Microsoft® Word® – Introduction to the Applied TAM Interface
Install Free Set

SESSION HANDOUT

Prepared for Applied Systems Client Network and Applied Systems

Applied Systems Client Network
2340 South River Road
Des Plaines, IL 60018
Phone: 800-605-1045
Fax: 224.220.1443

Applied Systems, Inc.
200 Applied Parkway
University Park, IL 60484
Phone: 708-534-5575
Fax: 708-534-8016

Original Author:

Jennifer Godwin, Applied Systems

Updated By:

Todd Arnold	AB Solutions, Inc.	8/1/2013
Marcia Priest	AB Solutions, Inc.	8/8/2015
Graham Blundell	GB Consulting	8/12/2015

Target Audience:

	Accountant/Bookkeeper		Producer
	CSR		Trainer
	Carrier		Vendor
X	IT Manager/Systems Coordinator		ALL
X	Operations		Other: (describe)
	Principal/Owner		

Table of Contents

Seminar Type: Management

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 and to 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 the first session in the Applied TAM version of the Proposal Track. You will install the free set of proposal documents and be introduced to the Applied TAM/Microsoft ® Word interface and the basics of editing the documents in order to create a customized proposal for your agency, different from all other agencies' proposals.

Learning Outcomes:

- You will be able to create proposals from the information in your database.
- You will know how to use the Applied TAM/Word interface.
- You will have a full set of proposal documents on your system for customization.

Assumptions: This seminar is based on the following:
Applied TAM Version 2014/2015
Microsoft ® Word Version 2010, 2013

Introduction to the Proposal Workshop

The Applied TAM/Word Integration is one of the most powerful tools in your automation arsenal. Utilizing this integration provides your agency the ability to use client detail that already exists in Applied TAM as well as to standardize the wording and look and feel of the documents that are generated by your staff that represent your agency. Using this integration increases your service staff efficiency by minimizing the need to manuscript the wording of every document that is generated as correspondence to your clients.

We will be concentrating in this series of classes on Proposal Documents. All of the tools we will discuss during class also apply to Formletters.

The intention of this session is to provide you with a set of workable Applied TAM templates that you will customize to match your agency's branding – including, but not limited to, your colors, font family, logo, photos, etc.

PLEASE READ THIS FIRST
This is a demonstration/hands-on session. It is highly recommended that you attend as many of the Proposal Track sessions as possible after this class to develop the skills you will need to continue to customize your templates. The knowledge gained from these sessions will be critical in your ability to continue updating your templates once back at your office.

If you are reading this ***prior*** to arriving in Las Vegas for APPLIED NET 2015, here is a list of tasks that you should complete and bring with you to the workshop:

1. Access the absolutionsinc.com downloads page and download the Free Proposal Set – TAM – Commercial Lines (zip) file. Be sure to save this file to a location you will remember or write it down.
2. Follow the instructions in this handout to import the proposal templates into your Applied TAM database. Please see the next section for step-by-step instructions.
3. Have a list of the fonts and font sizes, along with the RGB (Red/Green/Blue) color numbers, for any colors you wish to incorporate in your templates. Bring those with you to class.
4. If you have picture files (e.g. logos or otherwise) that you wish to use during the workshop, have them loaded/accessible on the laptop you will be bringing to class.

If you are reading this ***after*** arriving in Las Vegas for APPLIED NET 2015, do not worry. You can still attend the series of classes and learn/practice some new tips and techniques. If possible, please attempt to complete steps 1 and 2 above prior to this class. If that is not possible, we will have a few of the template files available to copy and import into your Applied TAM system.

