Vertafore

AMS360 2020 R2 User Release Notes

12/11/20

We are pleased to release AMS360 2020 R2. With each release, we are improving and updating AMS360 to provide you with the best possible experience.

SYSTEMS REQUIRED

Minimum workstation requirements as shown in the AMS360 2019 R1 & R2 Online Configuration Guide (Doc ID: 15240) on My Vertafore. You must be registered with My Vertafore and signed in to access this document.

Browsers

- Microsoft Internet Explorer 11 (32-bit) with default settings
    - Microsoft has announced that beginning August 17, 2021, all Microsoft 365 apps and services will no longer support IE 11; Vertafore recommends customers use Microsoft Edge or Chrome with AMS360
- Microsoft Edge
- Google Chrome

Operating Systems

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

Microsoft Office

- Office 2016 (32-bit)
- Office 2019 (32- and 64-bit)

.Net

- .NET 4.7 (required)

SUPPORTED SYSTEMS

Microsoft Office

- Office 365 (32-bit and 64-bit)

    A. We only support Microsoft Word, Excel and Outlook locally.

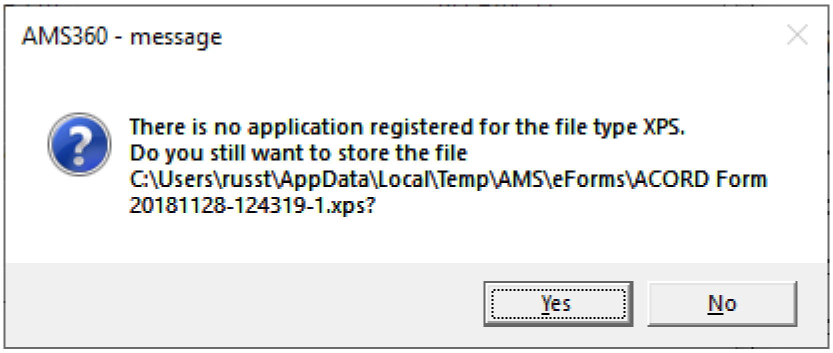
TECHNICAL REQUIREMENTS

XPS message

Microsoft has changed the way that they are giving customers the XPS viewer which is used for some functionality in eForms manager.

Depending on the build number of the OS that you have, you may need to install the new viewer. Click here for more details.

- You will receive the following error message when the system is logging an activity using print functionality vs. fax or email.



AMS360 Message

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. From My Vertafore, click **Submit Idea** in the upper right corner of the page.

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)

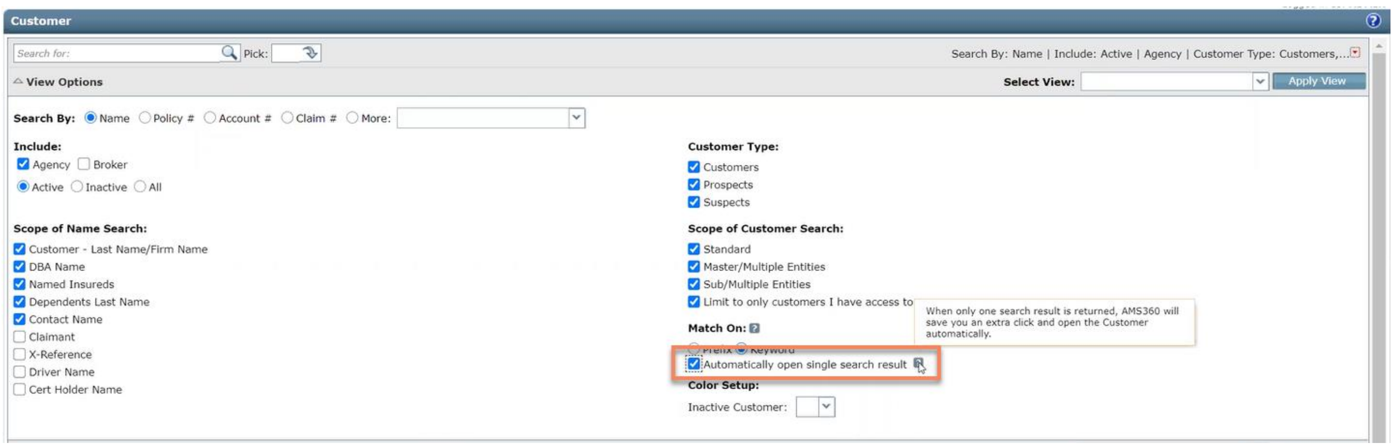
What's New?

Vertafore no longer supports Windows 7 with the release of AMS360 20R2 as Microsoft stopped supporting Windows 7 in January 2020.

Auto open a record with only one search result

There is now a view option in the **Customer** center which will allow a customer record to automatically open if only one result is returned in the customer search. This option can be turned on/off and saved to a User/Agency or System default.

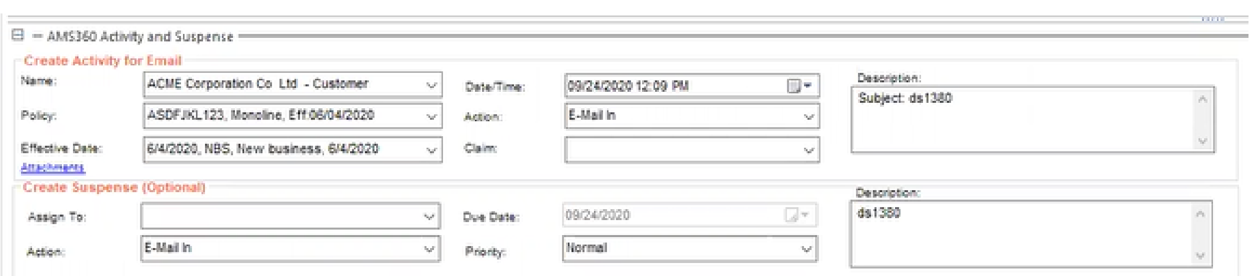
- This currently does not apply to a customer's **Policy #**
- Be sure to click on **Save** once you turn on this feature
- This feature must be turned on and is set to off by default



Auto Open a Record

Outlook Add-in Enhancements

Your Microsoft Outlook Add-in will now have **Customer Search** and **Attachments** enhancements included.

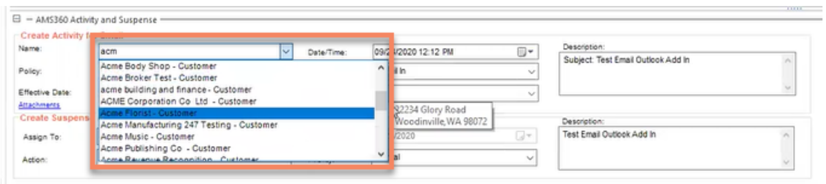


Outlook Add-In

Note: After upgrading to 20R2, please go to the **Administration** center, click on **Utilities** and then **AMS360 Downloads**. Please go to the section for Outlook Add-In and click on the link titled **AMS360OutlookAddin.msi.** This will ensure that you are on the latest version of the Add-In. If this is not done, you may experience issues when using the Outlook Add-In.

CUSTOMER SEARCH

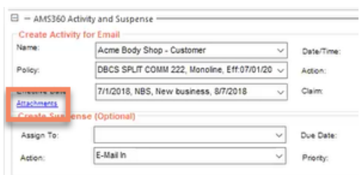
1. When you start to type in the Name field, you will now see a drop-down menu appear with the name you are looking for. Click on the customer name you are looking for and continue with your normal activity process.



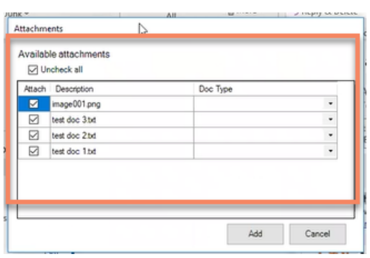
Customer Search

ATTACHMENTS

1. Click on the **attachments** link in the Outlook Add-in. From here you will see a new **attachments** winform where you will have the option to select which of the emails attachments you want to send over to AMS360.

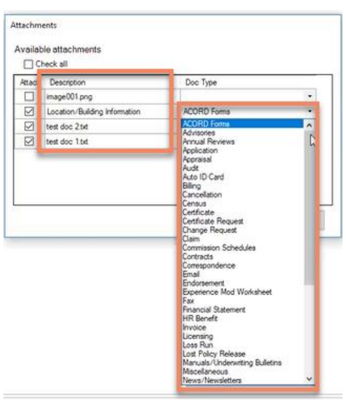


Attachments



Available Attachments

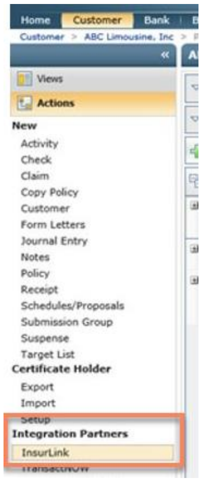
2. You will also be able to rename the **Attachments** in the **Description** field as well as select what kind of **Document Type** the attachments are to help better understand the information in AMS360. When you are ready, click on **Add** and then **Save.**



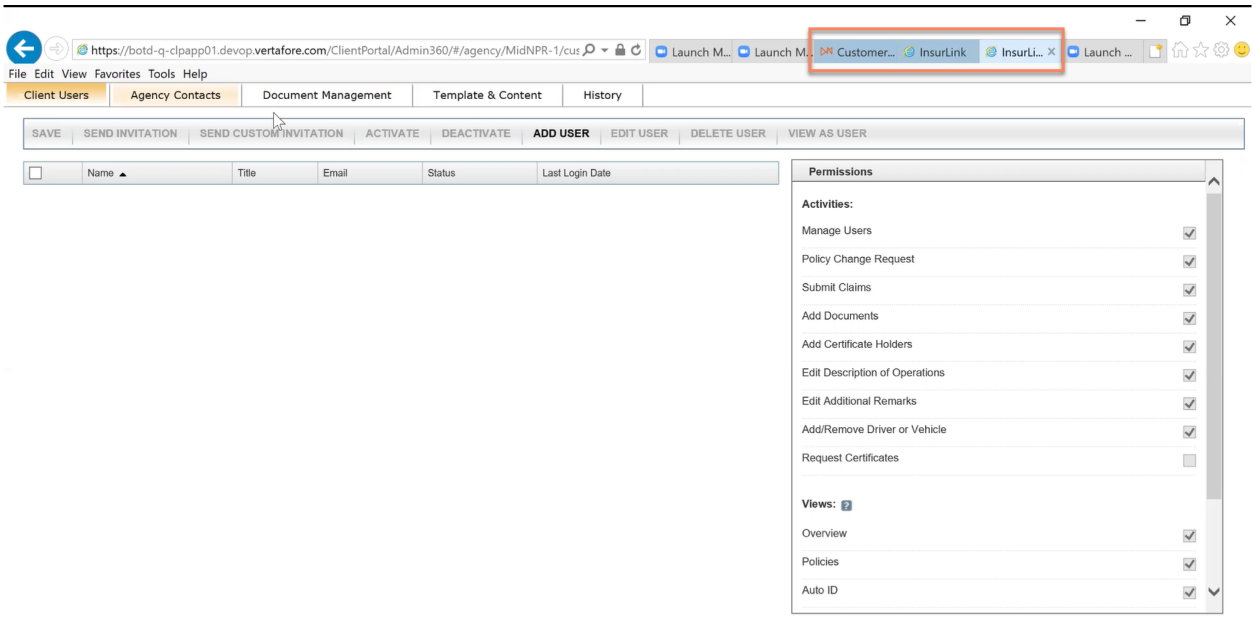
Description & Doc Type

InsurLink Update

The InsurLink link is moving from the **Views** section to the **Actions** section under **Integration Partners.** In addition, when you click on **InsurLink** a new tab in your browser will open with the application.



