AMS360 2018 R1 Release Notes

We are pleased to release AMS360 2018 R1. With each release, we are improving and updating AMS360 to provide you with the best possible experience.

To print this topic in its entirety, in the upper-right corner of this Help page, click **Expand all**, and then click **Print** .

System Requirements

Required

Minimum workstation requirements as shown in the AMS360 2018 R1 Online Configuration Guide (Doc ID:14400) on My Vertafore. You must be registered with My Vertafore and signed in to access this document.

Supported

Browser

- Microsoft Internet Explorer 11 (32-bit) with default settings
- Microsoft Edge
- Google Chrome

Operating Systems

- Microsoft Windows 7 (32-bit and 64-bit)
- Microsoft Windows 8.1 (32-bit and 64-bit)
- Microsoft Windows 10 (32-bit and 64-bit)

Microsoft Office

- Office 2013
- Office 2016

.Net

- .NET 4.7 (required)

For more information about AMS360 recommended and supported configurations, see the Supported Configurations Matrix (Doc ID: 12604) on My Vertafore. You must be registered with My Vertafore and signed in to access this document.

Feedback

We value your feedback to ensure we are working on what is most important to you. If you have an idea to improve the product, you can suggest and vote on product enhancement requests on Vertafore Ideas. On My Vertafore, click **Submit Idea** in the upper right corner of the page. We appreciate your input to help us provide you with the highest quality product.

For more information on using Ideas, please see the following documents. You must be registered with My Vertafore and signed in to access these documents.

- Ideas Overview (Doc ID: 13054)
- How to Submit Ideas (Doc ID: 13049)
- What are the statuses in Vertafore Ideas? (Doc ID: 13055)

What's New

Proposal Builder

Proposal Builder will be available for use in the Fall of 2018. In the event a user selects the proposal builder button on the launch page within AMS360, they will be directed to a "coming soon" landing page.

eDocs and Message Download Integration

What are eDocs and Messages?

TransactNOW's **eDocs and Messages Download** was designed to enable carriers to securely send agencies a variety of messages and document attachments. It provides real-time connectivity from carriers to agencies for:

- Sharing policy or claim related information such as bill payment notifications, cancellations, reinstatements, claims status, claims payments, First Notice of Loss Information, etc.
- Providing general notices.
- Sharing additional documentation, such as DEC pages, insured or agency copies of policies, pending cancellation notices, claim activity, underwriting notices, etc.

With eDocs and Messages download, carriers have the ability to securely send all types of notifications, policy activity messages, and attachments to their agents. Agencies are able to streamline workflows, and access carrier specific information faster and easier in an automated "push" mode, instead of the current model of going into multiple carrier partner sites and "pulling" the data daily. This feature is free and available to all Vertafore AMS (Agency Management System) users.

Before

Agents receiving downloaded eDocs and Messages had to manually save and/or move the eDocs and Messages transactions they received daily. This was all done manually, from within the TransactNOW mailbox.

Now

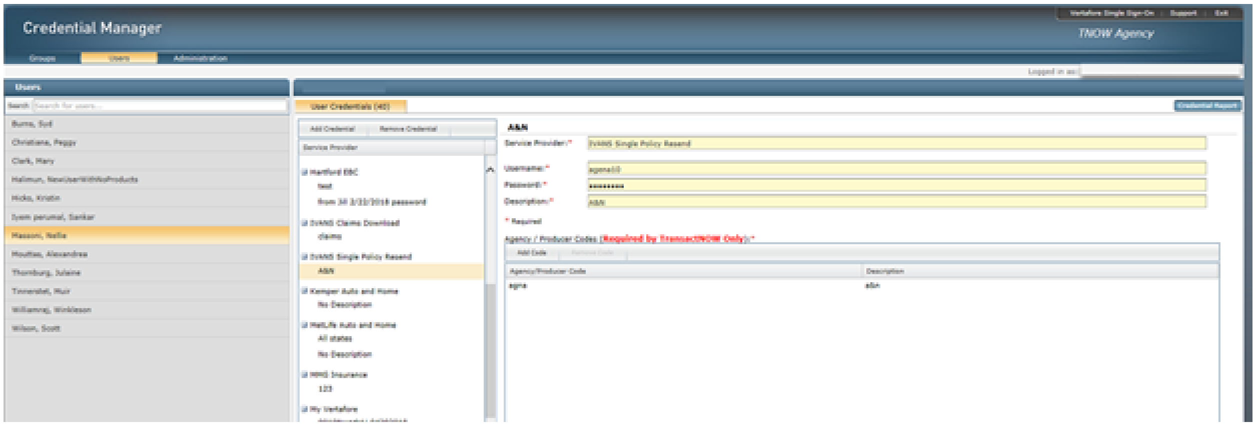
With TransactNOW's eDocs and Messages download integration, customers still receive eDocs and Messages downloaded from participating carrier partners, but they now have the added benefit of automatically routing these where they want them to go.

Requirements for eDocs and Messages integration:

- Agency Must be:
  - AMS360 Online
  - VSSO Enabled
  - Set up to receive eDocs and Messages in TransactNOW / Credential Manager
  - Set up the eDocs and Messages Configuration Screen
  - Set up with participating carriers, in order for the carrier to send the eDocs and Messages to your IVANS mailbox
    - NOTE: There are two ways to find the list of participating carriers:
      - Go to www.vertafore.com > Resources > Connectivity Lists and select either the AMS360 Carrier Partner List, or the TransactNOW Carrier Partner List.
      - Go to My Vertafore, and search for "Carrier Partner Lists" (Doc 5745).

Credential Manager – Setup

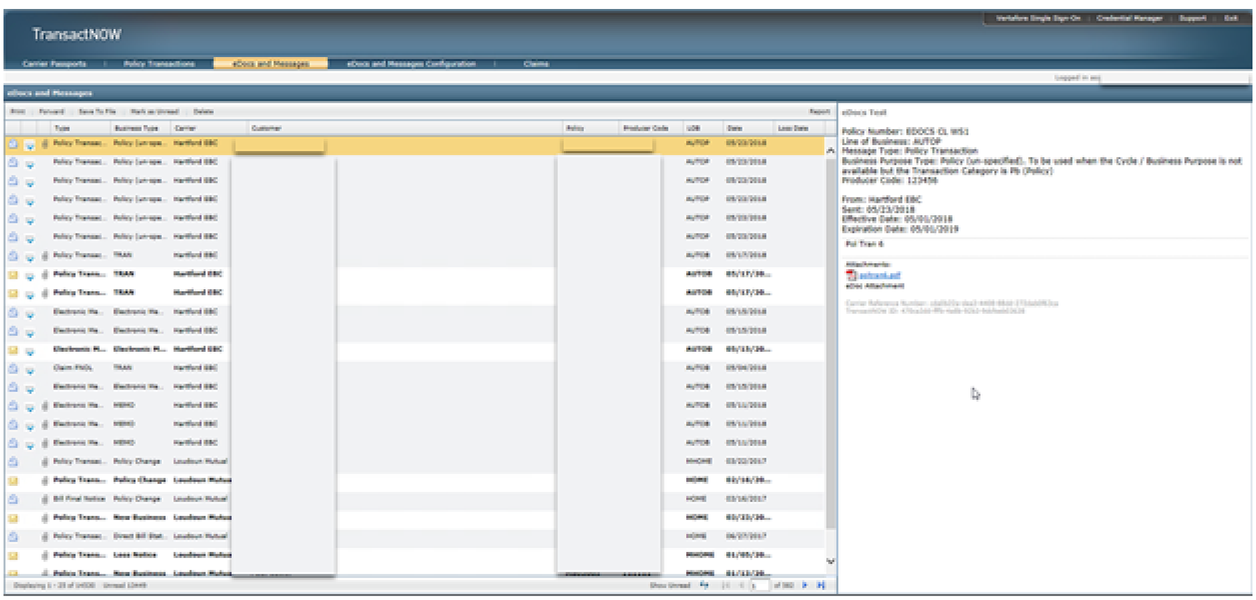
- To receive eDocs and Messages download, users must input their IVANS Y account information in the **Credential Manager**.
  - Detailed instructions and videos on how to do this are on My Vertafore (Doc 12564 and/or Article 12901).



Credentials Manager Screen

- Contact participating carriers to request that they start downloading eDocs and Messages to your agency. This can usually be done on the carrier's agency portal.

- To see what types of eDocs and Messages each carrier downloads, go to My Vertafore, and look at each carrier's eDocs and Messages download certification sheet. Here is how eDocs and Messages look when downloaded into the TransactNOW mailbox:



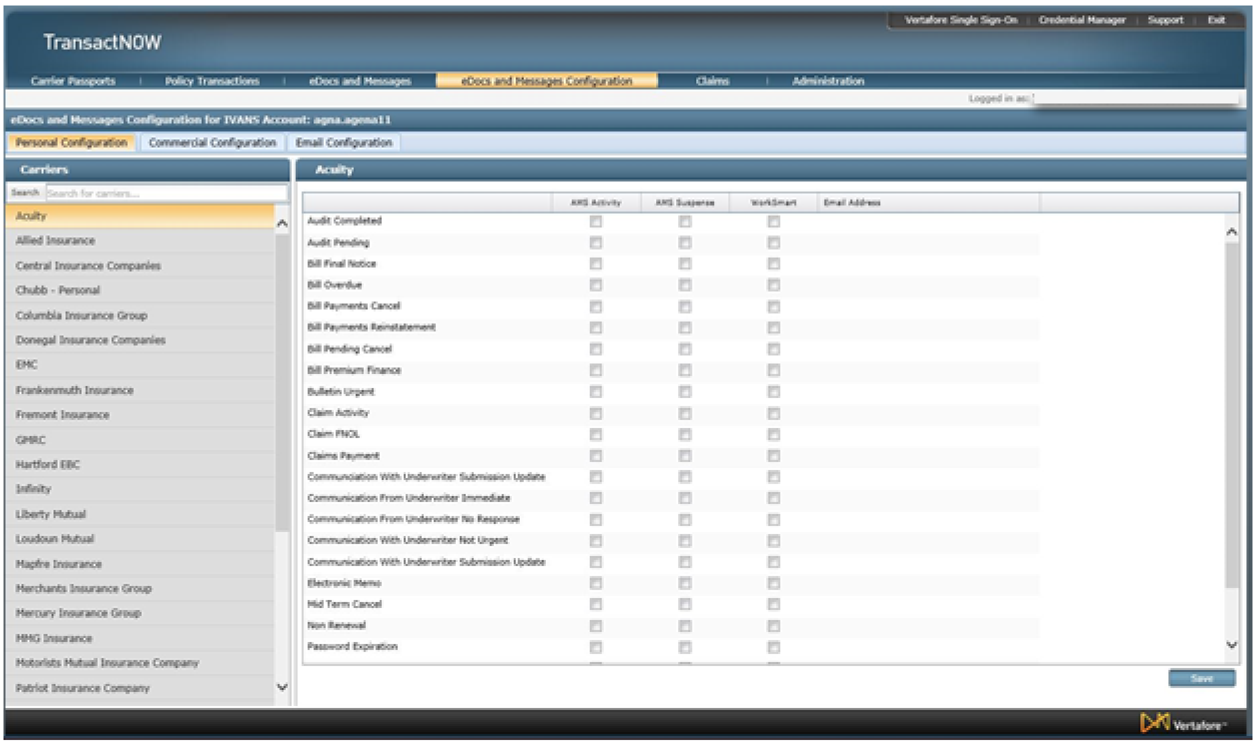
Downloaded Messages in TransactNOW

eDocs and Messages Configuration Screen

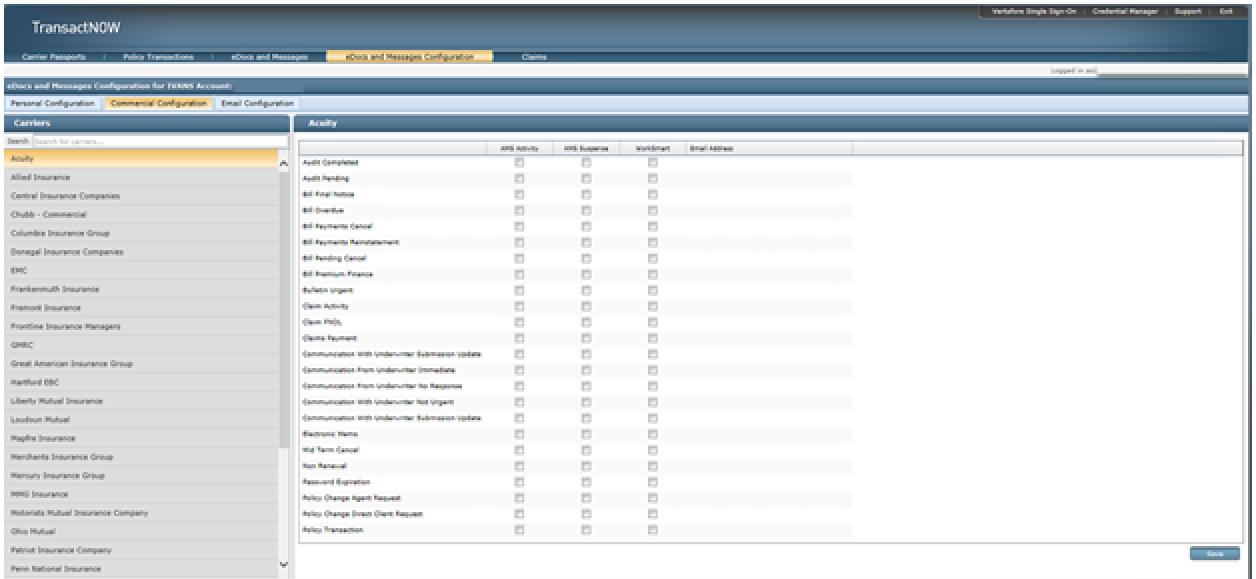
- Go to https://transactnow.vertafore.com/eDocsConfiguration to start your eDocs and Messages routing configuration. You must be logged into VSSO.

- Only the carriers that are certified to send eDocs and Messages will display in the left-most column.

- Determine where you want to route the specific eDocs and Messages types the carriers can send.
    - For a complete list of the types of eDocs and Messages a specific carrier downloads, go to My Vertafore, and look at each carriers' eDocs and Messages download certification sheet.
    - Routing of eDocs and Messages can be configured for Personal Lines (Personal Configuration) or Commercial Lines (Commercial Configuration).
    - Select by carrier, type of message, and whether to route to an Activity or Suspense in the agency management system, or to a WorkSmart email receiver (WorkSmart customers only).
    - Using the WorkSmart email receiver function you can have eDocs and Messages sent to your personal email.



TransactNOW Personal Configuration screen

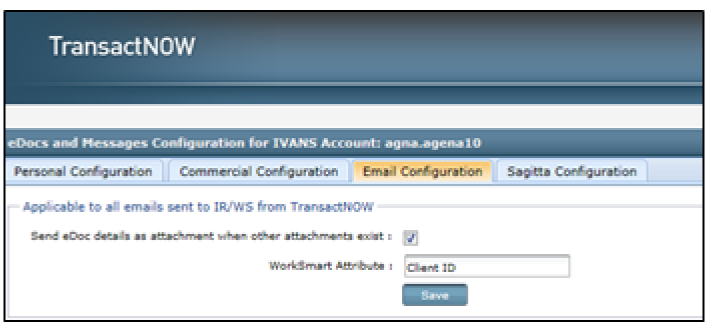


TransactNOW Commercial Configuration screen

ImageRight/WorkSmart Email Receiver Configuration

> If ImageRight or WorkSmart is being used for the eDocs feature, you may need to contact Vertafore to configure email receivers. Please contact your Vertafore Account Manager after adding the new email receivers for further configuration.

ImageRight/WorkSmart customers can set up the configuration to route specific eDocs and Messages types to their email receiver(s). Using the email configuration tab, agents can configure and add an email receiver for future uses.



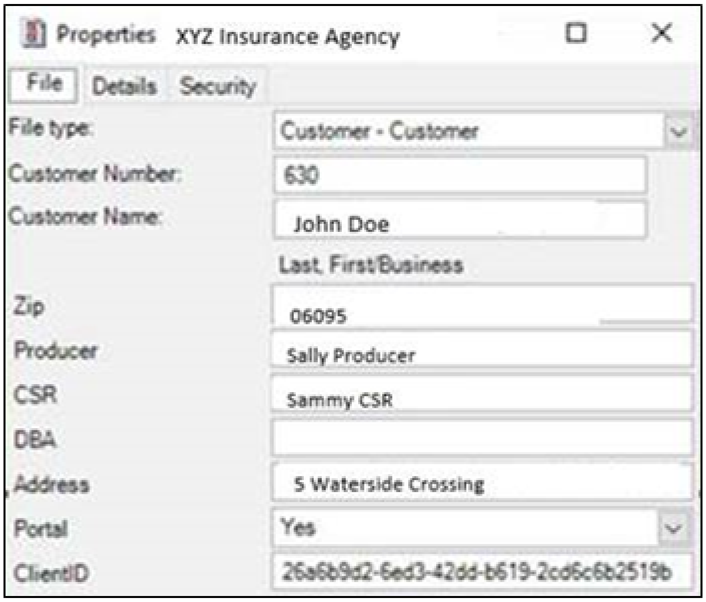
TransactNow: Email Configuration

- **Send eDoc details as an attachment when other attachments exist**: when checked, details from the carrier provided in the downloaded eDoc will be added as a separate attachment in ImageRight or WorkSmart

- **WorkSmart Attribute**: provide the label used in WorkSmart or ImageRight to uniquely identify a customer (for example, “Customer_ID” or “ClientID”). Use the steps below to determine what label should be used
  - In ImageRight/WorkSmart, open a Commercial Lines or Personal Lines file.