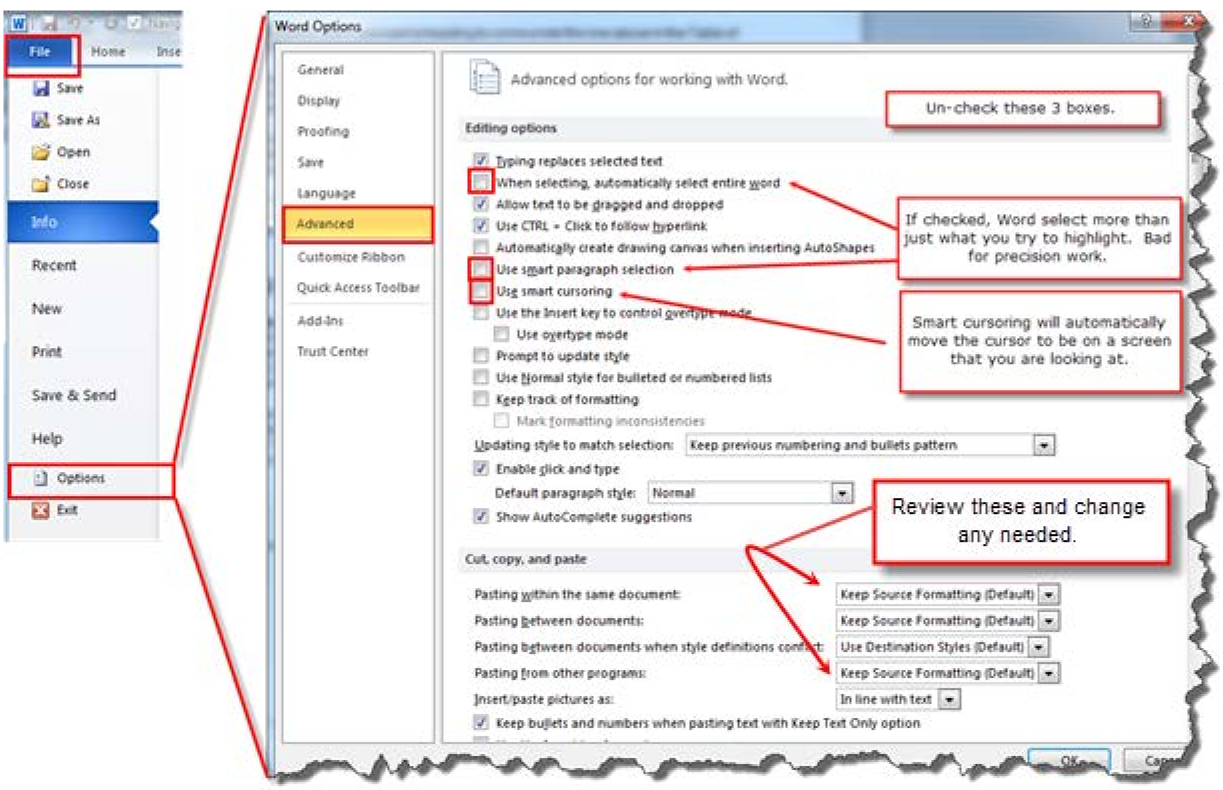
Word Configuration

Before we start working within the Applied TAM/Word Integration, there are a few items we may want to configure so that working within the templates is easier.

Pesky Advanced Options

First, let's **turn off** three Advanced Options that are designed to help the casual user of Word, but which will make the work of the more serious template builder more difficult. By default, all three of these options are turned on.

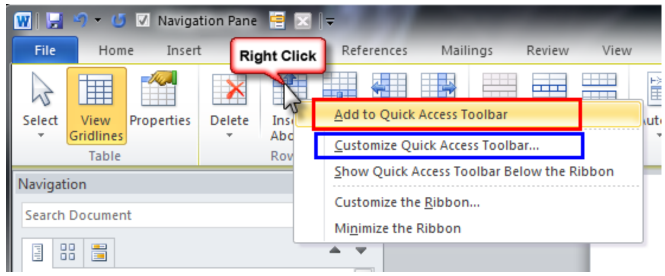
- When selecting, automatically select entire word
- Use smart paragraph selection
- Use smart cursoring



- Also review the Cut, Copy and Paste selections for any changes that might be useful there. Usually the defaults are okay except for Pasting from other programs, where you may want to change to use Merge Formatting as the option.

Quick Access Toolbar

Next, let's add some commonly used functions to your Quick Access Toolbar so that you will not have to shift focus among your Ribbon Tabs so frequently.



There are two ways to add commands to the Quick Access Toolbar:

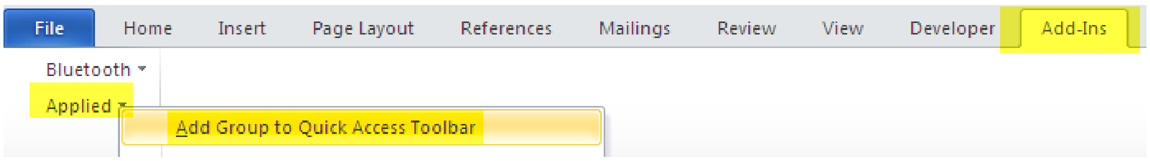
Right-click on the command where you find it on the ribbons and then left-click on "Add to Quick Access Toolbar".

-OR-

Select "Customize Quick Access Toolbar", change the Functions to "All Functions" and then scroll through the list and move to the "Selected" section. Click OK when complete:

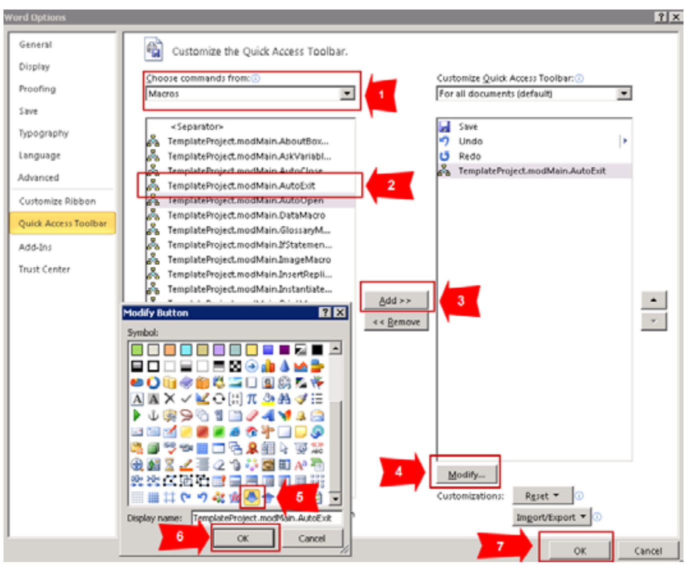
Applied Menu Add-In and Applied Save and Exit

Last but not least, add the Applied Add-In Menu to the Quick Access Toolbar. In order to access the Applied Add-In, you need to actually be editing a template within the Applied TAM/Word Integration. We will walk through the steps of adding a template and then, once in Word, click the Add-Ins ribbon, right-click on the Applied menu, and then left-click on Add to Quick Access Toolbar.



