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

SESSION HANDOUT

APPLIED NET

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Target Audience:

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

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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, 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 is the first session in the Epic version of the Proposal Track. You will install the free set of proposal templates and be introduced to the Applied Epic/Word interface. We will walk through the basic functions of Adding a Template, Copying Templates, Template Associations, and Applied Epic Data Fields. Also provided are details on management of form letter and proposal templates through the use of Template Folders and Proposal Groups.

This session will provide you the basics of how to use each of the functions within the Applied Epic/Word Integration. We will be focusing on Summary / Proposal templates for this series of classes, though all of the tools also apply to attachment templates.

Learning Outcomes:

- Create attachment templates using the basic functions of Applied Epic Data Fields.
- Install a full set of proposal documents on your system for customization.
- Implement agency specific versions of Summary and Proposal templates.

Assumptions: This seminar is based on the following
Applied Epic Version 2014 MU6
Microsoft ® Word Version 2010, 2013

Introduction to the Proposal Workshop

The Applied Epic/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 Epic.as well as standardize the wording and look and feel of the documents that are generated by your staff that represents 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 Summary/Proposal Templates. All of the tools we will discuss during class also apply to Attachment Templates. For additional details on Attachment Templates, please see Appendix A at the end of this handout.

The intention of this session is to provide you with a set of workable Epic 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 absolutionsinc.com downloads page and download the Free Proposal Set – Applied Epic – 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 desired Applied Epic 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 Epic system.

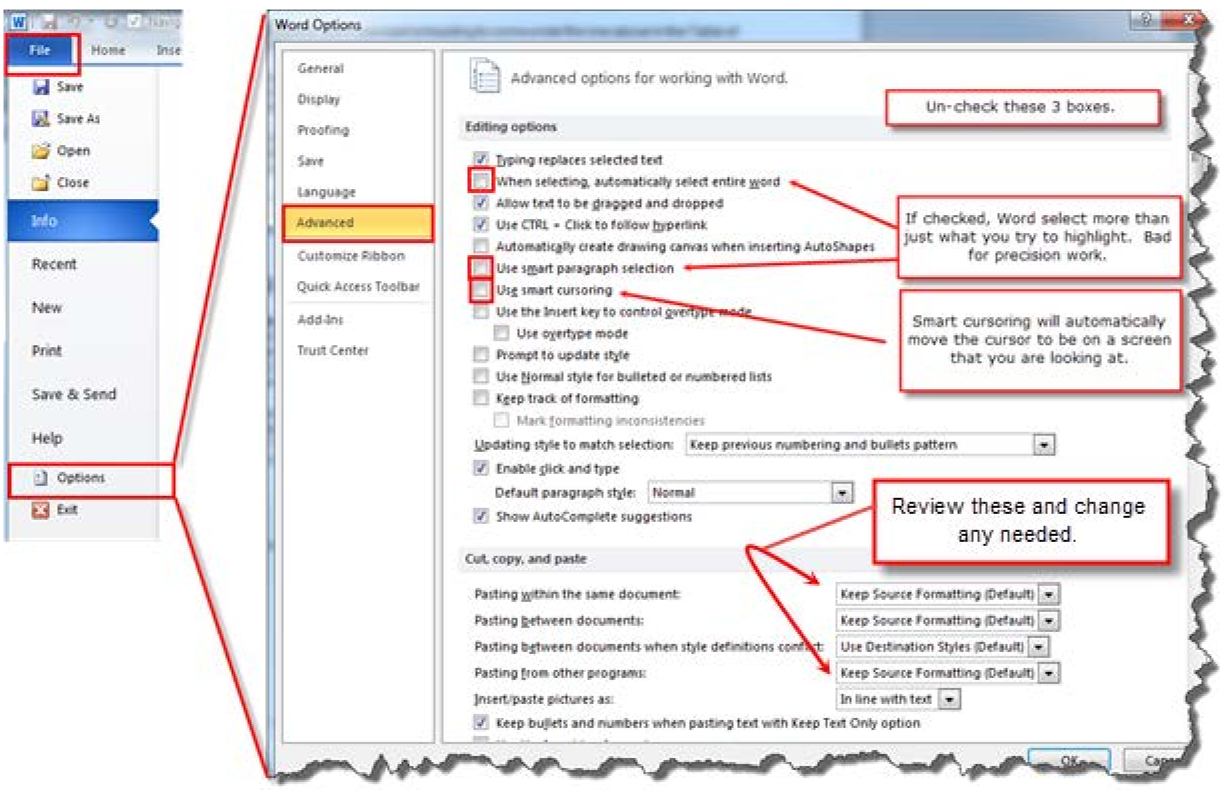
Word Configuration

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

Pesky Advanced Options

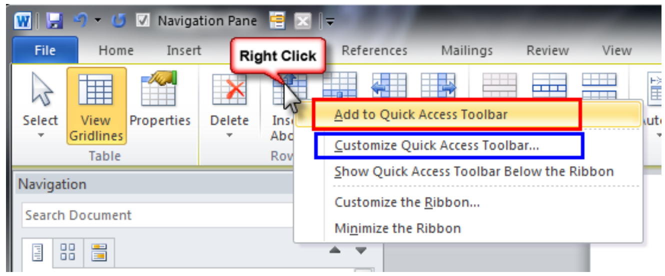
First, let's **turn off** 3 Advanced Options that are designed to help the casual user of Word, but which will make the work of the more serious template builder more difficult. By default, all 3 of these options are turned on.

- 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:

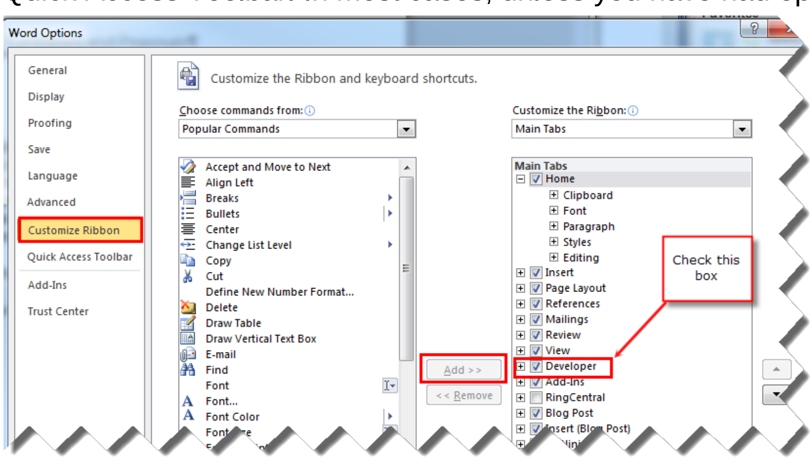
Right Click on the command where you find it on the ribbons and then left click on "Add to Quick Access Toolbar"

-OR-

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

Design Mode

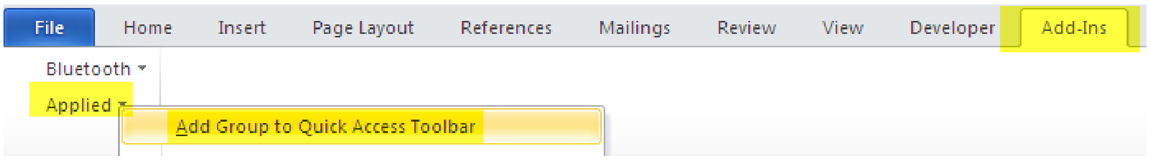
Once we start adding Applied Epic data fields into a template, in order to apply any formatting to those fields, we need to "remove content control". Content control can be viewed in design mode where controlled data fields will show up with "Group" indicators around them. It is possible to remove content control just by right clicking and then selecting "Remove Content Control" on grouped items, but it can be helpful to view your document in design mode to be able to see them. That particular command is located on the Developer ribbon. Since that is the only command that will be needed in most situations from that particular ribbon, add it to the Quick Access Toolbar. In most cases, unless you have had opportunity to need the Developer ribbon before, this ribbon may not even be active within your version of word. In order to activate it, click on File, Options, Customize Ribbon and then mark the box to the left of Developer Ribbon and then click OK.



Once you have the Developer Ribbon activated, you can then right click on the design mode icon & left click on Add to Quick Access Toolbar or as outlined above, access File, Options, Quick Access Toolbar and select that command and add it to your Quick Access Toolbar. Alternatively you can simply add the Design Mode icon through the "Customize Quick Access Toolbar" process mentioned above.