Actions: InsurLink

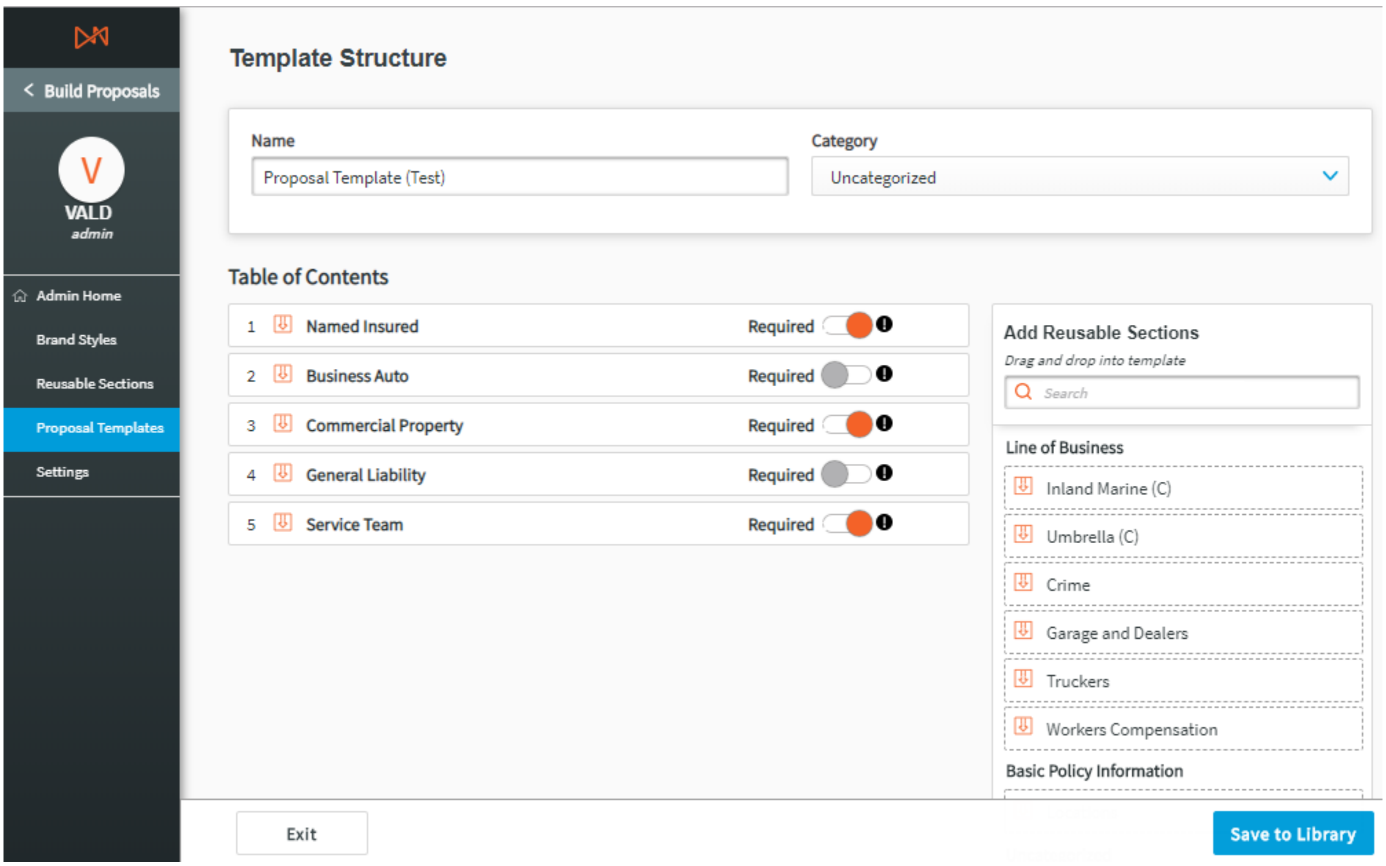


InsurLink: New Tab

Proposal Builder Integration

Proposal Builder is a new feature for AMS360 Online users that aims to deliver time savings, branding consistency, and lower E&O risks.

There are two roles in Proposal Builder, Admin and Account Manager. Admin users can customize every aspect of their organization's proposals to ensure consistent branding style and messaging. This includes standardized cover page and document formatting, reusable sections, the ability to import AMS360 data, and setting the proposal structure. Account Managers use the standardized brand styles and content as building blocks to create professional and consistent proposals quickly.



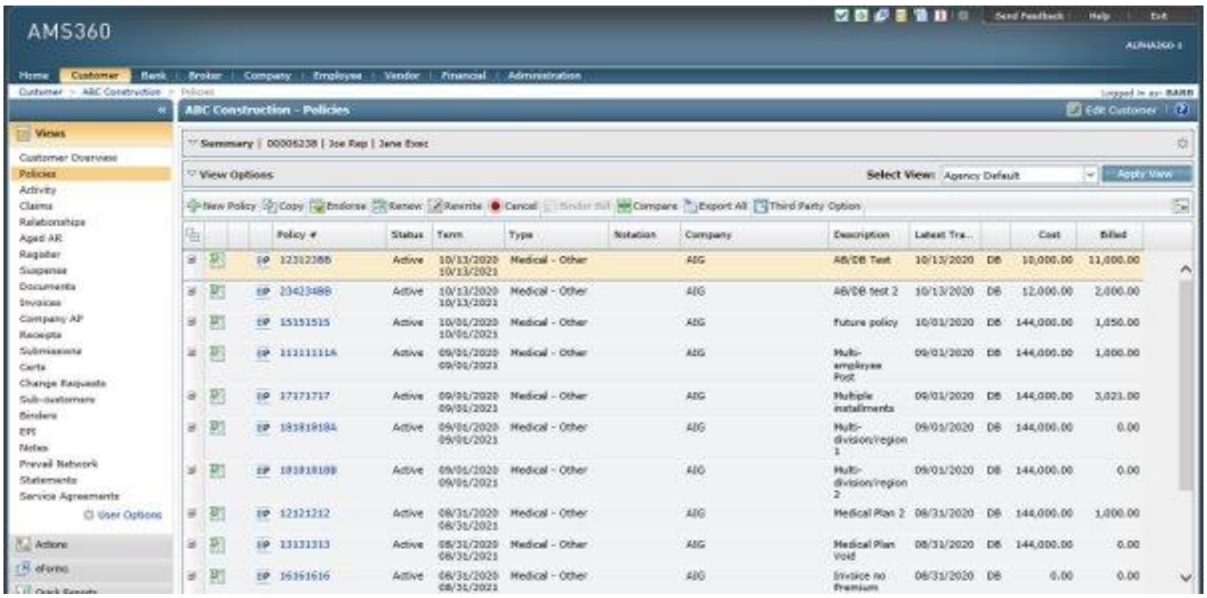
Proposal Builder Template

Vertafore

Enhancements to BenefitPoint

The new integration uses our EMS API technology and we have changed this integration from a Direct Bill Entry Statement to Customer Center Billed. This is so that we can post in items individually and only return the items that cannot be matched. In addition, we have improved the error messages so you will easily know what needs to be corrected and we have created a new report titled **Direct Bill Invoice.**

- The new statement integration is for on-line customers who do Accrual accounting only



AMS360: Policies

- <u>Invoice</u>
  - With the first invoice posting the policy will be flagged with a data entry origin of **Benefit Point** and the policy will be changed to **Customer Center** billed
    - A BenefitPoint Icon will display next to the policy and on the register view
    - Because of this origin, these policies cannot be pulled to a Direct Bill Statement
  - The Premium does not need to exist on the policy to have an invoice posted
    - Because of this, the Unbilled Premium field in the UI could show a negative value in the cases where the Billed amount is greater than the available Transaction Premium
  - How the Unbilled Premium is calculated has not changed
  - The Premium does not need to be included on the statement to have the invoice posted
  - Not all the employees receiving commission on the statement need to exist on the policy in AMS360
    - You will still only pay an employee once on an invoice

- A broker will need to exist on the policy to pay commission to a broker
- AMS will not enforce that the commission amount be equal to the commission percentage
    - This is due to different rounding rules in BP as compared to AMS

- All Invoice Dates will be the date of posting unless changed
    - The reason for changing the effective date would be to do a future effective dated policy

- The GL posting cannot be less than the policy effective date
    - The GL posting date will be changed in these circumstances to be the policy effective date

- <u>Changes because of no DBE Statement</u>

    - The GL posting date can now be selected in BenefitPoint
        - There are permissions for allowing backdating or not

    - There will be no Direct Bill Entry statements in the company center

    - There is a new Direct Bill Invoice report that can be run by the BP statement ID, Date, or invoice range
        - The new report will also show if items did not post
        - The new report will reflect GL posting dates

- <u>Void:</u>

    - Processing a void in BP will now void the invoice that was first created

- <u>Statement Posting Limitation</u>

    - You will receive an error if you try to post a direct bill invoice to an agency billed policy

    - Currently there is a 10,000-row limit on posting an individual statement

    - There is a 99-invoice limit on posting to a single policy on a single statement

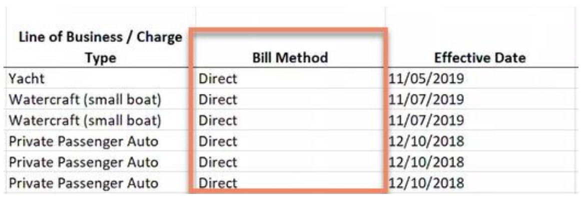
Accounting

Revenue Recognition Report Enhancements

We have made several enhancements to both Revenue Recognition reports (Employee Benefits and P&C) with the overall goal of condensing data and improving data integrity.

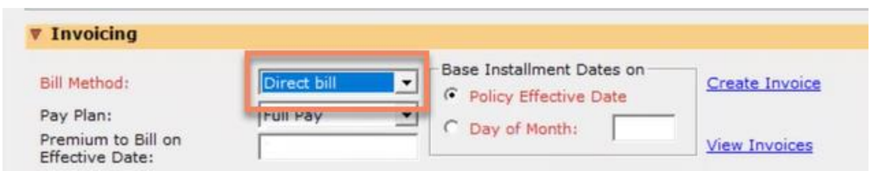
EMPLOYEE BENEFITS

1. The **Bill Method** column will now pull from **invoices**. If a policy is unbilled it will be pulled from the **Policy**.



Line of Business / Charge Type	Bill Method	Effective Date
Yacht	Direct	11/05/2019
Watercraft (small boat)	Direct	11/07/2019
Watercraft (small boat)	Direct	11/07/2019
Private Passenger Auto	Direct	12/10/2018
Private Passenger Auto	Direct	12/10/2018
Private Passenger Auto	Direct	12/10/2018

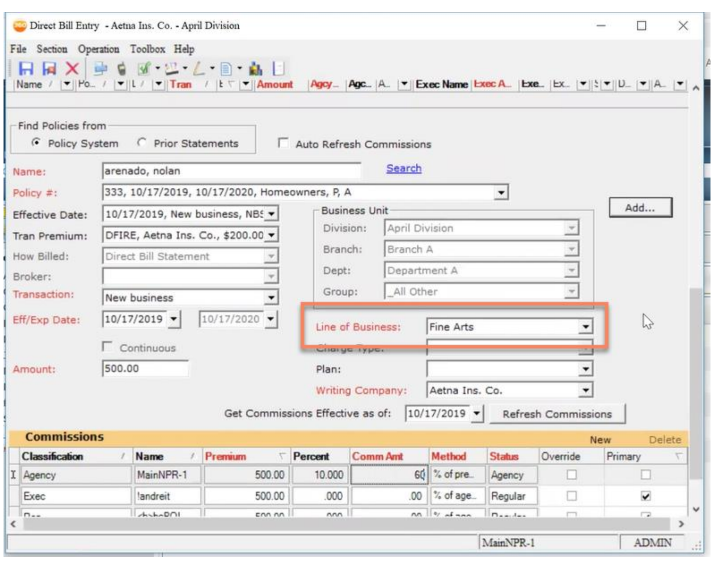
Revenue Recognition Report: Bill Method



Invoicing: Direct Bill

2. **Submission** and **Deleted** policies have been removed from the Revenue Recognition Report.

3. The **Line of Business** column will now pull from the invoice for **Direct Bill Entry** billing.

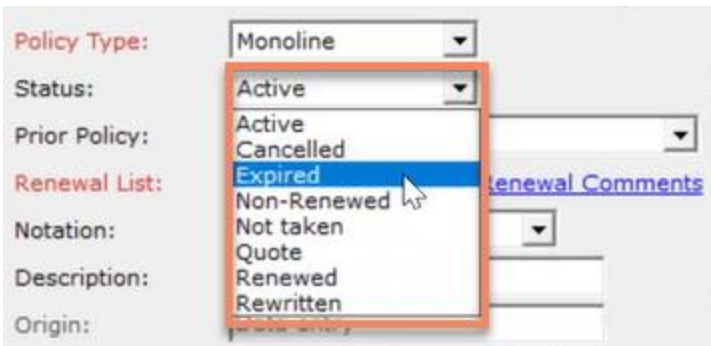


Direct Bill Entry: LOB

Truckers	Direct
Homeowners	Direct
Business Auto	Direct
Fine Arts	Direct
Homeowners	Direct
Commercial Property	Direct
Inland Marine (C)	Agency
Fine Arts	Agency

Revenue Recognition Report: LOB

4. Policies with a status of **Renewed, Expired** or **Canceled** will now display $0 for the **Unbilled Revenue** column.



