

TAM

Workflow Efficiencies

Shortcut Keys TAM Home Base

- **[Alt] + [F]** opens *File* pull-down menu
- **[Alt] + [O]** opens *Options* pull down menu
- **[Alt] + [L]** opens *Tools* pull down menu
- **[Alt] + [M]** opens *Mail View* pull down menu
- **[Alt] + [H]** opens *Help* pull down menu
- **[F5]** opens *Employee In/Out Box*
- **[F6]** opens *Address Book*
- **[F7]** opens *Print Receipt for Cash*

List Screens

- **[CTRL] + [A]** activates the *Add* button
- **[CTRL] + [D]** activated the *Delete* button
- **[CTRL] + [L]** returns to *Customer/File List*
- **[ALT] + [O]** opens *Options*
- Arrow Keys move up down right and left
- **[ALT] + First Character on Menu** opens the drop down menu
- Type the ***underlined letter*** from drop down menu and hit ***Enter*** to open the task

Client Detail Screen

- **[CTRL] + [P]** moves to Previous Customer
- **[CTRL] + [N]** moves to Next Customer
- **[CTRL] + [L]** will Return to Customer List
- **[ALT] + [O]** opens Options Menu
- **[ALT] + [C]** Cancels and Closes current screen
- **[F4]** to lookup validation fields

Shortcuts

Client & Policy Detail

- *Client Detail*
 - Email from link
 - Get a Map from *Map Quest* link
- *Policy Detail*
 - Right Click **Company** or **Producer** to view *Address* and *Phone Number*

ACORD Applications

- Tab through fields
- **[Page Down]/[Page Up]** moves through the pages
- **[Space bar]** marks radio buttons
- Use Pre-Fills
- Use Signatures when printing
 - Certificates
 - Binders
 - Evidence of Property

Additional Shortcuts

- **[ALT] + [F4]** Closes the top-most application and its related screens
- **[ALT] + [Print Screen]** sends an image of the top-most screen to Clipboard
- **[CTRL] + [C]** Copies highlighted items
- **[CTRL] + [X]** Cuts highlighted items
- **[CTRL] + [V]** Paste what was copied

Activities

- *Activity Center*
 - *Filter options*
 - *Activity not attached to Client*
 - *Activity closed from home base*
- *Activities*

- *Synchronize Activity with Outlook Calendar*
- *Generate Form Letters on follow up date*

List Screen Views

- Right Click on **List View Columns**
 - *Insert Columns*
 - *Reset Columns*
 - *Remove Columns*
- Right Click on **Caption Buttons**
 - Creates the title of the picture buttons

Screen Defaults for Customers and Prospects

- *Agency*
- *Branch*
- *CSR*
- *Producer*
- *Code*
- *Marketing Plan* (Prospects & Customers)
- *Statements* (Customers)
- *Invoice Page Break* (Customers)
- *Service Charges* (Customers)

Screen Defaults

- *Policy Billing Screen*
 - *Status*
 - *CSR*
 - *Billing*
 - *Producer*

Screen Defaults

- *User Setup from Homebase*
 - *Client Number*
 - *Personal*

- *Commercial*
- *Policy List*
- *Claims List*
- *Customer Filters on List Screen*
- *Automatically Save Applications*

Screen Defaults

- *System Setup from Homepage*
 - *Client Filter*
 - *Color Code Activities*
 - *Color Code Claims*
 - *Color Code Policies*
 - *Sign on – Remember user codes*
 - *Synchronize Conglomerate Children*
 - *Urgent Activity Categories*
 - *Agency Specific Help File*

Screen Defaults

- *Client Filter*
 - *Client Screen*
 - *Security*
- *Policy Filter*
 - *Active Policies only*

Screen Defaults

- *List Filters*
 - *Policy*
 - *Activity*
 - *Memo*
 - *Claims*
 - *Invoices*
 - *Attachments*

Other Defaults

- *Company Commissions*
 - *By line of business*
 - *By Bill Mode*
 - Twelve Different Combinations
- *Producer Commissions*
 - *By Company*
 - *By Policy Type*
 - *By Policy Status*
 - Twelve Different Combinations