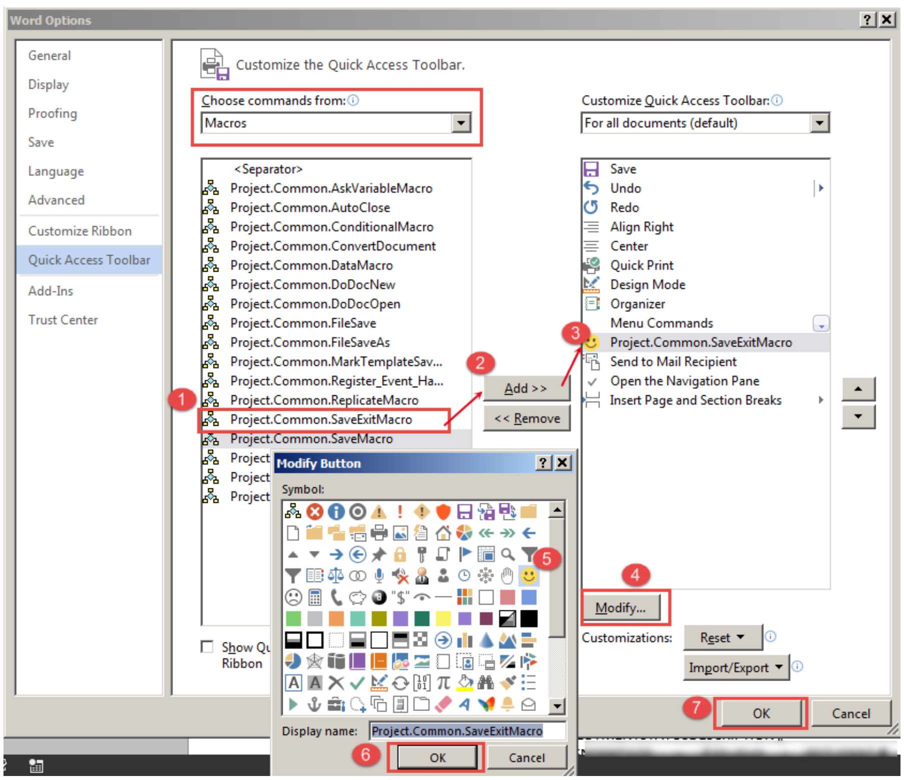
Applied Menu Add-In and Applied Save and Exit

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 Epic/Word Integration. Open Word within Epic, click the ***Add-Ins*** ribbon, right click on the ***Applied*** menu, 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". From ***File, Options, Customize Quick Access Toolbar***, change the *Functions* to ***Macros*** then:

1. Select ***Project.Common.SaveExit Macro***
2. ***Add*** to move to the right window



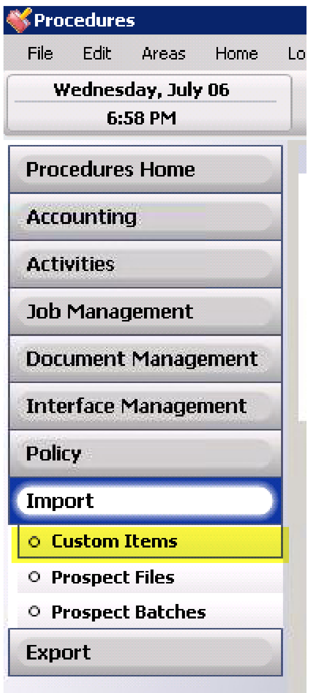
3. With the item selected in the right window
4. ***Modify***
5. Select an icon from the Options
6. ***OK*** when complete
7. ***OK*** to Exit the Word Options window.

Now that we have all of our "easy to access" commands set in the Quick Access Toolbar, let's work with it in creating proposal templates.

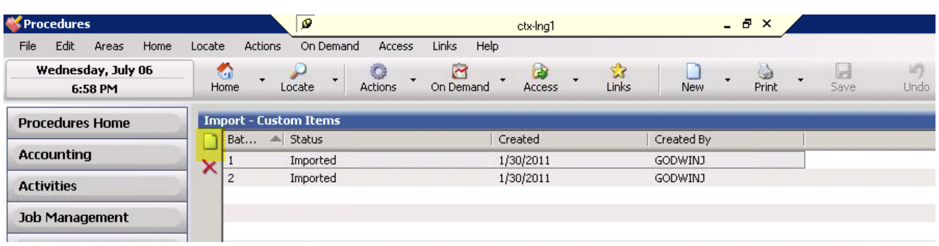
Importing Templates

For this series of classes, we are going to import the Free Proposal set from the AB Solutions website to assist you in creating your own set of templates customized for your agency.

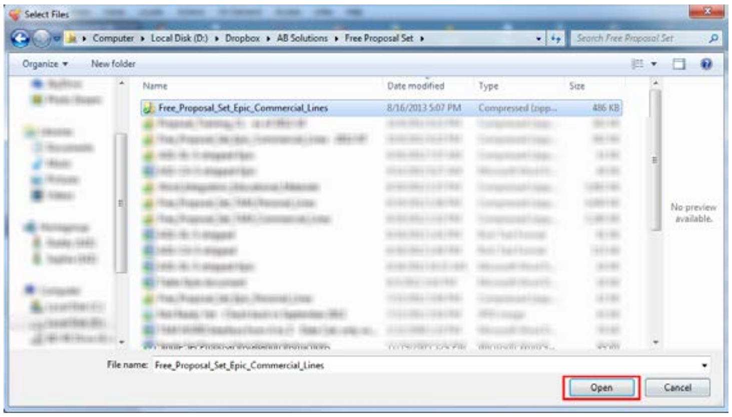
From the Homebase screen of your selected Applied Epic database (e.g. sample1 or production), click ***Procedures – Import – Custom Items***.



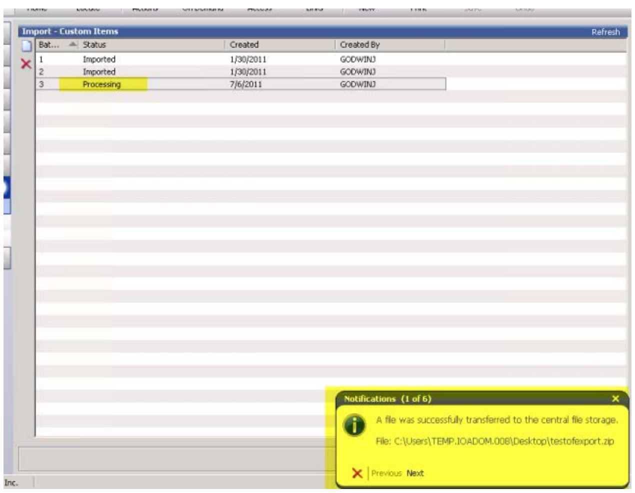
The *Import – Custom Items* screen opens. If you haven't imported any items previously, this screen will be empty. Otherwise, previously imported files may show. Click the ***Add*** Icon:



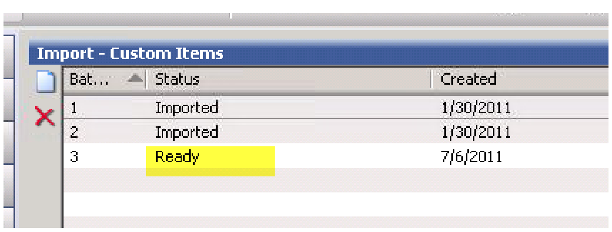
This opens the Select Files dialogue box. Navigate to the location of the [export] files (i.e. files downloaded from absolutionsinc.com), select that file and click ***Open***.



Back at the Import – Custom Items screen you will see your file processing.

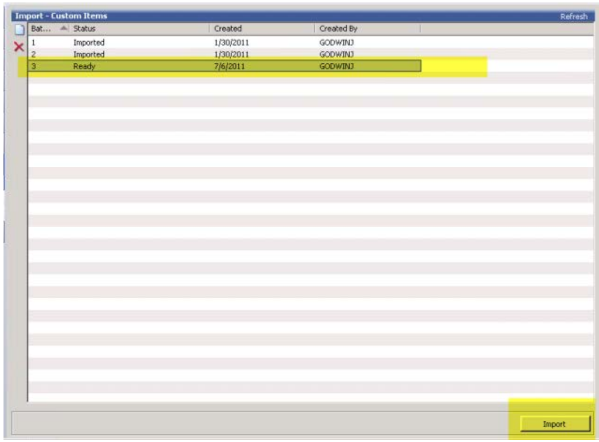


When processing of the file is complete and ready for import, the status will change to “Ready”.

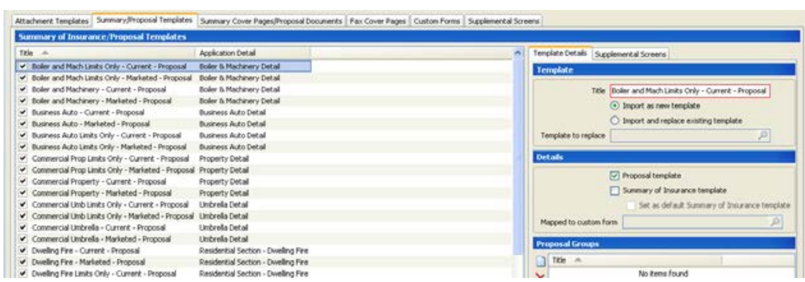


Note: the file will not update to “Ready” status automatically. To check its status, click on the Refresh link in the top right corner of the Import – Custom Items screen. Be patient; all good things come to he who waits

Select the file then click the ***Import*** button.