Status

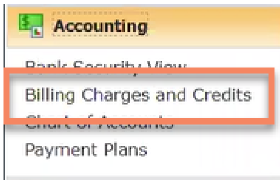
AJ
Unbilled Revenue (Deferred Revenue)
$ 0.00
$ 0.00
$ 0.00
$ 0.00
$ 0.00
$ 0.00
$ 0.00
$ 0.00

Revenue Recognition Report: Unbilled Revenue

5. Agency Commissions for non-premium fee charges will now display in the report as individual line items.

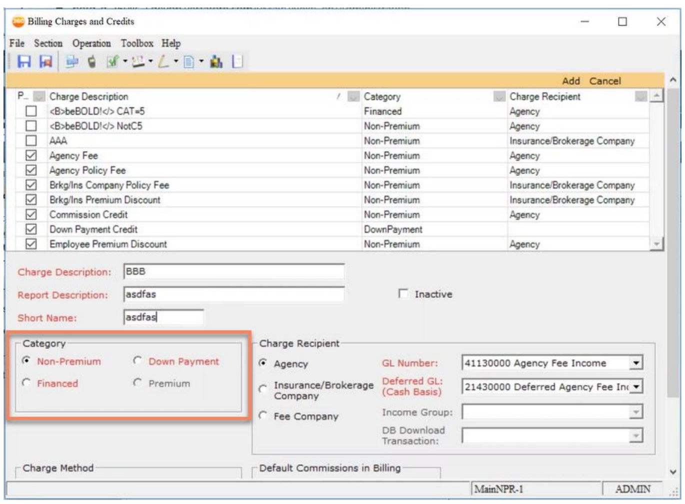
Custom Charge Type

a. In the **Administration** center, click on the **Accounting** tab and then click on **Billing Chargers and Credits**. In the **Billing Charges** winform, click on **New**.

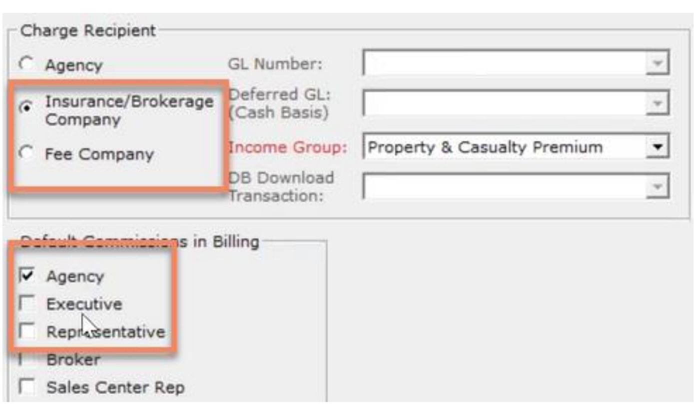


Billing Charges and Credits

b. Fill in the required info and in the **Category** section, click on **Non-Premium**. Then, under the **Charge Recipient** section, click **on Insurance/Brokerage Company.** Next, click on **Agency** under the **Default Commissions in Billing** Section.



Billing Charges and Credits: Category



Billing Charges and Credits: Charge Receipt

c. Finally, when you are ready click on **Add** and then **Save** and **Close.**

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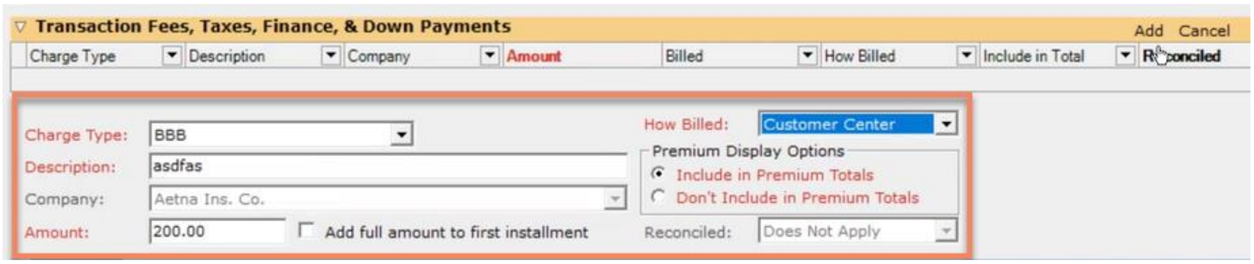
Policy View

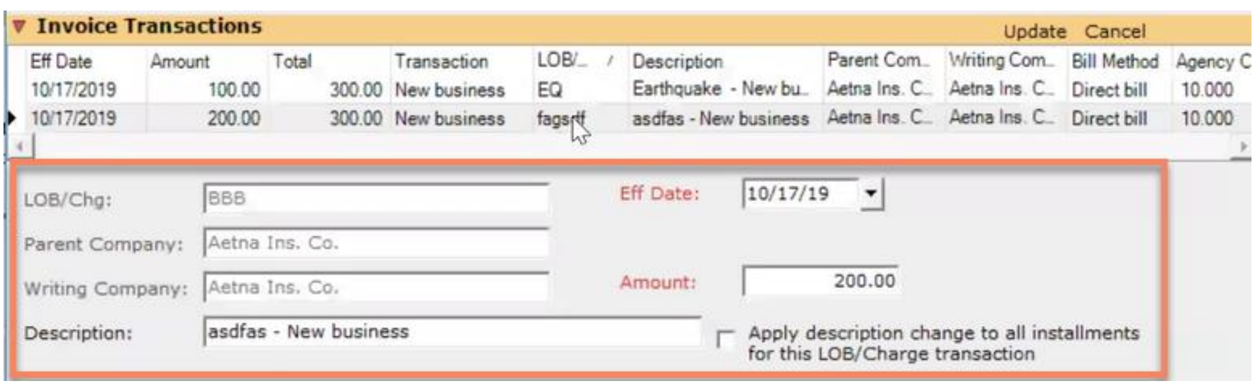
a. When you open the **Policy** winform you will now see your new custom charge type under the **Transaction Fees, Taxes & Down Payments** section. Fill in the **Amount** and **How Billed** sections and when you are ready, click on **Add.**



Policy: Charge Type

b. Under the invoicing section, click on **Create Invoice.** In the **Standard Invoice** winform you will now see your new **Invoice Transaction.** When you are ready, **post the invoice** and **generate** the **Revenue Recognition** report. You will now be able to find your new custom charge.

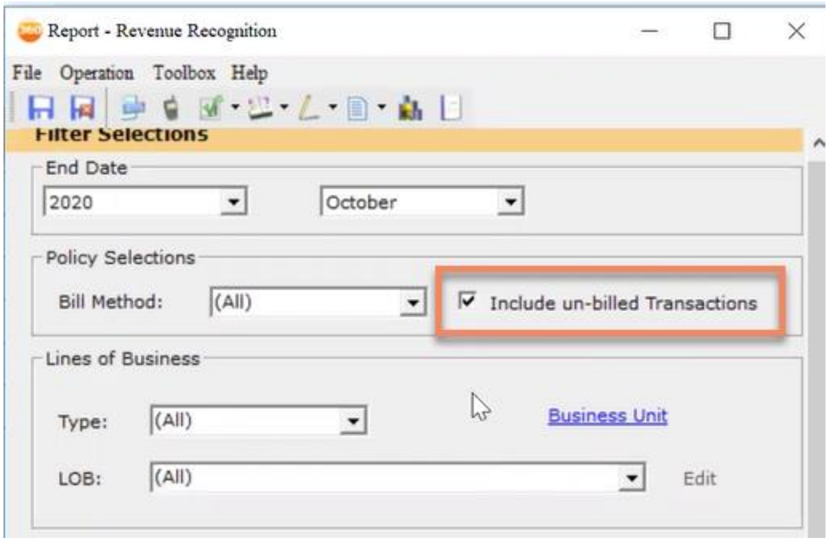
Bill To



Invoice Transactions

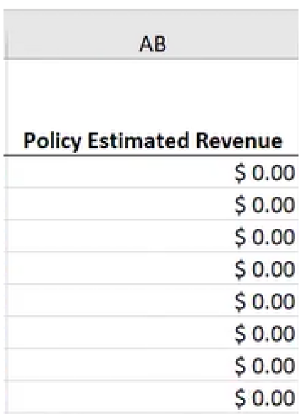
Revenue Recognition Report: Invoice Transactions

6. There is now a filter on the Revenue Recognition report that will **show/hide** unbilled transactions.
    a. It is **checked** by default.

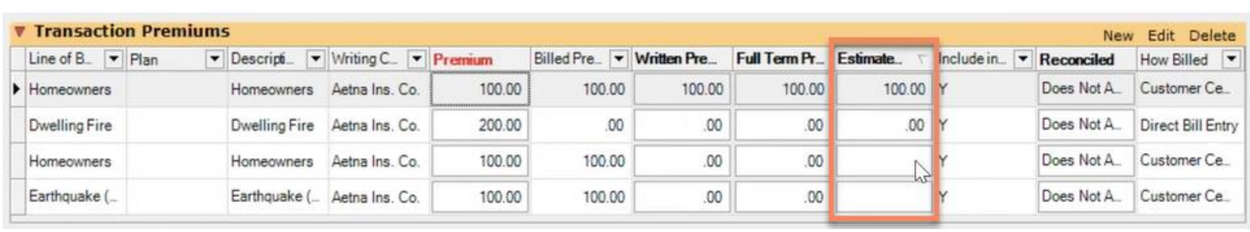


Include un-billed Transactions

7. The **Policy Estimated Revenue** field has been added as a column in the Revenue Recognition report.



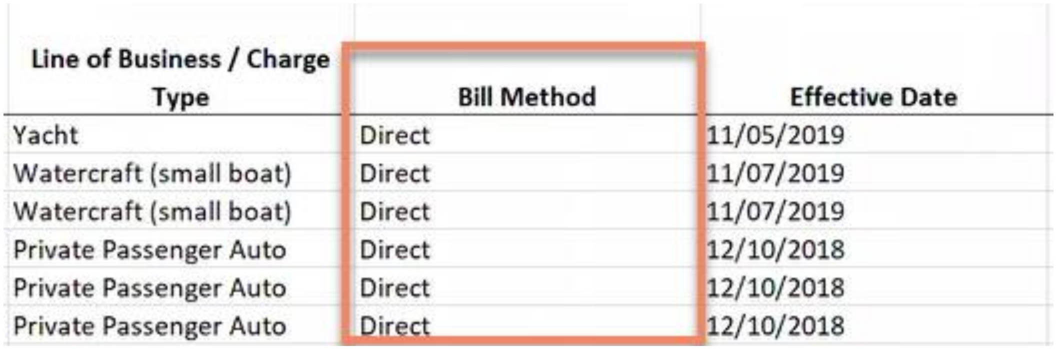
Policy Estimated Revenue Column



Estimated Revenue Info

P&C

1. The **Bill Method** column will now pull from **invoices.** If a policy is unbilled it will be pulled from the **Policy.**



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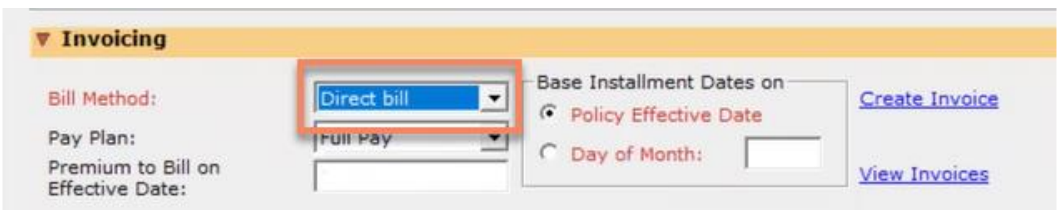
Private Passenger Auto	Direct	12/10/2018

Revenue Recognition Report: Bill Method



Invoicing: Direct Bill

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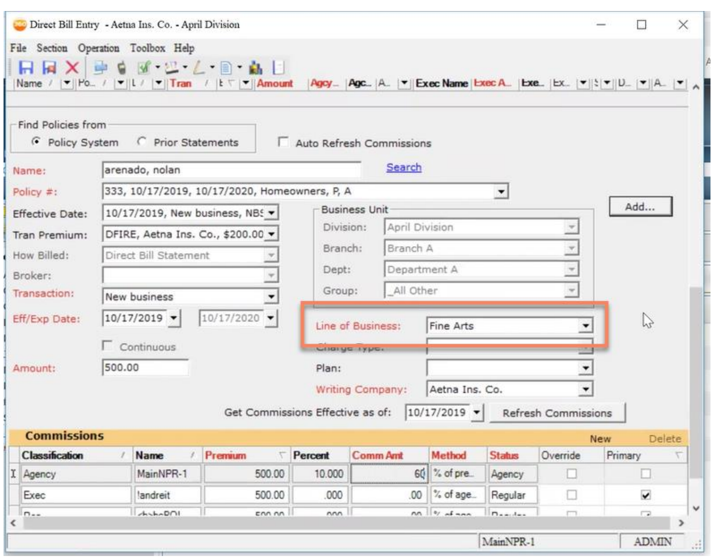
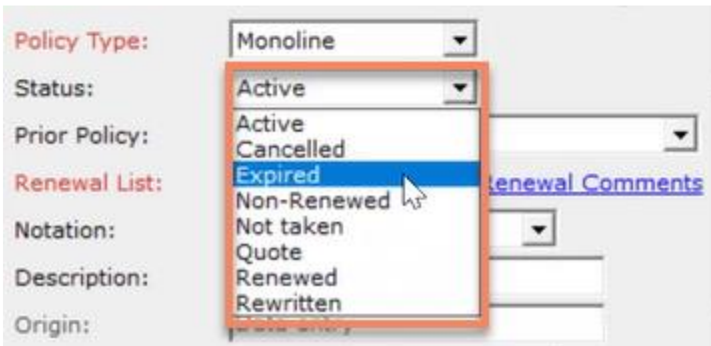


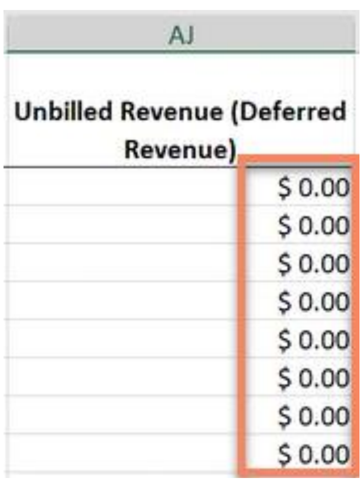
Direct Bill Entry: LOB

Revenue Recognition Report: LOB

4. Policies with a status of **Renewed**, **Expired** or **Canceled** will now display $0 for the **Unbilled Revenue** column.



