Applied TAM Tips & Tricks

SESSION HANDOUT

Applied Client Network
www.appliedclientnetwork.org

Prepared for Applied Client Network

Applied Client Network
330 N. Wabash Ave, Suite 2000
Chicago, IL 60611
Phone: 800-383-2952

Original Author:

Laura Nelson LRN Consulting Services, LLC August 2011

Updated By:

Laura Nelson LRN Consulting Services, LLC August 2015

Target Audience:

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

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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:

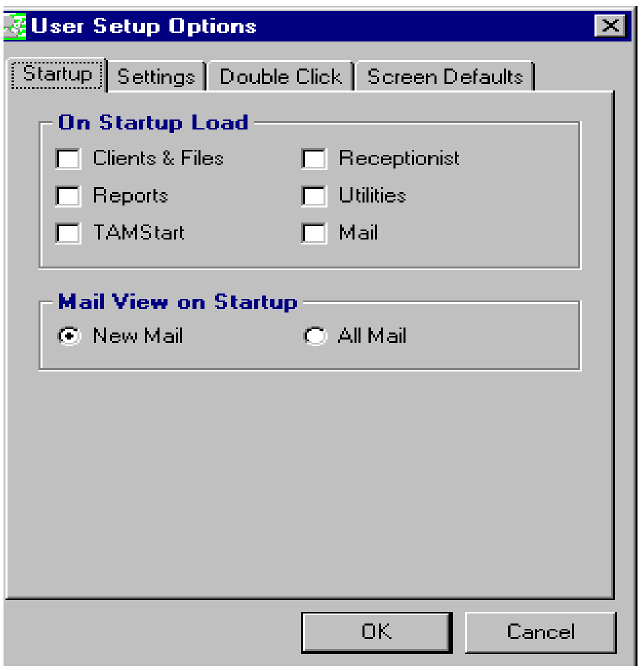
- Understand what various buttons accomplish in the system
- Know how to set up your system to be efficient
- Discover effective workflow shortcuts

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

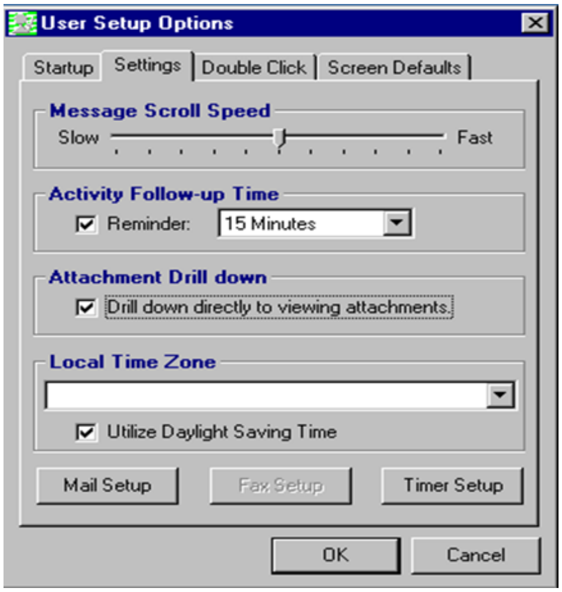
Home Base

Workstation Setup

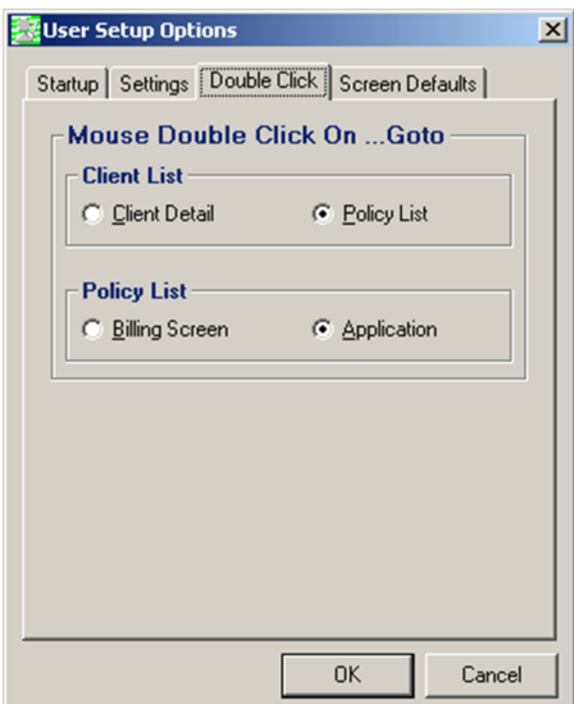
From the File bar of Home Base, ChooseTools, **User Setup.** This will bring up the option box shown below. *Any changes made in User Setup are for the workstation – so it will not follow that user from station to station, as the settings apply to the workstation. It is important to note that any changes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