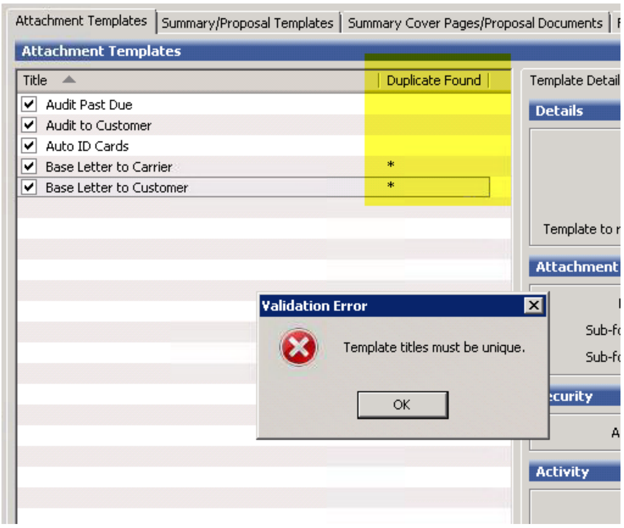


The Import screen opens. Click on the *Summary/Proposal template* tab. All of the files available for import will be selected by default. You may unselect an item by unchecking the box to the left of the template title. You may change the details of each item by selecting the item in the list on the left and then modifying the details on the right. Next Click on the *Summary Cover Pages/Proposal Documents* tab and repeat these steps.

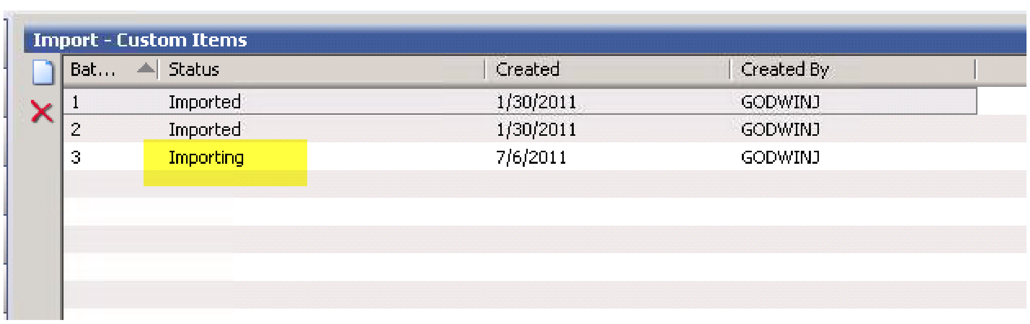


Once all files have been selected and modified, if desired, click on the ***Import*** button.

Note: Files will automatically be marked “Import as new template.” If you click ***Finish*** and any templates with the same name already exist, an indicator will display in the Duplicate Found column and a Validation Error dialogue box will display.

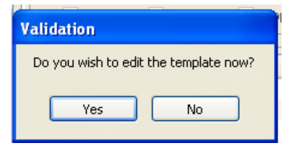


Click ***OK*** on the error message. One by one select each template where a duplicate exists and either 1) change the name of the template or 2) click the radio button Import and replace existing template. Once details for all templates to be imported have been corrected, click the ***Import*** button. The status of the file will now show “Importing.”



You will need to click on the ***Refresh*** link to update the status of your import process. Once the file says “Imported” you can exit the Import – Custom Items screen by clicking File, Exit or clicking the X in the top right corner.

Editing Templates in Word



There are two ways to open up Word and edit Summary / Proposal templates. From Home Base select ***Configure***. From the Configure Menu, access ***Policy***, and ***Summary/Proposal Templates***.

- Choose the template and ***Edit***. Clicking ***Finish*** in the Template Details area will generate a Validation box asking us if we want to Edit the Template Now. Answer ***Yes*** if to edit the template.
- Select ***Actions => Edit Template***

Inserting Date Fields

Most proposal cover pages and letters begin with a date. To insert a date and time into a template, you can use Applied Epic's data field found under the Applied Menu or Word's Quick Parts field:

- **Applied Epic's "Today's Date" Variable**
  Click the ***Applied*** menu and select ***Data***. In the *Data Field Selector* window, open the ***GeneralDataMerge*** folder and select the ***Today's Date*** variable.

  This variable, when merged, reflects the date that the document was created. If the document is added as an attachment on an account, it always reflects that merged date.

  This is the desired output for most agencies.

-OR-

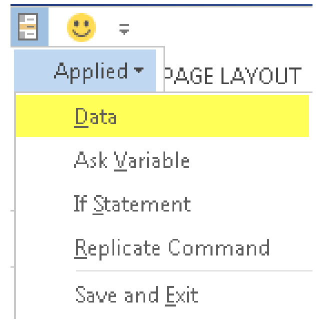
- **Microsoft Word's "CreateDate" Variable**
  In Word 2010 or 2013, open the ***Insert*** ribbon bar and then click on ***Date & Time***.

Then choose the date and time format that you would prefer, and don't forget to check the box to ***Update automatically***.

When this variable is added to a template, it updates the date that the document was merged. This date remains static unless any changes are made to the document, at which point the date is updated to the date of that last edit. In other words, this variable reflects the date that the document was last modified.

This output is not desired by most agencies. Use it with caution.

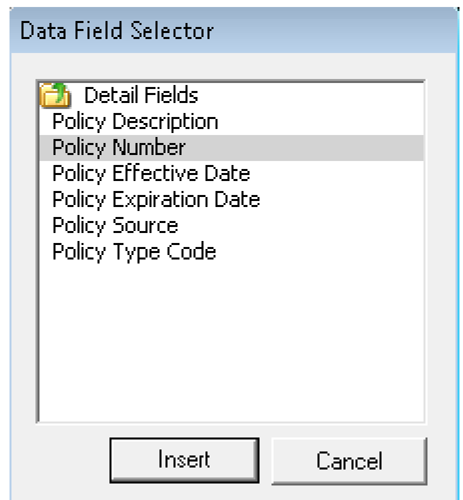
Epic Data Fields



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

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

- The *Data Field Selector* window displays. Double click on a ***folder*** to view its contents.
- To select a data field, do one of the following:
    - Double click on the ***field name***.
    - Click on the ***field name*** and click the ***right arrow*** button.
- To go back to the previous set of folders, double click the ***folder up*** button at the top of the list.



It's important to note that in Applied Epic, you can cut, copy, and paste data fields within a document or between two documents. Once you have something just right, there is no need to re-create it from scratch if you want to use it in a different document.

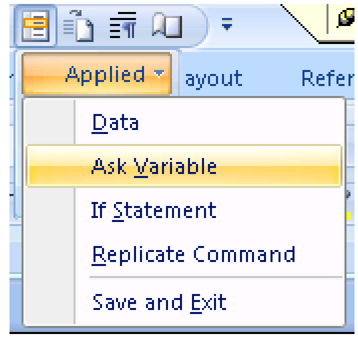
ASK Variables

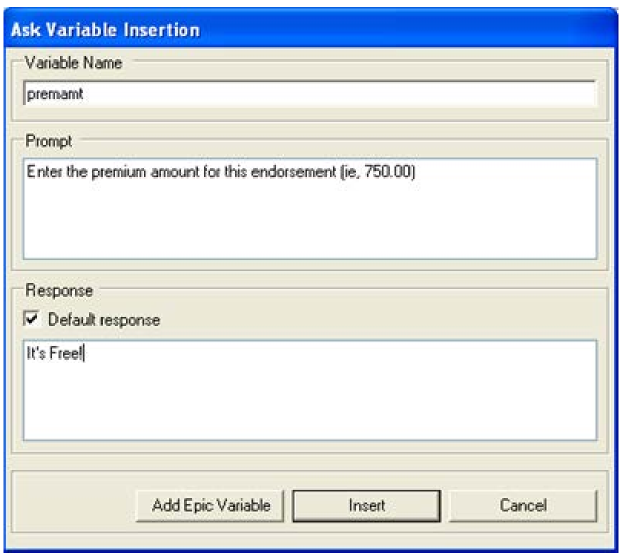
Note that we will be reviewing ASK variables in greater detail in the "IF ASK Math SET Bookmarks" class in this series.

ASK variables are a great tool for obtaining data that the system doesn't "know" or have contained in a data field, but that the end user does. ASKs are very useful in attachment templates, but also helpful in some proposal templates. Care must be taken when using ASKS in proposal documents so that the description which defaults advises the user merging the proposal group which template applies to the question that is being asked.

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, 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 put examples of how you want them to answer the question as shown above.
- Optionally 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*** then ***Cancel*** to exit the ASK variable function.

Example of an ASK variable:

{ ASK premamt "Enter the premium amount for this endorsement (ie, 750.00)" \d "It's Free!" * MERGEFORMAT }{ REF premamt }

NOTE: The REF portion of the ASK is where the answer is placed. By default, Applied Epic 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 (i.e.: a field value in the database, or the result of an ASK variable) to a value entered in the IF statement. The format of an IF statement is:

[IF “Expression” Operator “Comparison Expression” “True Text” “False Text” }

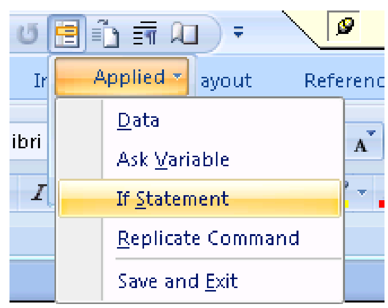
Note the placement of the quotation marks in the above example. If there is no false, the last two quotation marks will have nothing between them, or may simply be removed.

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
- Eliminate an entire row from a proposal template if the limits field is blank. This is very useful in the commercial auto page where either CSL or split limits might be written, one template can very easily cover both coverage options.
- Add in wording for specific coverages. An example here is to add in a description of that “blanketed coverage” means if there is a Location 0 listed on the application.