Status



Revenue Recognition Report: Unbilled Revenue

5. Direct Bill Entry invoices have been added to the Revenue Recognition report and will appear as individual line items.
    a. If a policy line of business matches a Direct Bill Entry line of business, then it will consolidate into a single row in the report.

BBB	Direct	10/08/2020	10/08/2021	Additional Products	20
BBB	Direct	10/08/2020	10/08/2021	Financial Products	30
BBB	Direct	10/08/2020	10/08/2021	401K Plan	10
BBB	Direct	10/08/2020	10/08/2021	Agriculture Property	60
BBB	Direct	10/08/2020	10/08/2021	Package (C)	60

Direct Bill Entry: 1 LOBs

    b. If a policy has several Lines of Business and a Direct Bill Entry Invoice Line of Business is used that does not match (such as Package) then the resulting row in the report will aggregate all policy estimated revenue fields for that billed row.

BBB	Direct	10/08/2020	10/08/2021	Package (C)	60
BBB	Direct	10/08/2020	10/08/2021	401K Plan	10
BBB	Direct	10/08/2020	10/08/2021	Additional Products	20
BBB	Direct	10/08/2020	10/08/2021	Financial Products	30

Direct Bill Entry: Multiple LOBs

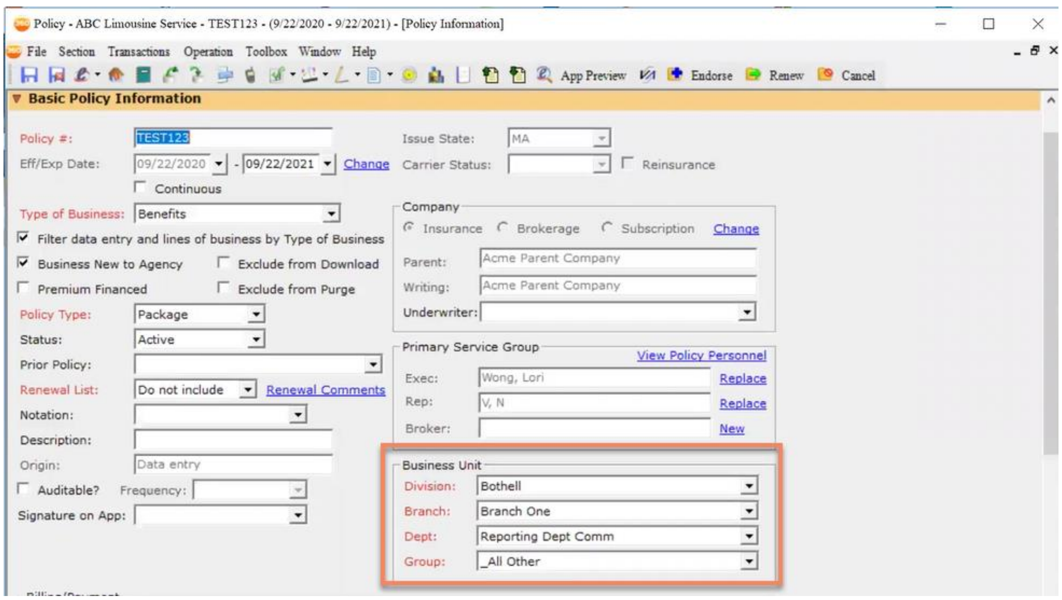
Policy

Prevent Assigning the wrong Business Unit on a Policy

SCROLL WHEEL LOCK

On the policy winform it is now impossible to use the scroll wheel on the Business Unit fields and change their values. These fields must first be selected by clicking the drop-down arrow and can then be used by the scroll wheel to pick a new value. This update is to prevent accidental changes to business units prior to invoicing the policy.

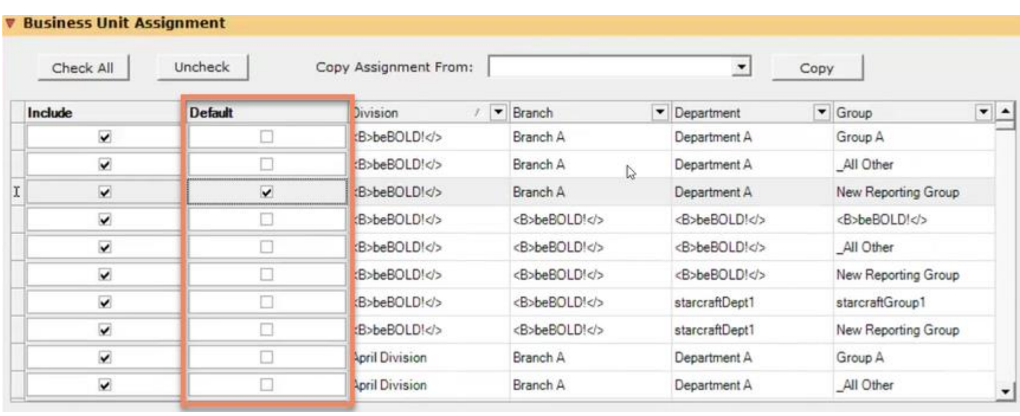
- This update does not apply to the Policy creation screen.



Business Unit

EMPLOYEE DEFAULT COLUMN

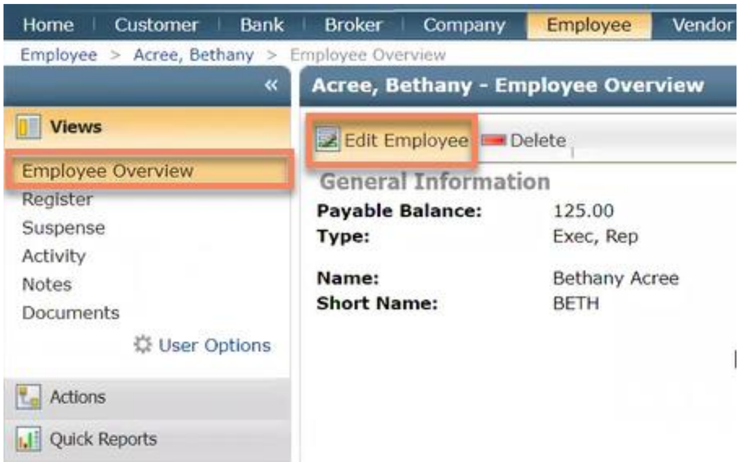
There is now a Business Unit employee default column in the **Employee Center** > **Edit Employee** > **Business Unit Assignment** section which allows an admin user to set the default Business Unit used by an employee when they create a customer.



Default

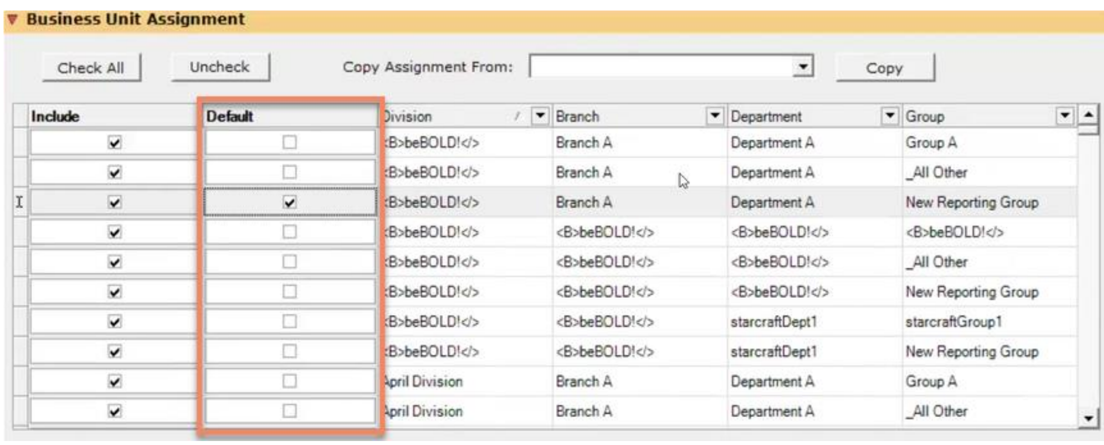
Business Unit Assignment

1. In the **Employee** center, select an employee, click on **Employee Overview,** and then click on **Edit Employee.** Open the tab for **Business Unit Assignment**, you will notice the new **Default** column.



Edit Employee

2. You can only select one Business Unit Default at a time. When you are ready, click on **Save.**

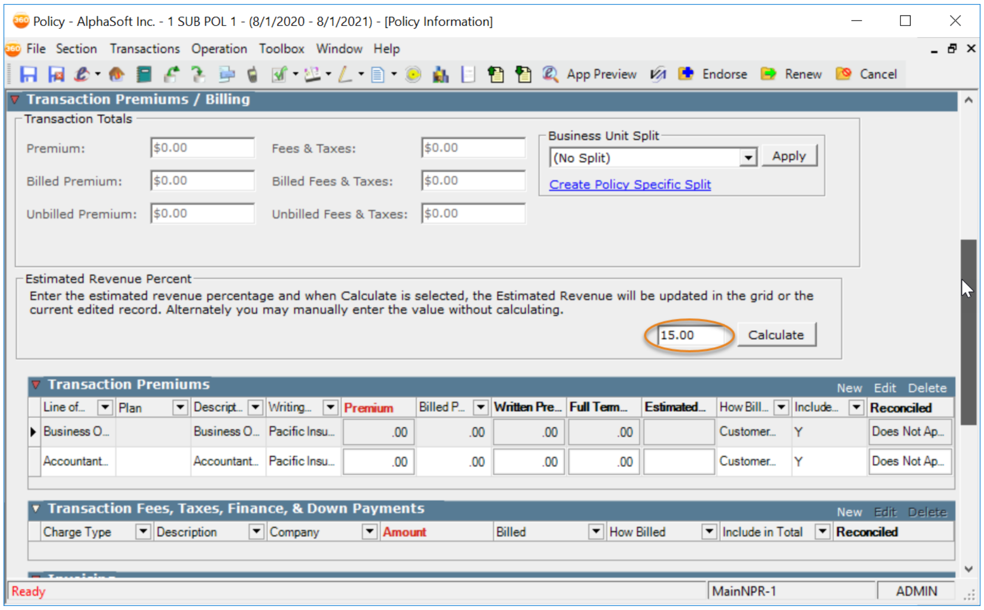


Default Column

- This section contains all the business unit combinations. However, the employee must have access to the default business unit selected for this functionality to apply. This column will allow you to select any Business Unit combination, but if the employee does not have access to the said Business Unit combination, then this functionality will not apply when the employee creates a customer. The agency must also have the Business Unit filtering turned on which is controlled in the **Admin** center.

Auto Populate Estimated Revenue

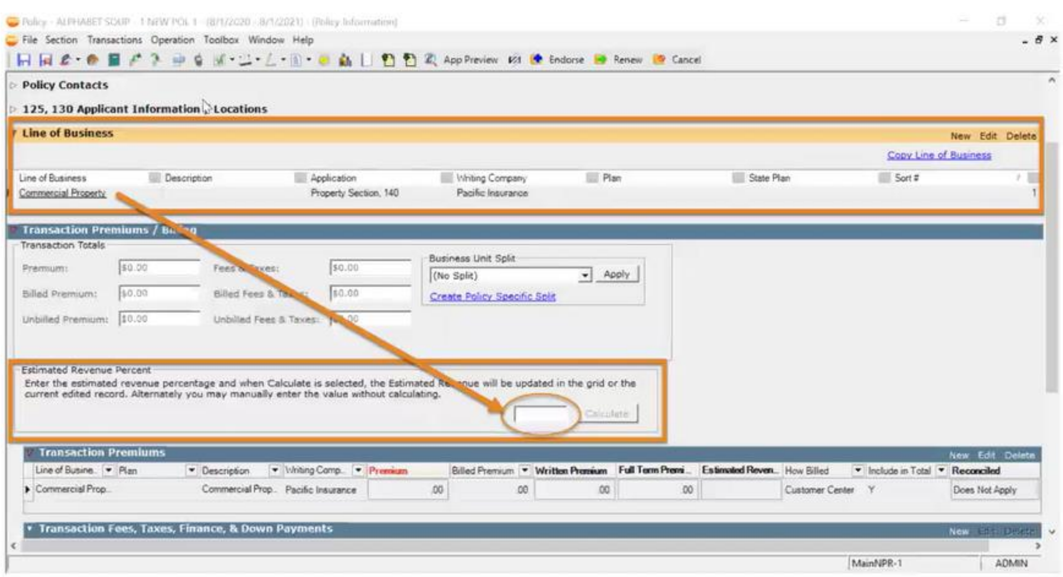
The Estimated Revenue Percent will now auto populate on a new policy. It is important to note that this is just an estimate and may not be the same as the Actual Revenue (Agency Commission) as the number will be based on Premiums and does not include fees.



