

2019 Fall Conference - October 27 - 29

Monday

10:00 – 11:15

Angela Painter - Account Manager Tune Up

We won't make you do sit-ups...but let's get your skills in AMS360 in better shape. Learn some tips, make sure you are customizing 360 to make the most of the system. This session will even cover some great email management ideas, including using form letters to send emails.

Joyce Sigler – Edocs & Messaging

Are you taking advantage of these features? Why you should - and - how to set this up to get the most out of Edocs & Messaging. There will be discussion about eDoc delivery, connectivity, text setups and eForms.

Lorraine Plezia Accounting Features a Long Time Overdue, Part 1 of 2: Payment import will provide you with the ability to import a .csv file from the bank into AMS360, applying the cash receipts against the insured's A/R invoices or on account and posting the deposit. You will have the ability to create a Service Agreement which may be associated with one or many policies, have service personnel commissions and multi-entity billing capability. You may then invoice customers for consulting and other service fees.

11:15 – 12:30

Angela Painter - What's New in AMS360 from the latest releases for Account Managers

Come check out some cool features, new options in the last few releases that affect Account Managers and the Service side of 360!

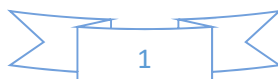
Joyce Sigler – Communications to the customer – Supercharge AMS360/Vertafore Agency Platform Output with Quick Parts – Part 1 Quick Parts is used to store repeated words or paragraphs in Word. After creating a Quick Part, those words or the entire paragraph can be inserted into your document making the document creation easier and *Quick er!* Such a time-saver!!

Lorraine Plezia Accounting Features a Long Time Overdue, Part 2 of 2: Data integrity is improved now that users cannot renew or rewrite a policy with inactive companies & producers. They are forced to choose an active entity. The Merge Customer feature allows us to combine two accounts, including accounting history. The new Revenue Recognition Report allows agencies to generate a report that details billed invoices against policies and how much money has been recognized versus earned against policies.

1:30 - 2:45

Angela Painter - Workflows and Time Management

Have you revisited your Workflows, compared your process against other team mates. Are we doing work "Just Because...Or its always been that way". This will be a great discussion session while exploring some ideas on how to create simple workflows.



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Monday *Cont.*

Joyce Sigler – Supercharge AMS360/Vertafore Agency Platform Output with Quick Parts Part 2

Ramp up your word documents, form letters and emails into additional tools for branding and efficiency.

Brett Chenail and Justin Silverman Client portal setup & enhancements and Client Portal is now mobile!!!

3:00 – 4:15

Angela Painter - Working as a Team!

Learn how each role in your agency is interconnected and vital. Make your job easier and more cohesive. Discuss needs and how we can work better together using each other's strengths as each role is important! Learn some great communication tools along the way.

Joyce Sigler - My Agency Reports Templates & Excel Part 1&2 combined How to get what you are looking for by creating templates in MARS

Dustin Mooney of Ridgit Bits on Cyber Security Your 30 Day Cybersecurity Action Plan

This presentation will discuss the one key topic every Insurance Agency should consider: cybersecurity risks. Now that businesses are being mandated to address their cybersecurity risks, significant challenges face insurance agency business owners and leadership. Dustin Mooney, a cybersecurity professional, will discuss how to move from understanding cybersecurity theory, compliance, and regulations to actionable steps that will reduce your overall cybersecurity risk exposure.

Tuesday

8:00 – 9:15

Angela Painter - Advanced Reporting with Target Lists & Form Letters

Can you find out information about your current clients, understand how to run Target Lists to get the "Who" and use Form Letters as the report to get the "What".

Joyce Sigler & Ben Lynds –

Join Ben and Joyce as they show how to use Image Right (Worksmart) from start to finish. See the management capabilities of always being able to see how much each employee has for a workload, and how to easily reassign work. Finding the information you need has never been so easy

9:30 – 10:45

Angela Painter - My Agency Home & 360–

Understand how to use Platform, My Agency Home and AMS360 together. Get the power of the dashboard, work with QuickNavs and understand where you are with a client on any give workflow or process.

Steve Cavallaro of JMK

Store, Share and Collaborate within your agency with Office 365. Explore several cloud based tools within Microsoft's online platform, including OneDrive and Teams. Learn how these tools can keep your team connected and improve productivity, even from a distance.

10:45 – 12:00

Angela Painter Client Reviews

Let's talk about the importance of Client Reviews - are you doing them, do your clients feel that you are only contacting them at Renewal time? Let's discuss options and ways AMS360 can help.

Karen Love with Linda Dodson and Vertafore representatives

with a "hands on" for navigating through NCOM & IDEAS Make sure you have your NetVU and My Vertafore logins, and we will walk through finding information you need. **BYOLT** (Bring Your Own LapTop) and Log in/on with Karen!