If desired, you can add a separate option to your Quick Access Toolbar for “Applied Save and Exit”.

Select “Customize Quick Access Toolbar”.



1. Change the Functions to “Macros”
2. Select TemplateProject.modMain.AutoExit
3. Add to move to the right window
4. With the item selected in the right window, Modify
5. Select an icon from the Options
6. OK when complete
7. OK to Exit the Word Options window.

Now that we have all of our “easy to access” commands set in the Quick Access Toolbar, let’s use them to create proposal templates.

Importing Templates

Applied TAM Proposal Installation – Introduction

These proposal documents are in a "zipped" (compressed) format. They must be Unzipped. If you are not using the Windows XP operating system on your workstation, then the product we recommend for this is WinZip. It is available at the following website: http://www.winzip.com/download.cgi.

Applied TAM Proposal Installation – Instructions

1. Copy all of the provided files to “X:\DOC\PROPDOC\” (Where “X” is your Applied TAM drive).
2. From the Applied TAM Home Base screen, on the Menu Bar, select “Utilities”, “General”, “Document Maintenance”, “Document Setup”, then click on the big black arrow in the Document Setup box.
3. Set your Document Type Radio Button to “Proposal”.
4. Set your Options Ratio Button to “Documents”.
5. Click on the New Button in the lower left of the screen. Answer “Yes” to the question ‘Do you want to add a new proposal document?’
6. Fill in the three fields according to the table below.
7. Click on “OK”. Microsoft Word will open.
8. In Microsoft Word, from the Menu Bar at the top of the screen, select “Applied”, then “Save and Exit”.
9. Answer “Yes” to the question ‘Do you wish to save the changes made to the current document’.
10. Repeat steps 5 through 9 for each row in the table before proceeding to step 11. (Note that the table continues on the next page.)

Name	Description	Associated Form
AG1-COVP	*Cover Page	None
AG1-AGCY	*Agency Introduction	None
AG1-LOC1	*Location Schedule	Commercial Application
AG1-PRP1	*Property	Property
AG1-GL-S	*General Liability	General Liability (1/97)
AG1-CA-S	*Commercial Auto	Commercial (Business) Auto
AG1-GD-S	*Garage	Garage & Dealers
AG1-EQUP	*Equipment Floater	Equipment Floater
AG1-EDP	*EDP	Electronic Data Processing
AG1-ARVP	*Accts Rec / Val Papers	Accts Rec/Val Papers
AG1-CR-S	*Crime	Crime
AG1-CUMB	*Commercial Umbrella	Umbrella Simplified
AG1-WC-S	*Workers Compensation	Workers Compensation
AG1-PREM	*Premium Summary	None
AG1-BLNK	*Blank Page	None

Name	Description	Associated Form
AG1-BOP	*Business Owners	Business Owners Application
AG1-BR-I	*Builders Risk/Installation	Installation/Builders Risk
AG1-TEA1	*Service Team	None
AG1-TEA2	*Staff Bios	None
AG1-TOC	*Table of Contents	None
AG1-TRNS	*Transportation	Transportation

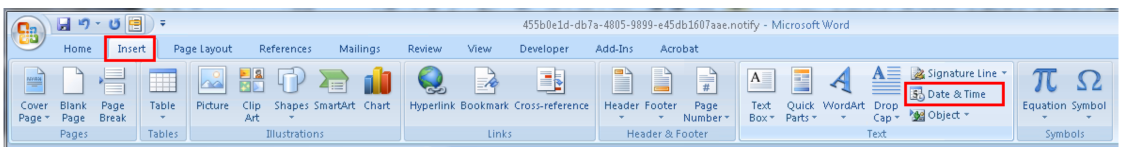
11. Set your Options Ratio Button to "Setups".
12. Click on the New Button. Answer "Yes" to the question "Do you want to add a new proposal setup?".
13. Double-click in the white area labeled Activity Category. Select the activity that you wish to associate with this proposal setup (PROP is the non-agency-specific code).
14. Under Setup Name, enter "AB1". Under Description, enter "*Commercial Proposals" (do not enter the quotation marks).
15. ***Read this entire step before proceeding***:
    - Move the individual documents listed under Documents Available over to Documents in Proposal.
    - Move only the documents that have a single asterisk (*) in front of their name.
    - The order that you move them in is the order in which they will merge together at the client level. So be sure to start off by selecting "*Cover Page", then do "*Agency Introduction", etc.
    - Progress through the entire available selection of single-asterisk documents in the order that you would like to have them appear on a finished proposal.
16. When you are done adding documents to the Documents in Proposal list, click on OK.