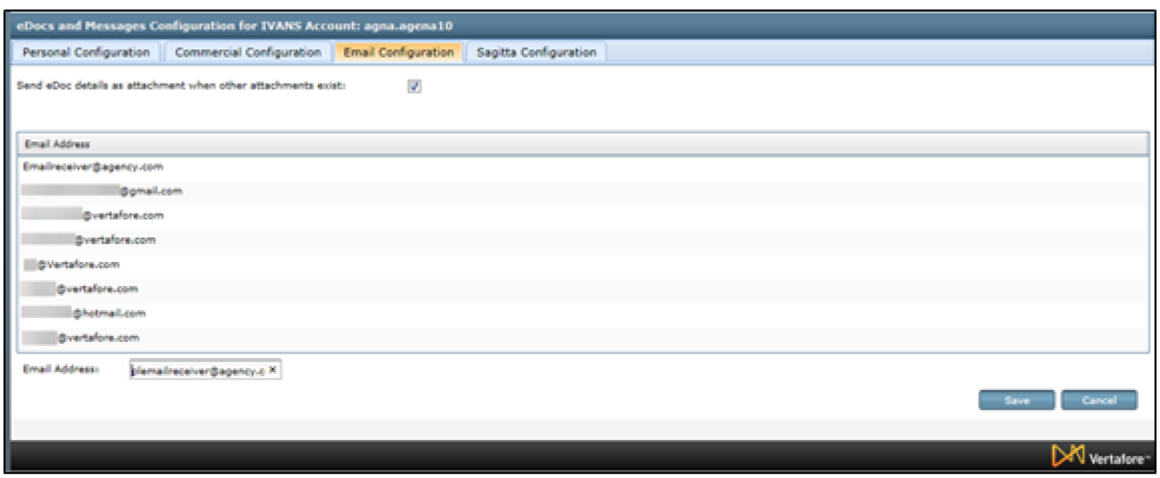
- Right click on the file node in the file tree and select properties.

- In the Properties window, the label used to identify a customer will be shown with other details about the file. In the below example, the label to be used would be "ClientID"



TransactNow: Properties

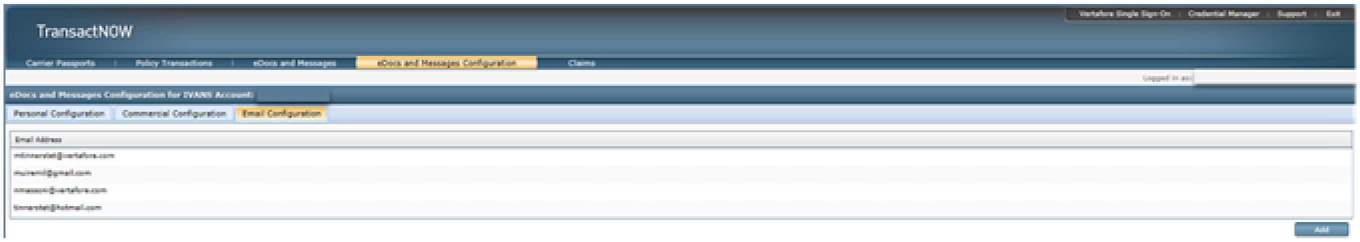
- Email Address Grid: use the **Add** button to add additional email receivers. In the textbox at the below the grid, enter the email address of your email receiver and click **Save**.



Enter email address

WorkSmart Email Receiver Configuration

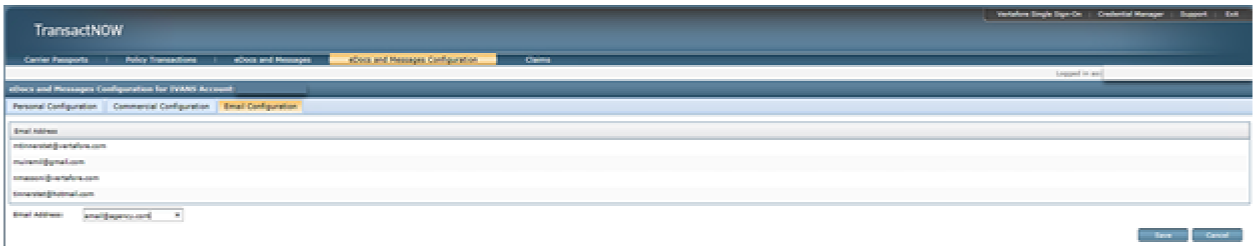
WorkSmart customers can set up the configuration to route specific eDocs and Messages types to their email receiver(s). Using the email configuration tab, Agents have the ability to **Add** an email receiver and **Save** for future uses.



Email Configuration screen

Adding an email receiver

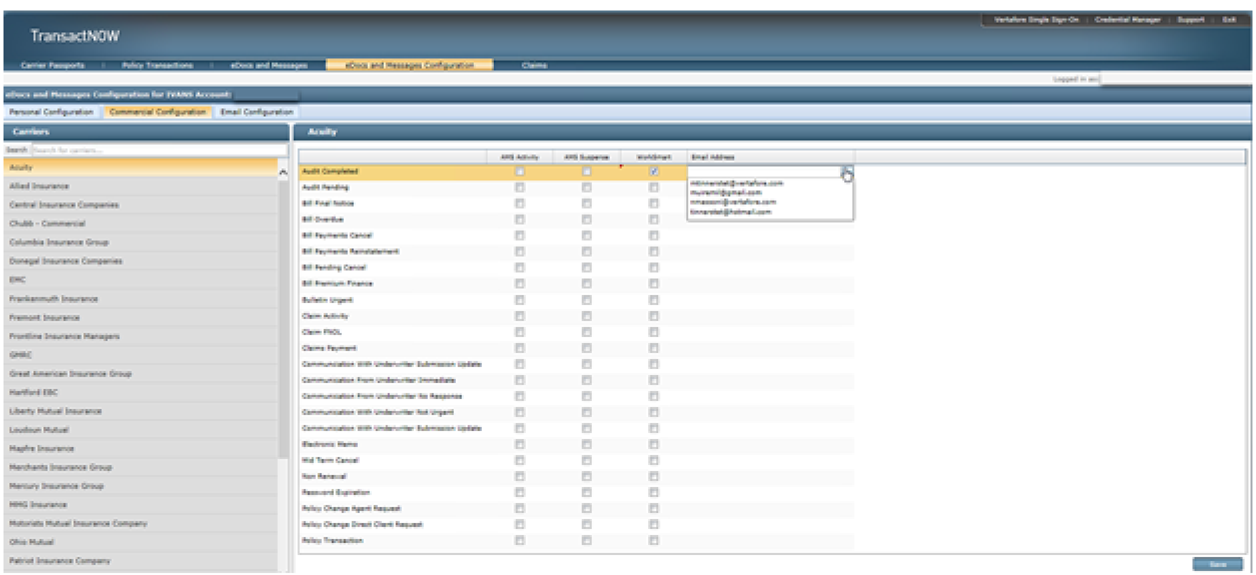
- Enter in the email address of your email receiver and then click **Save.**



Enter email address

Choose Email Receivers from the Drop down

- Once email receivers are configured, a user can select the email receiver they want to route to from the drop down.

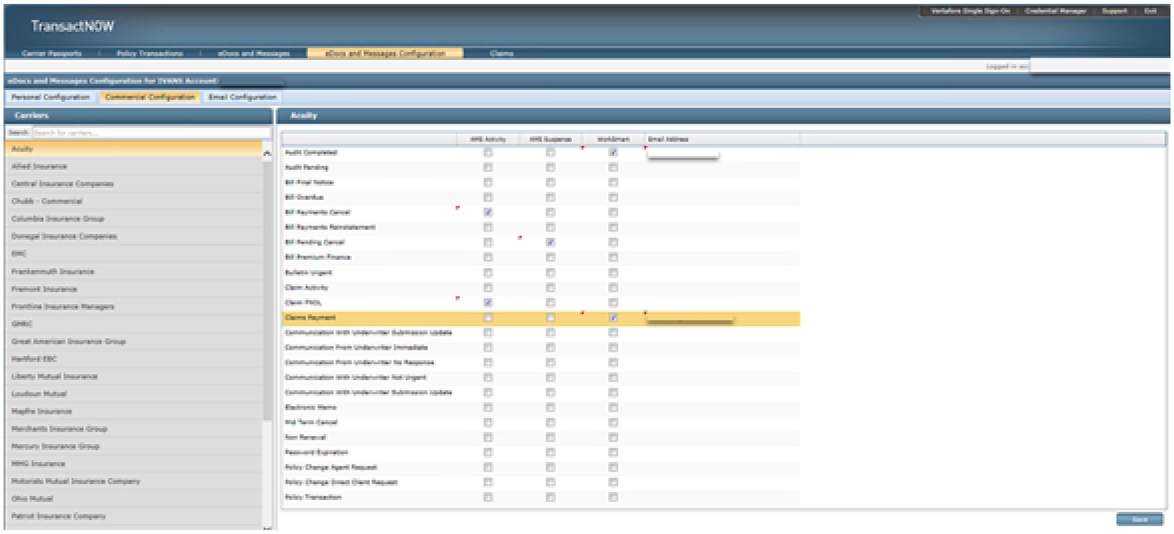


Select email

Routing eDocs and Messages to AMS360 Activities or Suspense

- Check the corresponding boxes and click **Save.**

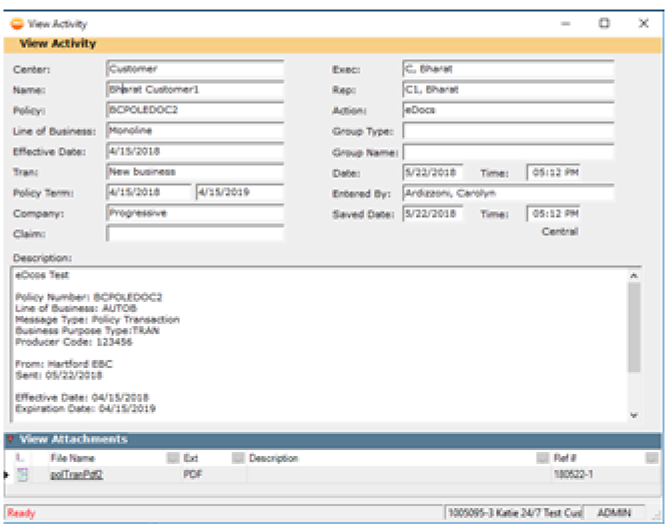
- Currently, selecting the activity option or document type is unavailable.



Save changes

AMS360 Activity View

- eDocs and Messages that are configured to route to Activities within AMS360 look like the sample below, with the **Description** populating with details downloaded from the carrier. You can also view attachments here.



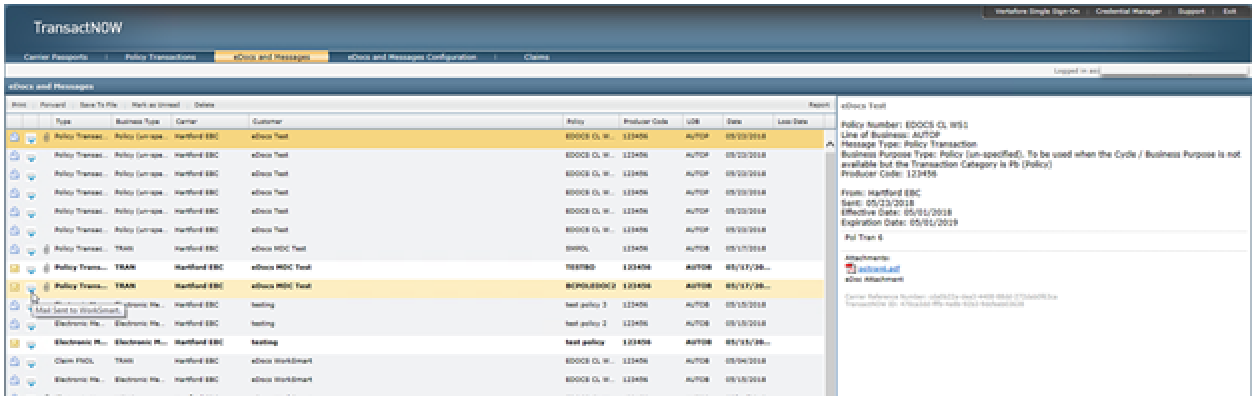
Description of eDocs screen

TransactNOW Changes

Once the eDocs and Messages routing is configured, the eDocs and Messages tab in TransactNOW will be updated to indicate the status of each of the eDocs and Messages received.

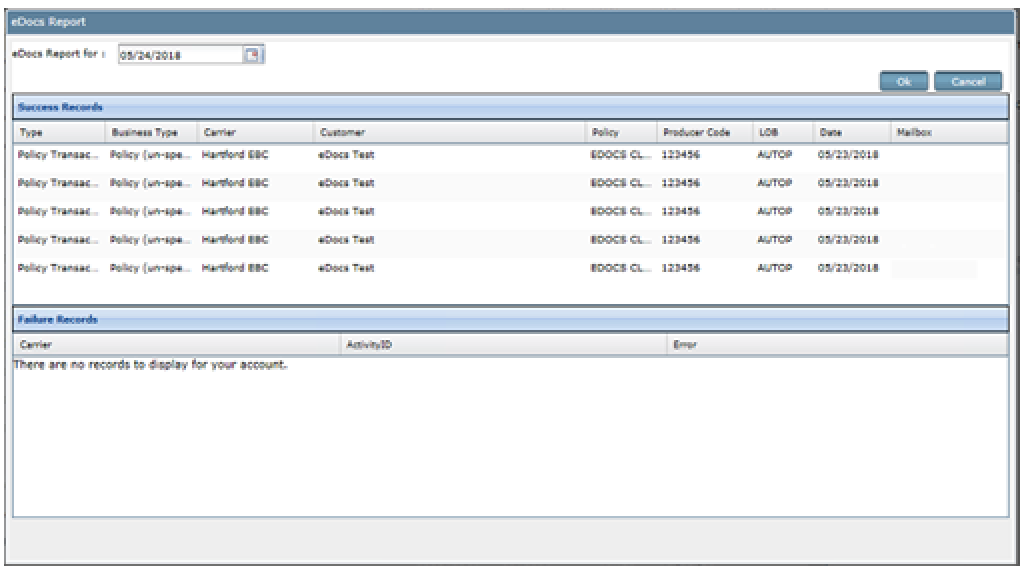
- No Icon – indicates that there is no routing configured for that particular carrier and eDocs and Message type combination

- Blue envelope Icon – Downloaded to management system
- Blue envelope Icon with a checkmark – Sent to WorkSmart
- Red exclamation point icon – Bad data and/or cannot be downloaded



eDocs and Messages status screen

- Click on the **Report** button to view eDocs Report Screen.



eDocs Report screen

eDocs- Writing Activities in AMS360 will link to AWS Storage Site

- TransactNow setup will let users choose where they want the documents to go.
- In AMS360, there is a new Activity action called **eDocs**.
- When sending to AMS360, documents will be stored in a new **Doc Storage** space.
- A suspense will be created to notify the CSR when a document has been updated.
- Unmatched eDocs will remain showing in TransactNow.
- Online agents now have access to Vertafore Single Sign-On (VSSO).

- Worksmart integration is now available.

Vertafore Messenger

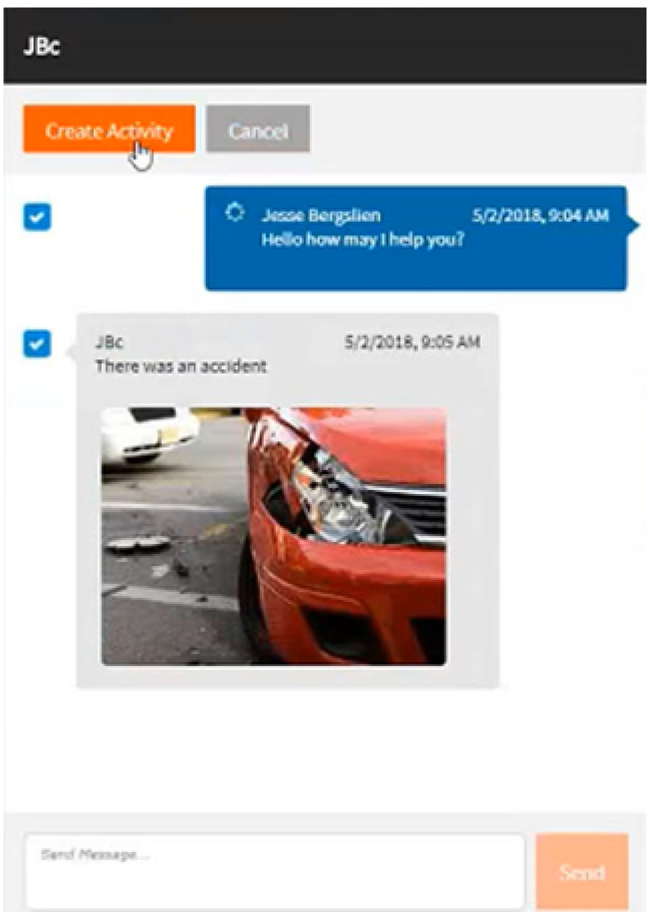
Before

When customers sent attachments through text message, agents would have to open Vertafore Messenger on their cell phones, download the attachments, send it to their work email account, and import those attachments into AMS360. This was both time consuming and an unsafe handling of confidential customer information.

