Applied TAM Tips & Tricks

SESSION HANDOUT
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Prepared for Applied Client Network

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Target Audience:

<table>
<thead>
<tr>
<th>Accountant/Bookkeeper</th>
<th>Producer</th>
</tr>
</thead>
<tbody>
<tr>
<td>X CSR</td>
<td>X Trainer</td>
</tr>
<tr>
<td>Carrier</td>
<td>Vendor</td>
</tr>
<tr>
<td>IT Manager/Systems Coordinator</td>
<td>ALL</td>
</tr>
<tr>
<td>X Operations</td>
<td>Other: (describe)</td>
</tr>
<tr>
<td>Principal/Owner</td>
<td></td>
</tr>
</tbody>
</table>
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Seminar Type: Training and Staff Development

Seminar Level: Basic: An introductory level course is basic in nature and addresses fundamental concepts. We expect attendees to have a basic level of insurance knowledge, have been oriented to an agency’s processes. For functional courses, it is not necessary for the attendee or participant to have previous knowledge of the agency management system or software program.

Class Description: This session will cover various items to turn on for efficient utilization of the system as well as making your users more effective. It will give you ideas on how to organize and how to get certain features enabled.

Learning Outcomes:

- Understand what various buttons accomplish in the system
- Know how to set up your system to be efficient
- Discover effective workflow shortcuts

Assumptions: This seminar is based on the following
Applied TAM Version 2015
Microsoft ® Word Version 2007/2010
Home Base

Workstation Setup

From the File bar of Home Base, Choose Tools, User Setup. This will bring up the option box shown below. Any changes made in User Setup are for the workstation – so it will not follow that user from station to station, as the settings apply to the workstation. It is important to note that any changes made in User Setup will not be activated until that user has logged out of TAM and logged back in.

![User Setup Options]

It is a good idea to NOT check any items under “On Startup Load”. If Clients and files are checked, this skips home base when logging in and will bypass activities. Mail opens Outlook and should be done after logging into TAM and working.
1. Check the Reminder Box for Activities to work like Outlook when the time is entered on the activity when created.
2. Check the Drill Down Box to open attachments
3. Click on the Mail Setup Button to add email address for TAM Integrated email

1. Set your double click options for going to Policy List or Client Detail when highlighting.
2. Set the double click of your mouse when highlighting the policy to go to the billing screen or application
Set the Screen Defaults for entering client for Commercial Lines or Personal Lines Format. Choose other options desired.
Activity Center

Click on the Magnifying Glass to Open Activity Center
Setup the Columns by clicking on the Filter Options Tab

Items on the left are columns available for open activities list on home base. Items on the right are the items you choose for setup. Use the
Note: When the Activity Center is open, each activity is on the top with the actual activity screen, including notes, on the bottom. Activities can be Closed, Revised, Attachments Viewed or Drilled Down to by clicking the options key.

Trick: The right click in TAM is the same as the Options Key. This can also be done from Home.
Clients & Files

Setting Columns

Add, Delete, Revise Columns on all screens in TAM the same way. Columns insert to the left, so if you want to add the producer column in front of the client name, right click on the Header Field for Name, Insert a New Column, a new column will appear. Now right click on the header for the new column and pick the Producer. Anything on the list can be a column. Some suggestions would be to add the attention line after the name and business phone for commercial account managers and residence phone for personal account managers. This is a individual user setting.
Setting Prefills

From the main client list, highlight any client, go to options – or right click- and choose Client Screen Defaults.

A blank client screen will come up. Fill in everything that would be on all clients. This is a user setup so each person would do this individually. Some suggestions would be to add in the agency, branch, CSR code.