Editing Templates in Word

1. From the Applied TAM Home Base screen, on the Menu Bar, select “Utilities”, “General”, “Document Maintenance”, “Document Setup”, then click on the big black arrow in the Document Setup box.
2. Set your Document Type Radio Button to “Proposal”.
3. Set your Options Ratio Button to “Documents”.
4. Scroll to and select the document you wish to edit.
5. Click on Revise, then Edit. The document will open up in Word.

Inserting Date Fields

- Open the “Insert” ribbon bar and then click on “Date & Time”.

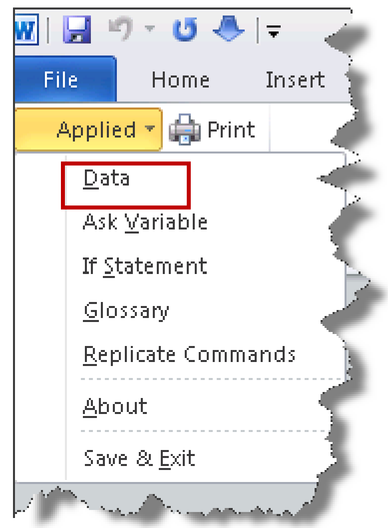


Then choose the date and time format that you would prefer, and don’t forget to check the box to “update automatically”.

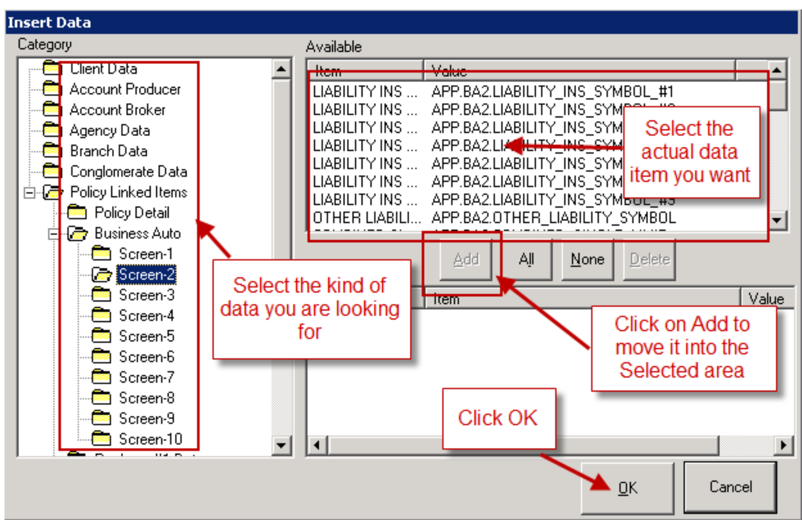
When the document is merged into a proposal on a client, this date is updated to the date of the merge. It then remains static – it does not update again if the proposal is edited at the client level.

Data Fields

The basics of inserting any data field into your template are:



1. Click the ***Applied*** menu and select ***Data***.



2. In the ***Category*** box***,*** select what kind of data you are looking for. Items from the Client Detail screen are in Client Data; Policy Detail items are in Policy Detail; and data elements from the application are in the Screens listed – count the tabs across the bottom of the application to determine which screen you should be looking in.

3. In the ***Available*** box, select the datafield(s) you want (hold down the Ctrl key to select multiple items).
4. Click on Add to move them to the ***Selected*** box.
5. Click OK.

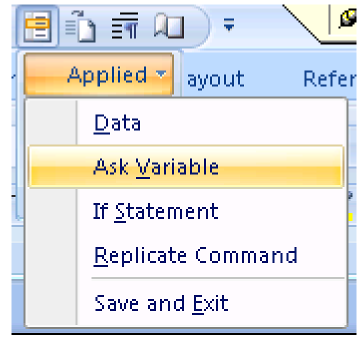
ASK Variables

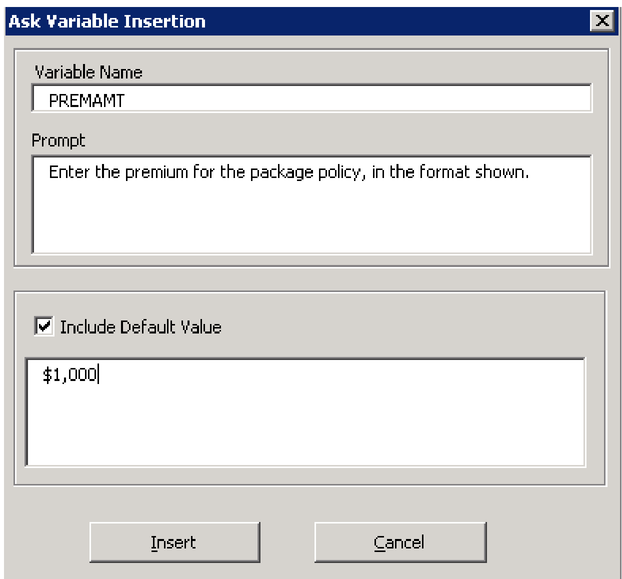
Note that we will be reviewing ASK variables in greater detail in the "IF ASK Math SET Bookmarks" class in this series.