Client Options

- *Client Filter*
- *Search Clients*
 - *Name*
 - *Policy Number*
 - *Claimant*
 - *Phone Number*
 - *Notes*
 - *Etc.*

Customized Workflow Using myTAM

- Setup with unique tasks for
 - CSR (Account Managers)
 - Producer
 - Receptionist
 - Marketing

Receptionist

- Log Calls without looking up phone number
- Emails message to employee
- Keeps record of all incoming messages

Window Operations

- These steps work in most windows. All mouse actions use the left mouse button: “Click” means quickly press and release the button, “double-click” means quickly click the button twice, and “drag” means move the mouse while holding down the button. Menu options that you select with a mouse are in italics.

Note: <Alt><Space> opens the application’s Control Menu. <Alt><Minus> opens the current document’s Control Menu.

Action	Pointer Position/ Button Action	Keyboard Commands
Bring launched application to foreground	Application window/Click, or Icon/Double-click	Hold down <Alt><Tab> until application name appears in box
Size window	Border or corner/Drag border outline	Open Control menu, S , choose border with cursor key, size with cursor keys, <Enter>
Move window	Title bar/Drag window outline	Open Control menu, M , move window with cursor keys <Enter>
Minimize window to icon	Minimize button/Click	Open Control menu, N
Maximize icon or application window to fill screen, or document window to fill application window	Title bar/Double-click; or Icon/Click, <i>Maximize</i>	Open Control menu, X
Restore icon or window to previous size	Icon or title bar/ Double-click	Open Control menu, R
Close foreground document and its window	Document Control menu box/Double-click	<Ctrl>-<F4>
Close foreground application and its window	Application Control menu box/Double-click	<Alt>-<F4>

File Manager

- A File Manager directory window defaults to a two-pane display. The pane on the left shows the directory tree of the current drive. The pane on the right lists the files and subdirectories of the left pane's selected directory.

Action	Pointer Position/ Button Action	Keyboard Commands
Move between directory pane, file pane, and drive icons	Pane or icon/Click	<Tab>
Select drive	Drive icon/Click	<Ctrl> - <i>drive letter</i>
Select directory or file	Directory or file name/Click	<Up>, <Down>, or first letter of name until selected
Expand branch one level	Directory name/Double-click	Select directory, <Plus>
Collapse branch	Directory name/Double-click	Select parent directory, <Minus>
Expand branch completely	<i>Tree – Expand Branch</i>	<Asterisk>
Expand all branches on disk	<i>Tree-Expand All</i>	<Ctrl>-<Gray Asterisk>
Select adjacent files	First file/Click, hold down <Shift>, Last file/Click	Select first file, hold down <Shift>, cursor to last file
Select nonadjacent files	First file/Click, hold down <Ctrl>, click on additional files	Select file, <Shift>-<F8>, cursor to next file, <Space> to select; <Shift>-<F8> when done
Select all files in directory	<i>File-Select Files-Select-Close</i>	<Slash>
Deselect all files in directory	<i>File-Select Files-Deselect-Close</i>	<Backslash>
Delete selected file(s) or directory	<i>File-Delete-OK-Yes or Yes to All</i>	<Delete><Enter>, Y or A
Copy selected file(s) to a different drive	Selection highlight/Drag to drive or directory icon, Yes	<F8>, type destination drive and path, <Enter>
Copy selected file(s) to a different directory on same drive	Selection highlight/Hold down <Ctrl>, drag to drive or directory icon, Yes	<F8>, type destination <Enter>

Action	Pointer Position/ Button Action	Keyboard Commands
Move selected file(s) to a different directory on same drive	Selection highlight/Drag to directory icon, Yes	<F7>, type destination directory, <Enter>
Move selected file(s) to a different drive	Selection highlight/Hold down <Alt> or <Shift>, drag to drive or directory icon, Yes	<F7>, type destination drive, <Enter>
Open another directory window	<i>Window-New Window</i>	<Alt>WN
Cascade directory windows	<i>Window-Cascade</i>	<Shift>-<F5>
Tile directory windows	<i>Window-Tile</i>	<Shift>-<F4>
Renew directory window	<i>Window-Refresh</i>	<F5>

Tip: When moving or copying a directory or file, both the source and the destination must be visible on screen.