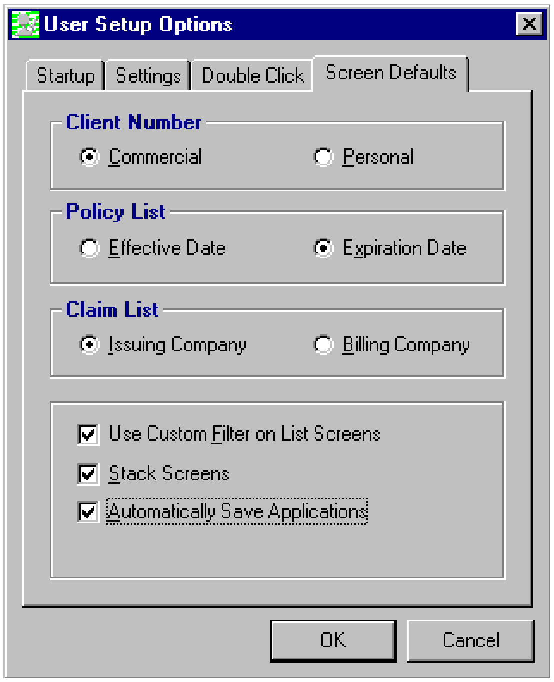
It is a good idea to NOT check any items under "On Startup Load". If Clients and files are checked, this skips home base when logging in and will bypass activities. Mail opens Outlook and should be done after logging into



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



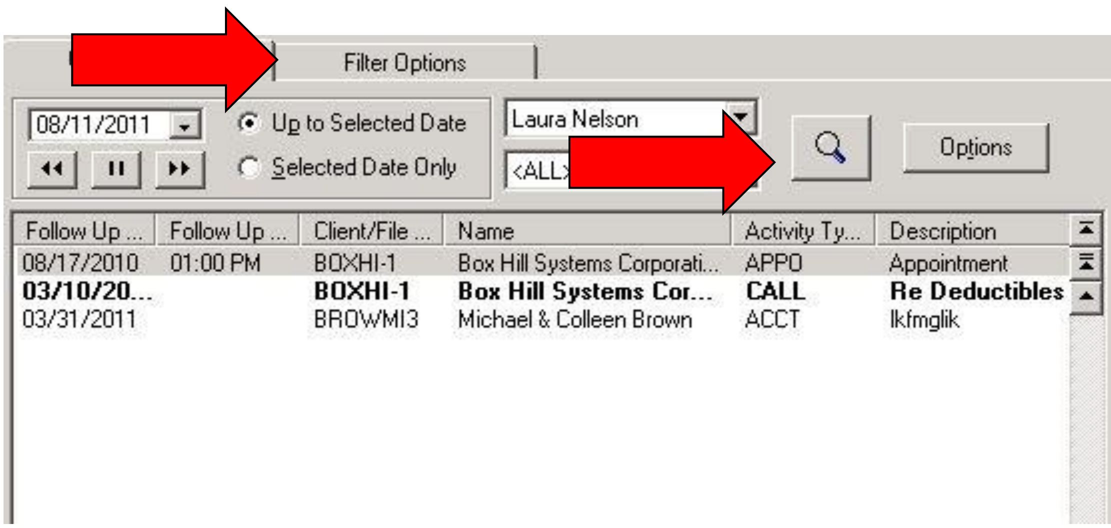
1. Set your double click options for going to Policy List or Client Detail when highlighting.
2. Set the double click of your mouse when highlighting the policy to go to the billing screen or application