Estimated Revenue Percent

ESTIMATED REVENUE RULES

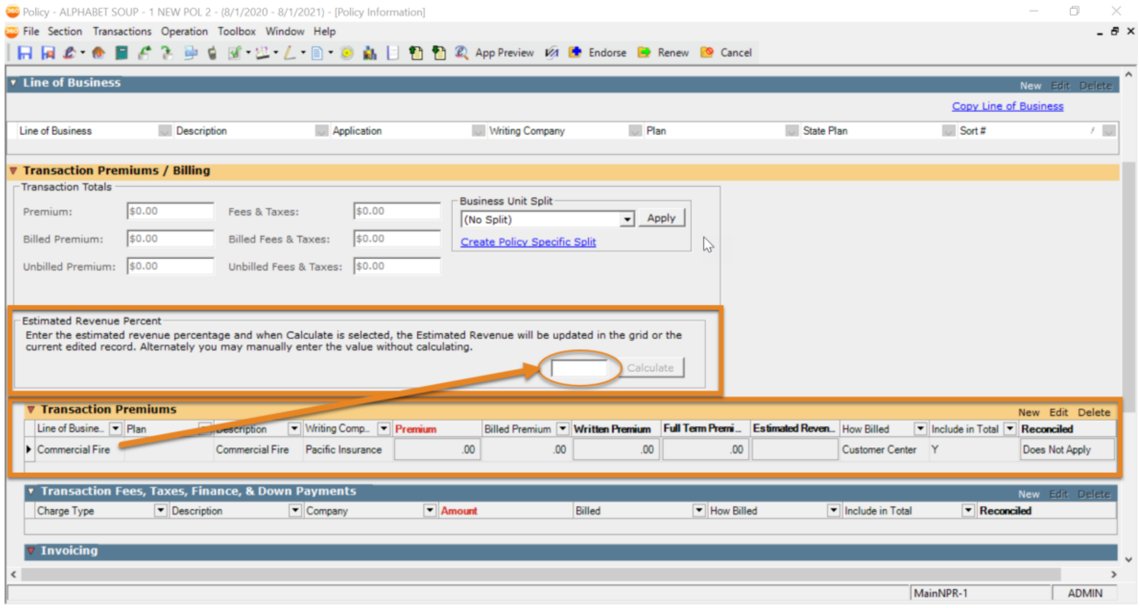
- If the **First Line of Business** entry is entered first, then the Estimated Revenue Percent will be determined and populated.

  LOB: Estimated Revenue Percent

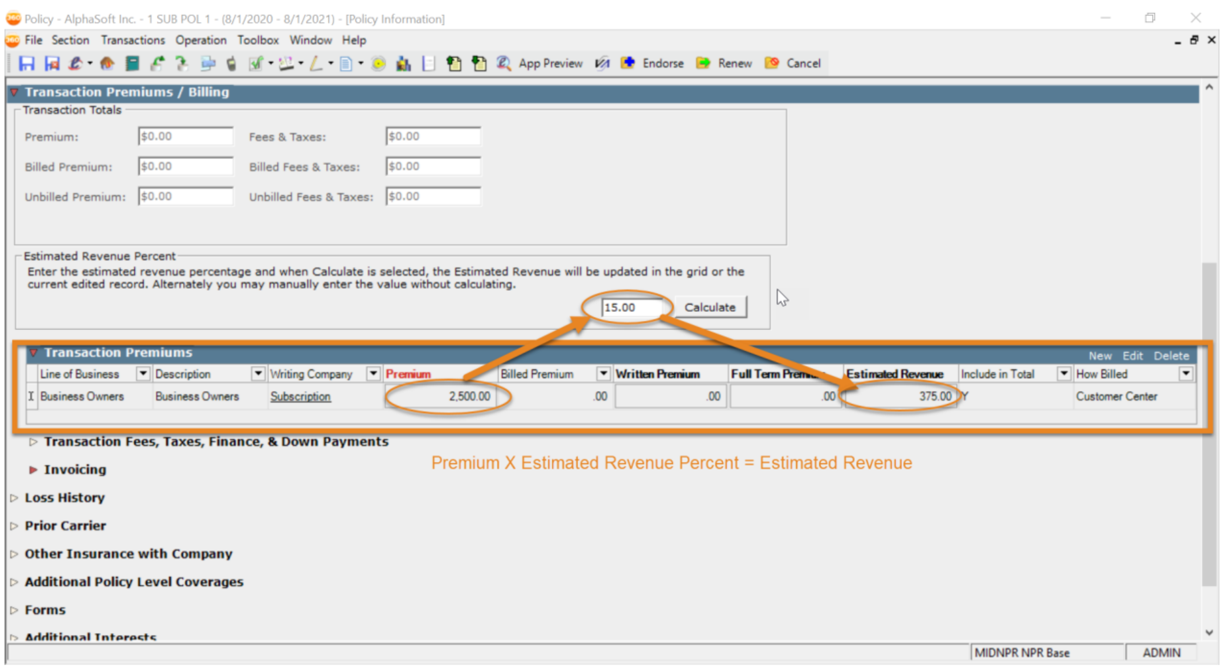
- If no LOB is entered in the LOB grid, and the first premium row is entered in the **Premium Grid**, the Estimated Revenue Percent will be determined and populated.

- When additional Premium transaction rows are added, the Estimated Revenue will calculate and auto-fill it on the Premium Transaction row.



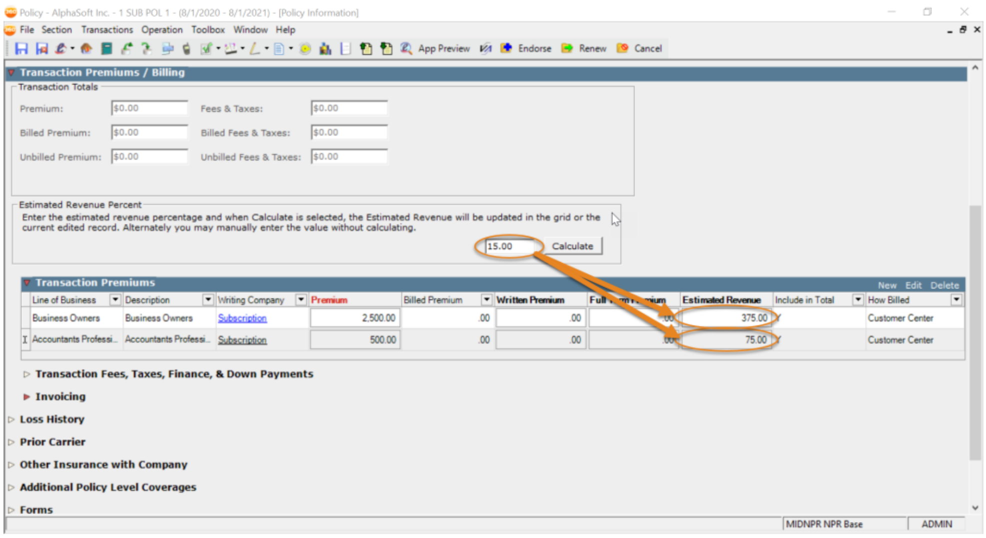
Transaction Premium: Estimated Revenue Percent

- When the Premium Amount is added or changed, the Estimated Revenue will calculate and auto-fill it on the Premium Transaction row.



Estimated Revenue Percent: Transaction Premium

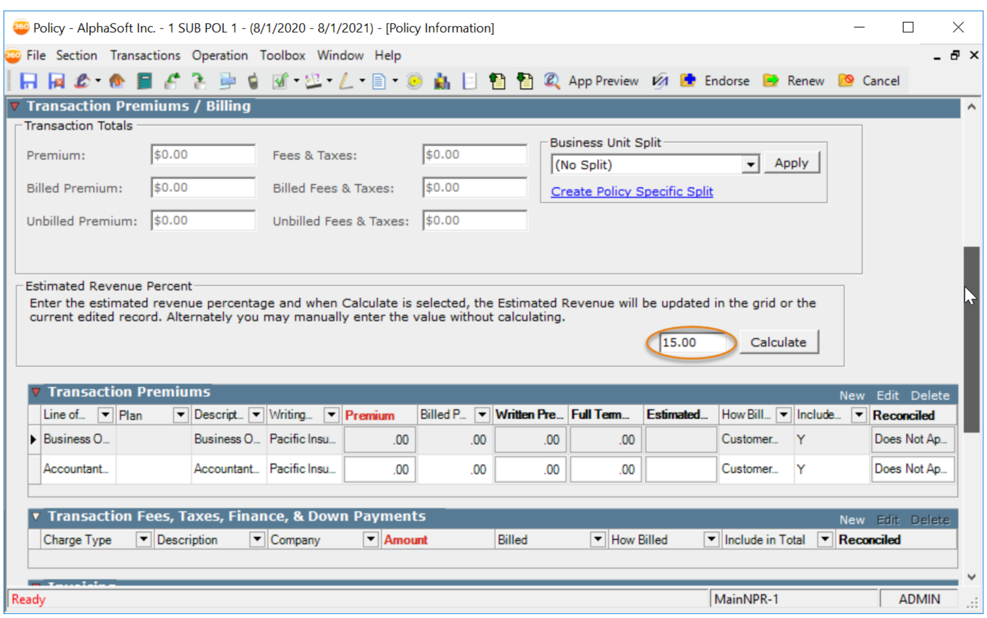
- When the Estimated Premium Percent is manually entered or changed, the Estimated Revenue will calculate and auto-fill it on all the Premium Transaction rows. This will occur when the user clicks out of the Estimated Premium Percent box or clicks the Calculate button.



Estimated Revenue Percent: Transaction Premium

- Endorsement will carry over to the Estimated Revenue Percent to each new transaction.

- On copy, renew and rewrite, it will retrieve and populate the Estimated Revenue Percent box from the Agency Negotiated Commission setup or Company Commission Setup for that transaction type.



Estimated Revenue

- If the downloaded policy and the manual shell both have the transaction, then both will have the Estimated Revenue and the user will need to zero out one of them.

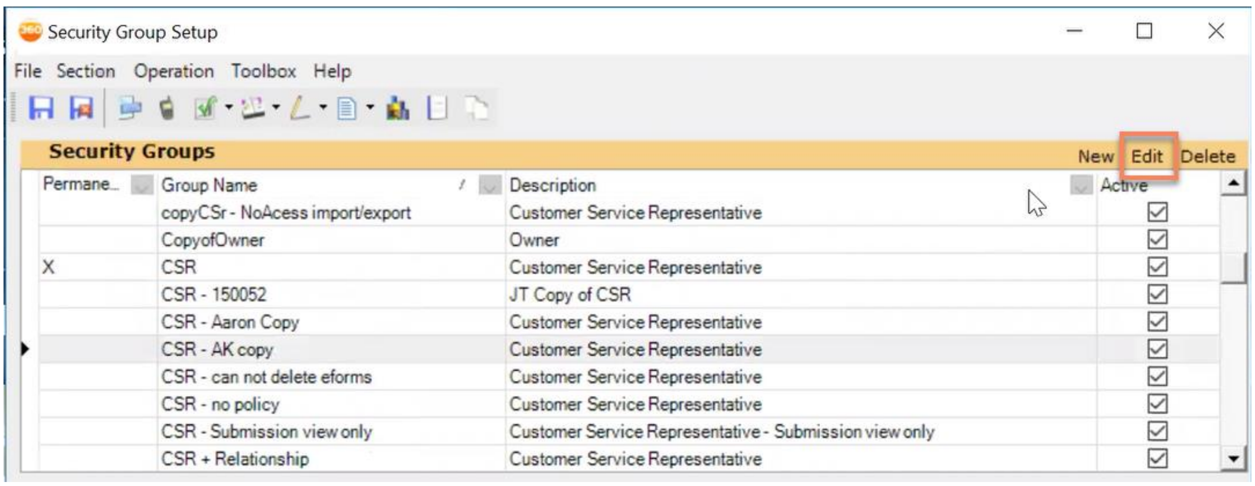
New Security for a Primary Service Group on Create Policy form

New security measures have been added to the Primary Service group component that will prevent users with **No Access** from changing personnel on the **Create New Policy** form.

- This will apply to all workflows that use the Create New Policy form (including New, Copy, Renew, and Rewrite.)

