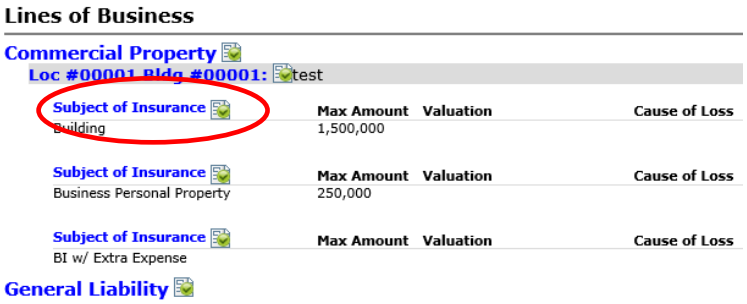
Navigating in AMS360—Using Dec Page View and Customer Center Views

Many of the complaints I hear about AMS360 revolve around "taking too many clicks" and most of the time this is because users are not really taking advantage of the AMS360 navigational features: Dec page view and customizable customer center views.

A key feature is the Dec page view. The dec page is the first icon after the + on each policy record. It looks like this:. Once you've clicked on the dec page, it opens in a new window (be sure pop-ups aren't blocked!). *Dec page is the first place to come when talking with an insured regarding policy details, as it provides many shortcuts to common functions. The dec page view not only shows covered locations, property and limits, but it has embedded within it lots of navigational shortcuts.*

There are a variety of links in the dec page. The links at the very top, in this case BOP Property and BOP Liability, will take you to the appropriate section of the dec page view. The policy number link, circled in red, will open the policy without closing the dec page view.

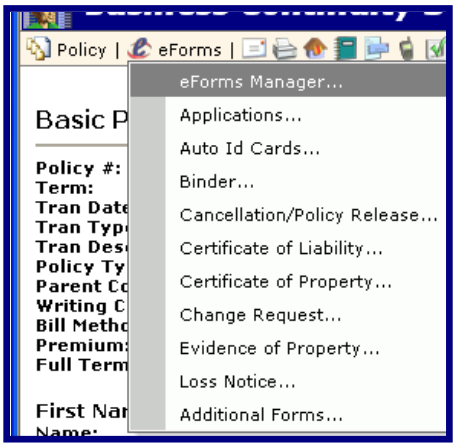
Farther down the dec page, the Line of Business links appear again, this time immediately prior to the line of business data. This time, clicking the circled Line of Business link will open the appropriate section of the policy—and this is the quickest way to check limits, then open the policy, as it will open the LOB directly! Note also the Top link at the right, located throughout the page, which returns you immediately to the top of the dec page. In addition to the link which opens the LOB, signs imbedded in the dec page will allow endorsements to be made to the specific policy information next to the sign. To endorse location 1 on the policy illustrated, click the endorsement sign at the end of loc 1 and AMS360 will open this specific area of the data grids once you input the endorsement date and description information.



The next navigational aid imbedded in the dec page view is the toolbar. The dec page toolbar also offers shortcut navigation to many functions.

You can endorse, renew, rewrite, cancel, or access the compare function from the policy menu, as well as copy the policy. You can also add or view Activity, Suspense or Notes from within the dec page view by using toolbar icons.

In a similar manner the eforms menu on the dec page toolbar provides access to any eforms that you might need to generate after discussing coverage items with the client. There is no need to exit the dec page, and then select the policy simply to access eforms!



Following across, the next icon over allows access to email the dec page using the contact book. The dec page is attached as an HTML document. The printer icon will create a printer friendly version of the dec page itself (note that the dec page can appear with or without underwriting and premium information—these are turned on or off with the check boxes under View Options at the bottom of the customer center page).

The flame icon files a new claim directly from the dec page, again with the correct policy already selected. The schedules/proposals icon immediately takes you to the schedules and proposals page, again selecting the policy from the dec page that began the process. The form letters icon also works this way, but loading the form letter page. The contacts icon loads the contact book, from which you can select phone numbers and/or initiate an email. The activity icon loads activity with the policy on the dec page, or allow viewing of activity or suspense. There are also icons for notes, the prorata wheel and applications view.

The last three icons on the toolbar are policy actions that can be taken without using the policy menu—endorse, renew, and cancel. Each will load the wizard that begins the action on the policy being viewed in the dec page window. Remember that the endorse icon appears throughout the dec page and provides the fastest way to endorse to a specific area of the data grids.

All of the icons will display their function as text if you hover over them with your mouse.

