# Applied TAM Tips & Tricks

SESSION HANDOUT



Applied Client Network www.appliedclientnetwork.org



## **Prepared for Applied Client Network**

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August 2011

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August 2015

## **Target Audience:**



Applied TAM Tips & Tricks



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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 <u>not</u> 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, ChooseTools, **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		×
Startup Settings Dout	ole Click   Screen Defaults	1
On Startup Load     Clients & Files     Reports     TAMCtart	<ul> <li>Receptionist</li> <li>Utilities</li> </ul>	
Mail View on Start	C All Mail	
	OK Ca	ancel

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

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<ul> <li>settings Settings Double Click Screen Defaults</li> <li>fessage Scroll Speed</li> <li>Sow</li></ul>		
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📴 User Setup Options	×
Startup Settings Double Click Screen Defaults	
Client Number	L
© Commercial © Personal	L
Policy List	L
○ Effective Date ● Expiration Date	L
Claim List	L
Issuing Company	L
<ul> <li>Use Custom Filter on List Screens</li> <li>Stack Screens</li> <li>Automatically Save Applications</li> </ul>	
OK Cancel	

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

ctivity Ty	Options	124
ctivity Ty	Description	12
PPO	Appointment	-
CCT	Re Deductibles Ikfmglik	
	ALL CCT	ALL Re Deductibles CCT Ikfmglik



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

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Up to	Selecte	d Date	C Selected Dat	te Only	<all></all>			•
Follow-Up	Code	Client/File	Name		Description		Action-On	Entere
08/17/2010	APPO	BOXHI-1	Box Hill Systems	s Corporati	Appointmen	t	08/17/2010	08/17
03/10/2	ACCT	BOXHI-1	Box Hill Syste Michael & Colles	ems Cor	Re Deduc	tibles	03/11/2	02/2/
00/01/2011	ACC1	billowinis	mender a colica	SILDIOWIL	ixinguix		03/31/2011	
•								•
ctivity De	tail —							
Operator L	N	Laura Nelson		Plan		_		
				Туре	BOP	Business C	wners Policy	
Category A	VPP0	Appointment		CSR	JF	Jeff Frankli	n	
anaviation 🗖				Company	CIN	Cincinnati I	ns. co *	
escription je	oppointin	ent		Producer	JKR	Joseph K.	Reihel	
Amount		0.00		Broker	1	— j		
					^		-	7
							<u> </u>	1
Note								
Note								

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**

	CSR	Proc	Tereste Caluma	
LAGUU-I	DU	RJV		
LRNCONS	KY KY	KNJ	Remove Column	<u>_</u>
MATUR01	AR	CJH	Reset Columns	atu
MCNUL-1	KY	JKR	•	Man
NELSLA1	KY	RFN	Agency	
NEUMA-1	MH	GG(	Attention	ar Sh⊨
OAKPL-1	KY	JKR	Branch	Heatii
OCHGR-1	TJ	RFN	Broker	
UMALSE1			Business Ph#	
PETLL-I	JF	BEP	City	
BEMCO-1	۵R	BEN	Customer Code	Inc
SMITKE1	JS	BEN	Conglom	
SMITKE2	TJ	GG/	Congioni	
TEMPL-1	AR	CJH	COR	
TERRE-1	AR	BEN	Fax	d Jor
TEST-01	AR	BEN	Heading	
TEST-02	AR	RFN	Home Phone	
TESTI-1	JF	RFN	Invoice Page Break	
TESTI-2	AR	REN	Marketing Plan	
TESTE-1	JS	JKH	Name	
TVCON 1			Note	intee
LINITE-1	ΔB	SGL	Occupation	hies (
LINITE-2	JE	SGF	Diadorea	hies (
UNITE-3	κΥ	BJV	Producer	1000
UNITE-4	AR	SGF	Service Charge	gies (
WEBERI1	TJ	CJH	Skip	a Wi
WOBUR-1	AR	BEN	State	ρο
			Statement	
			Street	
			User Field 1	
			User Field 2	
			User Field 3	
			Zip Code	

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.