ASK variables are a great tool for obtaining data that the system doesn't "know" or that aren't in a data field, but that the end user knows. Care must be taken when using ASKS in proposal documents so that the description which defaults advises the user merging the proposal group which document the question is being asked on.

To add an ASK variable, within your template:

- Make sure your paragraph markers are on (click the ¶ icon on your Home ribbon)
- Reveal Code – Hold down the ALT key and then click the F9 key on your keyboard
- Place your cursor where you want the ASK variable to be inserted and click Applied Menu, ASK variable.





- Enter a variable name in the Variable Name field – cannot contain spaces or non-alphanumeric characters.
- Enter the prompt you want the end user to see when the ASK box pops up. You can insert examples of how you want them to answer the question, as shown in the screen shot.
- Optionally, you can add a “default response” by clicking the box for Default Response. This is what will fill the ASK boxes answer area automatically. The end user will have an opportunity to type over this answer.
- Click Insert to put the ASK variable in the document. You will get a display of the question the end user will see; click OK.

Example of an ASK variable:

{ ASK PREMAMT "Enter the premium for the package policy, in the format shown."\d"$1,000" }
{ REF PREMAMT }

NOTE: The REF portion of the ASK is where the answer is placed. By default, Applied TAM puts this directly after the ASK. However, the REF portion of the ASK variable can be cut and/or copied and used in other places in the document anywhere AFTER the ASK variable appears in the document.

IF Statements

Note that we will be reviewing IF statements in greater detail in the "IF ASK Math SET Bookmarks" class in this series. IFs are often called "Conditional Statements". They are "true or false" statements. An IF statement uses an "operator" to compare specific information (e.g., a field value in the database, or the result of an ASK variable) with a value entered in the IF statement. The format of an IF statement is:

{ IF "Expression" Operator "Comparison Expression" "True Text" "False Text" }

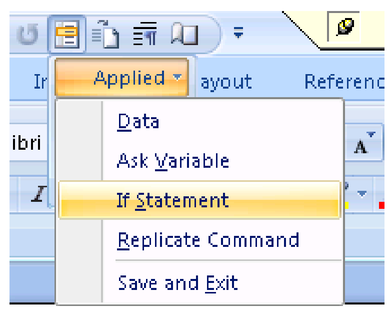
Note the placement of the quotation marks in the above example. If there is no false, the last two quotation marks will have nothing between them, or may simply be removed.

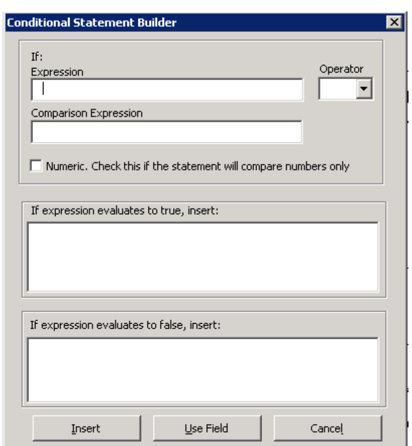
Examples of uses of IF statements would include:

- Have the proposal say "No Coverage" if a specific vehicle does not have physical damage coverage included.
- Add in wording for specific coverages. An example here is to translate abbreviations in the Property Subjects of Insurance field into standard wording – e.g., CONTS should print as Contents, or Business Personal Property.

To create an IF statement:

- Confirm your paragraph markers are on (click the ¶ icon on your Home ribbon)
- Reveal Code – Hold down the ALT key and then click the F9 key on your keyboard
- Place cursor where you want IF statement result to appear in the merged document
- Click Applied Menu, IF Statement

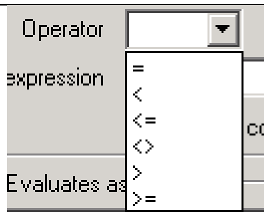




If Statement Builder Box opens:

- Expression field is generally based on an Applied TAM Data Variable but can also be based on the results of an ASK variable.
- To Add a Data Variable, with cursor in the Expression field, click on Use Field, or you may use a "placeholder" and place the data field later.
- Click Insert.

- The next field to complete is the Operator Field and the available values from the drop-down menu are:

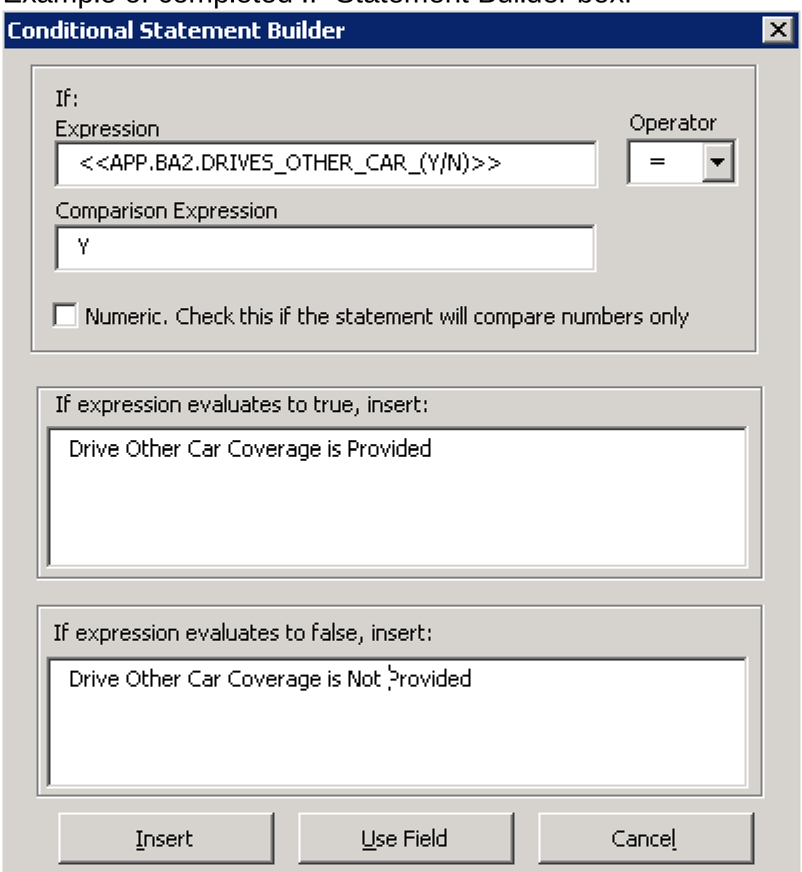


=	Looks for an exact match in comparison expression
<	Less than the value in comparison expression
<=	Less than or equal to comparison expression
< >	Not equal to comparison expression
>	Greater than comparison expression
>=	Greater than or equal to comparison expression

Select the appropriate value for the type of IF statement being built.

- The Comparison Expression field should be completed with the value you are comparing the value in the Expression field with.
- The TRUE field should contain what you want to pull into your merged document if the IF statement has a true result.
- The FALSE field should contain what you want to pull into your merged document if the IF statement has a false result (which could be nothing).

Example of completed IF Statement Builder box:

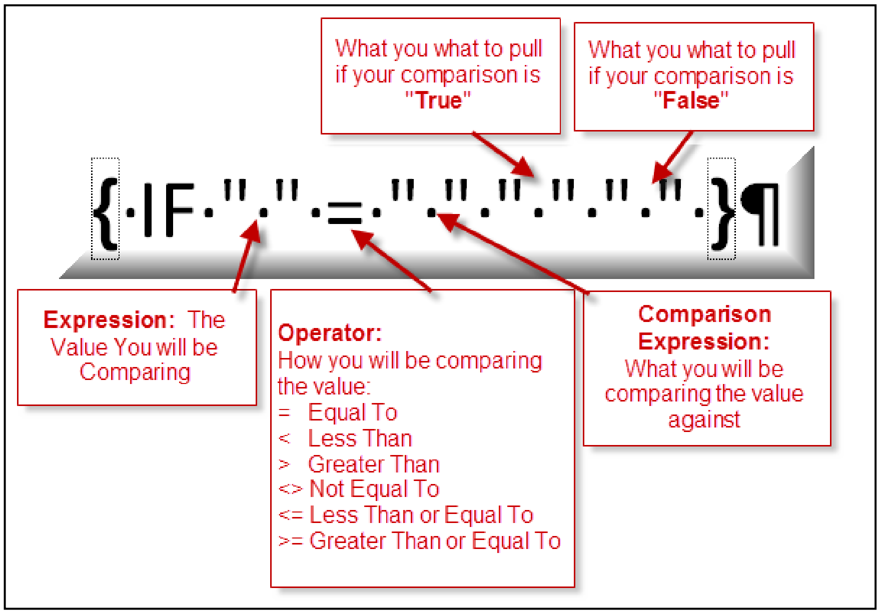


- Click Insert.

The resulting IF statement appears in the document:
{ IF "<APP.BA2.DRIVES_OTHER_CAR_(Y/N)>" = "Y" "Drive Other Car Coverage is Provided" "Drive Other Car Coverage is Not Provided" }

Let's break down what each piece of this IF statement means:

You can use place markers in any of these fields if you want to Insert the IF statement and then complete it manually.



Notes about True & False portions:
You do not have to have ANY value in these fields if you don't want anything inserted into the document (example, if there is information in the second address line of the customer's address, you want whatever is in that field to pull into the document PLUS put a line return before it to separate it from whatever the first address line value is, but if the field is empty, you don't want anything to pull or any line returns entered to separate. Just leave the False portion blank. The IF statement will look like this:

{IF "{ DOCVARIABLE CUST.INS.ATTN }" <> " " "
{ DOCVARIABLE CUST.INS.ATTN }" "" }

- An important note is that the comparison test for a blank field in Applied TAM is actually a space.
- You can format the text within the True and False portions of the IF statement any way you like. It can be bolded, italicized, bulleted, etc.
- Scanned images can be inserted into the True & False portions (e.g., if Prod1 is equal to DJH, enter this picture or signature graphic, etc.)

Replicate Commands

Replicate Commands are used to insert Schedules of Information into a template. There are many schedules within an application detail, such as vehicles, drivers, Workers' Compensation class codes, Property Subjects, etc.

While Replicate commands can be inserted without also using a Table, schedules of information generally have better results if they use a Table. The instructions below are for using the Replicate Commands with a Table.