Now

You can now receive and save attachments within Vertafore Messenger as long as the number used to receive text messages is not a 1-800# (this only applies to agencies that have ported a number to use for text messenger).

> The Multimedia messaging service is only supported on non-toll-free numbers.



Picture Message Conversation screen

> To view more information on Vertafore Messenger, including an instructional guide, click here.

Accounting

Acquisition Book of Business Tracking

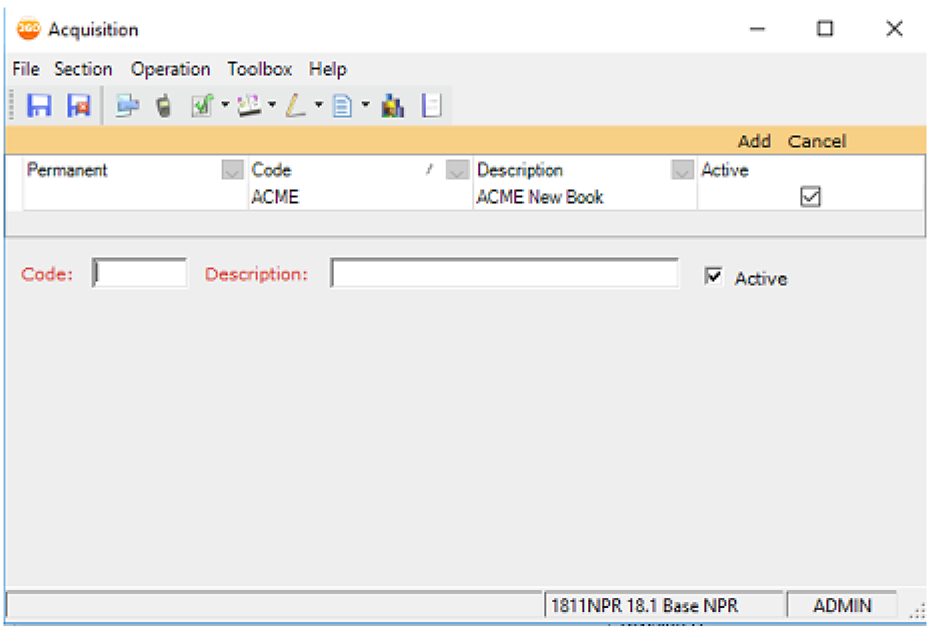
Before

You were not able to track different types of acquisitions so they could gather insights on the growth of their book of business.

Now

You can track different types of acquisitions and use those types to gather insights into the growth of your acquired books of business. Categories for acquisitions are defined at an agency level and then assigned to your customers. To ensure acquisition types cannot be altered once entered for a customer, security can be set to **view only for the acquisition** field.

To view more information on the new Accounting features, including an instructional guide, click here.



Acquisition Code and Description screen

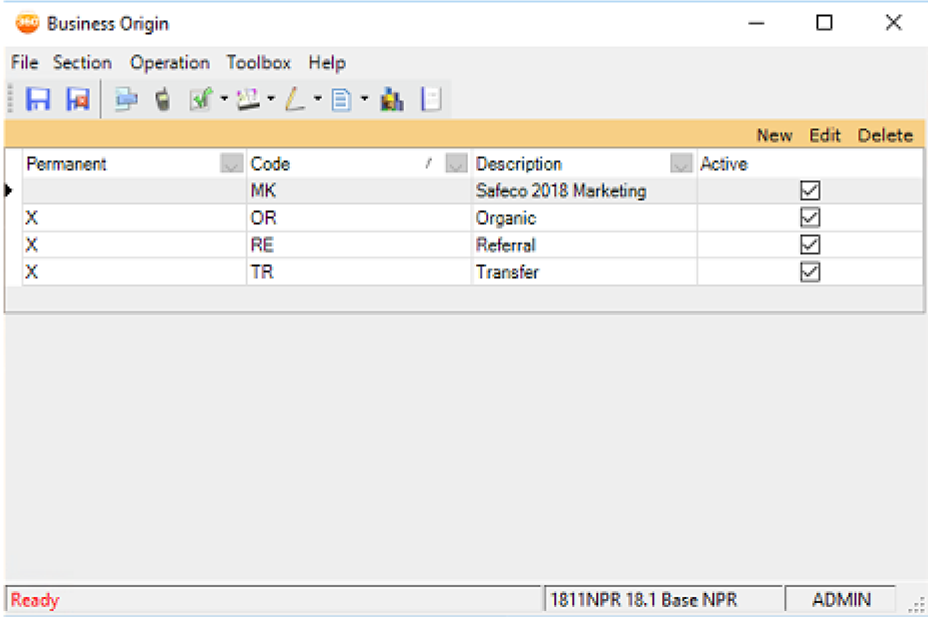
Business Origin

Before

You were not able to define employee commissions that varied between businesses that were coming into an agency or track revenue generated by that business.

Now

Business origin allows the tracking of revenue generated by the defined source of the business, at an agency and employee level. Setting up agency defined, business origins and associating commission splits by those origins, makes plugging correct commissions much easier for account managers.



Business Origin Screen

My Agency Reports (MAR) – VSSO enabled, online agencies only

The Customer Analysis, Book of Business and the Production reports have all been updated with the Business Origin type.

To gather insights into the revenue that is being generated by a specific origin of business, the Production Analysis and/or the Book of Business reports can be run to show current revenue amounts for any defined type.

You will now have access to these new report enhancements:

- Client Relationship Revenue Report
- Customer Net Balance
- Broker Net Balance
- Finance company Net Balance
- Finance company Aged A/R
- Relationship Revenue
- General Ledger
- Download Report Enhancements

- Customer Aged A/R Enhancements
- Book of Business Enhancements
- Broker Aged A/R Enhancements
- Download Detail enhancements
- Customer Analysis Enhancements

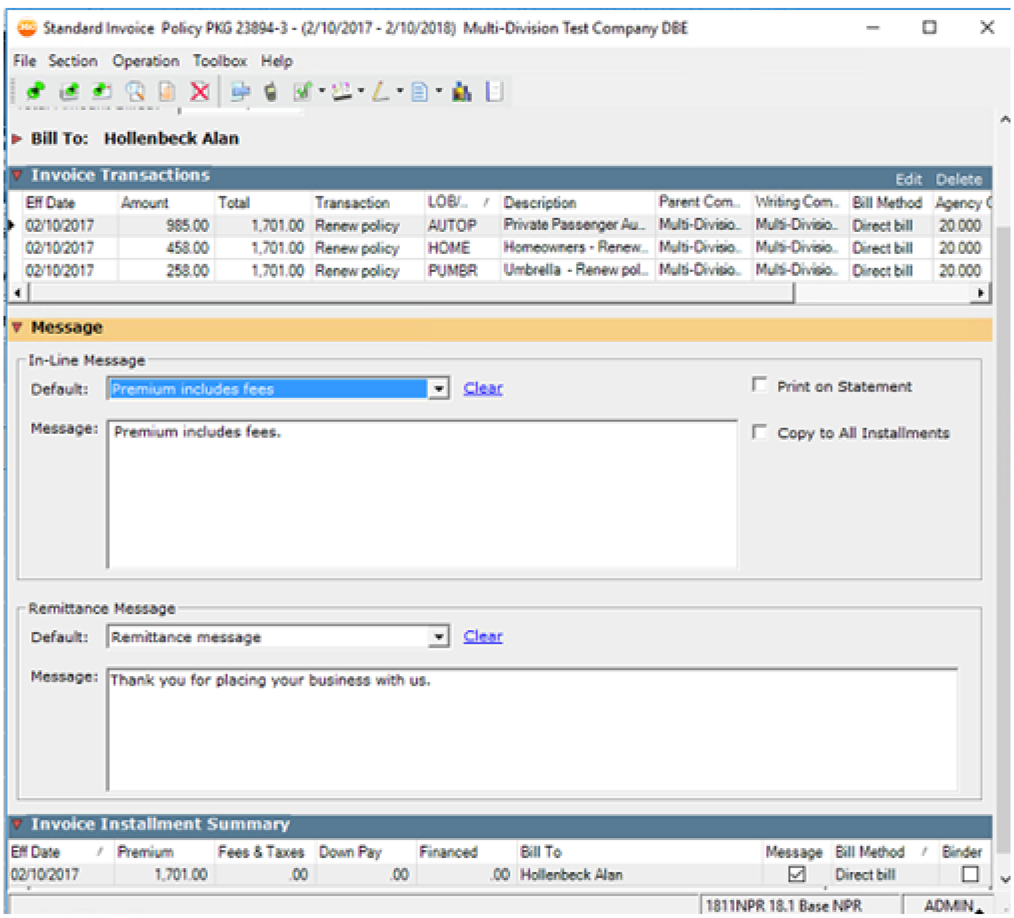
Invoice Enhancements

Before

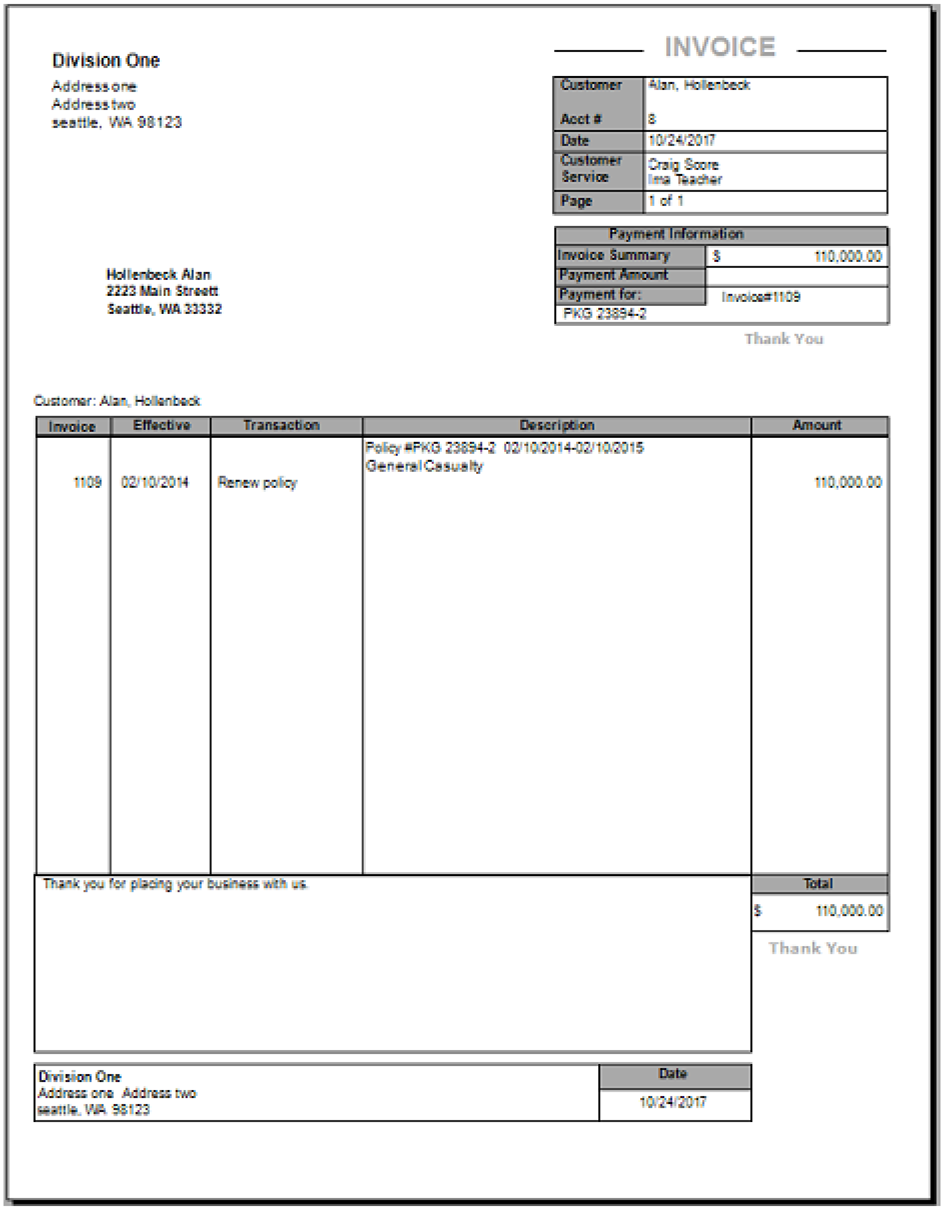
Every time you wanted to include remittance information on an invoice, the remittance description needed to be entered at the time you were either creating or printing the invoice.

Now

Invoice remittance messages can be entered once for the agency and then selected from a drop down list when creating individual invoices or the batch printing of invoices. This saves time and reduces the potential for typos when sending out invoices.



Standard Invoice Policy screen



Division One
Address one
Address two
seattle, WA 98123

INVOICE

Customer	Alan, Hollenbeck
Acct #	8
Date	10/24/2017
Customer Service	Craig Score Ima Teacher
Page	1 of 1

Payment Information	
Invoice Summary	$ 110,000.00
Payment Amount	
Payment for:	Invoice#1109
PKG 23894-2	

Thank You

Hollenbeck Alan
2223 Main Streett
Seattle, WA 33332

Customer: Alan, Hollenbeck

Invoice	Effective	Transaction	Description	Amount
1109	02/10/2014	Renew policy	Policy #PKG 23894-2 02/10/2014-02/10/2015 General Casualty	110,000.00

Thank you for placing your business with us.

Total
$ 110,000.00

Thank You

Division One Address one Address two seattle, WA 98123	Date 10/24/2017

Invoice

Sub-Ledgering General Ledger Accounts

Before

Sub-ledgering GL accounts by Insurance, Brokerage and Finance companies was restricted in AMS360.

Now

With this new feature, you can define new, detail general ledger accounts and require them to be sub-ledgered by either insurance, finance or brokerage companies. Once defined as a sub-ledgered account, all transactions that are processed through these accounts require that the appropriate company be entered.

An example of how you might want to use this new account might be to sub-ledger a new income account by Insurance Company to use when depositing commission income checks. The GL report will then itemize that account by company.

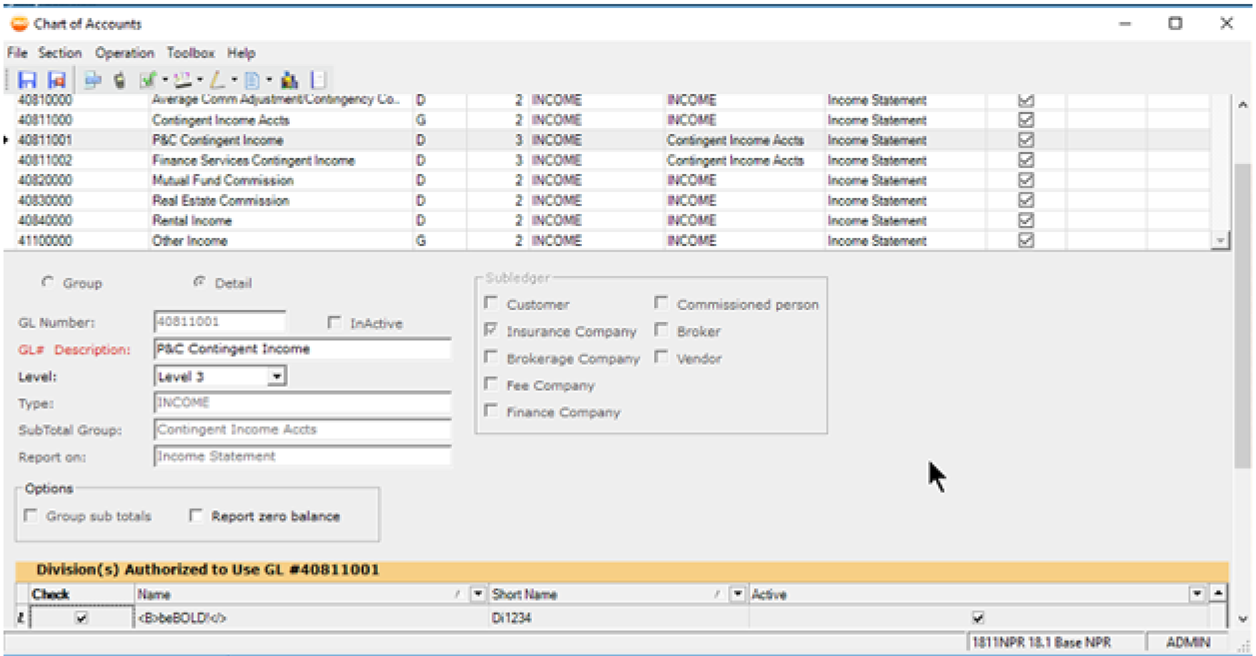


Chart of Accounts screen

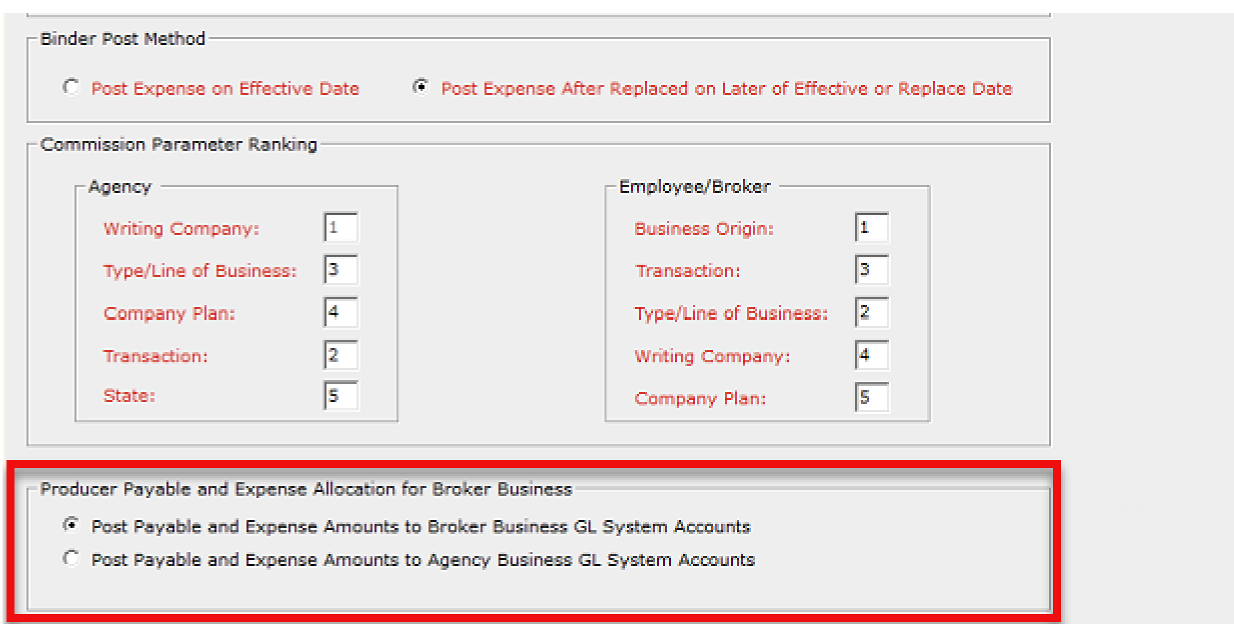
Producer Expense Tracking Option

Before

When producers were included on broker policies, the producer payable was tracked along with the broker payable in the broker expense accounts.