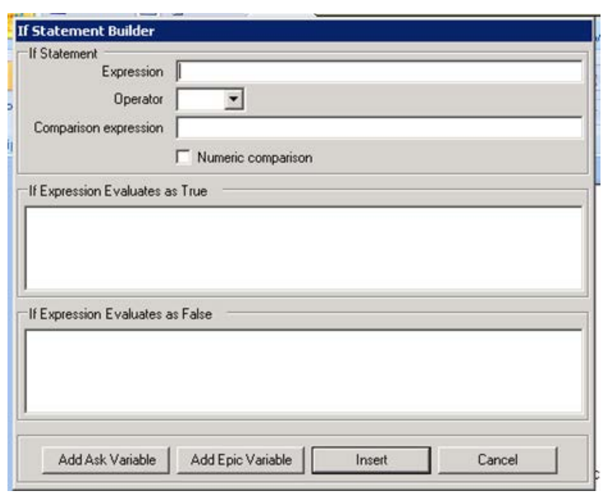
To create an IF statement:

- 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***

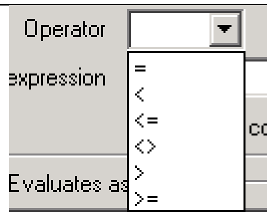


If *Statement Builder* Box opens:

- Expression field is generally based on an Epic 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 ***Add* Applied *Epic Variable***, or you may use a “placeholder” and place the data field later.
- Double click on each applicable folder to navigate to the field you want to use in the IF Statement.
- Click ***Insert***, then ***Cancel***.



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

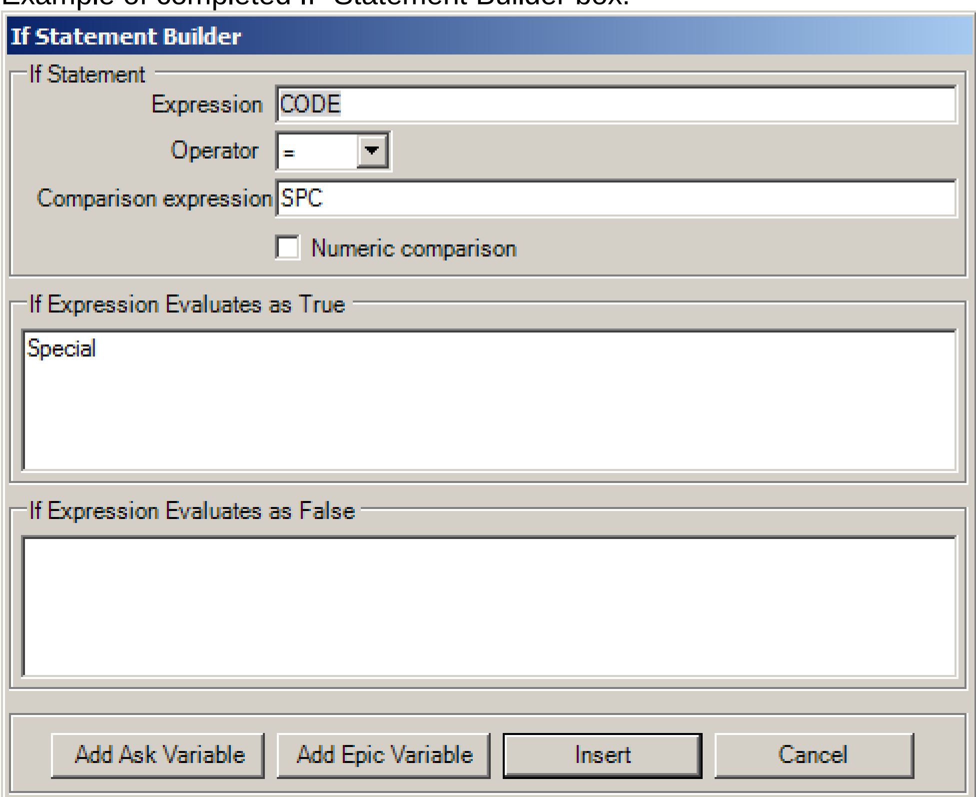


=	Looks for an exact match in comparison expression
<	Less than the value in comparison expression
<=	Less than or equal to comparison expression
< >	Not equal to comparison expression
>	Greater than comparison expression
>=	Greater than or equal to comparison expression

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:



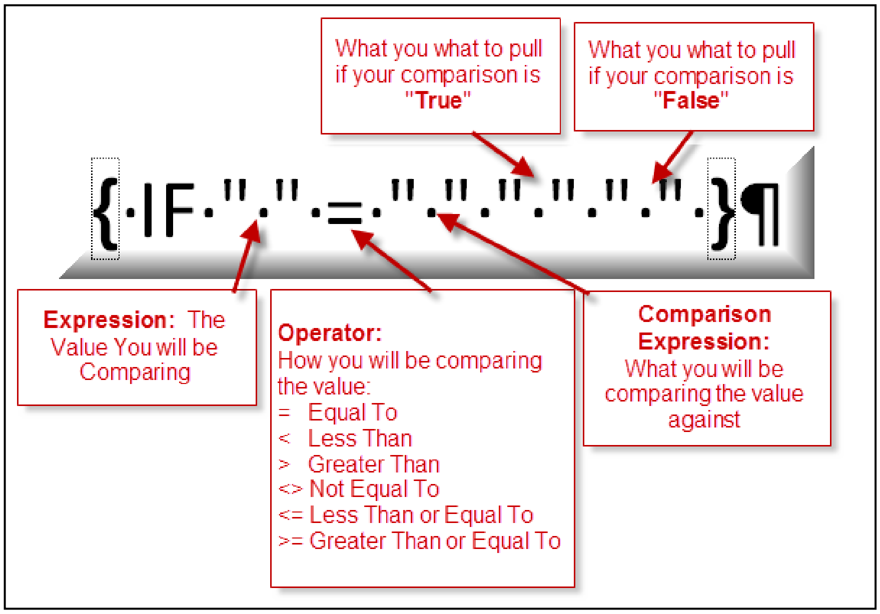
- Click ***Insert***, then ***Cancel*** to exit the IF statement.

The resulting IF statement:

```
¶
{·IF·"{·DOCVARIABLE·
MasterAccountMerge.Policy.Line.LOB.Property.RiskMerge.Subjects.Subject.CausesOfLoss.SubCausLoss.
Code*0*522·}"·=·"SPC"·"Special"·""·}¶
¶
```

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 2nd 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 1st 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:

```
{·DOCVARIABLE·MasterAccountMerge.Account.Common.Common.AcctName*0*6·}¶
{·DOCVARIABLE·MasterAccountMerge.Account.Common.Address.Address1*0*1·}{·IF·"{·DOCVARIABLE·
MasterAccountMerge.Account.Common.Address.Address2*0*5·}"<>·""·"¶
{·DOCVARIABLE·MasterAccountMerge.Account.Common.Address.Address2*0*5·}"·""·}¶
{·DOCVARIABLE·MasterAccountMerge.Account.Common.Address.City*0*2·},·{·DOCVARIABLE·
```

- 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 (example would be, if Prod1 is equal to CARJE1, enter this picture or signature graphic, etc.).

Replicate Commands

Replicate Commands are used to insert Schedules of Information into a template. Examples of schedules in Applied Epic are:

- Data from the policies selected to merge into the template
- Servicing Roles
- Any Schedule within application detail such as vehicles, drivers, Workers' Compensation class codes, Property Premises and Subjects, etc.

While Replicate commands can be inserted without also using a Table (as with policies or servicing roles), 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 in Applied Epic.

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, 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 2 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 Fields***) with whatever formatting, IF statements, etc. needed.
8. Adjust the column widths for the headers and data.
9. Place the cursor directly below the table.
10. Click ***Applied / Replicate Commands***.
11. Your cursor will be at the end of the first Replicate command – backspace once to remove the space between the field and the paragraph marker.
12. Place cursor at the end of the first Replicate command and hit the ***Enter*** button to create a return between the two commands.
13. Place your cursor at the end of the second Replicate command and remove the extra space between the field and the paragraph marker.

14. Take the mouse out to the left of the 2nd row containing the data fields and click with left mouse to select that row.
15. Click ***CUT*** or ***CTRL+X***.
16. Select the return that is between the two Replicate commands and PASTE the cut row.

The end result will look similar to this:

Vehicles¶

¶

Vehicle¤			Comp Deductible¤	Collision Deductible¤
{·DOCVARIABLE·BEGINREP·}¶				
{·DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Vehicle.VehNum*0*34·}·¤	{·DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Vehicle.VehYear*0*54·}· {·DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Vehicle.VehMake*0*55·}· {·DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Vehicle.VehModel*0*56· }¤	{·DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Vehicle.VehVIN*0*57·}¤	{· DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Coverages.VehicleCoverages.Comprehensive.COMP.Deductible1*8*61·}¤	{· DOCVARIABLE·MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Vehicles.Coverages.VehicleCoverages.Collision.COLL.Deductible1*8*62·}¤

{·DOCVARIABLE·ENDREP·}¶

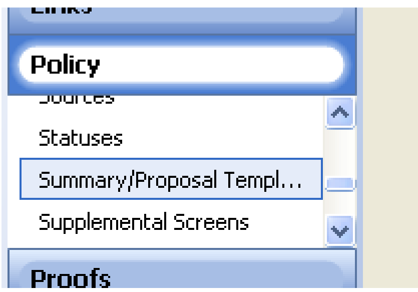
Save the document and test it. Re-access and edit the template to adjust as necessary.