Use tables to organize information and create interesting page layouts with side-by-side columns of text and graphics. Create a new blank table with the Table button under the Insert tab on the Ribbon and fill in the empty cells, or convert existing paragraphs of text (separated by a character such as a tab) to a table. A table can also be created from an existing data source, such as a database or spreadsheet. One of the best features of a table is the ability to format by column, row or cell. Tables are a great way to align schedules.

Usually tables are used in conjunction with the replicate commands to create a schedule – for instance, a list of the vehicles on a policy. First create a two-row table the way you want it, with the column headers and data fields, and then insert the replicate commands after you have finished.

Steps:

1. Associate the document template with the appropriate application that schedule data fields will pull from.
2. EDIT the document template.
3. Return at least once.
4. Create a table with two rows and as many columns as you want.
5. Click once anywhere in the table, right-click and then left-click on Table Properties. Click on Options and UN-mark the box "Automatically resize to fit contents". Optionally, right-click on the table and select "Autofit" and "Fixed Column Width".
6. In the first row, type the headers for the schedule. Format as desired.
7. In the second row, insert your data fields (Applied, Data) with whatever formatting, IF statements, etc. is needed.
8. Adjust the column widths for the headers and data.
9. Place the cursor directly below the table.
10. Click Applied / Replicate Commands. The following will be entered into the document.
    { DOCVARIABLE BEGINREP }
    { DOCVARIABLE ENDREP }
11. Take the mouse out to the left of the second row, which contains the data fields, and left-click to select that row.
12. Click CUT or CTRL+X.
13. Put your cursor on the same line as, and in front of, { DOCVARIABLE ENDREP } and PASTE the cut row.

The end result will look similar to this:

Vehicles

{ DOCVARIABLE BEGINREP }

Vehicle	Liab	PIP	Med Pay	UM	UIM	Comp Ded	Coll Ded
{ if "{ DOCVARIABLE APP.BA2.YEAR }" <> "" "{ DOCVARIABLE APP.BA2.YEAR } " }{ if "{ QUOTE { DOCVARIABLE APP.BA2.MAKE } * upper }" = "GMC" "GMC" "{ if "{ QUOTE { DOCVARIABLE APP.BA2.MAKE } * upper }" = "BMW" "BMW" "{ if "{ QUOTE { DOCVARIABLE APP.BA2.MAKE } * upper }" = "VW" "VW" "{ QUOTE { DOCVARIABLE APP.BA2.MAKE } * Caps }" }" }" }{ IF { DOCVARIABLE APP.BA2.MODEL } <> "" " { QUOTE { DOCVARIABLE APP.BA2.MODEL } * Caps }" "" }{ if "{ DOCVARIABLE APP.BA2.BODY_TYPE }" <> "" " { QUOTE { DOCVARIABLE APP.BA2.BODY_TYPE } * Caps }" "" }{ if "{ DOCVARIABLE APP.BA2.VIN/SERIAL_NUMBER }" <> "" " { DOCVARIABLE APP.BA2.VIN/SERIAL_NUMBER }" }	{ if "{ DOCVARIABLE APP.BA2.LIAB_BOX }" <> "" "•" }	{ if "{ DOCVARIABLE APP.BA2.PIP_BOX }" <> "" "•" }	{ if "{ DOCVARIABLE APP.BA2.MED_PAY_BOX }" <> "" "•" }	{ if "{ DOCVARIABLE APP.BA2.UNINS_MOT_BOX }" <> "" "•" }	{ if "{ DOCVARIABLE APP.BA2.UNDERINS_BOX }" <> "" "•" }	{ IF { DOCVARIABLE APP.BA2.DEDUCTIBLES_COMP/S.P. } > 0 "{ DOCVARIABLE APP.BA2.DEDUCTIBLES_COMP/S.P. }" "0" \# "$#,##x;;' No Coverage'" }	{ IF { DOCVARIABLE APP.BA2.DEDUCTIBLES_COLLISION } > 0 "{ DOCVARIABLE APP.BA2.DEDUCTIBLES_COLLISION }" "0" \# "$#,##x;;' No Coverage'" }

{ DOCVARIABLE ENDREP }

Save the document and test it. Re-access and edit the document to adjust as necessary.

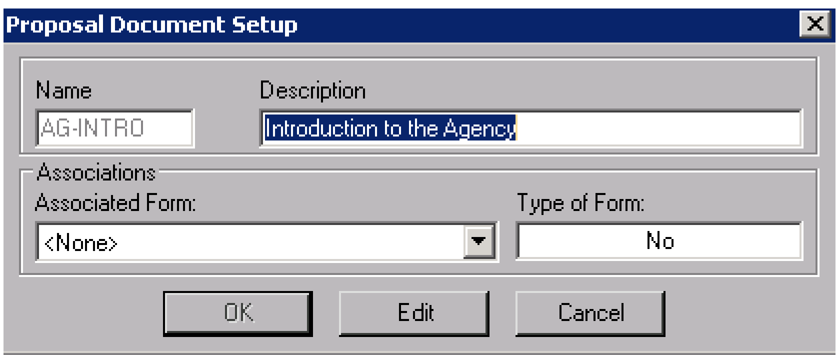
Customizing for Your Agency

All of the documents that are available for Proposals can be customized for your agency for such things as adding your agency logo, changing the font style and size, for adding color, etc. The techniques you need for doing this are covered in detail in other classes in this Proposal Track.