Now

You will have a choice to track the producer expense along with your agency expense, payable accounts, or with your broker expense accounts.



Producer Expense Tracking Options

Statement Changes

Before

The Account Current statement, detail grid did not show the finance company accounts receivable balance fields.

You also could not see who entered or last changed the account current statement in the register view.

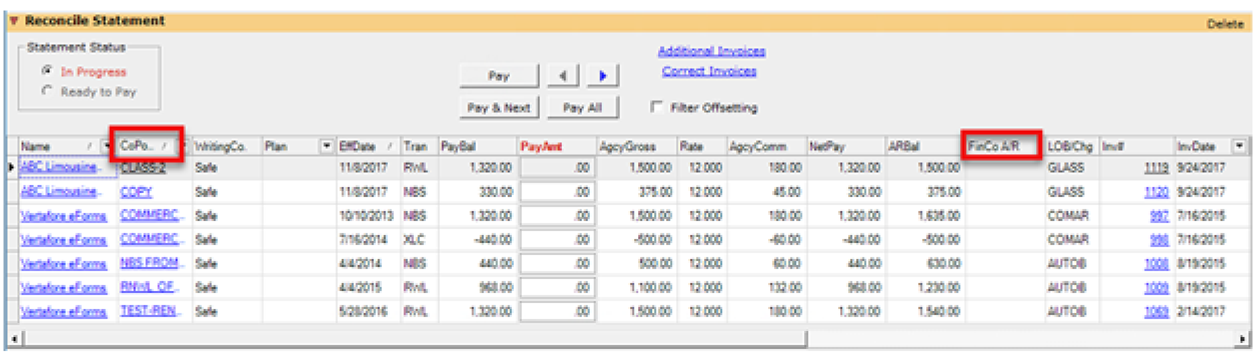
Now

You can view the finance company's receivable balance in the FinCo AR grid column. This amount is also reported as part of the Account Current reports, CSV file layout. You can also link directly to the customer and policy from the grid view.

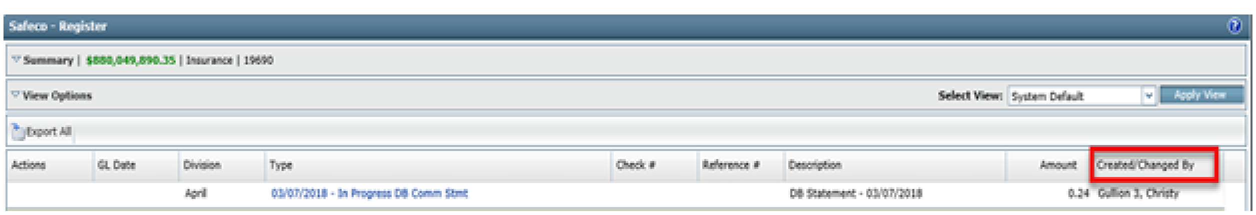
The Account Current statement view now displays the employee that entered or last changed the statement.

> For all records prior to the 18R1 update, that are 90 days old, the name of the individual running daily process will display as the responsible party. That is because during the archive process (which runs as part of daily process) we were updating the Changed By field to be the person running daily process.
>
> After the 18R1 update, this field will no longer be changed and you will see the appropriate responsible person on the register row.

For all Download Direct Bill Entry Statements, you will notice DBO as the Created/Changed By person as the AMS360 system creates these statements.



Customer and Policy, Finance CO AR Bal field



Created/Changed by

Activities and Documents in Financial Center

Before

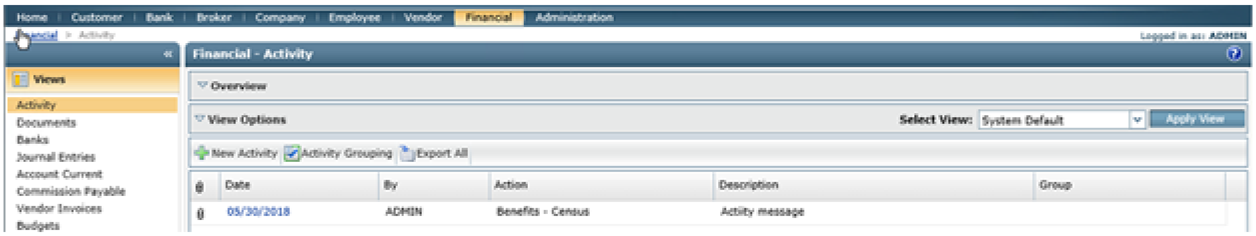
The Financial Center could not be used to document actions or store financial documents.

Customer could not store financial documents securely and limit access based on security settings.

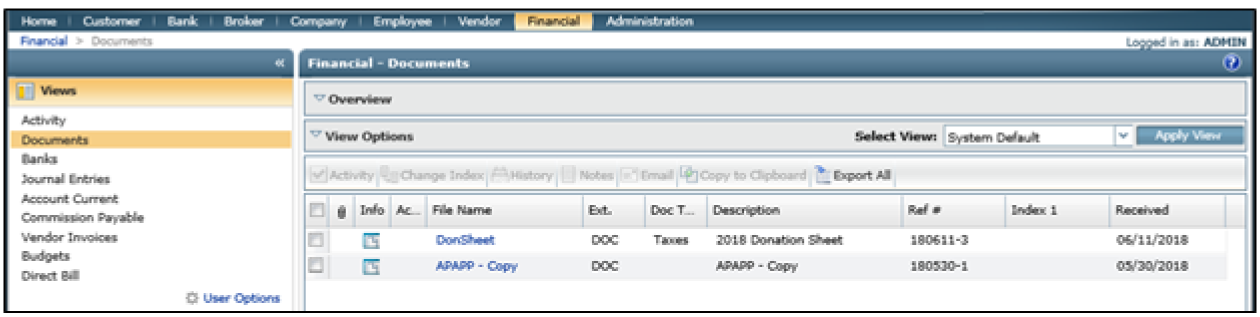
Now

You will be able to enter Activities related to the Financial Center and store financial documents securely.

Note: To enable these options, click on the **Financial Centers- User Options** and add Activity and Documents as a ‘Selected View’.



Financial Center – Activity View



Financial Center – Documents View

Update “Payment For” on Invoice

If there are multiple invoice numbers that print on a single invoice page, the system will not display the invoice number in the customer header area. This reduces the confusion on what invoices are included in the customer balance.

Estimated Revenue Amount - Auto-Calculate For Download Transactions

Estimated revenue tracked at the policy level will now update when transactions come in from download.

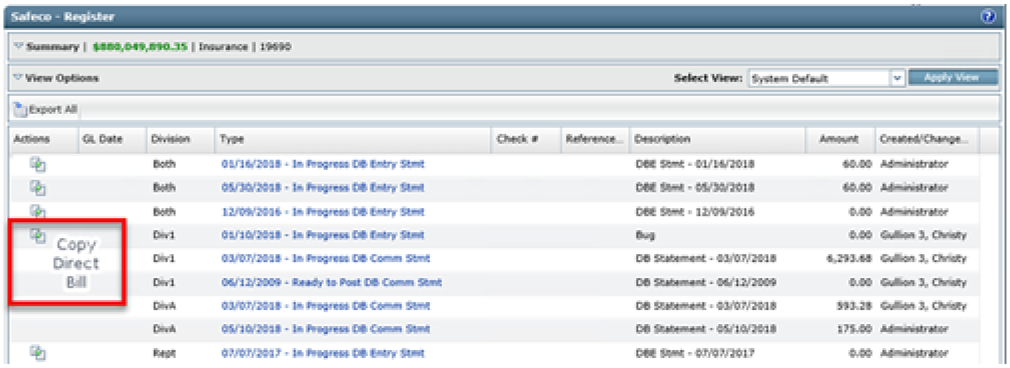
Copy Direct Bill Entry Statement

Before

Direct Bill Entry Statements (DBES) with the same clients and payments every month had to be re-entered every month.

Now

The copy Direct Bill Entry Statement feature will save you time by copying all transaction rows entered on a previous statement. Once copied, adjustments to the statement can be made prior to posting. The copy feature can be done from the Company or the Financial Center.



Copy Direct Bill screen

Click [here](#) for the Copy Direct Bill Entry Statement Walk-through.

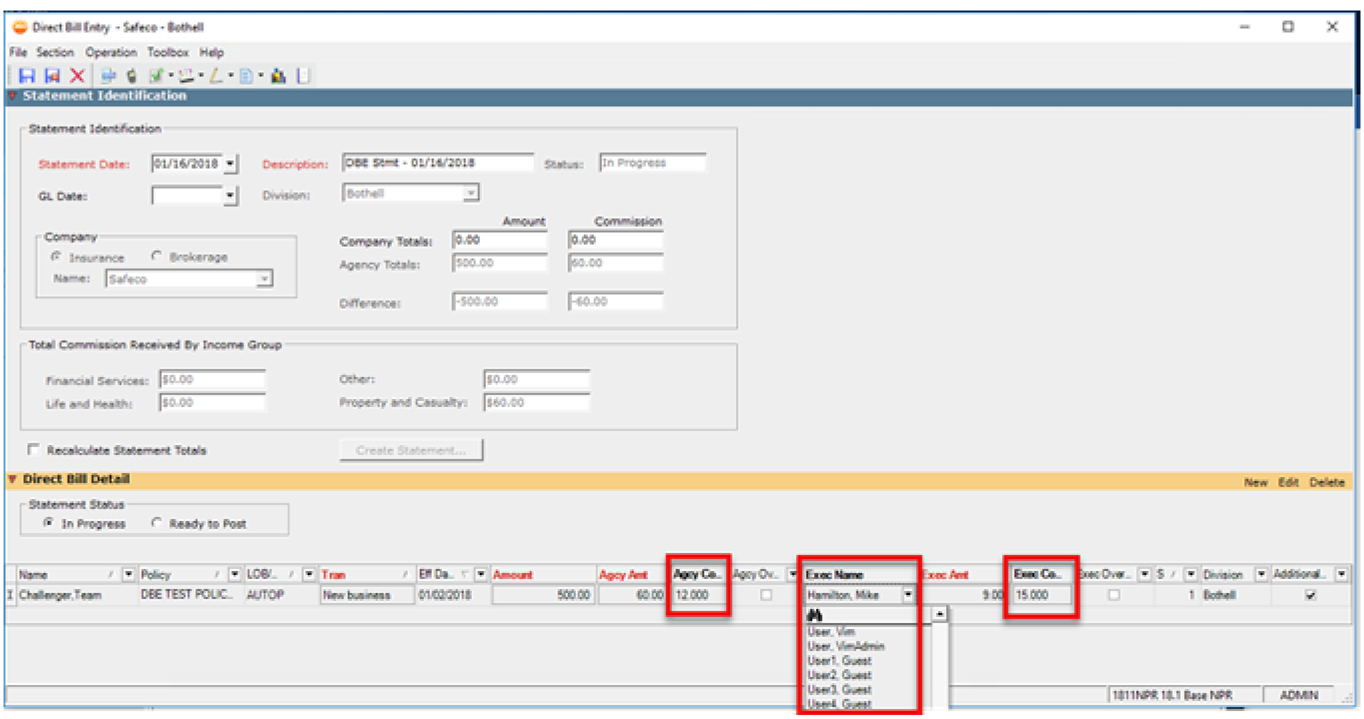
Direct Bill Entry Detail View Improvements

Before

To change the executive name, commission percentage or, to change the agency commission percentage the grid transaction row had to be expanded.

Now

These fields can be edited directly in the grid. You can also see if there are additional personnel entered for this policy.



Direct Bill Entry screen

Updated Download Customers/Policies Assign “Accounting Transactions” Grid

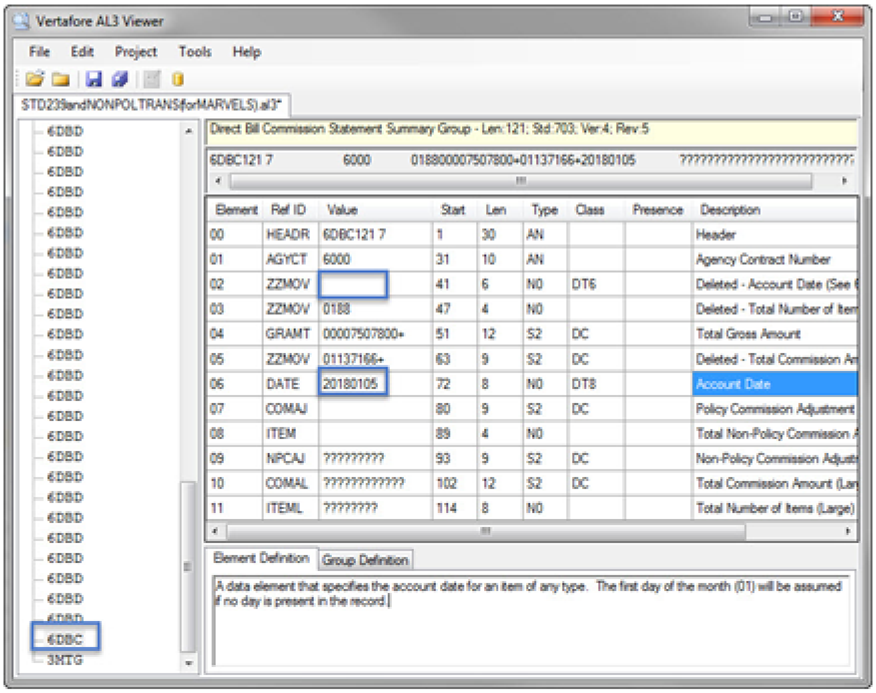
Before

You weren't able to distinguish data from a certain company statement when there were many, and you were also unable to determine when that data had loaded to Accounting Assignment.

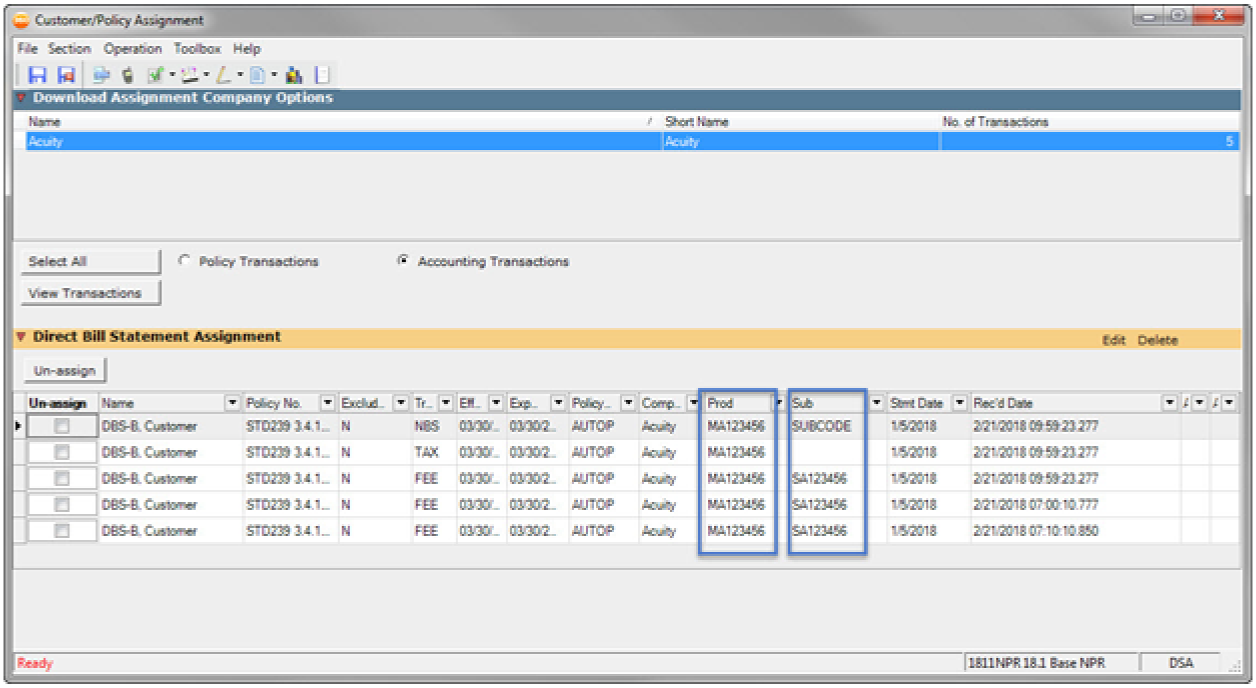
Now

The Accounting Assignment Winform now provides two fields to help orient the user around the data, those are:

- The **Stmt Date**: column will display the "Account Date" if provided by the carrier/company in AL3 6DBC06 (or 6DBC02).
- The **Rec'd Date** column the date the data loads into the AMS360 Agency's database.