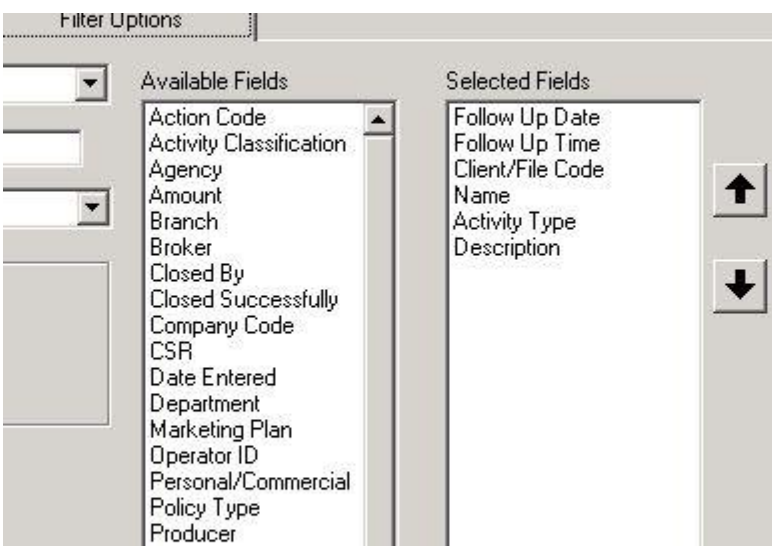


Set the Screen Defaults for entering client for Commercial Lines or Personal Lines Format. Choose other options desired

Activity Center

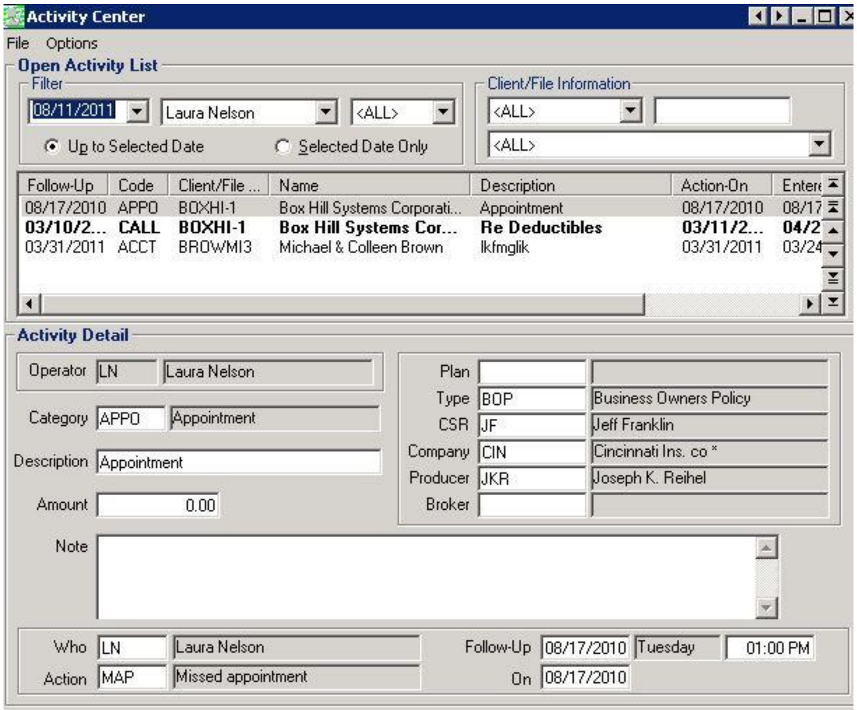
Click on the Magnifying Glass to Open Activity Center
Setup the Columns by clicking on the Filter Options Tab





