TAM Tips and Tricks

Activities

Activities from Home Base – You can change the list views here to see what columns you would like on your home base. To do this, click on filter options from the home base, select the activities on the left and double click on them to move them over to the Selected Fields column. You can also move the arrow up and down so that they are in the order you would like them to be.

Activities Not Attached to a Client – You can add activities to the home base in TAM that aren't associated with a client. To do this, click options, add activity, select the activity code and enter the activity.

Use Description Line as Instructions – Amend the description line of the activity to. For example: APPO – Appointment – Who, What, Where, - in the description, enter what the appointment is

Right Click to Close – You can right click on activities to close them either from the home base or from activities in client.

Drill Down – Use the activity file as the first place to find information. When a * is in the DD (drop down) column, you can jump directly to the document, spreadsheet, fax, memo, etc. To do this, go to an activity that has an * in the DD column, click on options, drill down.

Outlook Synchronization – From TAM's home base you can transfer activities between Outlook's calendar and TAM. To do this, enter your activity in TAM, click on add to Outlook. Then from the home base, click on Options, Outlook Synchronization. Please note that if you enter a time in your activity, it will put this into your calendar, if no time is noted, it will add it to Outlook as a task.

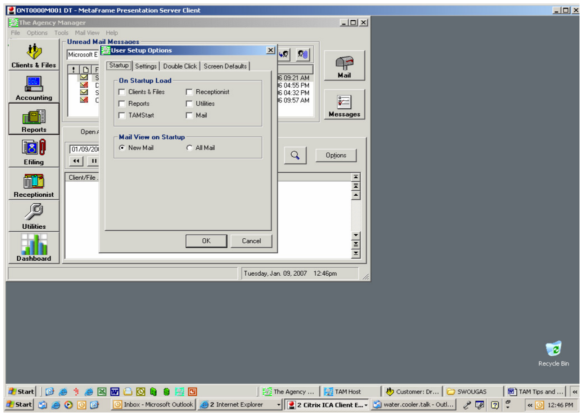
Message Centre

You can post messages for all TAM users to see, to do this, from the Home base, click of Options, Message Centre. Then you need to click on options, system setup, scrolling message to activate it.

Timer for Refreshing Email – You can set a timer to refresh the email screen more frequently, settings range from 10-60 seconds. To do this, from home base, click on tools, user setup, settings, timer.

User Setup

Click on Tools, User Setup from Home base, go through User Setup Options



Button Labels

You can turn them on and off by right clicking anywhere on a button and selecting caption buttons.

Search Clients

Ever have a risk where you can't find a client based on the client code that makes sense? Well, you can search by address. To do this from customer list, click on options, search, name search. You can search by name or address here. Enter the information you have and click on use advanced setting; you have the option to filter your search even more in here. Once you've made your selections, click on find.

You can also search by policy number by clicking options, search, clients by policy number.

Generate Map

To do this, click on clients and file, options, generate map. This will open a new pre-filled Map Quest request through Internet Explorer.

Screen Defaults

You can set your client detail defaults as well as billing screen defaults. For your client details default, you can set things like your agency, branch, producer or CSR code. Enter the information, click on options, set as default.

The same can be done with a billing screen. After you enter what you want the default info to be, click on options, set as default

Sticky Notes

If you are in a client that has a sticky note, a quick way to hide it is to click on the listing icon (usually policy).

Another tip with sticky notes is that when you are finished with them, you can keep them in notes. To do this, click on notes, highlight the sticky is question and in the first field of the description field, enter an ‘x’. This will remove the sticky note from where it is and keep it in Notes for future reference. If you find you want that same note back, all you have to do is go back to notes and take the ‘x’ out of the description field.

Active Policy Filter

This tip is for the offices that use multiple billing screens. After a while the screens become cumbersome. If you only want to view in force policies, you can. To do this, click on policies, options, active policy view. You can then select the policy status of what you’d like to view, ie. NEW, REN, REW, click ok. If you find you don’t like this option or would like to see all policies associated with a client again, click policies, option, use filter. There will have been a check mark next to use filter, you are just unpicking it.

Insert Email Signatures

You can automatically insert your own signature in new, reply and forwarded email created in TAM. To do this, from home base, click on tools, user settings, mail setup.