Tip-If you require a field to be completed, go to each account managers client screen defaults and put XXX in the boxes you want to make sure get completed. Phone might have XXX-XXX-XXXX.
Client Detail Screen

Email from Client Screen

**When you click on the Envelope:**

```
Laura Nelson
LNR Consulting Services, LLC
Ph: 503-371-5047  Fax: 503-322-2297
Website: www.lnconsulting.net

CONFIDENTIALITY -- This E-mail and any files transmitted with it may contain privileged and confidential information and is intended solely for the use of the individual or entity to whom they are addressed. If you have received this E-mail in error please notify the system manager. Please note that any views or opinions presented in this E-mail are solely those of the author and do not necessarily represent those of the company. Finally, the recipient should check the E-mail and any attachments for the presence of viruses. The sender accepts no liability for any damage caused by any virus transmitted by this E-mail.
```
By using email through the client you now have the red paperclip that accesses all the attachments under the client and the black paper clip that access any file outside of TAM. There is also a Send and Attach button that will automatically attach the email and create an activity. Emails under contacts can also be accessed. If you used Outlook you would have no access to the existing attachments under the client and you would also have to attach the email after it was sent.

Additional Tips:

- Under Options setup Conglomerate Customers
- Under Options, Search, you can do a name search not only on the first line but on the attention line as well.
- Under Options, Activate/Inactive Client (Must be set up in Utility Manager)
- Under Options, Search, you can search clients by policy number
- Under Options, Search, you can search a client by an invoice number
- Setup Prospect Prefill screens by going to any Prospect, Options, (or right click) and pick Prospect Screen Defaults
- Set your columns for Prospects, Vendors and any other type file you may want.
- MapQuest Button is located next to address, as well as on all applications where an address is typed, Homeowners, Dwelling Fire, Commercial Application
- Set Account to Personal or Commercial
- Skip is for Reports if you want the client to be included or not in a search report

Policy List

Prefills

Prefill Billing screens defaults can also be setup like client screen defaults. Go to any client, any policy and under options (or right click) pick Billing Screen Defaults. A suggestion would be to change the Bill Mode from agency bill to direct bill
Policy Attachments

Billing Screen Detail

1. The red paperclip on the billing screen will give you all the attachments ONLY associated and attached to that policy.
2. There is now a field on the billing screen to Turn Off Policy Download (This also turns off Activity Notes and Claims).
3. Set up the View Mode for policies to only include current policy types and not cancelled or RED policies. Go to any policy, under options pick Active Policy View. The go to Active Policy Setup and pick the current status codes. This should give you your list of current policies only. You should not see any cancelled or expired policies. To see all the policies click on the Active Policy View and uncheck Use Filter.
Drop and Drag Feature

From Email or Documents, you can now drop and drag emails or just the attachments directly to a policy/claim/client.

Additional Tips & Tricks

- On the Billing Screen Detail screen, the right click works on the company and producer fields to bring up the addresses and phone numbers.
- Add the Notes Field as the last column so you can see things like addresses on multiple policy types, jobs for multiple Bonds.
- On the main policy list, the right click brings up your options list
- Print Summary of Insurance to FILE. This will open Word so you can edit.
NEW: There are new fields on the billing detail screen, slot number and policy number. If at all possible, attach an activity to a billing screen. The activity detail will let you know which policy it is attached to and the policy number of that policy.
Add the Amount Column next to the Description. For changes and new and renewal policies you can see the premium if entered in the amount field of the activity.

The * at the end of the activities mean there is an attachment to the activity and you can go to options, right click, and drill down to the document.

Additional Tips & Tricks

Security for Closed Activities:
Because Existing Notes cannot ever be changed, agencies may wish to reconsider Security Manager settings to allow users access to edit closed activities. The only line that can be changed in that process is the description line, so if an agency chooses to make a change, procedures might need to be revised to always include what is in the description line also in the Add Notes box (particularly if agency procedure dictates that the field be overwritten). If users cannot delete Open or Closed activities, revising a closed activity no longer has the same effect as it did on earlier versions. It will however change the way Management reviews activity reports, as an activity might be re-used instead of having a new one added.
Invoices