AL3 6DBC group

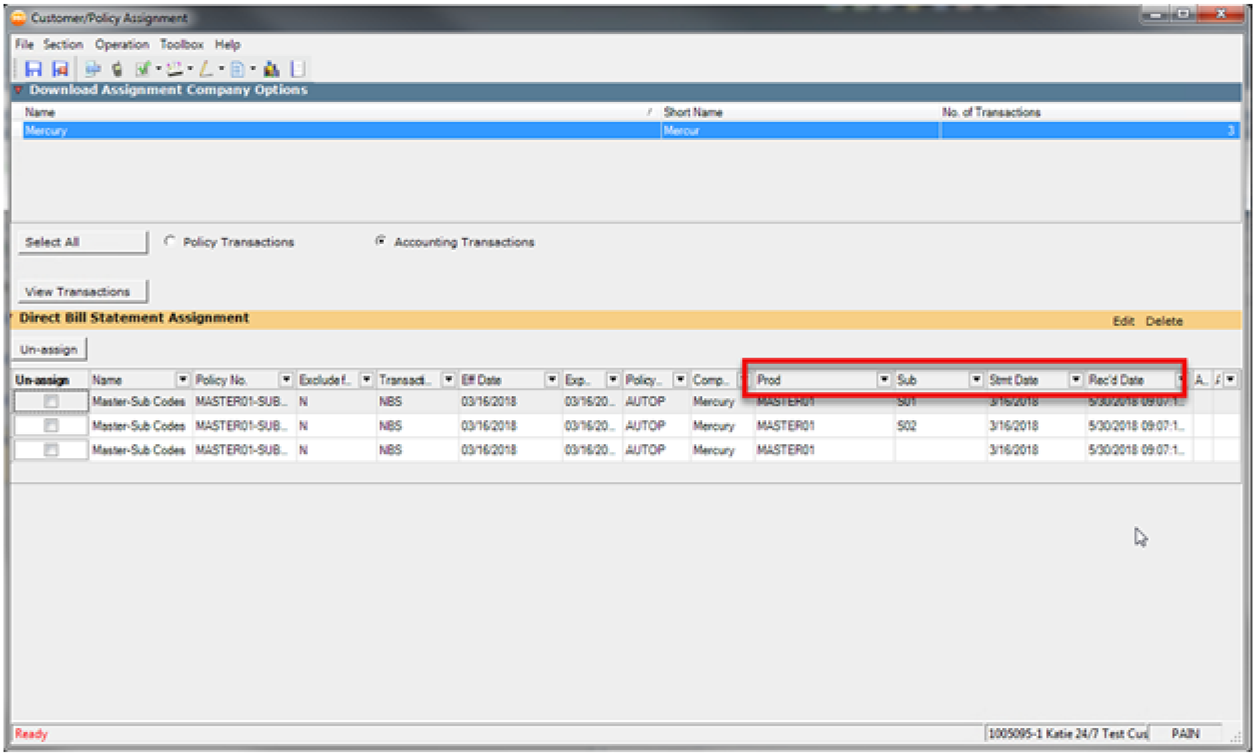


*Added **Stmt Date** and **Rec'd Date** columns*

Download - Customers/Policies Assigned for Accounting

Now

- Added grid columns for **Prod** (master) and **Sub** codes, as done with Policy in the last release.
    - The logged-in user will only see rows that the user is configured to see/access.
- Added **Stmt Date** (Statement Date), which is the date the statement was created by the carrier.
- Added **Rec'd Date** (Received Date), which is the date this data processed and could not find a policy match to relate/match.



Direct Bill Statement Assignment added columns

To view more information on the new Accounting features, including an instructional guide, click here.

Automated Document Distribution

Before

Without this feature, you needed to manually schedule the distribution of letters, faxes, and emails.

Now

With Automated Document Distribution, you can save time by distributing documents on an automatic recurring schedule. There is a new **Preferred Method** of Distribution field; AMS360 Online users can now select Print, Email, or Fax as preferences for customer document delivery.

This feature is visible only to AMS360 Online users with VSSO.

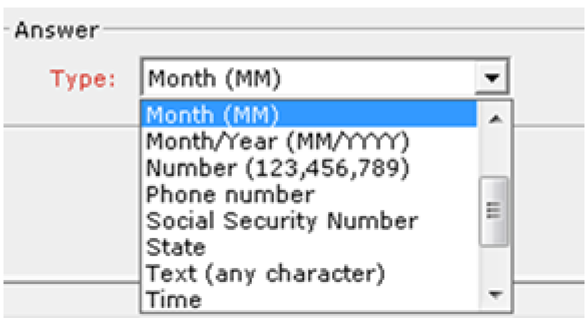
1. To access the **Preferred Method of Distribution** field, open a new or existing customer's information from the AMS360 Customer Center. This field is located towards the bottom of the form.

2. Selections for this field are **Email**, **Fax**, or **Print**. If the field is left blank, it will default to Print (although the field will still appear blank). Letters, including envelopes and labels, will automatically be part of a print batch.

Preferred Method of Distribution

In order for this automated distribution to correctly interact with jobs, both the **Preferred Method of Distribution** and the **Profile Answer Type** will need to be populated. The **Profile Answer Type** can be updated at each customer level to the correct **Month (MM)** format.

3. To update this field, navigate to the **Administration Center**, click **Customer/Policy** on the left toolbar, and then click **Profile Questions**. Click **New** and then click **Month (MM)** in the Answer Type section.



Profile Answer Type

There are new security items for the Home Center **Distribution** view, defaulted to Owner and Admin users. Additional security groups will need to be manually added to access this view.

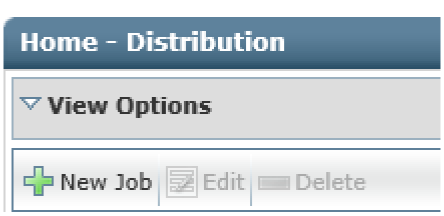
If you have the correct security access, you can access the **Distribution** view by navigating to the **Home** tab and clicking **Distribution** in the left-sided toolbar.

4. Within the **Views** tab in the left-sided toolbar, the **Distribution** view will be at the bottom of the **Views** list.

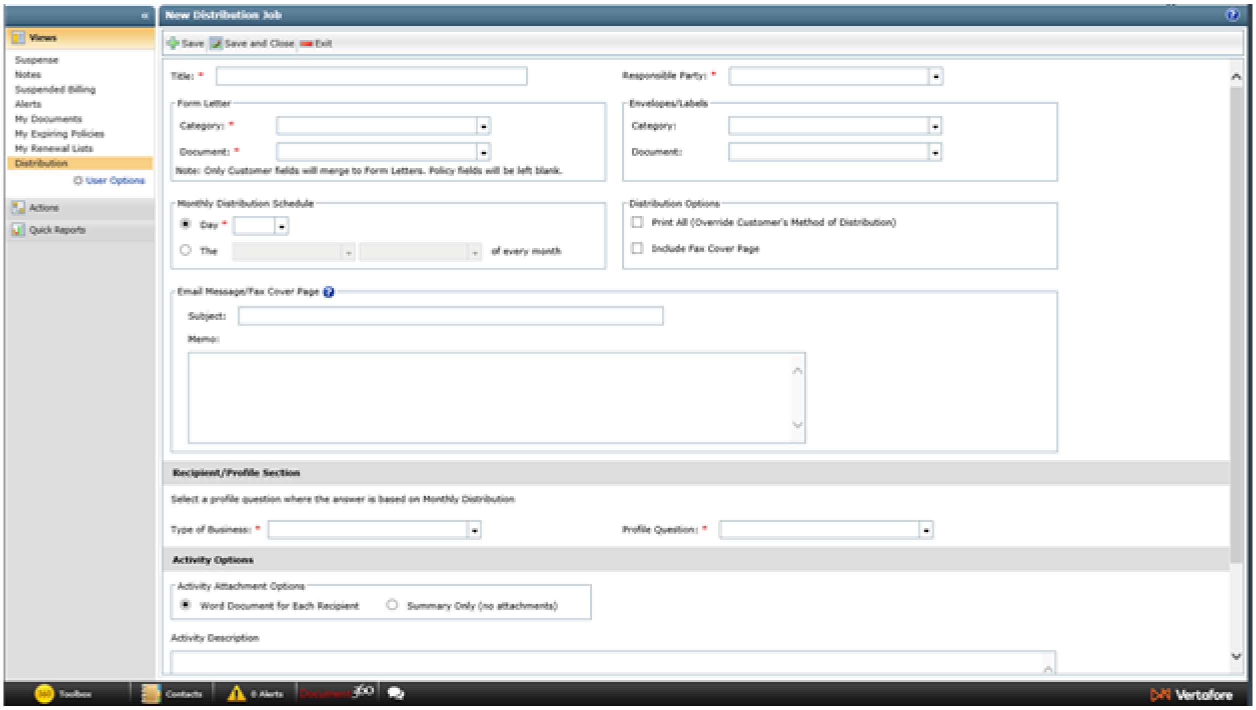
New Security Items:

Distribution View - New Distribution Job

5. Click the **New Job** button to set up a new distribution job.



New Job



New Distribution Job

The **Responsible Party** drop-down will only display for AMS360 Online VSSO users.

- **Form Letter** and **Envelopes/Labels** will only merge **Customer** fields.
- **Print All (Override Customer's Method of Distribution)** will print all letters, regardless of previously specified Customer Preferred Method.
- The recipient/profile question will only show for those with the Answer Type **Month (MM)**.
- An activity will be logged with or without form letters attached.
- No form letters attached to the original AMS360 v1.0 Base List will appear in the Form Letter Category/Document and Envelopes/Labels Category/Document.
- **Email and Fax Subject Memo** will be part of the **Activity Description**, not a separate attachment.
    - A new activity/suspense action called **Automated Distribution** has been added.
- **Edit Distribution Job**
    - This will carry over all changes from the New Distribution Job for editing.

- **Delete Distribution Job**
    - This will delete jobs.

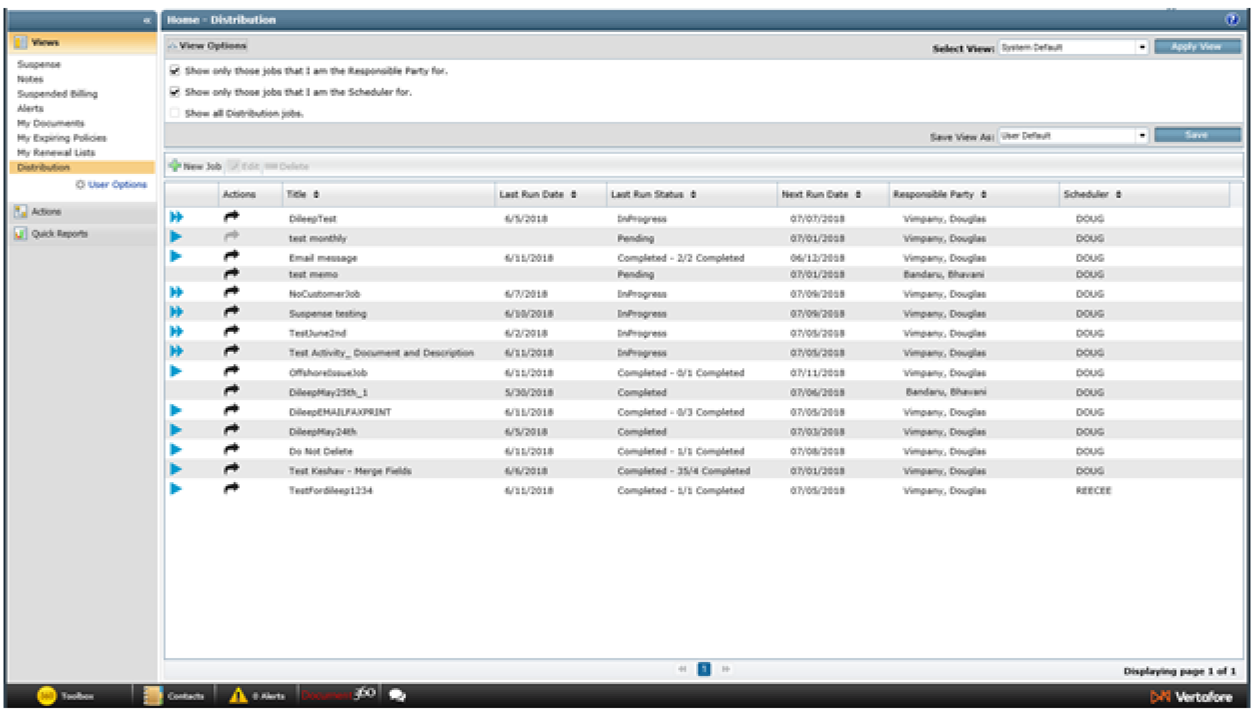
- View Options Checkbox: **Show All Distribution** Jobs
    - In **View Options** at the top of the **Distribution** view, there is an option to **Show All Distribution** jobs.

Home Center Distribution View

Includes the following features:

- Only the **Responsible Party** will be able to see the **Run and Resume Jobs** button. They will receive a suspense five days prior to the specified **next run date.** The new activity/suspense action of **Automated Distribution** will be default.

- There are icons to indicate the status of a job.

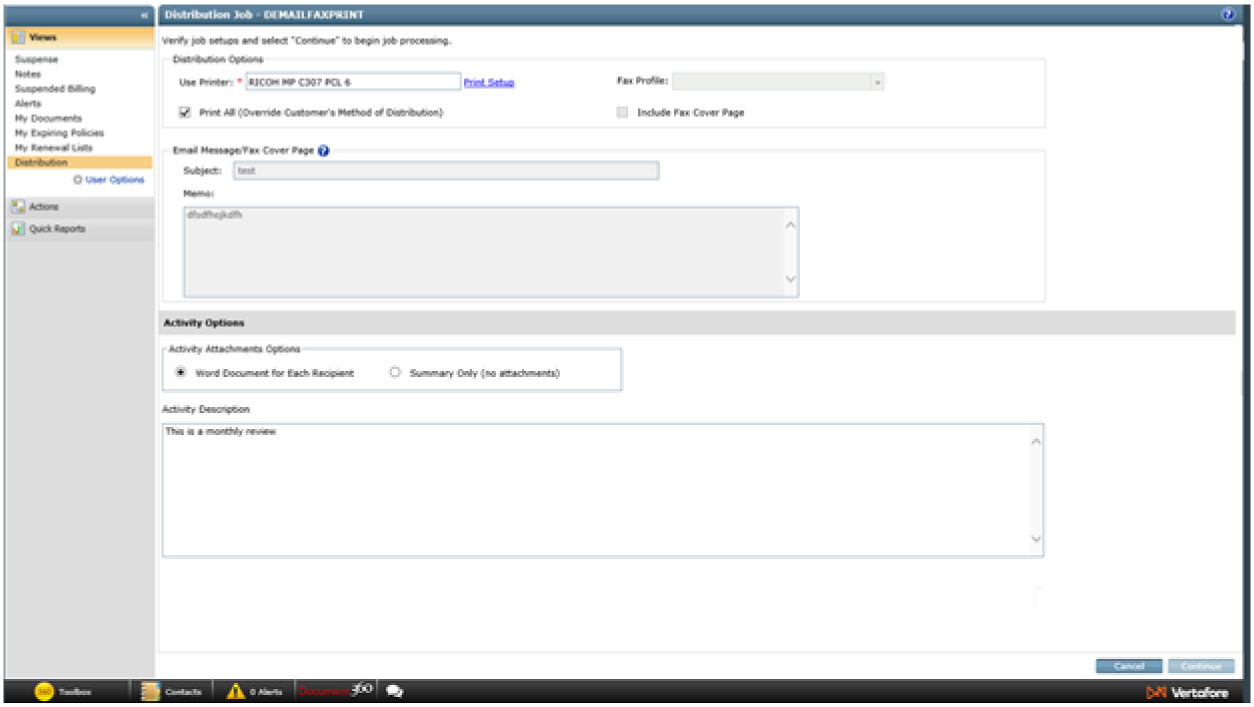


Distribution Status

- The **Run Now** button will take the user to a verification form. This is where the **Customer Preferred Method** takes effect.
    - If any of the **Distribution Options** are gray/disabled, this means the customer does not have those distribution options set up in the **Customer Preferred Method** field.

- **Run Now** can be selected multiple times, and could run for the same customer list. However, the list can change if the customer methods are selected or profile questions are answered.