Summaries of Insurance / Proposal Templates

Summary of Insurance and Proposal Templates are built to merge coverage detail specific information held in Applied Epic application detail into Word documents. Summary of Insurance templates for the main coverages associated with ACORD application detail come pre-installed in your Epic database.

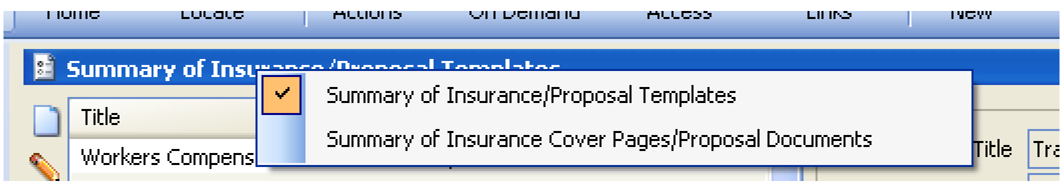
Pre-configured base Proposal templates are available for download and import from Applied Epic Help.

There are also free proposal sets for Applied Epic available from AB Solutions, Inc. on the downloads area of their website at www.absolutionsinc.com

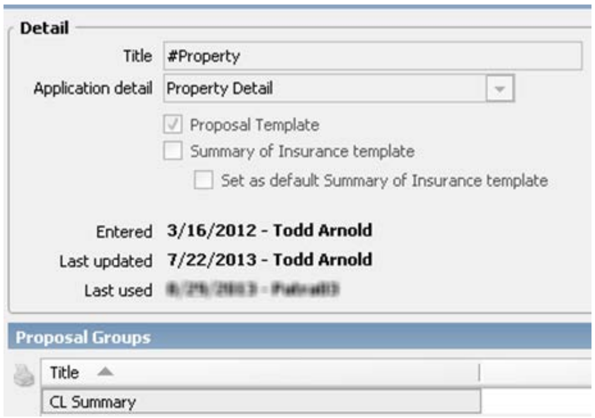


To edit or create Summary of Insurance or Proposal templates, click on ***Configure***, ***Policy*** then ***Summary/Property Templates***.

The default list view is of the coverage specific templates themselves. You also have access to cover pages or other non-coverage specific pages by modifying your listview:



We will focus on coverage specific templates first. Templates identify how the template will be used.



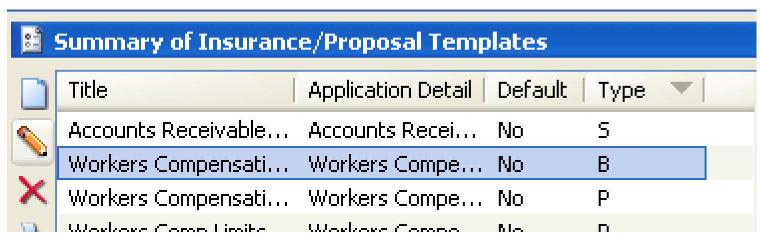
A summary or proposal template can only be associated with one application detail.

For those templates that will not be associated with ANY specific application detail, ACORD or Custom Form, they will reside under the **Cover Pages/Proposal Documents** area.

A template can be BOTH a Proposal and Summary of Insurance template or just unique to Proposal or Summary. Also, for those templates identified to be used as a Summary of Insurance template, they can also be set as the default template that will be used when the End User generates a Summary of Insurance from the On Demand menu on a client account.

In the list view of the templates themselves, there are indicators for the type of template:

S = Summary Only
P = Proposal Only
B = Both Summary and Proposal indicators marked



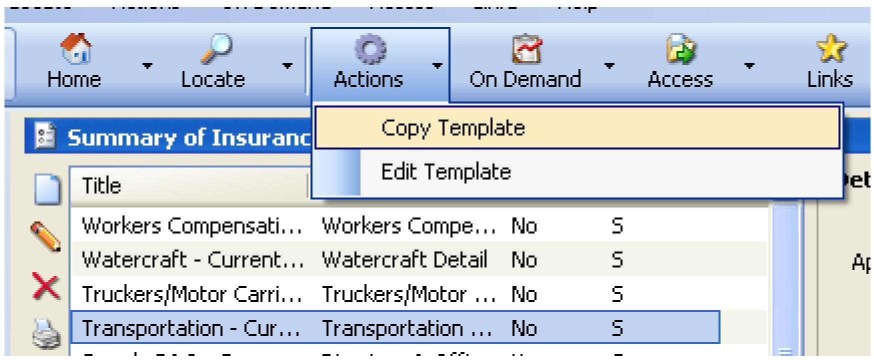
Customizing for Your Agency

All of the templates that are available for Summaries and 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.

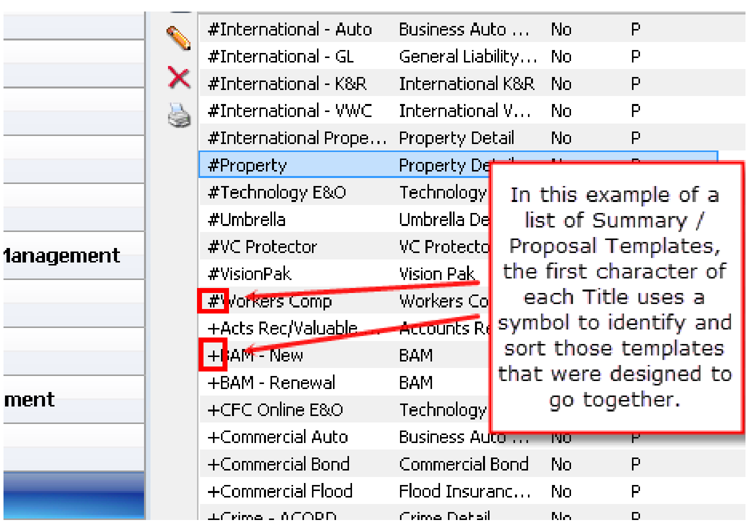
In order to customize the Summary of Insurance templates they must be copied first as the base templates that are installed in your Applied Epic database cannot be modified. Although you CAN modify the Proposal templates you import, it is also strongly suggested that you copy the Proposal templates first before modifying.

Copying Templates

- Click to highlight the ***summary/proposal template*** you wish to copy.
- Click ***Actions, Copy Template*** on the options bar.



- In the popup window that displays, enter new agency specific name of the template in the ***Copy To*** field:



This name should contain characters that will easily identify it as an agency specific template, and if the agency will have multiple “styles” of templates, different leading characters should be used on each.

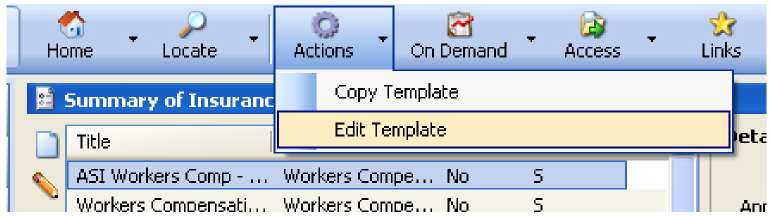
Titles, and their leading character indicators, can always be changed.

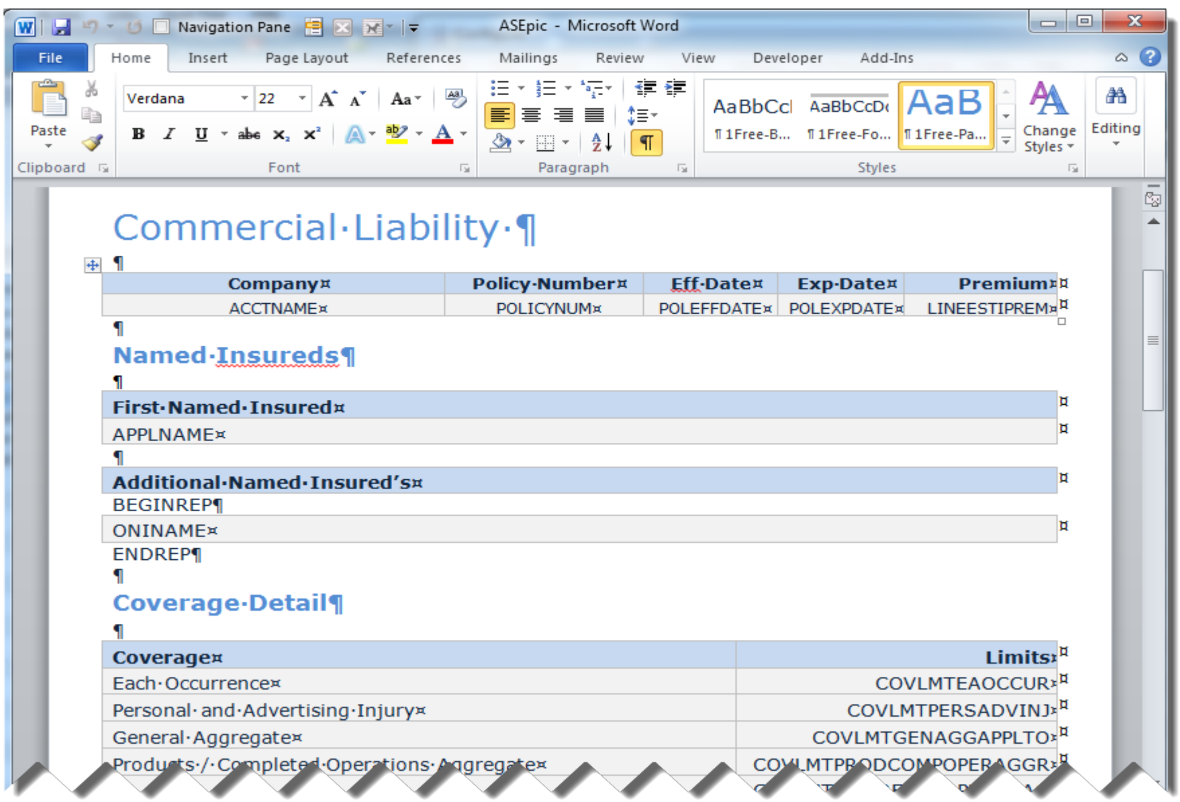
- Click ***Finish*** or press ***[Enter]*** to complete copy process.