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#### **Setting Prefills**

Och Graphics	Steve Ochs		614
Sean M. O'Malley			435
*Pet Store	SEE OMALSE1		
Charles Phelps			252
Remco Vending, Inc.	Client Detail		P.O
Keith Smith	Move Client		185
Kelly Smith	Conglomerate Customer		020
Temple Steel	Summary of Insurance		121
test	Call History		121
test	Client Screen Defaults		
Test Inc	Forms Transfer		
lestinc	Archives		1.00
lest L & H Inc	Find First Onen Them		123
test prospect	Find First Open Item		270
Tyson and Associates Transport United Technologies Corp	Update Sureties		210
United Technologies Corp.	Real-Time Interface		210
United Recycling	Generate Map		844
United Technologies Corp.	Print a Barcode		210
Richard J. & Sheila Weber	Links	►	369
The Woburn Ins Co	Search	⊁	123
	Customer Filter	•	
Enter Code	Create Label	►	
	Listings Menu	•	
	WorkElows	•	
Detail 0p		T	]

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

籠 Customer Detail : Box Hill Systems Corporal	ion : BOXHI-1	
Name         Box Hill Systems Corporation           Attn         Mark Schurr           Street         161 Avenue 0           City         Chicago Heights         State IL           Zip         60411	Bes         Fag         708-756-4921           Mobile 1         708-751-2309         Bus 1         708-756-4900           Mobile 2         Bus 2         Email 1         Imschurr@boxhillsystems.com         Imschurr@boxhillsystems.com           Email 2         Imschurr@boxhillsystems.com         Imschur@boxhillsystem	
Hdg Mr. Schurr Ocp DISTRIBUTOR Note CL-SPI Web C Personal Lines C Commercial Line Skip	Agey 1 The Agency Manager Brch 1 University Park CSR AR Anne Richmond Prod JKR Joseph K. Reihel NEW 4 Commercial-15001/25000 Premium ALEXGR1 The Alexis Group	Claims 0 Notes Infos 0 3
Balance Forward User Fields User Fields Policy	Balance 5458.00 Last Payment 10/12/07 2000.00	Do Not Purge

#### When you click on the Envelope:

🖻 New Mail Message	) – D ×
File Edit Insert Tools	
Send Send & Attach	
Barro Laura@Lrnconsulting.net	
Be Bec	
Subject:	
Laura Nelson LRN Consulting Services, LLC Ph. 561-310-5247 Fax: 561-828-2297 Website: www.Inconsulting.net CONFIDENTIALITY This E-mail and any files transmitted with it may contain privileged and confidential information and is in 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 I system manager. Please note that any views or opinions presented in this E-mail are solely those of the author and do not neo represent those of the company. Finally, the recipient should check this E-mail and any attachments for the presence of virus sender accepts no liability for any damage caused by any virus transmitted by this E-mail.	itended the cessarily es. The
	1.



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

	📕 Billing	Screen: I	BOAT-WA3475123							_ 🗆 ×
	<u>T</u> ype	BOAT	Watercraft			1st Written 04/	01/1993 🖵		1-001[	1]
	Status	REN	Policy Renewal			<u>N</u> ote		,		
	Dept	3 3	Personal Lines							<u>_</u>
IEW #2		🔲 Turn (	, Off Policy Download							-
NEVV #Z	Policy	WA3475	123	Eff	04/01/201	Exp 04/	01/2015 💽 Pay	Mode д	Billing Direct	•
	Comment									
	Lica Do	y 20 Prov	Tracciua		Produce	ſ		%		Comm
	ICo PF	N RO Prog RO Prog	gressive gressive		1 GGO	r  Gary Goodman	1	% @	40.00	Comm 49.06
	ICo PF BCo PF % %	10 Prog 10 Prog	gressive gressive 14.00 Comm	122.64	1 <b>GGO</b> 2 3	Gary Goodman		% @	<b>40.00</b> 0.00 0.00	Comm 49.06 0.00 0.00
	ICo PF BCo PF % %	10  Prog 10  Prog	gressive gressive 14.00 Comm Ln#	122.64	Produce 1 <b>GGO</b> 2 3 Pre <u>m</u>	Gary Goodman	Bal	× (2) (2) (2) (2) (2) (2) (2) (2)	40.00 0.00 0.00 Dbal	Comm 49.06 0.00 0.00
	Ln	RO Proy	gressive gressive 14.00 Comm Ln#	122.64	Produce 1 GGO 2 3 Prem	Gary Goodman 876.00	Bal	% @ 0.00	40.00 0.00 0.00 Dbal # 1	Comm 49.06 0.00 0.00 0.00 0.00

- 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.