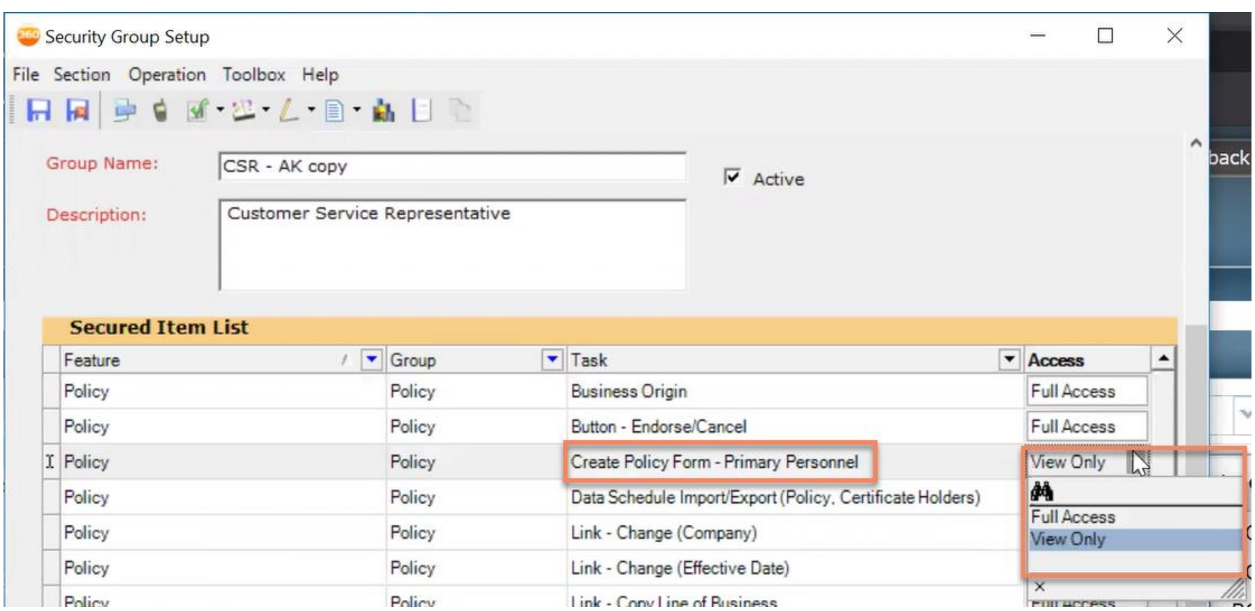
ADMIN SETUP

1. In the **Administration** center, click on **Security Group Setup** under **General.** Select the security group you wish to limit access to than click on **Edit.**



Security Group Setup

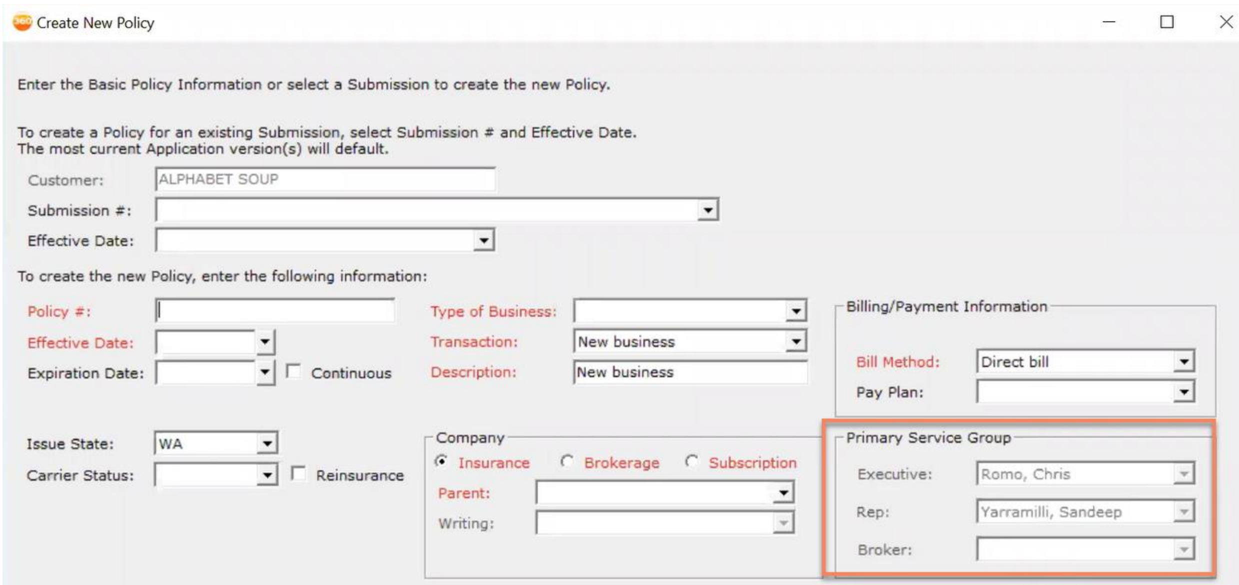
2. Scroll down to the **Secured Item List** and navigate to the Policy group called **Create Policy Form.** You can use the drop-down menu to select either **View Only** or **Full Access.** For now, click on **View Only.** When you are ready click on **Save and Close.**



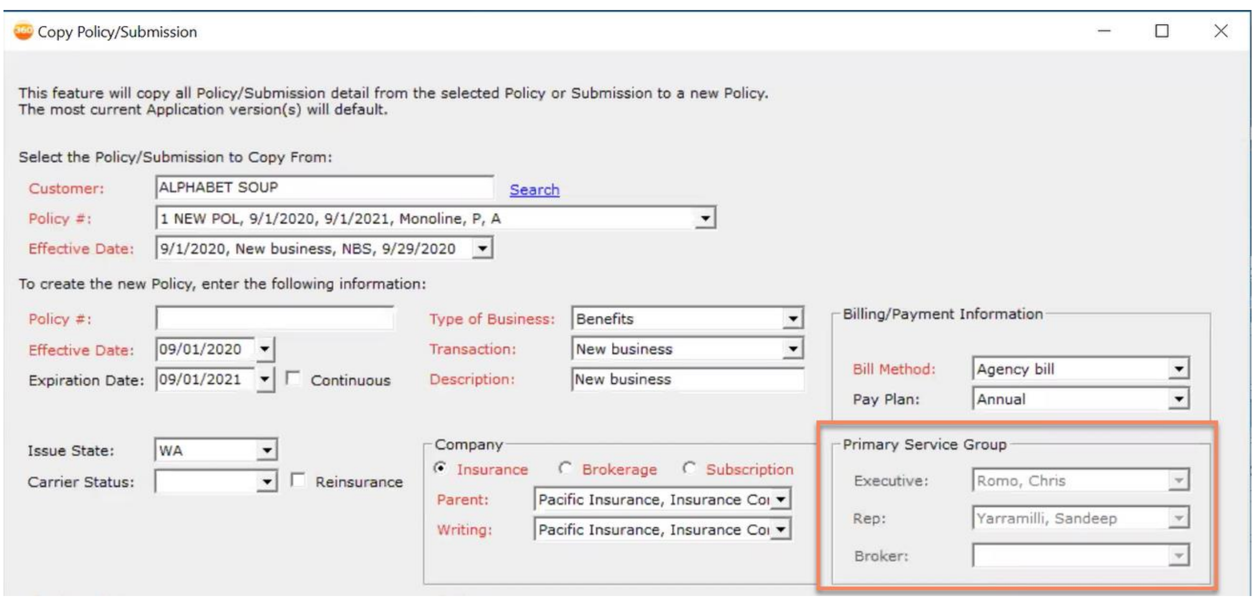
Create Policy Form: View Only

EMPLOYEE VIEW

1. In the **Customer** center, select an existing customer and click on **New Policy**. When the winform opens, you will now notice that you do not have permission to update the **Primary Service Group** fields. The information is locked in and you cannot make edits.
    a. This also applies to Copy, Renew and Rewrite forms.



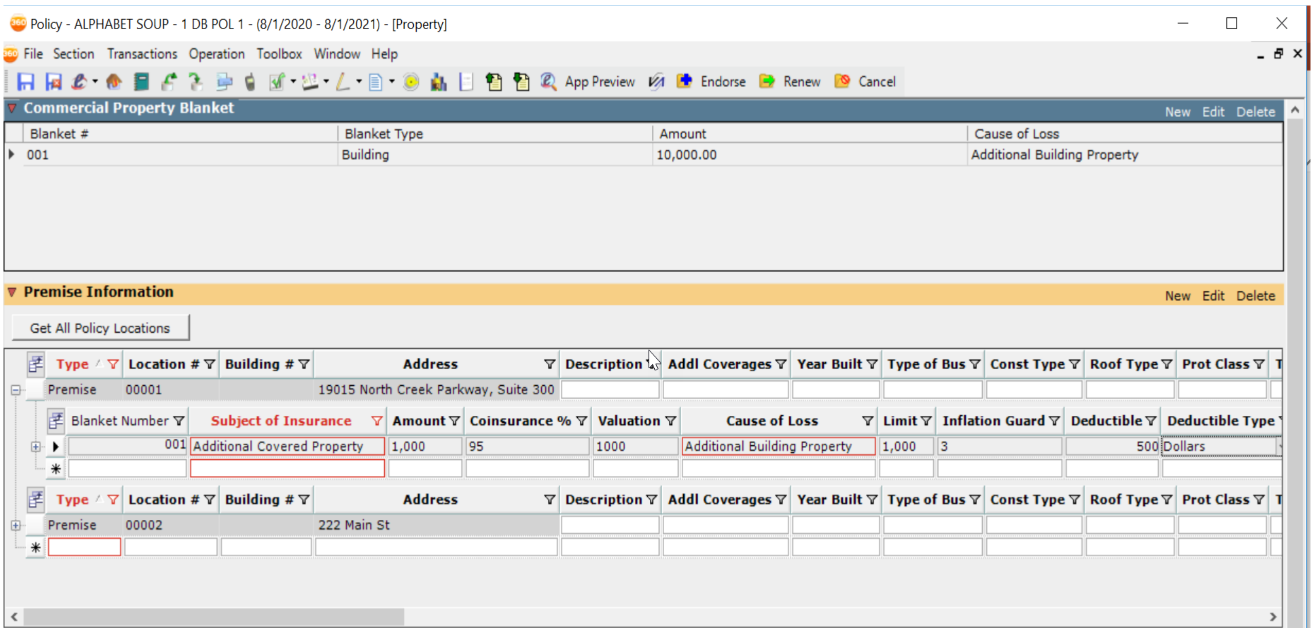
Create New Policy: Primary Service Group



Copy Policy/Submission Policy: Primary Service Group

Commercial Blanket Updates

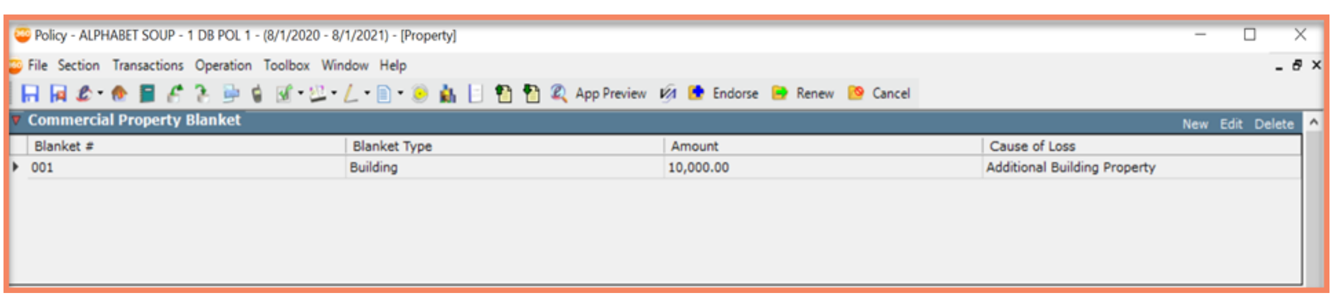
We have updated the commercial blanket coverage on a policy to meet the current ACORD standard. This includes adding a separate section for creating blanket coverages with blanket numbers, adding an ability to select a blanket number on a location/building in the premise section and have the blanket data auto-populate to that premise. We also updated the AL3 import and export functions. Old style blankets in the premise section remain as legacy information but do not import or export.



Commercial Blanket Updates

UPDATED UI

- We have added fields to the new **Commercial Property Blanket** Section in the **Policy** winform.
- Blankets will be entered in this new section.
- Columns:
    - Blanket #
    - Blanket Type
    - Amount
    - Cause of Loss

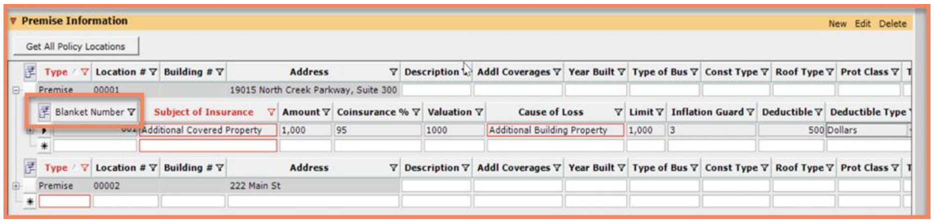


Commercial Property Blanket: New Section

- For **Blanket coverage:**
  - We added a **Blanket Number** column
  - Now, most fields will auto-populate

- The **Type** column has been removed for blankets.