Editing Templates

- Click to highlight the ***summary/proposal template*** you wish to copy.
- Click Actions, Edit Template

The template will open within the Applied Epic/Word Interface



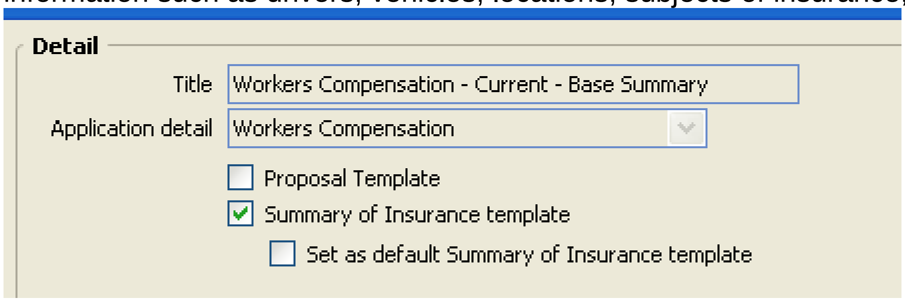


Editing functions are the same as outlined in the earlier section of this document.

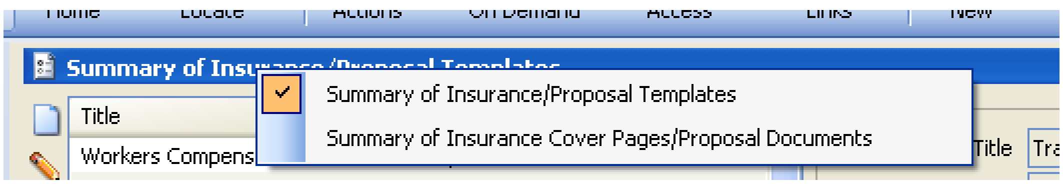
To save the changes made, exit the document and click ***Yes*** when prompted to Save Changes.

Application Specific versus Cover Pages

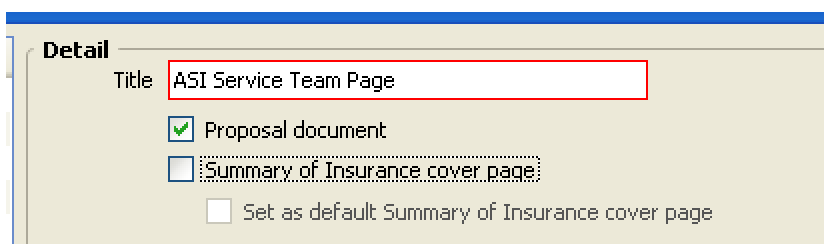
Application specific templates are tied to a specific ACORD or Custom Form application. This allows the merging of coverage details, limits, forms & endorsements, as well as scheduled information such as drivers, vehicles, locations, subjects of insurance, etc.:



Cover Pages are not application specific and can be both cover pages as well as agency specific pages such as Agency Service Team pages, Commission Disclosure page, Agency Mission Statement, etc. To access these pages, change your listview under Configure/Policy/Summary/Proposal Templates section to ***Summary of Insurance Cover Pages / Proposal Documents***.



The process for either copying the base template cover pages or creating your own is similar to those for Summary of Insurance/Proposal Templates.

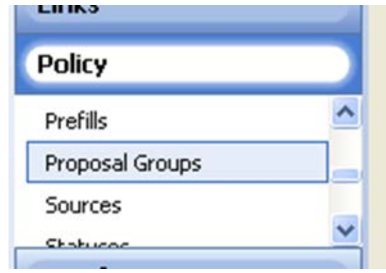


Identify how you want to use the document and click ***finish*** to begin editing the document. All of the editing tools outlined in the above are available for use in creating this template.

Proposal Groups

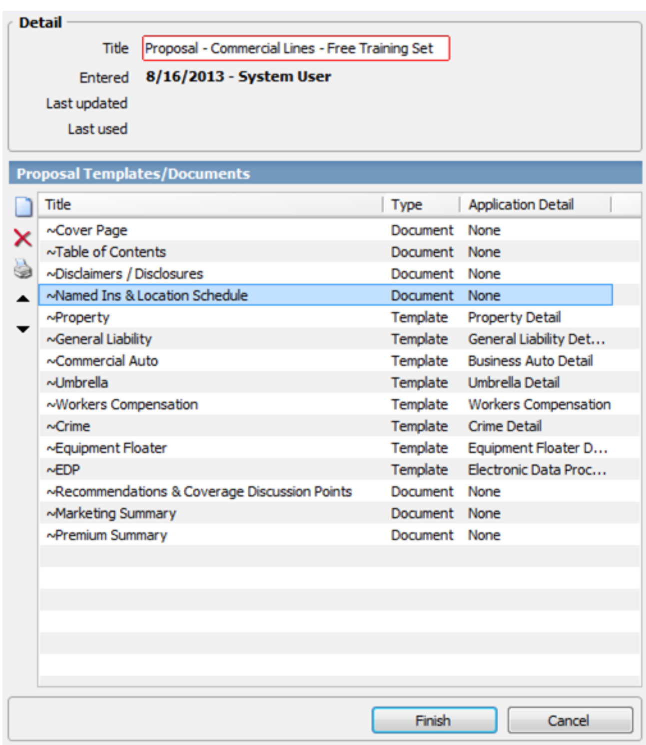
Proposal groups are used to assist your end user in creating a proposal. They group proposal templates, both coverage specific and non-coverage pages, into a set of templates that allow them to easily select all the templates they intend to merge. You can put the pages in a specific order within the group although the end user still has the ability to change the order or add and remove pages while they are selecting the proposal they want to merge from the ***On Demand*** menu.

Proposal Groups are located under
Configure / Policy / Proposal Groups



Proposal Groups do not exist by default and will need to be created, though if you import a set of templates the associated Proposal Group may come along with the templates.

To start, click the ***Add*** Icon and enter a name for the Proposal Group:



Give your new Proposal group a Title, and then click the ***Add*** Icon under Proposal Templates/Documents to begin selecting the templates you want to make part of this group:

Make your selections in both tabs – Proposal Templates (Application specific) and Proposal Documents (Non-app specific).

Click ***Finish*** once you have completed your selection.

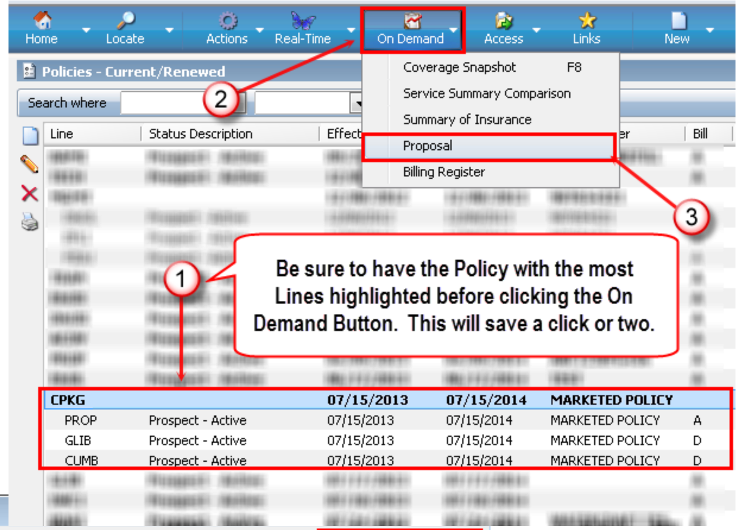
Use the black up & down arrow keys to move the pages around in the grouping to get the order you want. The order you set here will be the default order when your users use this group at the Account level.