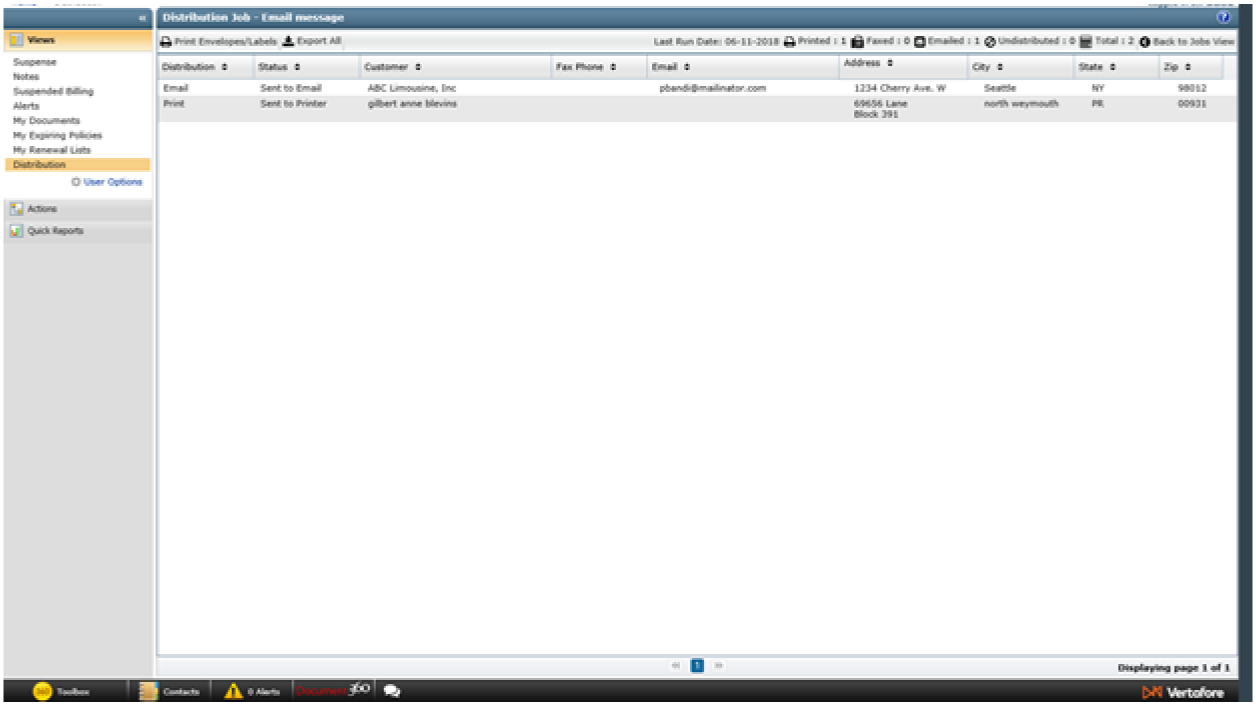
- After clicking **Run Now**, a Verification Form window will display; click **Continue** at the bottom of the form. A window with the job results will display, with a message that results are currently loading.



Distribution Job

- If a job failed to print, email, or fax, the **Status** column will show **Failed** with one of the following reasons:
    - Unable to Send to Printer, Fax, or Email.
    - Activity creation failed. Please run the job again.

- From this point, you can **Print Envelopes/Labels** and/or **Export All** results.



Distribution Job - Email

Download Enhancements

XLN Transactions Do Not Set the Policy Status to "Cancelled"

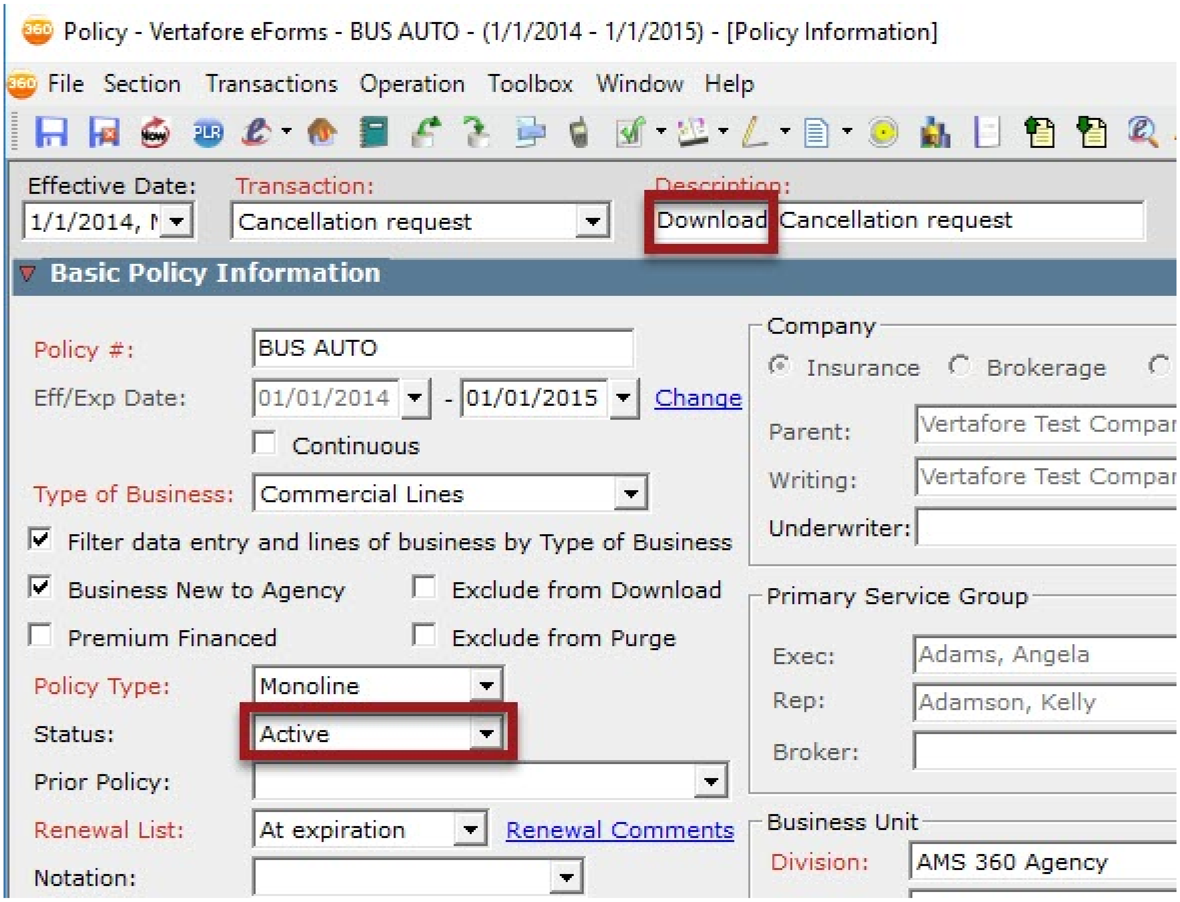
Before

Both **XLN** (cancel notification) and **XLC** (cancel confirmation) transactions would change the status of the Basic Policy Information to Canceled.

Now

XLN transactions received in download will no longer set the status of the Basic Policy Information's status to Canceled.

XLC transactions will continue to set the Basic Policy Information's status to Canceled.



Cancellation Status screen

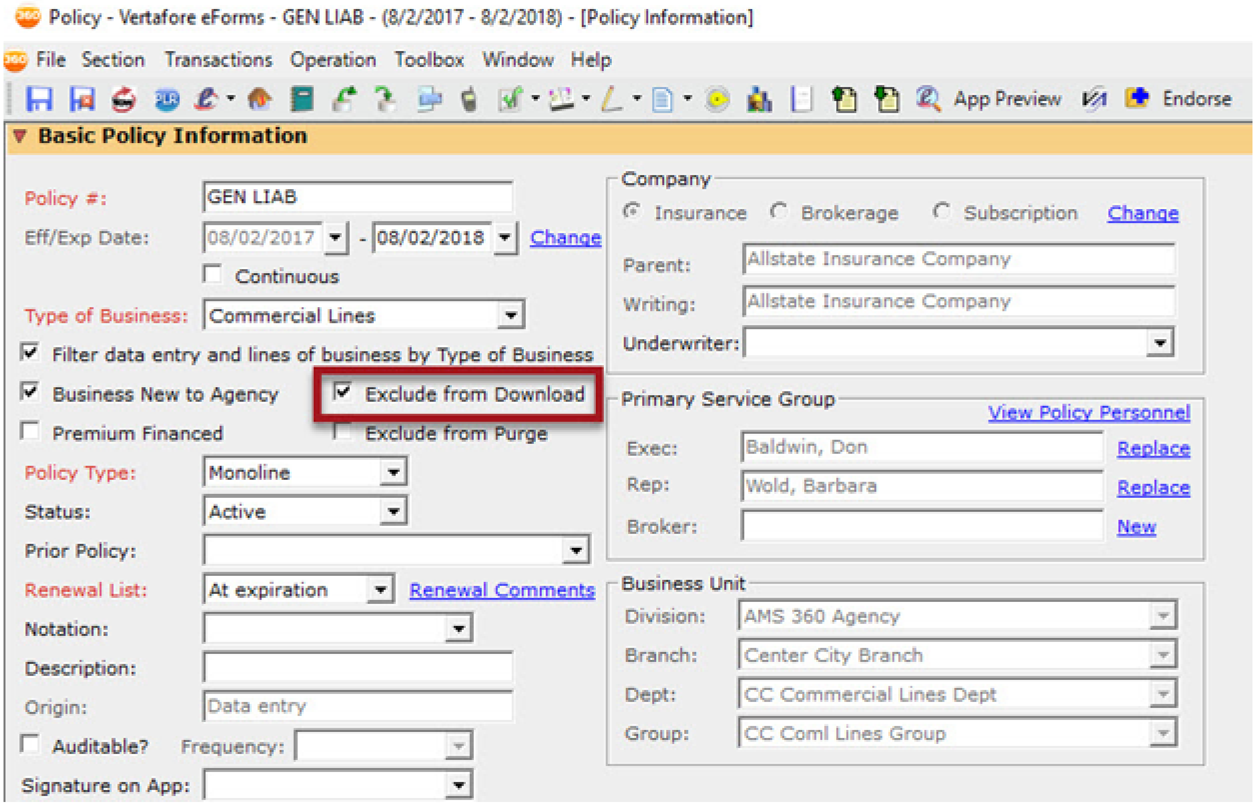
Exclude a Policy from Receiving Downloads

Before

There was not an option to exclude policies from receiving download transactions.

Now

There is now a checkbox called **Exclude from Download** that will prevent any download transaction from automatically applying to the policy. This is in the **Basic Policy Information** section for a policy.



Exclude from Download screen

Moved Claim Payment Types into Appropriate Calculations

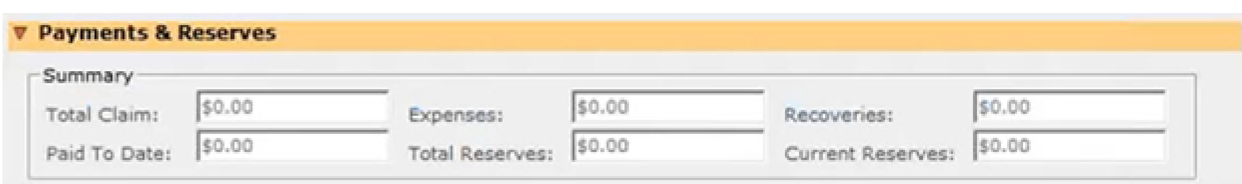
Before

Salvage/Subrogation was not being calculated accurately.

Now

Payment will be treated like Claim Payment and totaled in the **Total Claim** field.

Salvage/Subrogation Recovery will be treated as Salvage; it will be subtracted from **Total Claim** and added to the **Recoveries** field.



Payments & Reserves screen

Excluded Drivers in Commercial Lines are Now Supported

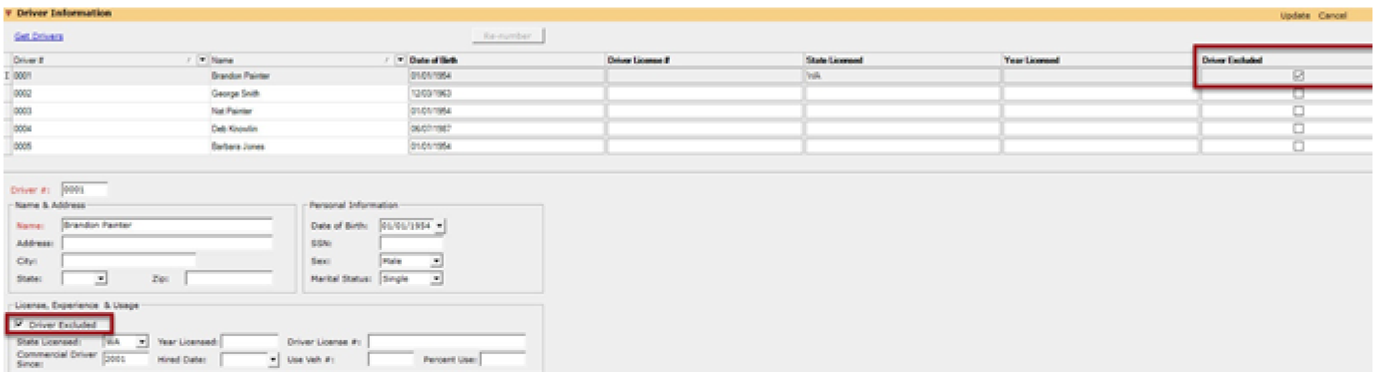
Before

Excluded Drivers in commercial lines were not supported in the **Grid and Drivers** section.

Now

There is now a field in the **Grid and Drivers** section for:

- Business Auto
- Motor Truck Cargo
- Truckers
- Transportation
- Garage & Dealers



Grid and Drivers Options

Retain Nature of Business and Description of Operations

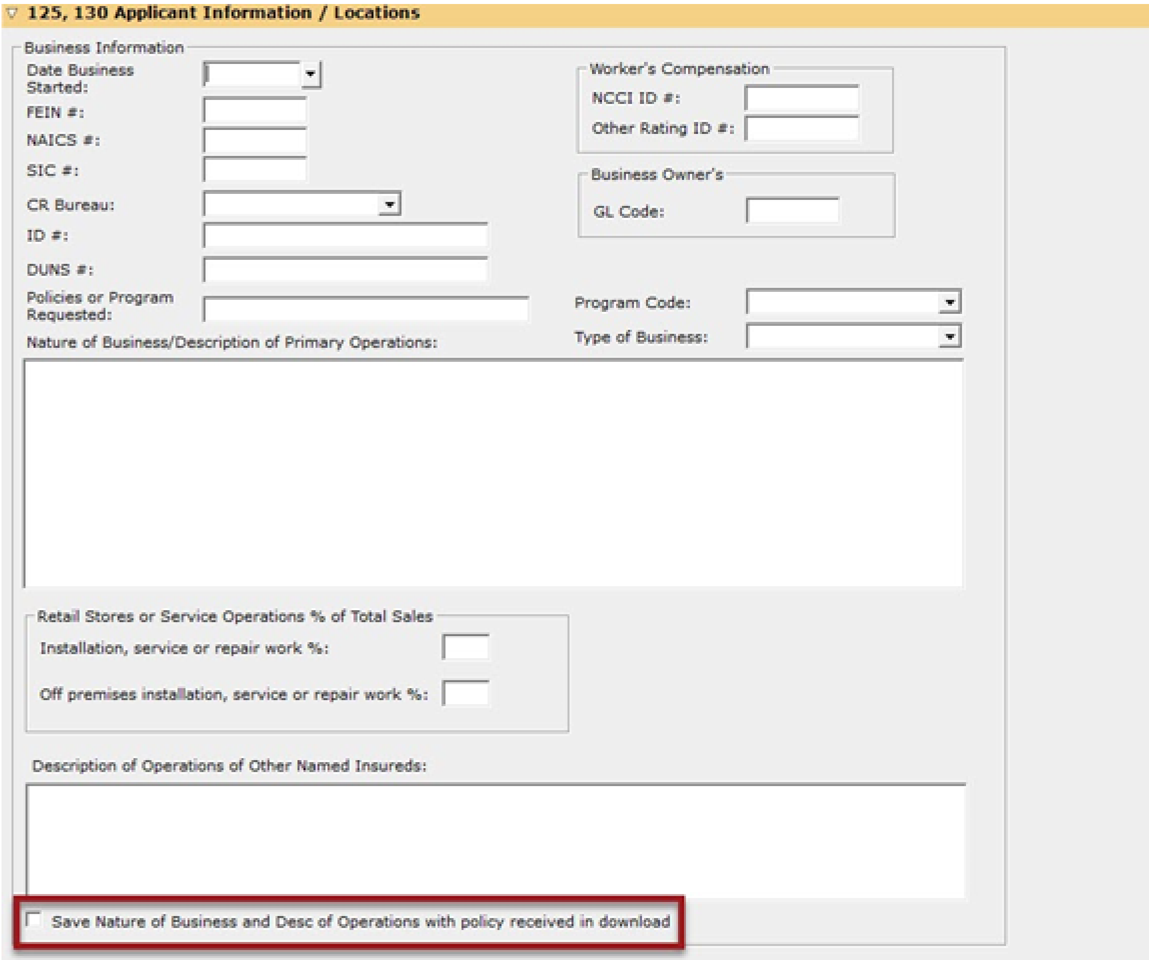
Before

There was not an option to retain Nature of Business/Description of Operations from being updated by download.

Prior to this additional checkbox, when a policy transaction was downloaded, the Nature of Business that was entered could have been overwritten – in most cases this meant it was removed.