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

Ask Us
APPLIED
Client Network

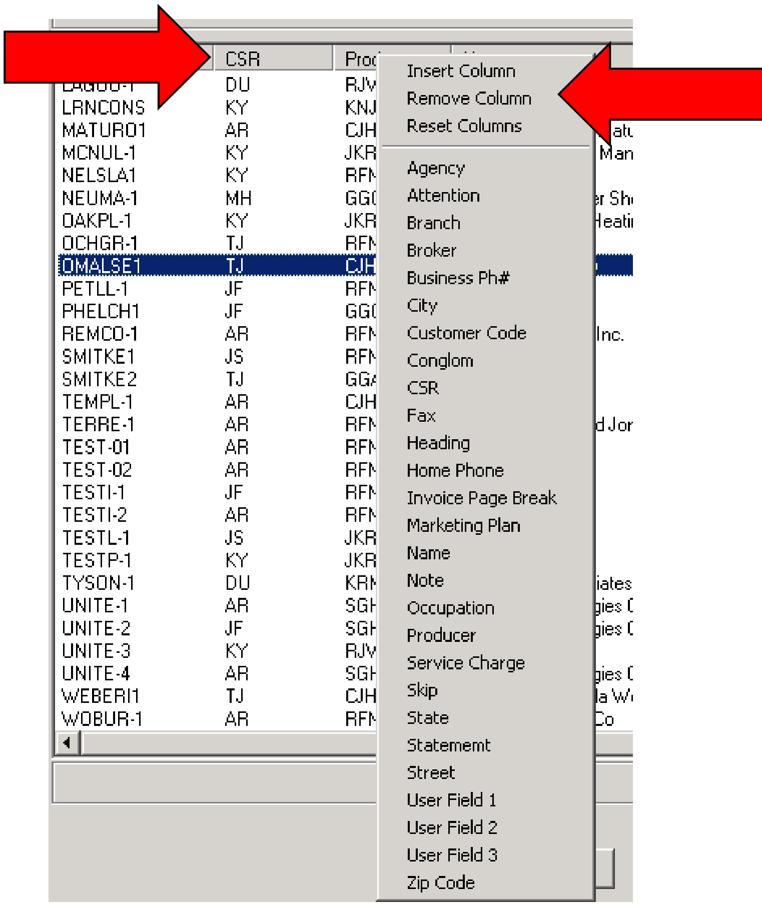


Note: When the Activity Center is open, each activity is on the top with the actual activity screen, including notes, on the bottom. Activities can be Closed, Revised, Attachments Viewed or Drilled Down to by clicking the options key.