Detail Screens – Quick view of address/phone number

If you are in a clients billing screen and need an address or phone number of an insurance company, you can right click on the company and the info is right there for you.

Customizable View Lists

You can customize the list views by right clicking on the title bar and inserting additional columns.

Commission Default Indicator

Company, Producer and Broker Codes will appear bold on the billing screen if commission defaults exist for the codes. To enable this function, from the TAM Home base, click on tools, system settings and click on Commission Default Indicator.

Department Filter Security

This enables you to hide activities, attachments and memos from those users who lack the security clearance to view them based on department. To enable this function, from the TAM Home base, click on tools, system settings and click on Department filter – Activities, attachments, a/o memos.

Color Coded Activities, Claims & Policies

Use the color coded feature to show late activities, claims or policies in a more meaningful manner on the client level. To enable this function, from the TAM Home base, click on tools, system settings and select color code activities, claims and policies.

Require History/Activities

Do you have staff that constantly click cancel on moving policies to history or creating activities. Well, you have the ability to make them do this by clicking on tools from Home Base, system setup, then require activities or require history.

Email View

You have the option to view unread mail or all mail from TAM Home Base. To make your selection, click on Mail View from home base and make your selection.

Email directly from Customer Detail

You can email a client directly from the customer detail screen now and have the ability to send and attach in one click.

Online Real Time

Do you just have a quick question that you need to ask Applied Support and don't want to sit in a phone queue? Well, you can connect OLRT from TAM Home Base. Click on Help, On-line Real Time, login to the portal, select your problem area and you will be connected.

PDF Printing

When selecting to print a form, you can preview the form which creates a pdf version that can be emailed.

Rename Codes

You have the ability to rename codes, for example clients, producers, companies, policy types. This has to be done with everyone out of the system. You need to login to TAM through utility manager, click general, rename.

Account Views

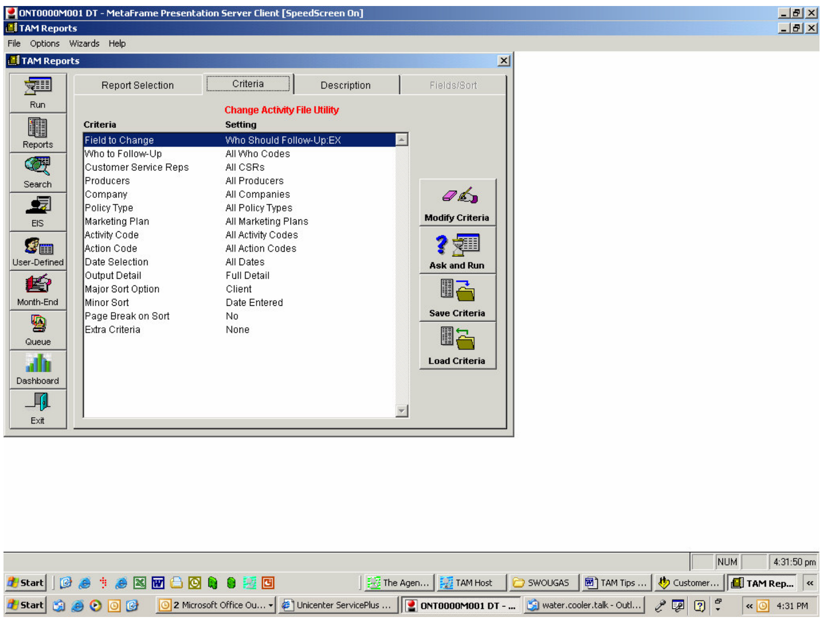
You can use the account views option to view a complete summary of individual client transactions. To do this, select your client, click on invoice, options, account views, transaction date range (you can enter the date range you want here).

Titled Memos

Use these just like a formletter, however, they cannot be altered once complete. The only drawback is data cannot be merged from client like a form letter.

CSR Workload Reassignment

Use this utility to select a portion of one CSR's workload and assign it to another. It will only reassign open/active data that is not a part of history. This utility does not rename one CSR to another. The second part of this utility is to run the change activity file utility which is in Reports – Activity



Folders

Use folders in document setup to organize your formletters so you don't have to search through all the letters. This is in utilities, general, document setup.