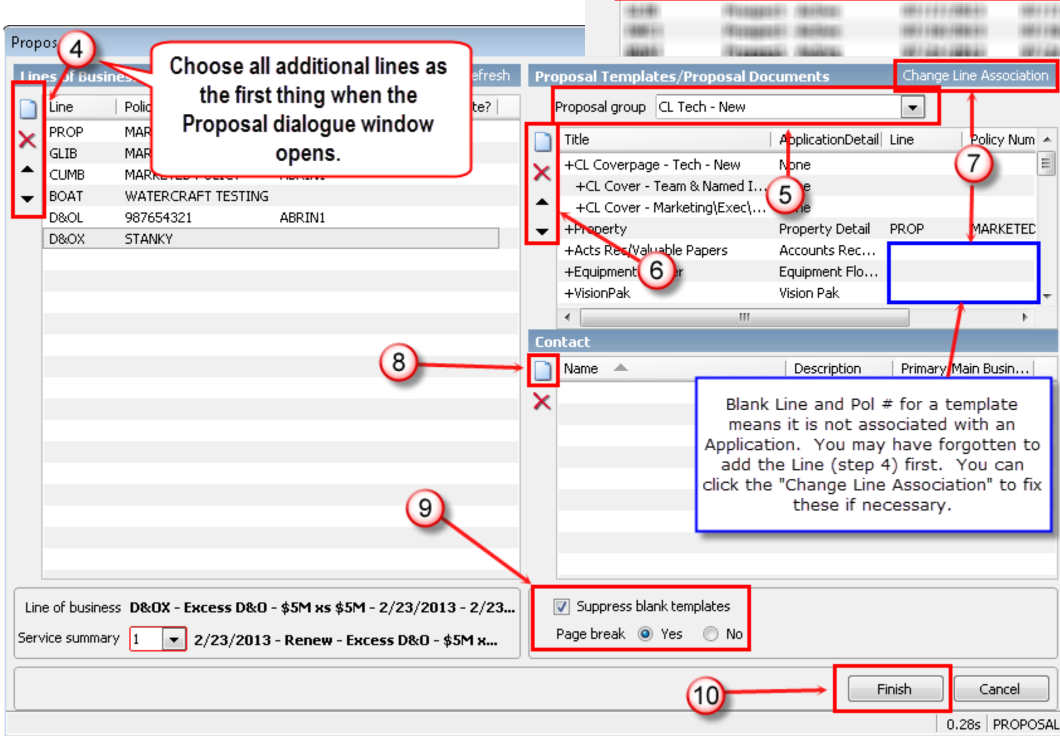
Click ***Finish*** to complete or ***Add*** to create another proposal group.

Generating Proposals at the Account Level

End users will click ***On Demand*** from the policy list screen and then select ***Proposal*** to get the merge process started.

When merging a proposal at the Account Level, the order in which user selections are made do matter.





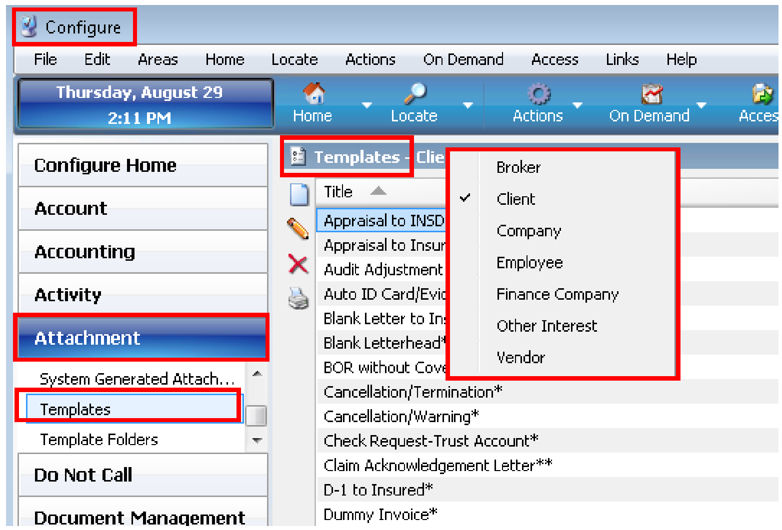
In Epic, the user has a lot of control over the Proposal merge process. This is a very good thing.

However, in order to benefit from this control, they do need to take the time to understand how to use those controls.

Appendices

Appendix 1: Attachment Templates

Attachment templates use the same set of skills as proposal / summary templates. They are located in a separate area of Configure and have a few different configuration choices.



From home base, click on ***Configure***, then choose ***Attachment*** then select ***Templates***.

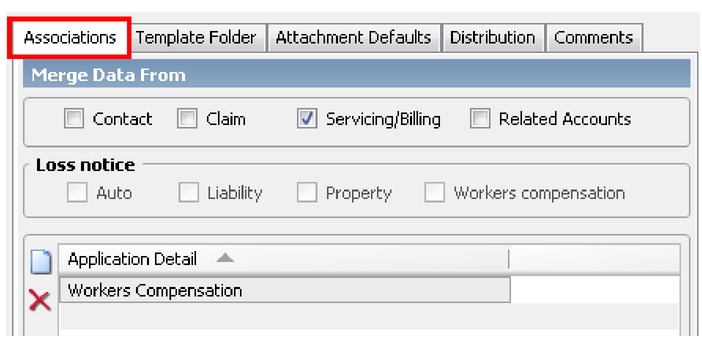
Templates may be created for different types of "Files". To choose between the types of templates, click on the word ***Templates*** on the title bar (right below the button bar) and make your selection.

To create a new Attachment Template, Click the ***Add*** button to the left of the list and then enter a ***Title*** for the new template in the field on the right.

There are five tabs that have information that can, or in some cases must, be filled in.

Associations

Select the ***checkboxes*** of the sources from which you wish to merge data for the new template. These are the choices:



- Contact (Allows you to pull a particular contact's information into your template)
- Claim (Allows you to pull specific claim detail information into your template)
- Service/Billing (Allows you to pull information from Policy / Line Detail and any components contained there)
- Related Accounts

- Loss Notice information can also be integrated. Since there are different types of ACORD loss notices, you must select which form(s) you would like to include. This area is only activated once you have selected ***Claim*** in the section above.
    - Auto Loss Notice
    - Liability Loss Notice
    - Property Loss Notice
    - Workers Compensation Loss Notice
- To choose **Application Detail** from which to merge data, click the ***Add*** button to the left of the list. You can choose one or multiple application detail. This allows you to pull in actual data from application detail such as limits, deductibles and schedule items such as vehicles, drivers, Forms & Endorsements or Additional Coverages.
    - In the popup window that displays, select the ***checkbox*** next to each desired application. Click ***Finish*** or press ***[Enter]*** when you have made your application detail selections.

Template Folder

Template folders can be used to limit the number of individual template selections each user must view when adding a new template at the Account level.

Note that ***User Field Defaults*** are a very important part of thinking about your template folder setups.

To choose a template folder or folders in which this template should reside, click the ***Add*** button to the left of the list on this tab.

- In the pop-up window that displays, select the ***checkbox*** next to each desired folder. We will talk about template organization a little later in this session.
- Click ***Finish*** or press ***[Enter]***.

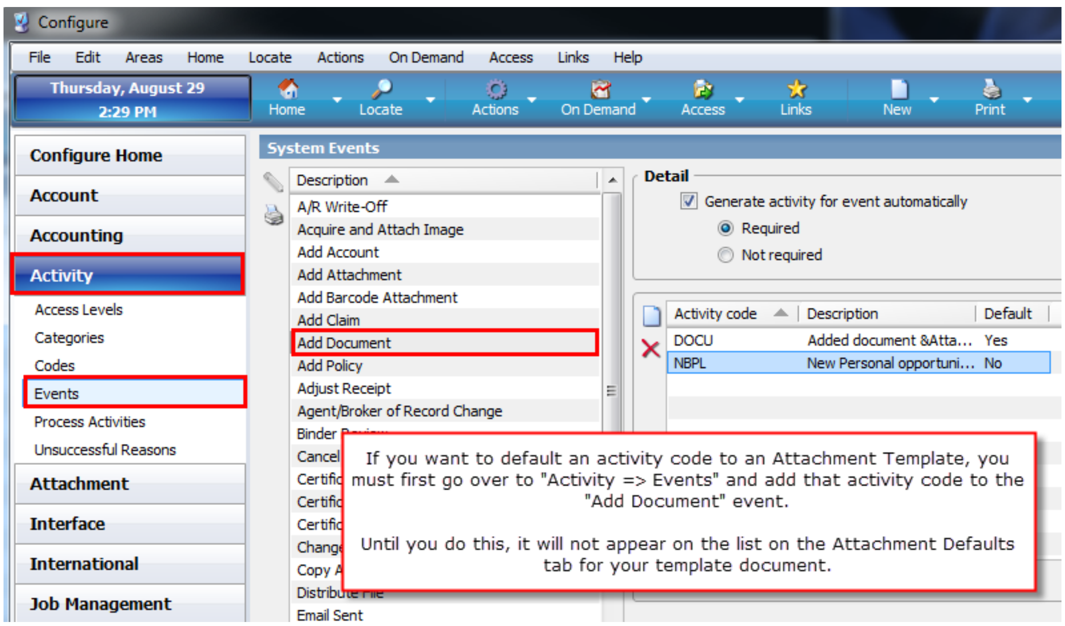
Note the separate section that follows which addresses template folders in more detail.

Attachment Defaults

This area is where you determine the default Attachment Folder(s), Access Level and Activity Code you want to tie to this particular template.

Each of these settings can be overwritten once the end user is merging the document.