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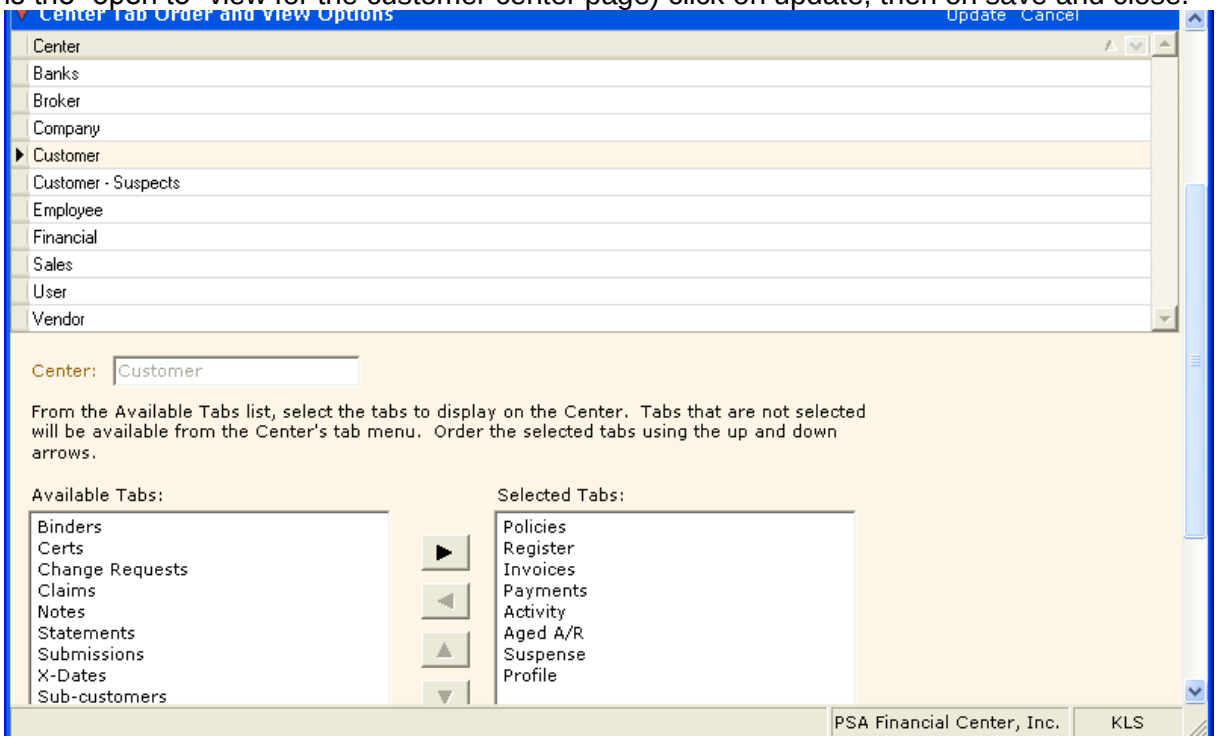
Dec page and its embedded links simplify many actions; many others are more easily carried out using the Views accessible from the sidebar menu. If your default view is not customized to have access to the voews you need, it can be changed by clicking on the gear next to User Options. When the options load, click on the triangle marker for Center Tab Order and View Options. Then highlight the Customer line and click Edit, or double click the customer line to open the view selections. Use the over and up/down arrows to add and properly organize the views most useful in your specific job function, up to eight to ten views. Once you've added and organized your views (and remember that the first view in the order is the "open to" view for the customer center page) click on update, then on save and close.



Now that the views are appearing on your customer center display, be sure to click on the Certs view to open a certificate or to add holders, the Change request view to get back to an issued change request, and the EPI and Binder view to get access back to those forms. The claims view provides a link to the loss notice on the right, the actual claim win-form on the left. Clicking the link to a form on the view will open eForms and load the chosen form in the viewer. If it is a certificate, simply right-clicking on it in the tree (it will be highlighted) allows you to add or modify a cert holder. This tab navigation is significantly faster than trying to manually find the form with the eForms manager. The Document view provides access to *all document items attached* to activity without first going through the activity itself. In addition, items attached to activity can be emailed directly from the Documents view!!! This view is a real time-saver when resending an email or forwarding documents to another person.

These shortcuts are integral to using AMS360 quickly and efficiently. Make friends with the dec page view and the views, and use them as your "jumping off point" to save lots of clicks throughout the AMS 360 program.

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Karen Simms
Simms Consulting
www.karensimms.net