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## Activities

New Ac	tivity Detail			
Entered Operator	09/09/2015 DE DEMO	<u>P</u> lan Type CSR	BOAT	Watercraft Anne Richmond
<u>C</u> ategory	CHGR Change request/Describe	Company	PRO	Progressive
Description	Added New Motor	Producer	GGO	Gary Goodman
Slot	1001 NEW	Broker		
Policy #	WA3475123			
Amount	400.00			
Add No <u>t</u> e				→ Ope <u>n</u> ○ Yes ▼ ● No
Existing				~
⊂ <u>S</u> uccessfi ⊙ Yes ◯ No	Closed By DE Reference WA347512	DEMO 3	SubId	On 09/09/2015 -
	ОК	Options	Cancel	

**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.

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Activity List												
DAVIH	E1	Herbert C. [	Davis	:								
<u>A</u> ll	0pen	Closed		Fill	jer							
Entered	Time	Follow-Up Date	W	Cate	Description	Co	Produ	Close	Amount	Drill		
09/09/2015	07:23 PM	10/07/2015	AB	CHGR	Added New Motor	PRO	GGO	DE	400			
04/17/2014	03:50 PM	04/17/2014	DE	CLFU	Claim Follow-Up	PRO	GGO		0			
11/10/2006	11:19 AM	02/25/2007	EΧ	EXDT	Exdate follow-up	PRO	GGO	$\times$	856			
11/15/2005	07:14 PM	02/25/2006	EΧ	EXDT	Exdate follow-up	PRO	GGO	$\times$	845			
11/01/2004	04:23 PM	02/25/2005	EΧ	EXDT	Exdate follow-up	PRO	GGO	$\times$	845			
11/07/2003	07:29 PM	02/26/2004	EX	EXDT	Exdate follow-up	PRO	GGO	×	965			
11/05/2002	10:07 AM	02/25/2003	EX	EXDT	Exdate follow-up	PRO	GGO	×	965			
11/0//2001	10:29 AM	02/25/2002	EX	EXDI	Exdate follow-up	PRU	ննՍ	×	893.45			
11/15/2000	11:35 AM	02/25/2001	EX	EXUI	Exdate follow-up	PRU	ննՍ	XX DH	893.45			
06/16/2000		08/31/2011			Dested CL#2004	PRU	660 660		002.45			
04/14/2000	11-52 AM	04/14/2000	EV	LASH	Loss potice cont		660	S	053.40	×		
04/14/1999	11.52 AM	00/11/1333	~~	CASH	Edss houce seriu Pd \$976 32 on	PBO	660	$\approx$	876 32			
04/14/1000			01	GASH	1 d ф070.52 011	1110	uuo	01	070.02			

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.

Applied TAM Tips & Tricks



### Invoices

DAVINET THEDERC. Davis														
General			Pending Filter											
6	sacti	Tran	Policy Number	Item #	Polic	Effective	Β.,	C.,	Description	Amount	Balance	Referer	nce	
þ	2/1999	REN	WA3475123	117	BOAT	04/01/1999	D	Y	Policy renewal	876.32	0.00			₹
1	4/1999	PAY	WA3475123	122	BOAT	04/14/1999	D	Υ	Ck#3214 Boat policy	-876.32	0.00	DP#	46	
1	4/1999	ELT	WA3475123	130	BOAT	04/01/1999	D	Υ	Direct Bill Co's ELT of F	876.32	0.00			
lþ	5/2000	REN	WA3475123	372	BOAT	04/01/2000	D	Υ	Policy renewal	893.45	0.00			
1	4/2000	PAY	WA3475123	380	BOAT	04/14/2000	D	Υ	Ck#2356 Boat Pymnt	-893.45	0.00	DP#	71	
Þ	2/2000	ELT	WA3475123	386	BOAT	04/01/2000	А	Υ	Direct Bill Co's ELT of F	893.45	0.00			
2	0/2002	REN	WA3475123	899	BOAT	04/01/2002	D	Υ	May 2002	965.00	0.00			
Þ	1/2004	REN	WA3475123	1597	BOAT	04/01/2004	D	Υ	April Renewal	845.00	0.00			
1	5/2006	REN	WA3475123	2307	BOAT	04/01/2006	D	Υ	April 06 Renewal	856.00	0.00			
1	5/2007	REN	WA3475123	2572	BOAT	04/01/2007	D	Υ	Mar & Apr Renewal	876.00	0.00			

- 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