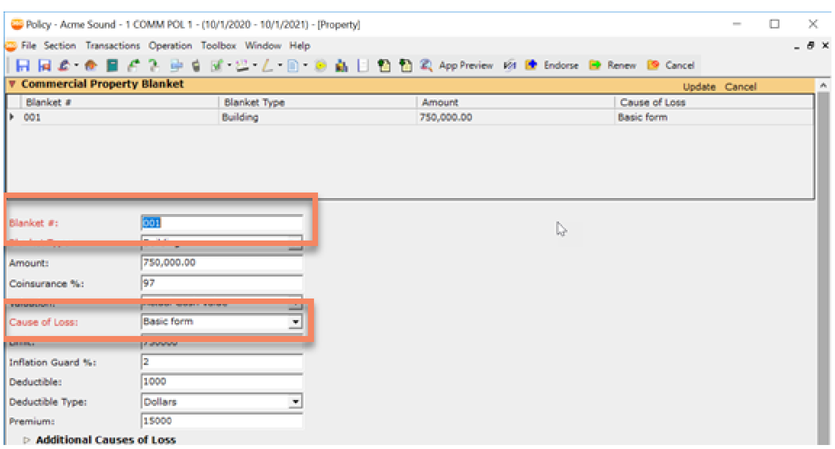
- Existing blankets will remain unchanged, but you will not be able to **export** or **import** the info.



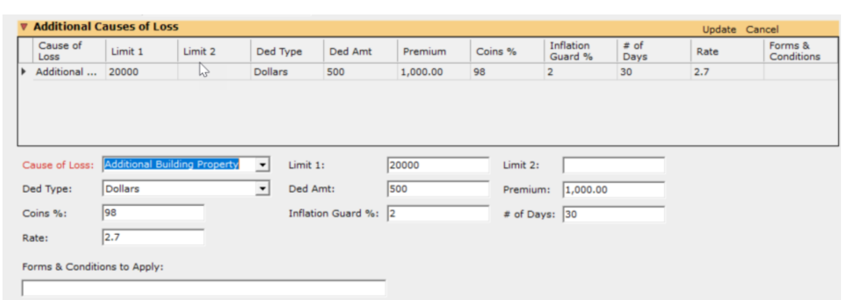
Premise Information: Updated Section

Additional UI Updates

- **Commercial Property Blanket** section:
  - New fields have been added
  - New **Additional Cause of Loss** section has been added
  - In the **premise** section when a blanket number is entered, the fields below will be auto populated with the corresponding information
    - After the initial load, changes must be done manually
  - Changes to any **Premise** data will not update the CPB section blanket



Commercial Property Blanket



Additional Causes of Loss

Updated Property Codes

- Add Subject of Insurance Codes (SOI):
    - Accounts Receivable Uncollectable
    - Appurtenant Structures
    - Barn
    - Dwelling
    - Equipment Breakdown
    - Fine Arts on Exhibit
    - Fixed Equipment
    - Hazard Substances
    - Outbuilding (Farm)
    - Shade Structure

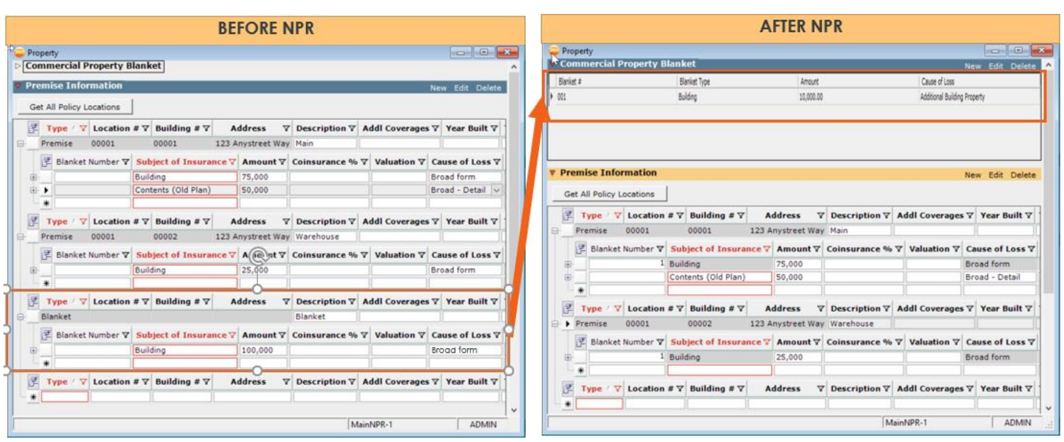
- Add Blanket Types:
    - Building
    - Building and Contents
    - Building, Personal Property and Business Income
    - Contents
    - Other
    - Tenants Improvements and Betterments
    - Time Element

- Add Coverage Codes (COL):
    - Extended Coverage (old plan)
    - Spoilage Breakdown
    - Spoilage Power Outage

NPR CUSTOMER DATA

- We have copied the **Blanket** section info to the **Commercial Property Blanket** section.
    - You will still be able to see this info in the premise section, but you cannot export this info

- You will assign a blanket number to a location that will carry that blanket coverage.



Before and After: NPR

Convert SOI to Blanket Type for Existing Blankets

- The NPR process will make these updates in the new Commercial Property Blankets section:
  - A blanket will be created from an existing **old type** blanket in the premise section
  - The SOI will convert SOI to Blanket Type per the table below, any SOI code not in the table will convert as OTHER
  - A Blanket Number will be assigned

- The user will need to assign a blanket number to the property rows that should have that blanket coverage. And create new blankets, as required.

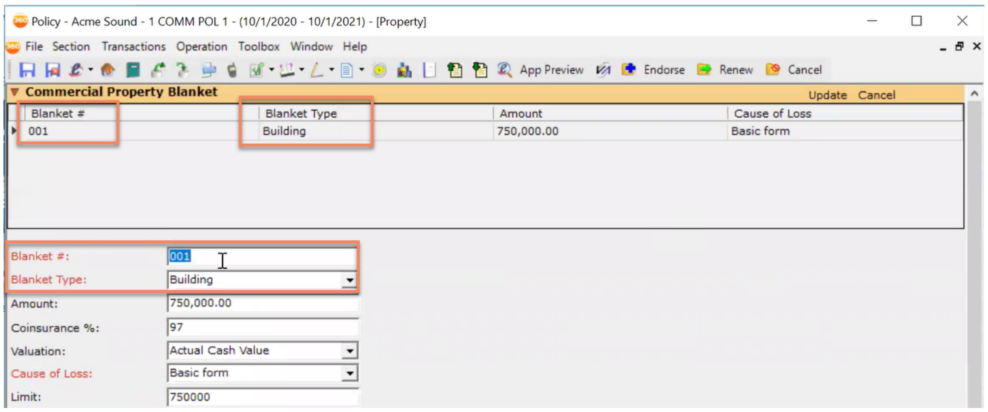
SOI Desc	SOI Code	Blanket Type	Code
Building	B	Building	B
Building & Contents	CBCC or BC	Building & Contents	BC
Multiple SOI's for Business Income and Personal Property	Multiple	Building Personal Property & Business Income	BP
Contents	C	Contents	C
Time Element	TIMEL	Time Element	T
Tenant Improvements & Betterments	TIB or TIBOP	Tenant Improvements & Betterments	TB
ALL OTHERS	All other codes	Other	OTH

ACORD Blanket Type List (and Convert from SOI)

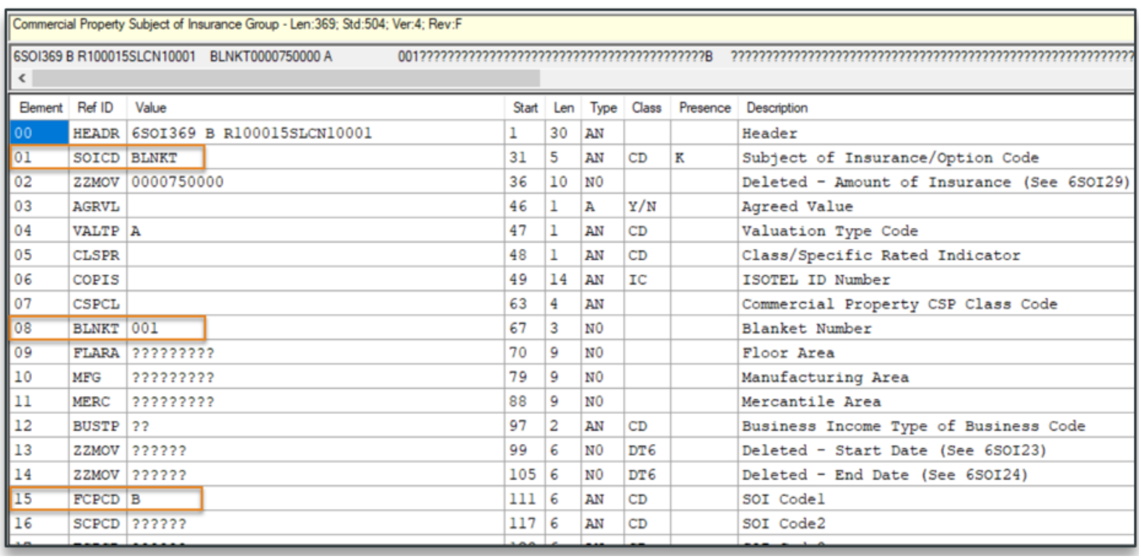
AL3 FILE EXPORT UPDATE

- The export function sends the **Blanket Number** and **Blanket Type** to the correct elements in the 6SOI blanket and property groups for all the Blankets and Properties on the policy.

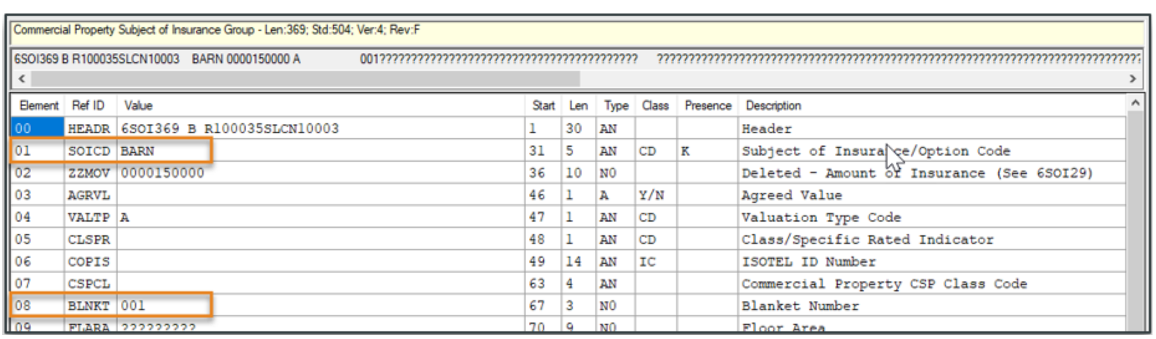
- The AL3 tree structure aligns with ACORD standard.



Blanket # & Type



6SOI under 5LAG01 = 0000 for Blanket

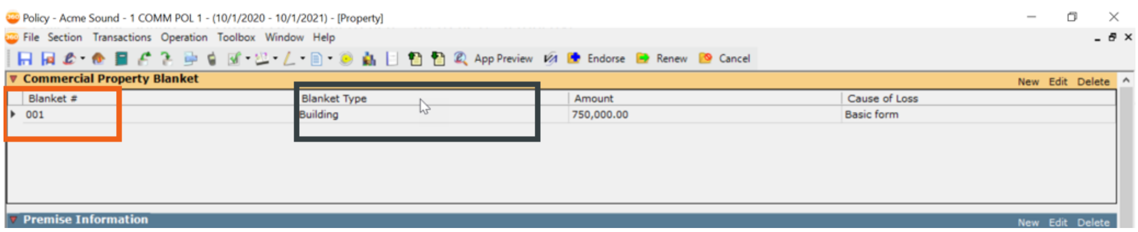


6SOI under 5LAG01 = 000X for Property

AL3 FILE IMPORT UPDATE

- The import function has been updated to pull in the **Blanket Number** and **Blanket Type** elements from the 6SOI blanket and property groups and populate the policy.
- The AL3 tree structure aligns with ACORD standard.
- Import from Blanket 6SOI:

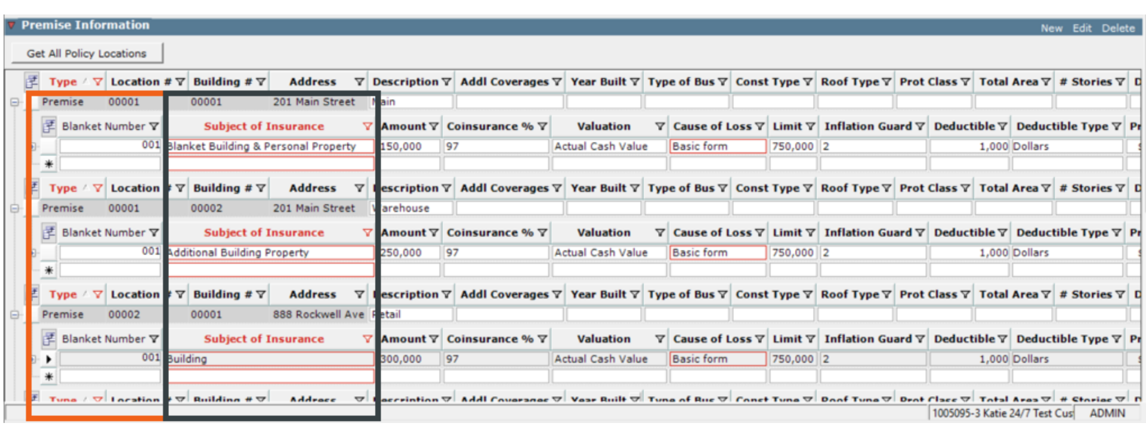
Element	Value	Import	To DB Location
01	BLNKT	No	
08	Blanket #	Yes	CPB section: Blanket #
15	Blanket Type	Yes	CPB section: Blanket Type



Blanket # & Type

- Import from Location 6SOI:

Element	Value	Import	To DB Location
01	SOI	Yes	Location row: SOI
08	Blanket #	Yes	Location row: Blanket #



Premise

ACORD 140 UPDATES FOR BLANKET

The blanket now displays in the **BLANKET SUMMARY** section (with the blanket number, amount, and the blanket type description).