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Policy Number</th>
<th>Item</th>
<th>Policy</th>
<th>Effective</th>
<th>B/C</th>
<th>Description</th>
<th>Amount</th>
<th>Balance</th>
<th>Reference</th>
</tr>
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<tbody>
<tr>
<td>04/11/1999</td>
<td>PAY</td>
<td>WA3475123</td>
<td>117</td>
<td>BOAT</td>
<td>04/01/1999</td>
<td>D</td>
<td>Policy renewed</td>
<td>875.32</td>
<td>0.00</td>
<td>D# 46</td>
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<td>WA3475123</td>
<td>122</td>
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<td>04/14/1999</td>
<td>D</td>
<td>Ctr#3214 Boat policy</td>
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<td>0.00</td>
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<td>PAY</td>
<td>WA3475123</td>
<td>130</td>
<td>BOAT</td>
<td>04/10/1999</td>
<td>D</td>
<td>Direct Bill Co's ELT of F...</td>
<td>875.32</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>04/11/2000</td>
<td>PAY</td>
<td>WA3475123</td>
<td>372</td>
<td>BOAT</td>
<td>04/07/2000</td>
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<td>893.45</td>
<td>0.00</td>
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<td>WA3475123</td>
<td>300</td>
<td>BOAT</td>
<td>04/14/2000</td>
<td>D</td>
<td>Ctr#2495 Boat Pymnt</td>
<td>893.45</td>
<td>0.00</td>
<td>D# 71</td>
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<td>04/11/2002</td>
<td>PAY</td>
<td>WA3475123</td>
<td>309</td>
<td>BOAT</td>
<td>04/01/2002</td>
<td>D</td>
<td>May 2002</td>
<td>965.00</td>
<td>0.00</td>
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<tr>
<td>04/11/2004</td>
<td>PAY</td>
<td>WA3475123</td>
<td>1527</td>
<td>BOAT</td>
<td>04/07/2004</td>
<td>D</td>
<td>Aprl Renewal</td>
<td>845.00</td>
<td>0.00</td>
<td></td>
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<tr>
<td>04/11/2006</td>
<td>PAY</td>
<td>WA3475123</td>
<td>2302</td>
<td>BOAT</td>
<td>04/07/2006</td>
<td>D</td>
<td>Aprl 06 Renewal</td>
<td>856.00</td>
<td>0.00</td>
<td></td>
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<tr>
<td>04/11/2007</td>
<td>PAY</td>
<td>WA3475123</td>
<td>2872</td>
<td>BOAT</td>
<td>04/01/2007</td>
<td>D</td>
<td>Mark &amp; Acy Renewal</td>
<td>976.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

- Add the Reference Column – This will show the check number or payment receipt number
- Messages used when printing are not stored or saved in TAM. These should be used for Generic messages only
- Messages to be saved should be done at the invoice level by hitting the Message button
- Add the item number as a column for easy reference
- The total client balance is on the main client detail screen on the bottom right
- Set your filter to put the newest invoice on top instead of bottom of list

Info Tab

Used mostly for Commercial Lines the Info Tab also allows you to find SIC codes and NAICS codes.

Miscellaneous Tips & Tricks

- Under Utilities, Forms, you can print stand-alone forms such as auto accident information
- When moving between fields the Tab key moves to the next field and the Shift-Tab moves back a field
- Escape key closes a window
- Alt-Print Screen copies a picture that can be pasted in another document
- Control-Insert and Shift-Insert work like copy and paste when those options are not available
• Set up Prefill Applications under Utilities, Forms, Install Prefills
• To access Spell Check in many parts of TAM click F7
• You can drop and drag an email from Outlook and attach to a client, policy or claim
• Any ACORD form in TAM when previewed will automatically create a PDF document
• The Contact Tab allows you to add additional detail screens with multiple phone numbers, email address that can be accessed from email and fax@vantage
• When adding a lienholder to an Evidence of Insurance, right click to check the address. This also works under the lienholder name on billing screen