Now

There is now a checkbox called **Save Nature of Business and Desc of Operations with policy received in download.** This checkbox allows a user to indicate that it should not be overwritten, meaning this will allow downloads to retain the remarks and description in the next download.



Applicant Information new checkbox

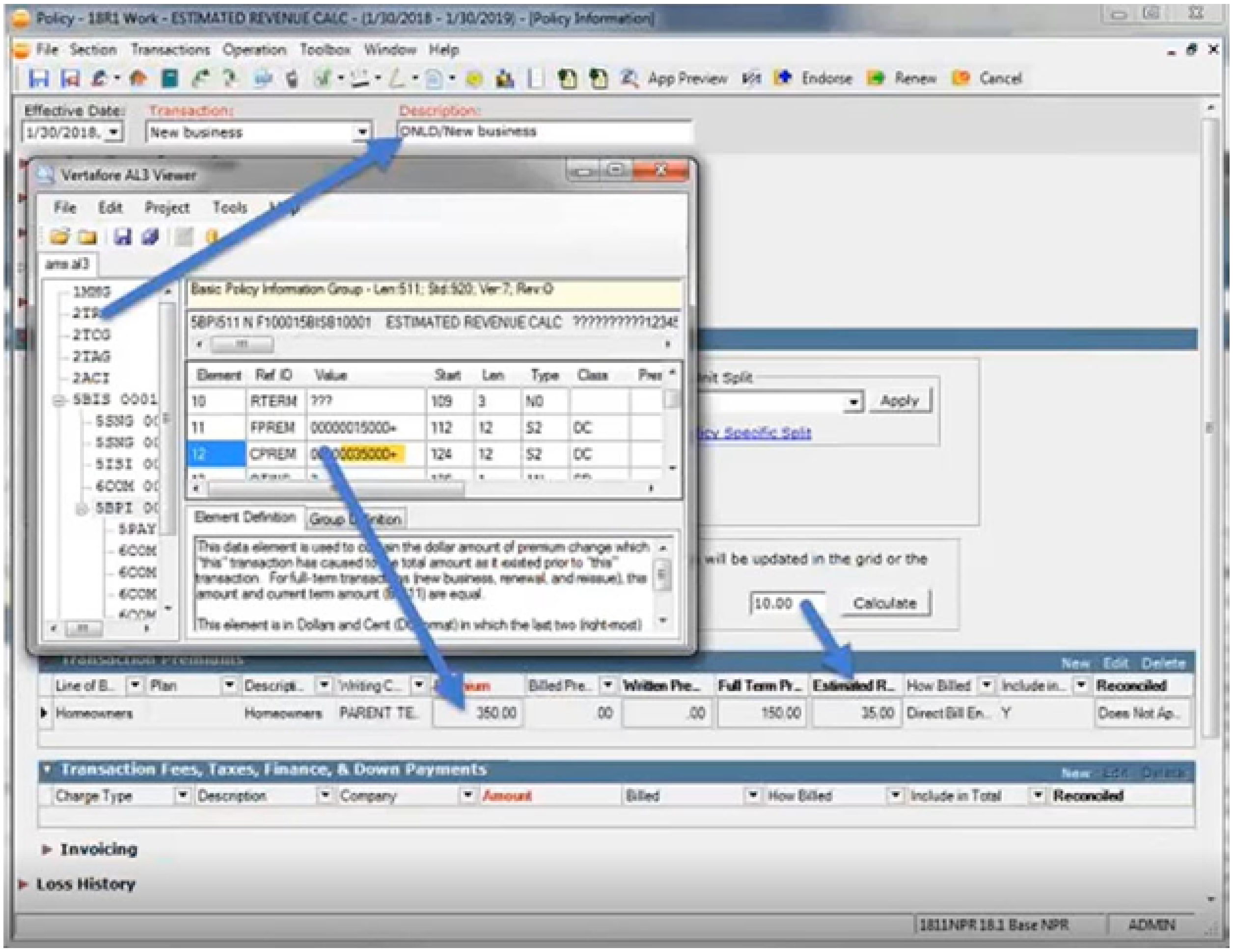
Estimated Revenue Amount Now Auto Calculates

Before

The **Estimated Revenue** field was manually updated and not mapped from the Estimated Percent.

Now

The **Estimated Revenue** now auto-calculates when the **Estimated Percent** amount is entered. It also auto-calculates on downloaded transactions when the **Written Premium** is included and the **Estimated Percent** is entered.



Estimated Revenue screen

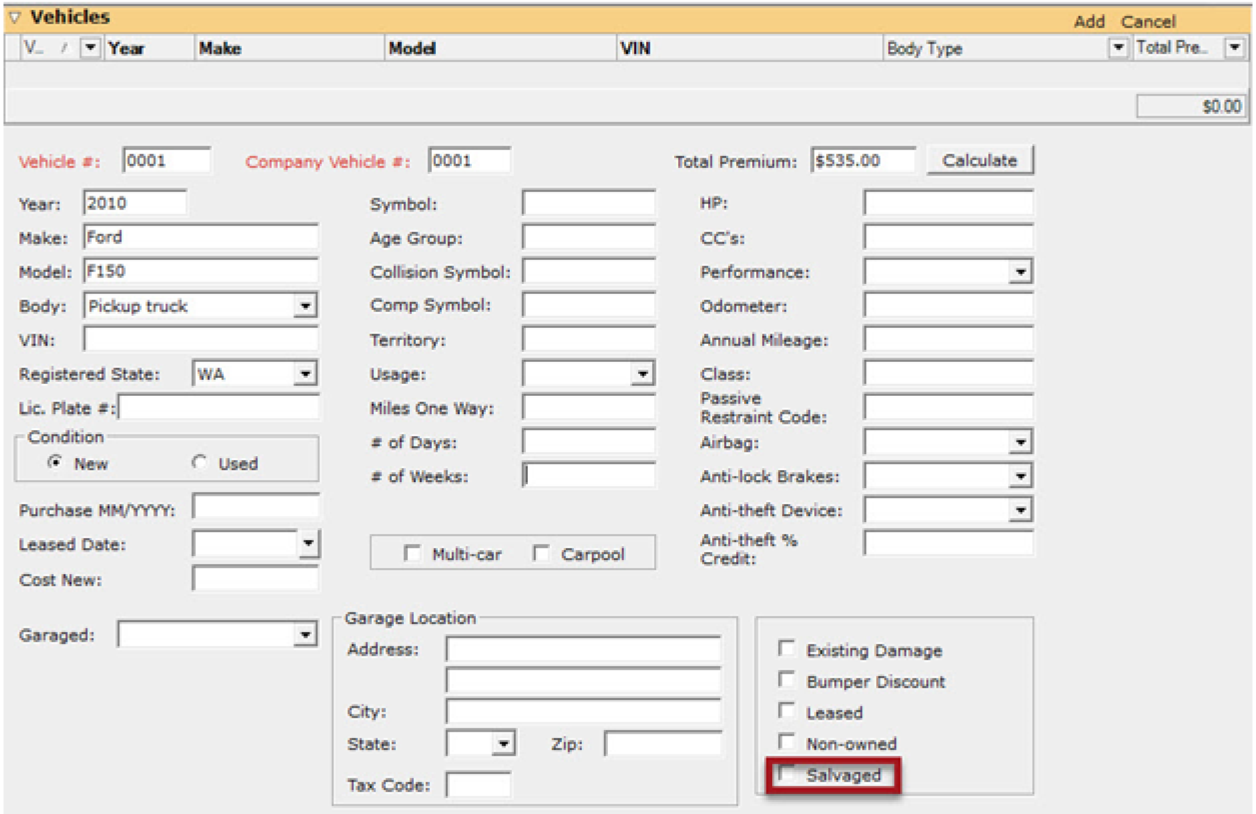
Added a Field to Support Salvaged Vehicles

Before

The Personal Auto window did not support salvaged vehicles.

Now

There is now a **Salvaged** checkbox within the **Private Passenger Auto** window that supports salvaged vehicles.



Salvaged Vehicles Option

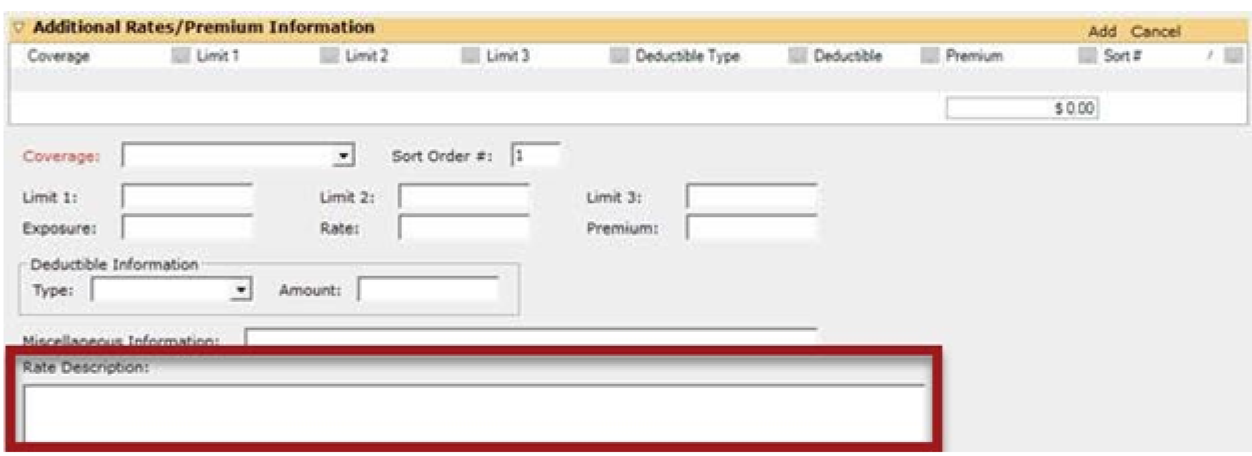
Added a Rate Description field to Workers Compensation

Before

There was not a field within Workers Compensation to elaborate upon the rate description. If a carrier sent this detail, the database did not retain it because there was no storage for it, nor a place in the interface to display the data.

Now

There is a new **Rate Description** field to accommodate information coming from downloads.



Rate Description field

Additional Updates

- ACORD 126 – (2016/09)
  - Download changes to support the General Aggregate Limit **Applies to** Fields.
- IVANS
  - To improve download efficiency, we have updated the nightly download process to use IVANS SOAP services in lieu of Transfer Manager.
- Updated the Anti-Theft Device Code List

Customer and Policy Enhancements

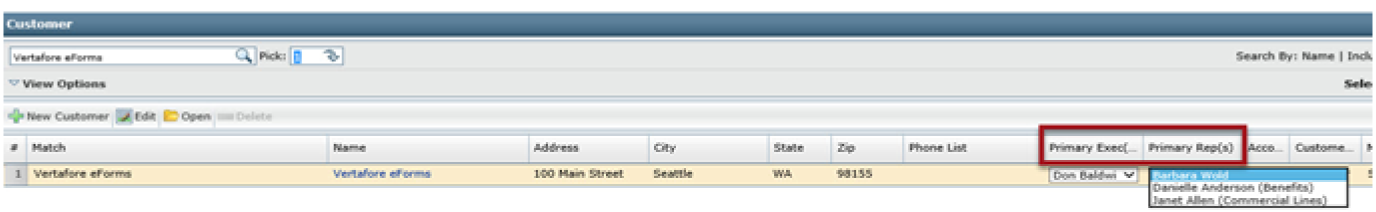
Customer Search Improvements

Before

Agencies could not quickly view additional personnel associated with a customer during a customer search.

Now

The Exec and Rep columns have been renamed to **Primary Exec(s)** and **Primary Rep(s).** These fields have been enhanced to a drop-down list so you can view all personnel by type of business. These are in alphabetical order by first name (the main exec and rep for the customer will always be on top).



Customer Search screen

New Fields Added to Customer Summary

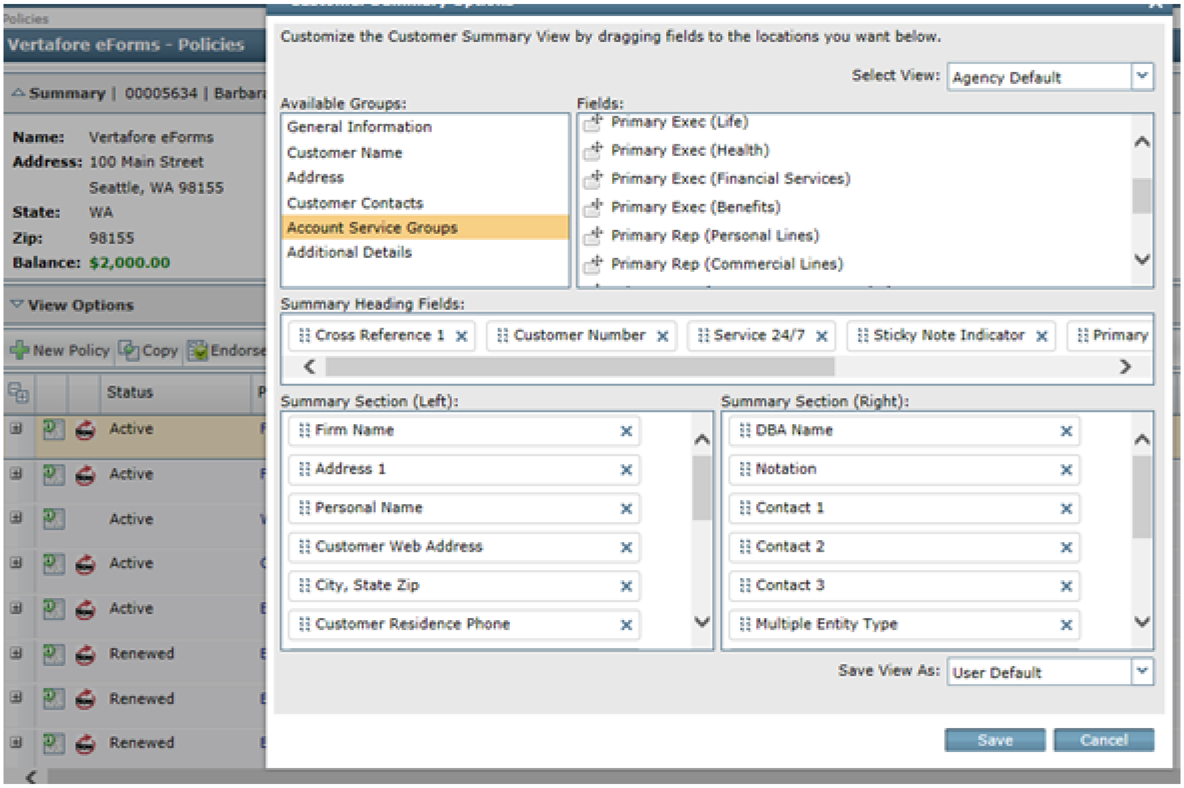
Before

You could not quickly review additional personnel associated with a customer while viewing a specific view in customer summary.

Now

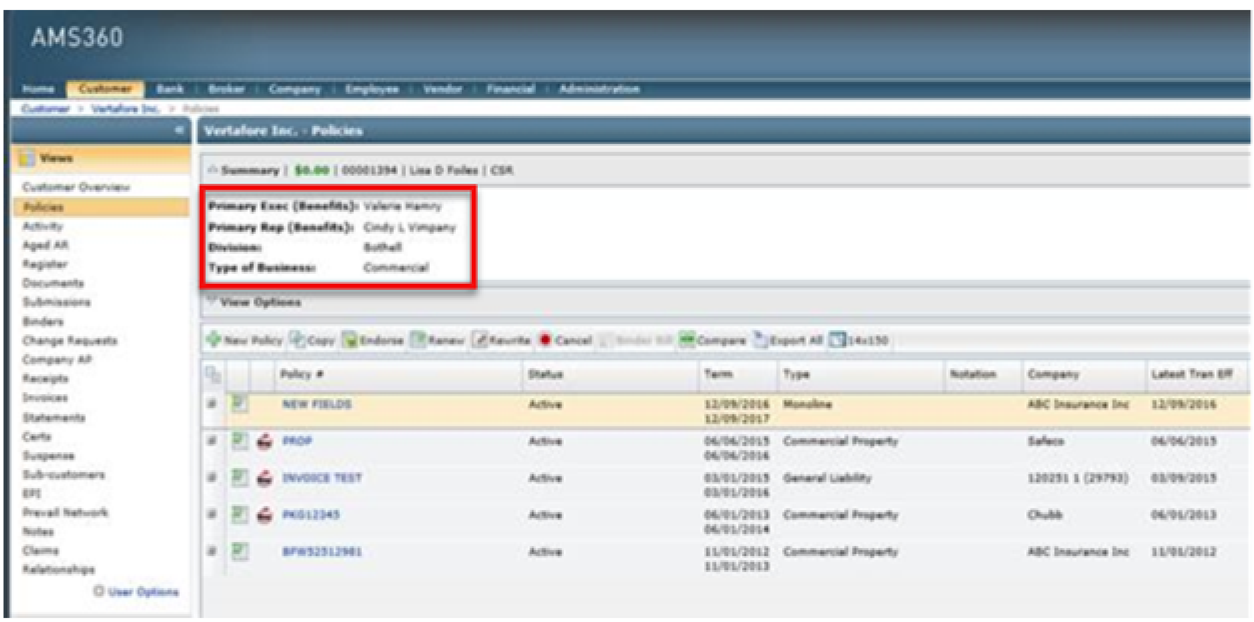
Additional fields for Account Service Group have been added for **Primary Exec** and **Primary Rep** for each type of business.