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

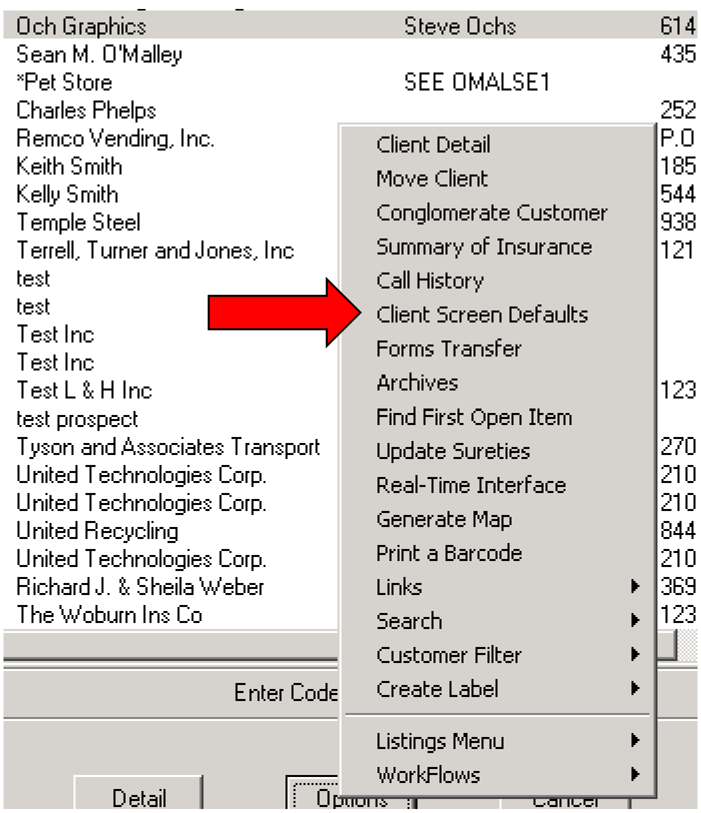
Clients & Files

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



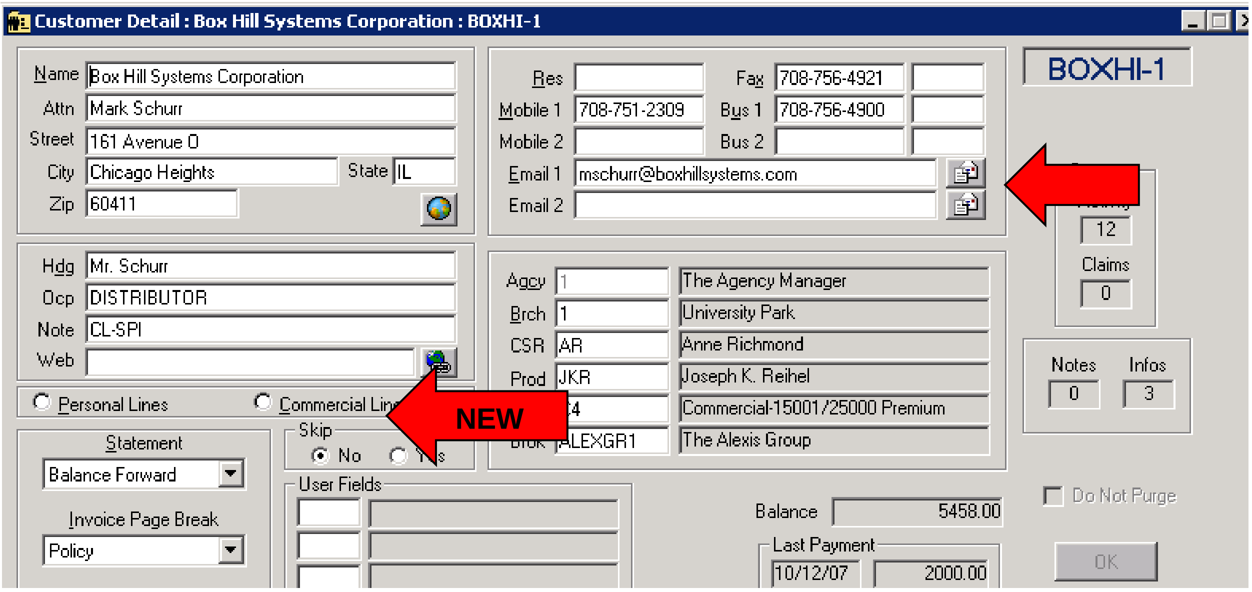
From the main client list, highlight any client, go to options – or right click- and choose Client Screen Defaults.

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.