Application Specific versus General Pages

Application-specific templates are tied to a specific ACORD or Custom Form application. This allows the merging of coverage details, limits, forms and endorsements, as well as scheduled information, such as drivers, vehicles, locations, subjects of insurance, etc.:

General Pages are not application specific and can be cover pages as well as agency-specific pages, such as Agency Service Team pages, Commission Disclosure page, Agency Mission Statement, etc. These pages are created simply by entering “None” in the ***Associated Form*** area of the Proposal Document Setup dialog box.



You cannot put any application-specific datafields in these pages, but you do still have access to Client & Billing Detail screen information.

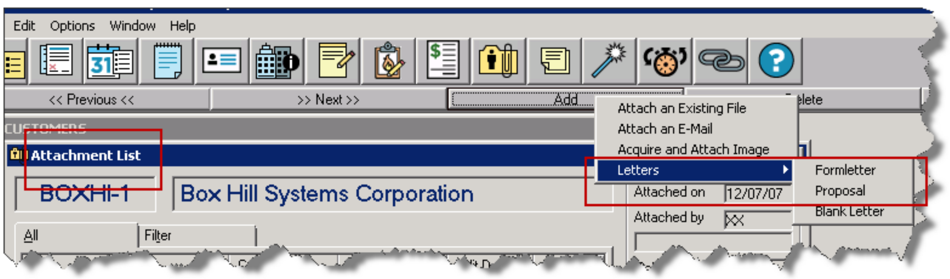
Proposal Setups

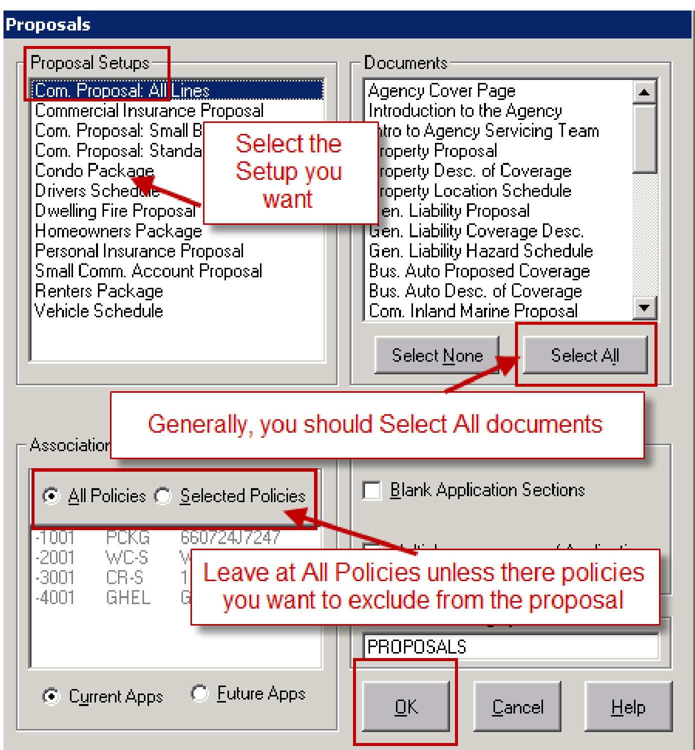
As described earlier in the section on importing the free Proposal Set, you must incorporate documents into a Proposal Setup in order for the end user to be able to access them.

You can have the same document in more than one Proposal Setup. For instance, you may have market-specific pages for Property or Liability, but you want to use the same WC and "About the Agency" pages in all your setups.

Generating Proposals at the Account Level

Proposals are added at the Attachments screen; click on Add, Letters, Proposal.





Make the selections in the three areas of this dialog box. First pick the Proposal Setup you want. That will then put a specific list of documents in that area; generally you should Select All. Applied TAM will eliminate any pages that do not have corresponding applications on the account.

In the Policies area, you can leave it at All Policies unless you have expired policies, or policies you do not want in the proposal, on the list.

After you click OK, a warning will pop up telling you it might take a while and you need to be patient. Click Yes to proceed.

Appendix

Other Classes and Handouts from the Proposal Track Series

- Proposals and the Power of Graphic Design – This class also includes information on a Style Guide you may find useful for your design specifications.
- Microsoft® Word – Introduction to the Applied TAM Interface – Install Free Set – Includes instructions for downloading and installing templates.
- Intermediate Word Formatting – Applied TAM – includes Tables, Borders & Shading, Section Breaks, headers & footers, etc.
- Leveraging Microsoft® Word - Applied TAM
- Applied TAM/Microsoft® Word - IF, ASK, Math, SET, Bookmarks, INCLUDETEXT
- Applied TAM/Microsoft® Word – Formatting Numbers, Text & Dates
- Applied TAM Proposal Workshop / Advanced Clinic – This session has no handouts and will be based upon questions and issues brought to the group by the attendees.