1. Add those additional fields via the **Summary Options** tool in order to see them in the summary.



Summary Options screen

2. Once they are added, you will see them in the summary.



Summary Options Review

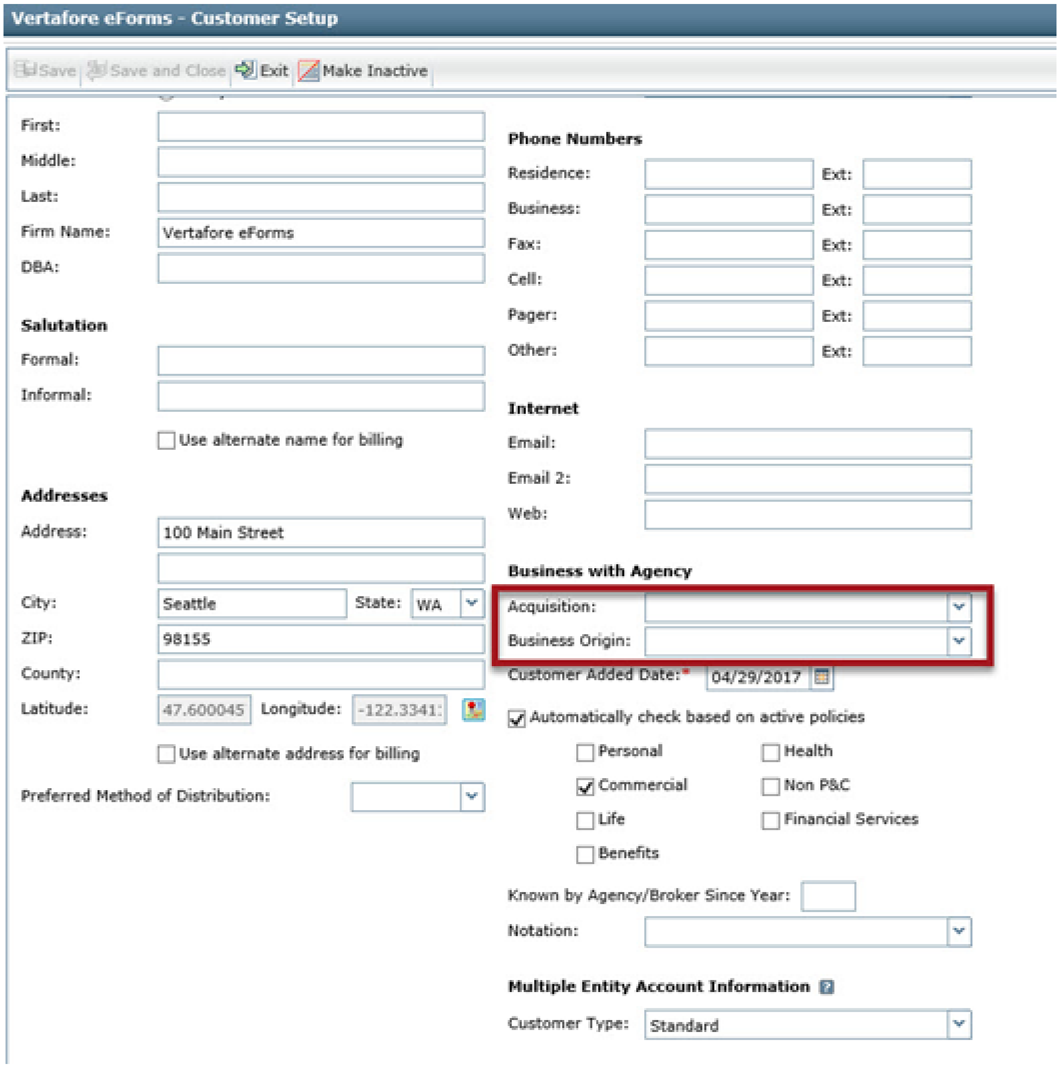
New Acquisition & Business Origin Fields

Before

There was not an option to track acquisitions and original business origins for customers.

Now

Acquisition and **Business Origin** fields have been added to the customer setup.



Customer Setup screen

New First Written and Business Origin Fields

Before

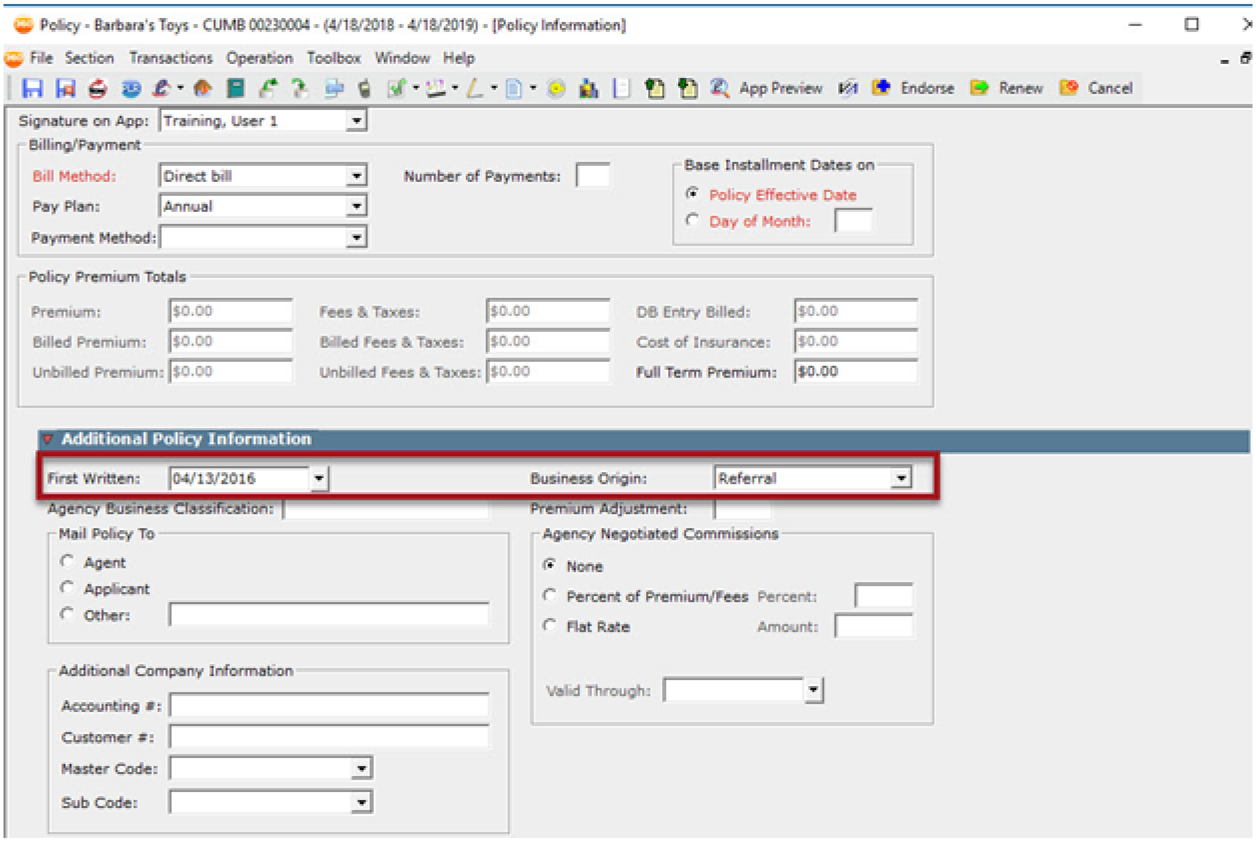
There was not an option to track the first written date or a customer's business origin in the policy information.

Now

There are now fields for **First Written** and **Business Origin** policy information within the **Additional Policy Information** section.

- **First Written** is a date field; when writing a policy for the first time, it will default to the effective date of the policy.

- If **Business Origin** is filled in the customer information, it will automatically show the same data in the policy information.



Policy Information Options

Updated 125, 130 Application Information

Before

There was no way to track when business started for a policy, even if the information was available in customer information.

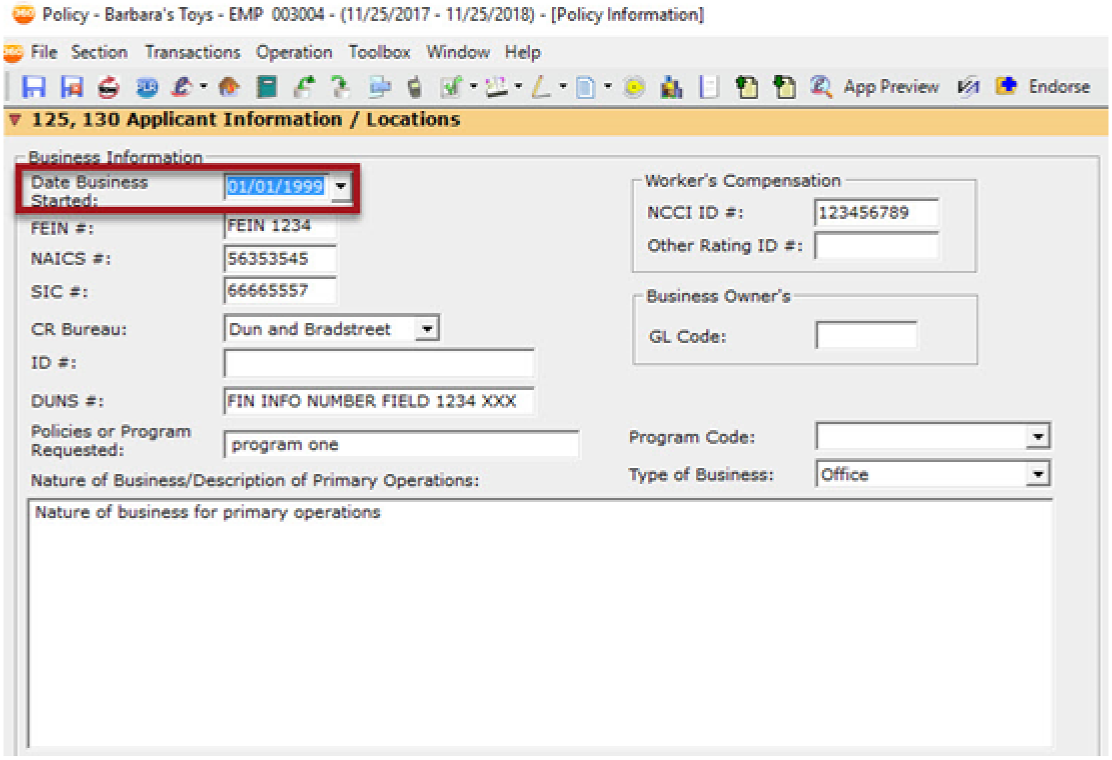
Now

There is now a **Date Business Started** field within **125, 130 Applicant Information / Locations**.

- This draws the year from the Additional Customer Information **In Business Since** field, if filled.

- The system will automatically insert the month and day **01/01** in front of the year.

- This field is mapped to the ACORD 125 and 130.



Date Business Started Autofill

Updated Buildings Section

Before

The **Buildings** section did not include fields that plug to the ACORD 125.

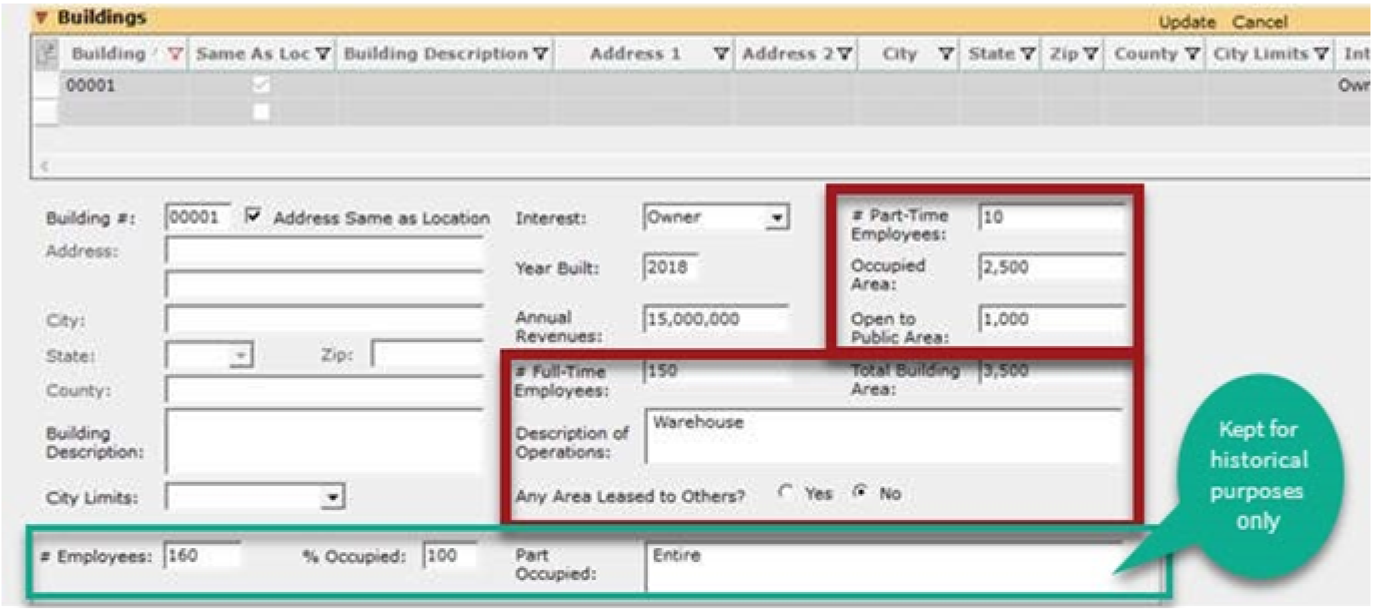
Now

The **Buildings** section now has the following fields:

- # Full-Time Employees
- # Part-Time Employees
- Occupied Area
- Open to Public Area
- Total Building Area
- Description of Operations
- Any Area Leased to Others?

- This will now integrate to the most recent versions of the ACORD 125, 125FL, and 823 **Additional Premises** section.

Some of these fields are replacing older fields. The older fields' data is retained and now stored in a **Historical Data** group. These historical fields do not map to ACORD forms.



Historical Data Screen

Update to Commercial Property and Commercial Umbrella Limits

Commercial Property and Commercial Umbrella limits now allow 9 characters, plus formatting, in order to accommodate values such as 100,000,000.

Excluded Drivers for Commercial Lines are Now Supported

Before

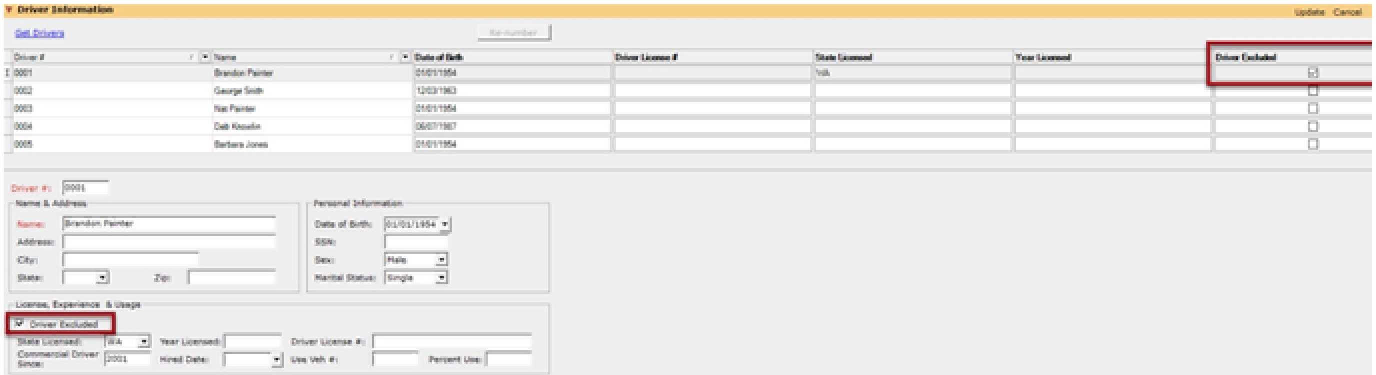
Excluded Drivers in commercial lines were not supported in the **Grid and Drivers** section.

Now

There is now a field to capture "Excluded Driver" in the **Grid and Drivers** section for the following lines of business:

- Business Auto
- Garage & Dealers
- Motor Truck Cargo
- Transportation

- Truckers



Driver Information Options

Updates to ACORD Forms

- Converted all uff forms to the new viewer format and the old viewer was removed.
- The new fields added to the policy sections have been mapped to the **ACORD 125** and **ACORD 130**.
- **Certificate of Liability** enhancements:
    - For Workers Compensation, the **individuals excluded** field is now mapped.
    - Certificate of Liability now overflows to the **ACORD 101** for Description of Operations and Notes.

Secure Submissions and Policies Separately

Before

Producers desired the ability to create and view submissions, even if they didn't have the same access to policies within AMS360.

Now

Submissions are no longer dependent on policy security. If a user has access to the "Submissions View Button -> New Submission Group", then they will be able to access and create submissions. Within the data entry of creating the submission, all features for the given submission will be available, regardless of the security associated with policies.

ACORD, eForms & Download

Increased AL3 Limits for Commercial Property

When using the Property LOB coverage field's customers will now be able to accept formatted values up to 100,000,000. This will help support the growing needs of agencies.

Increased AL3 Limits for Commercial Umbrella

When using Umbrella LOB limits of liability customers will now be able to accept formatted values up to 100,000,000. This will help support the growing needs of agencies.