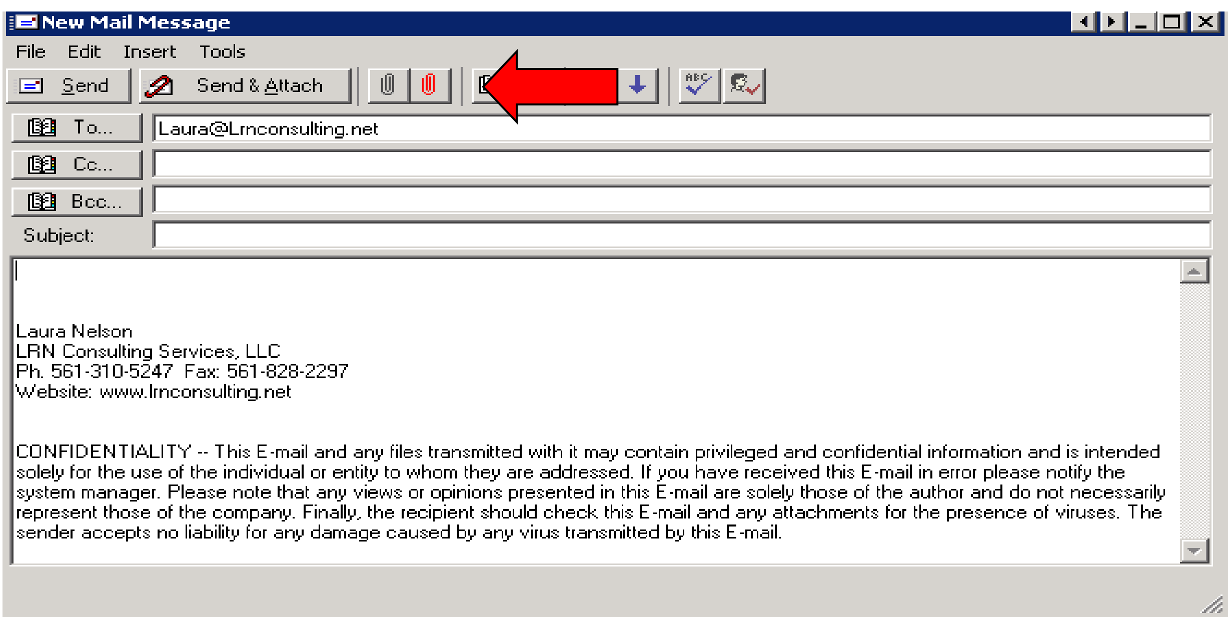
Tip-If you require a field to be completed, go to each account managers client screen defaults and put XXX in the boxes you want to make sure get completed. Phone might have XXX-XXX-XXXX.

Client Detail Screen

Email from Client Screen



When you click on the Envelope:



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

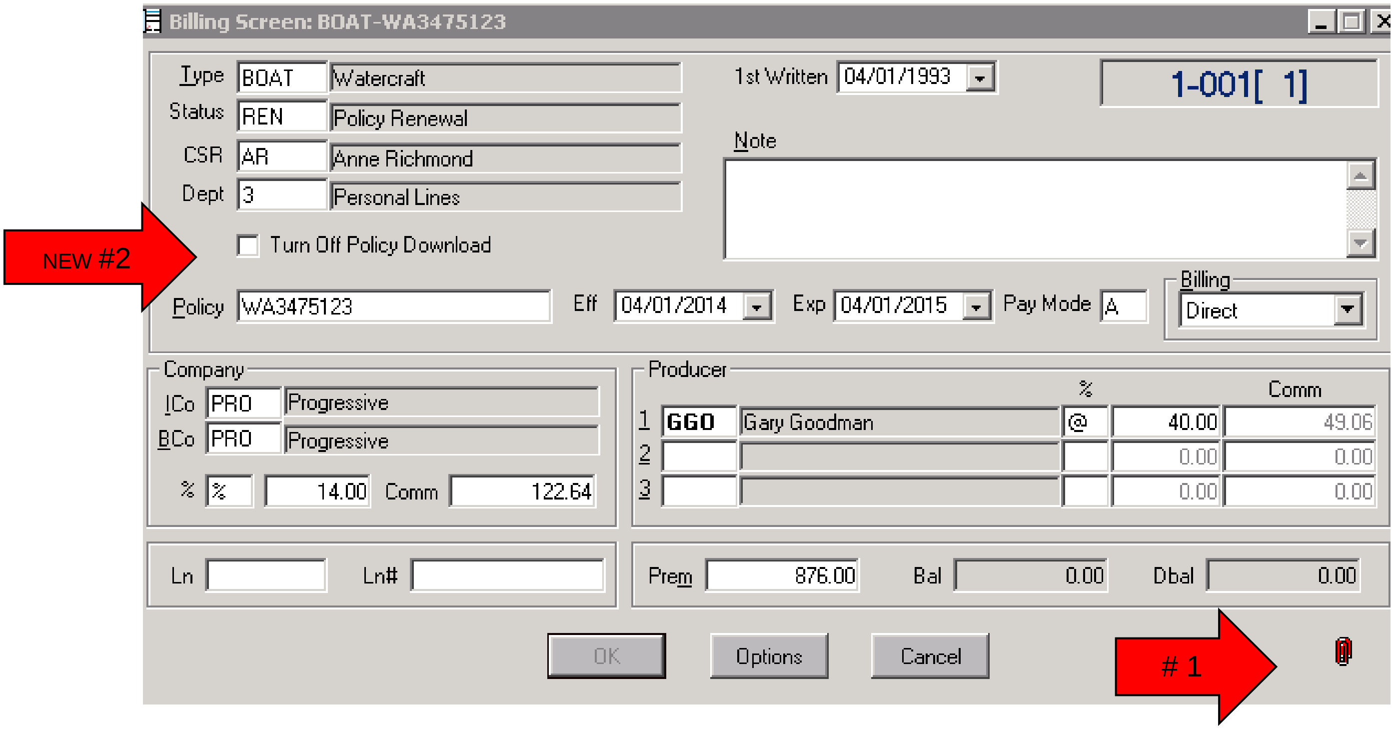
Policy List

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.

