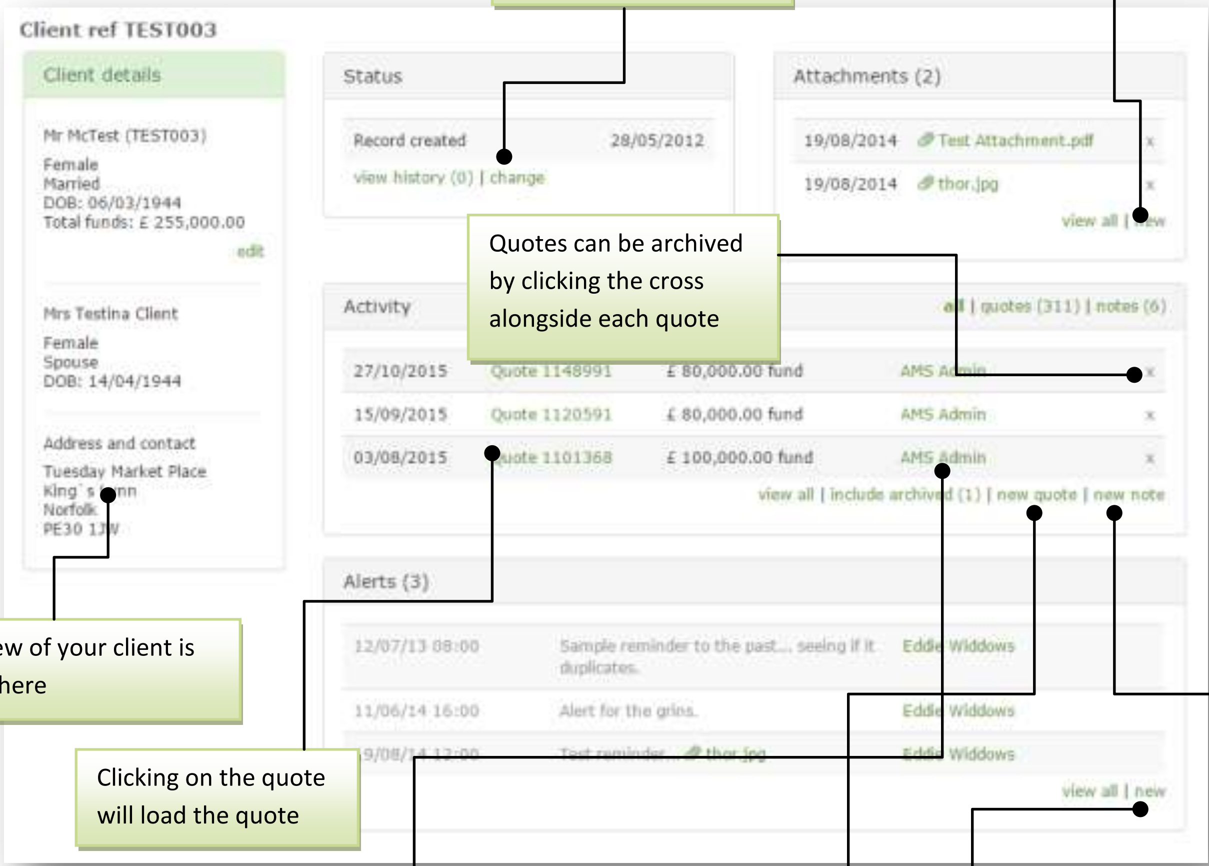
Click on the client's name to view their **timeline** where you can view their complete quote history.

ams allows you to save a quote to be submitted later. These quotes are marked as 'In progress'

Client timeline

Click here to attach a file. If supported, these attachments will be available to send to providers within manual quote requests.

The client's status can be set here



Quotes can be archived by clicking the cross alongside each quote

An overview of your client is displayed here

Clicking on the quote will load the quote

Notes can be added to your client's record

To start a new quote for this client, click here

Your colleague that carried out the quote is displayed here

You can set up an email reminder here. The reminder can be sent to you or any of your colleagues