- Choose the ***Folder*** (and ***Subfolder 1*** and ***Subfolder 2*** if applicable) in which documents created with this attachment template will be stored by default.
- Indicate the default ***Access*** level for documents created with this attachment template.
- Choose an activity ***Code*** for documents created with this attachment template. Depending on your agency's workflows, tying a specific Activity Code to a particular template can be used as a milestone in the workflow that letter is used in.



Distribution

This area is used to determine how a letter will be generated/distributed if it is generated automatically either as a result of a further action of an Activity or as part of a Marketing campaign in reports.

- Choose the appropriate ***Paper type***.
- Select the desired ***Letter type***.
- Deselect the ***Use Contact Method from Contact Detail*** checkbox you do not want to use the contact method that is specified in the contact detail for accounts for which the templates will be used.
- If you deselect the checkbox, select the appropriate radio button:
  - Generate as email
  - Generate as mail
  - Generate as fax

Comments

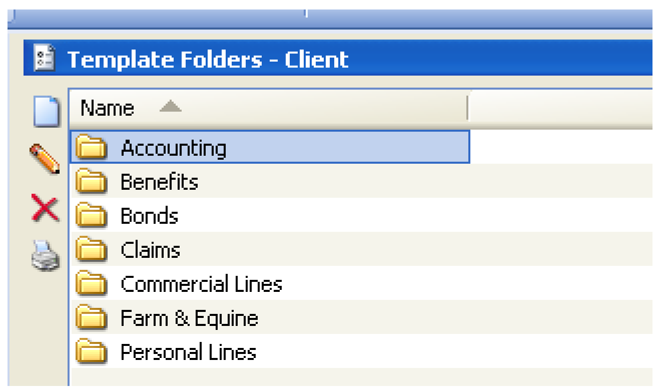
Utilize the comments area to note any special situations that may exist in this particular template. Consider it a place to put a “bread crumb” trail to other possible editors of the template itself (it’s a good idea to think of the “you” that might have to revise this document in a year or more from now as being a totally different person than the “you” of today; so be nice to your future self.)

Appendix 2: Attachment Template Folders

Templates can be assigned to a folder or folders to help organize the templates for ease of use by your end users.

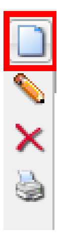
Please note that once a template is assigned to a template folder, it is not visible in the User Interface unless you have selected that folder first. However, you can associate a specific template with multiple template folders.

If you haven’t configured any Template Folders yet, Applied Epic comes with several folders by default. Any of these folders can be edited or deleted as they do not affect the templates associated with them.



To create template folders, access “Configure, Attachments” and click on “Template Folders”

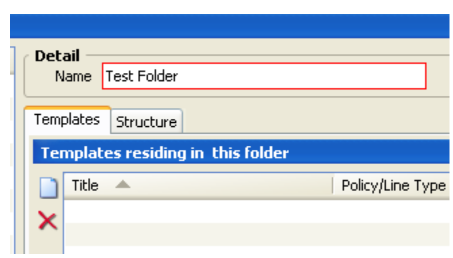
This area defaults to Clients – click on the listview to change to any other entity in Epic to create template folders for those entities.

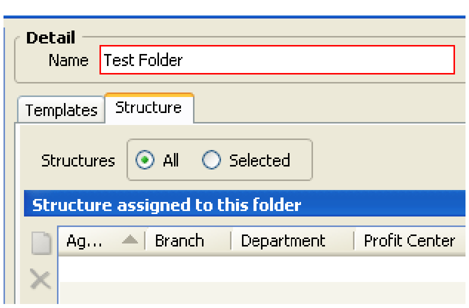


To add a folder, click on the Add Icon

Enter the folder Name

You can then add templates to this folder by clicking on the Add Icon under the Templates tab.



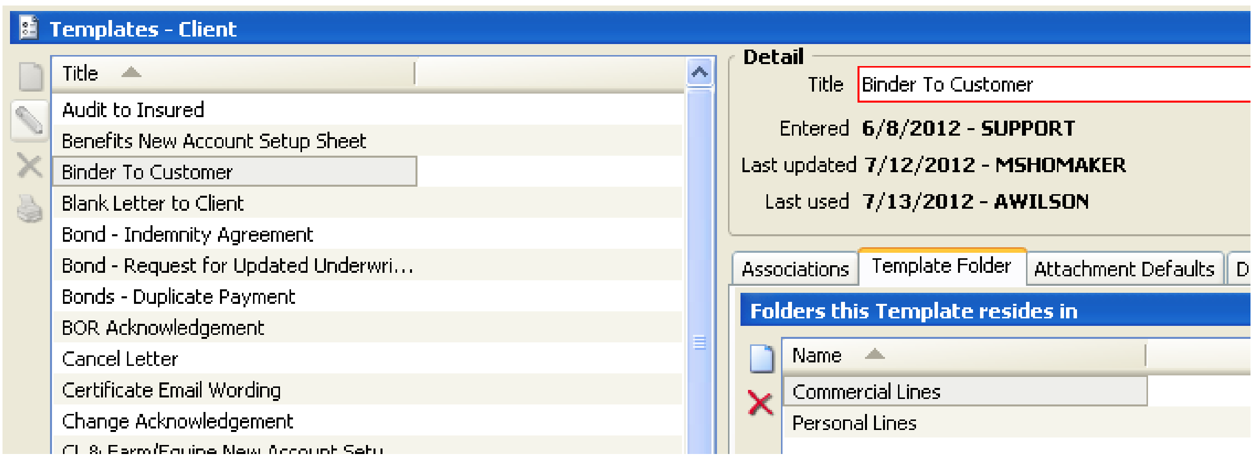


You can apply Structure restrictions to this template which controls access to the templates within the folder based on the End User’s Structure controlled under the Security area of Configure.

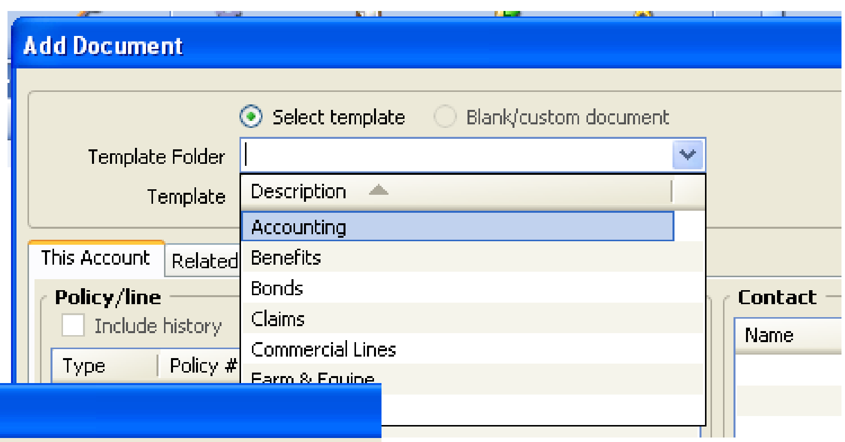
By default, this area is set to “All”. If you click the Selected radio button, then click the Add icon and mark the boxes to the left of each organization to select the restricted structure you want assigned to this template folder. Click Finish to save your changes to the folder’s structure settings.

Once the folder is created, click Add to add another template folder or Finish if complete.

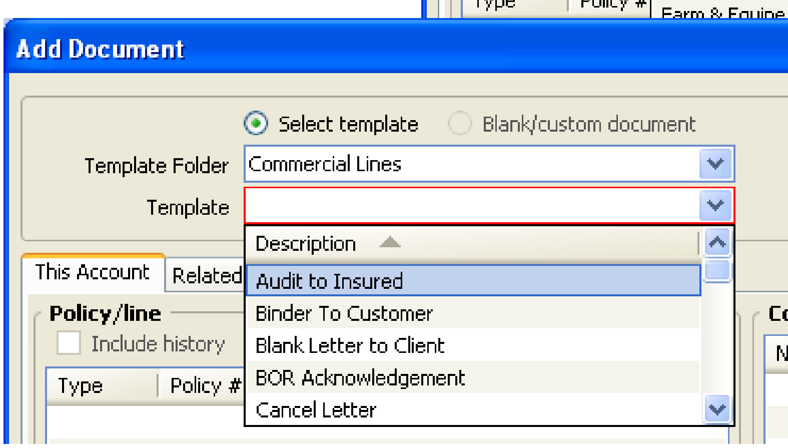
It is also possible to manage what template folders a template is associated with by editing the Template details and clicking on the Template Folder tab:



To merge a document on a client account, once you have clicked, Attachment, Document, the first field that needs to be selected is Template Folder:



Then you will see the templates that have been associated with that folder:



Appendix 3: 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 Epic Interface – Install Free Set – Includes instructions for downloading and Importing templates.
- Intermediate Microsoft® Word® Formatting – Applied Epic – includes Tables, Borders & Shading, Section Breaks, headers & footers, etc.
- Leveraging Microsoft® Word® Styles - Applied Epic
- Applied Epic / Microsoft® Word® - IF, ASK, Math, SET, Bookmarks, INCLUDETEXT (Service Roles)
- Applied Epic / Microsoft® Word® – Formatting Numbers, Text & Dates
- Applied Epic Proposal Workshop / Advanced Clinic – this session has no handouts and will be based upon questions and issues brought to the group by the attendees.