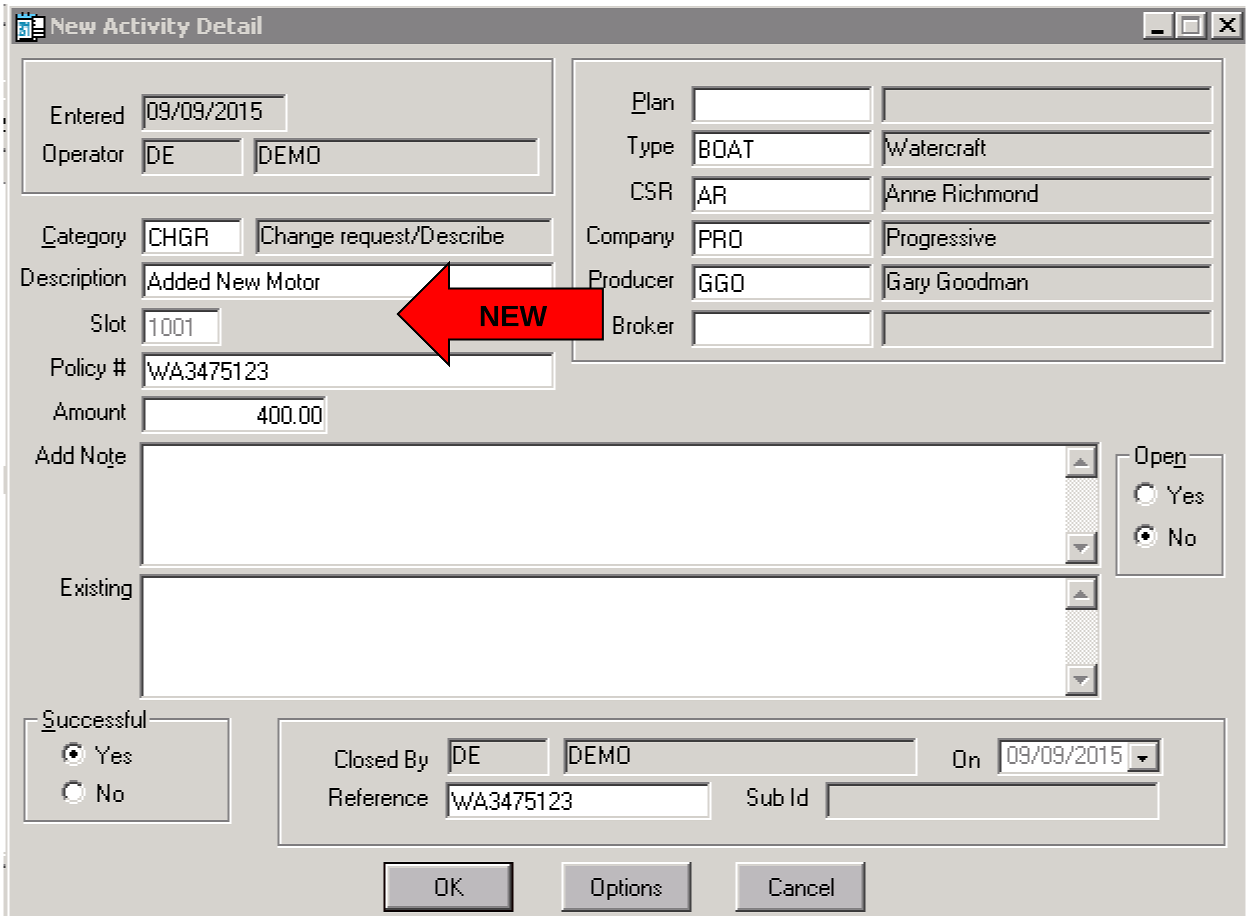
Drop and Drag Feature

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.

Activities



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.

Activity List

DAVIHE1 | Herbert C. Davis

All | Open | Closed | Filter

Entered	Time	Follow-Up Date	W...	Cate...	Description	Co...	Produ...	Close...	Amount	Drill ...
09/09/2015	07:23 PM	10/07/2015	AR	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	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	856	
11/15/2005	07:14 PM	02/25/2006	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	845	
11/01/2004	04:23 PM	02/25/2005	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	845	
11/07/2003	07:29 PM	02/26/2004	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	965	
11/05/2002	10:07 AM	02/25/2003	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	965	
11/07/2001	10:29 AM	02/25/2002	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	893.45	
11/15/2000	11:35 AM	02/25/2001	EX	EXDT	Exdate follow-up...	PRO	GGO	XX	893.45	
06/16/2000		08/31/2011	DM	CALL	Get bdates for al...	PRO	GGO	DM	0	
04/14/2000		04/14/2000	CY	CASH	Boat pd Ck#3804	PRO	GGO	AR	893.45	
08/04/1999	11:52 AM	08/11/1999	EX	LOSS	Loss notice sent...	PRO	GGO	XX	0	*
04/14/1999			CY	CASH	Pd $876.32 on ...	PRO	GGO	CY	876.32	

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

General | Pending | Filter

nsacti...	Tran...	Policy Number	Item #	Polic...	Effective ...	B..	C..	Description	Amount	Balance	Reference
02/1999	REN	WA3475123 ...	117	BOAT	04/01/1999	D	Y	Policy renewal	876.32	0.00	
14/1999	PAY	WA3475123 ...	122	BOAT	04/14/1999	D	Y	Ck#3214 Boat policy ...	-876.32	0.00	DP# 46
14/1999	ELT	WA3475123 ...	130	BOAT	04/01/1999	D	Y	Direct Bill Co's ELT of F...	876.32	0.00	
05/2000	REN	WA3475123 ...	372	BOAT	04/01/2000	D	Y	Policy renewal	893.45	0.00	
14/2000	PAY	WA3475123 ...	380	BOAT	04/14/2000	D	Y	Ck#2356 Boat Pymnt ...	-893.45	0.00	DP# 71
02/2000	ELT	WA3475123 ...	386	BOAT	04/01/2000	A	Y	Direct Bill Co's ELT of F...	893.45	0.00	
20/2002	REN	WA3475123 ...	899	BOAT	04/01/2002	D	Y	May 2002	965.00	0.00	
01/2004	REN	WA3475123 ...	1597	BOAT	04/01/2004	D	Y	April Renewal	845.00	0.00	
15/2006	REN	WA3475123 ...	2307	BOAT	04/01/2006	D	Y	April 06 Renewal	856.00	0.00	
15/2007	REN	WA3475123 ...	2572	BOAT	04/01/2007	D	Y	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