- PREMISES INFORMATION now displays the blanket number
- PREMISE INFORMATION no longer maps blanket premise

AGENCY CUSTOMER ID: 00001336

ACORD®

PROPERTY SECTION

DATE (MM/DD/YYYY): 10/02/2020

AGENCY NAME		CARRIER	NAIC CODE
8.5.2 24/7 Test		JTS Insurance Company	45451
POLICY NUMBER	**EFFECTIVE DATE**	**NAMED INSURED(S)**	
CPKGE 12345	05/01/2018	Floral Lawn	

BLANKET SUMMARY

BLKT #	AMOUNT	TYPE	BLKT #	AMOUNT	TYPE
1	$100.00	Building	3	$300.00	Building, Personal Property & Busine
2	$200.00	Building & Contents	4	$400.00	Contents

PREMISES INFORMATION

PREMISES #: 1 STREET ADDRESS: 5731 W 92nd Ave

BUILDING #: 1 BLDG DESCRIPTION:

SUBJECT OF INSURANCE	AMOUNT	COINS %	VALU-ATION	CAUSES OF LOSS	INFLATION GUARD %	DED	DED TYPE	BLKT #	FORMS AND CONDITIONS TO APPLY
Building	5,000,000	90	ACV	Special (Including theft) Detail					
Access Gate								5	

ACORD Form

- When the application contains more than 4 blankets, the additional blankets will overflow to the 101 form

AGENCY CUSTOMER ID: 00001336

LOC #:

ACORD®

ADDITIONAL REMARKS SCHEDULE

Page of

AGENCY		NAMED INSURED
8.5.2 24/7 Test		Floral Lawn
POLICY NUMBER		
CPKGE 12345		
CARRIER	**NAIC CODE**	
JTS Insurance Company	45451	EFFECTIVE DATE: 05/01/2018

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: 140 FORM TITLE: Blanket Summary Section

Blanket Number Amount Blanket Type
5 $500.00 Other

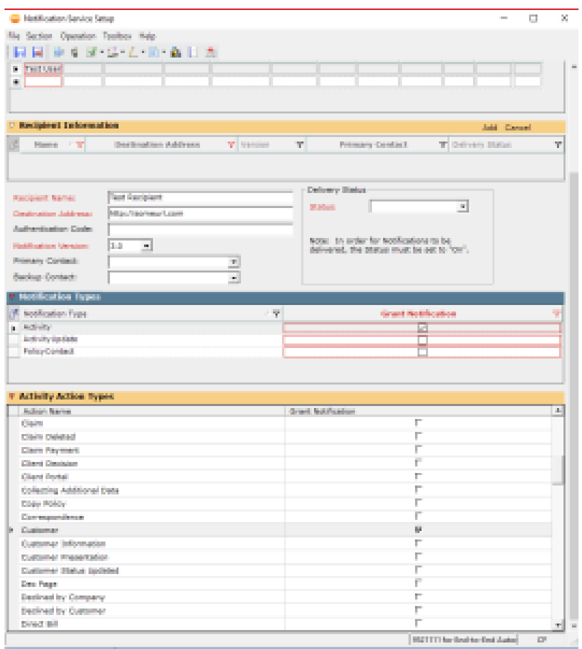
ACORD Form 101

Notification Services

Notification Service Setup

Vertafore has extended notification services so that external applications are now notified whenever activities either:

1. Provide the capability to configure the notification for recognizing the creation and/or modification of Activities.
2. Add the capability of a Notification Service for reporting Policy Contact and Activity changes.



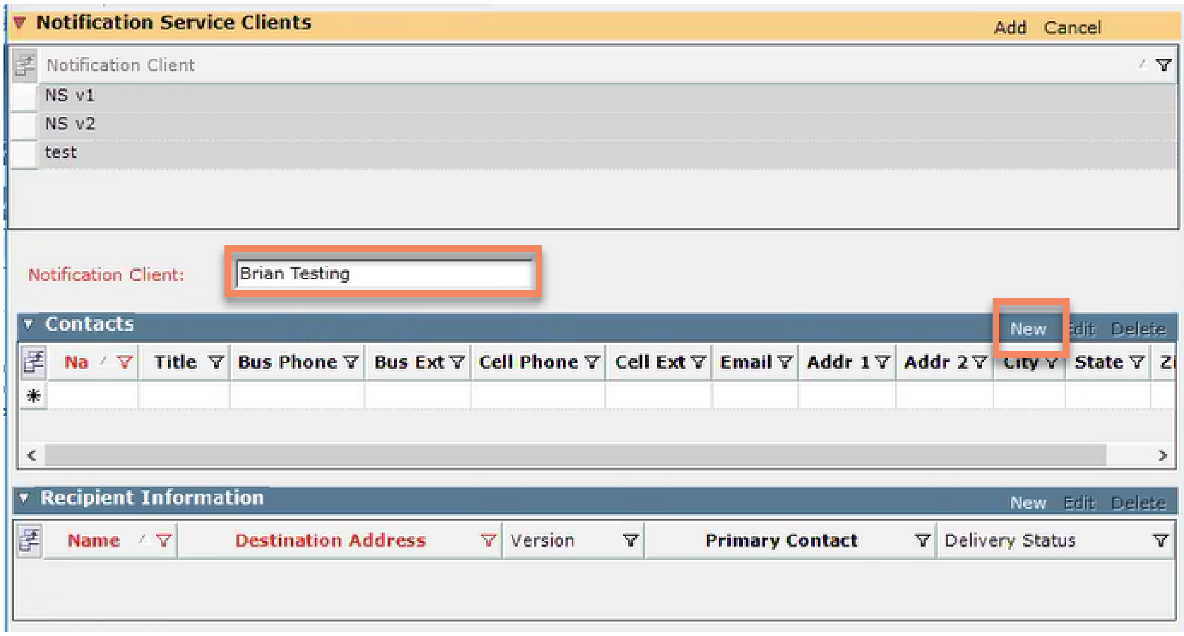
Notification Service Setup

ADMIN SETUP

1. In the **Administration** center, click on **Notification Service Setup** under the **General** section.

General: Notification Service Setup

2. In the **Notification Service Setup** winform, click on **New** and then enter a **Notification Client's** name. Then, click on **New** in the **Contacts** section.



Notification Service Clients

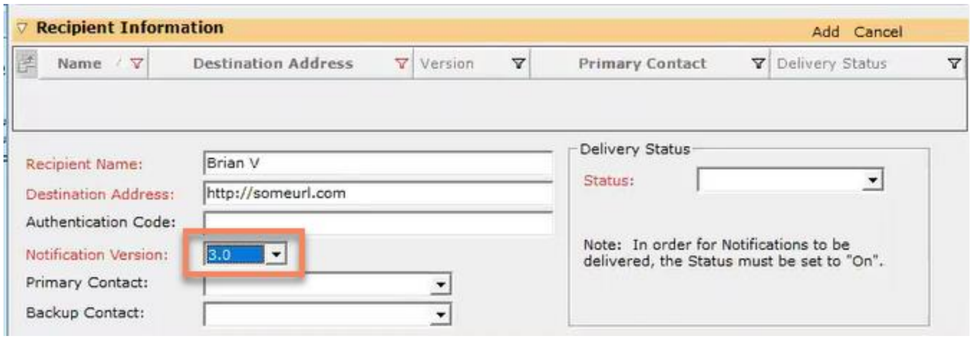
3. In the **Contacts** section fill in the required information. When you are ready, click on **Add**.

Contacts

4. Next, scroll down to the **Recipient Information** section and click on **New.**

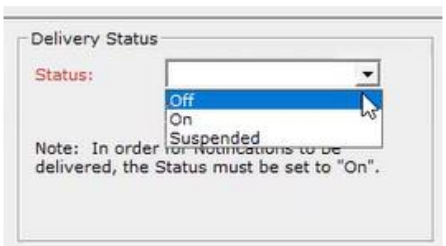
Recipient Information

5. Fill in the required fields and set the **Notification Version** field to **3.0.**



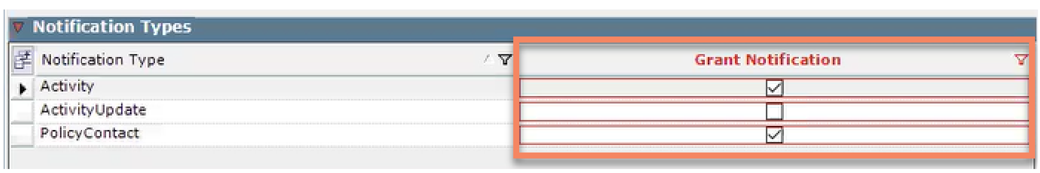
Recipient Information: Notification Version

6. Under the **Delivery Status** section, select **Off**, **On** or **Suspended** depending on your needs.



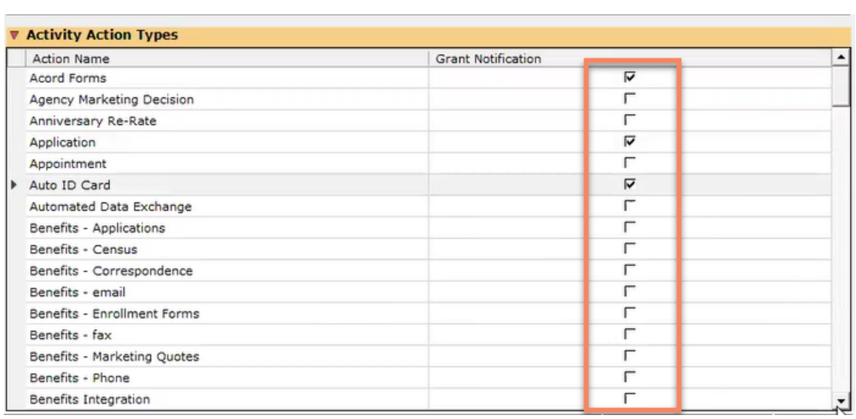
Delivery Status

7. In the **Notification Types** section, click on the items you wish to receive notifications for.



Notification Types

8. Finally, scroll down to the **Activity Action Types** section and select the **activities** you wish to receive notifications for. When you are ready, click **Add** at the top and then **Save & Close.**



Activity Action Types

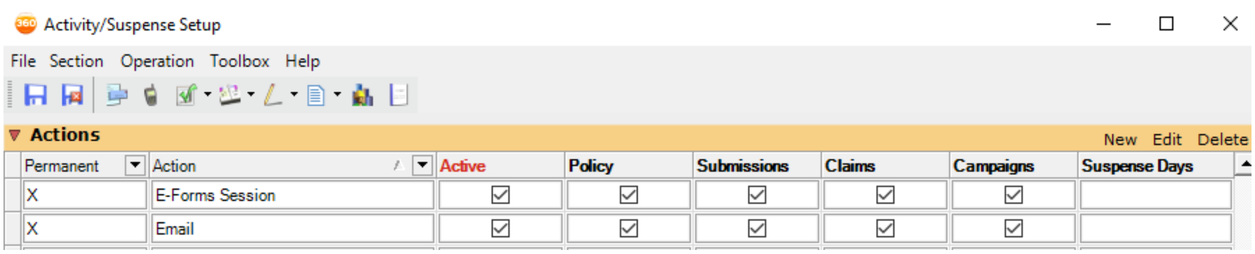
Activity/Suspense Setup

Added Activity Actions

We have added the following **Actions** to the **Activity/Suspense** Setup winform.

- For use with real time integration we added the following:
    - Email
    - Meeting
    - Phone Call
    - Text Message

- For tracking who logs into the Mobile Application we added the following:
    - Mobile



Email

Mobile

Phone Call

Text Message

Mobile App Login Tracking

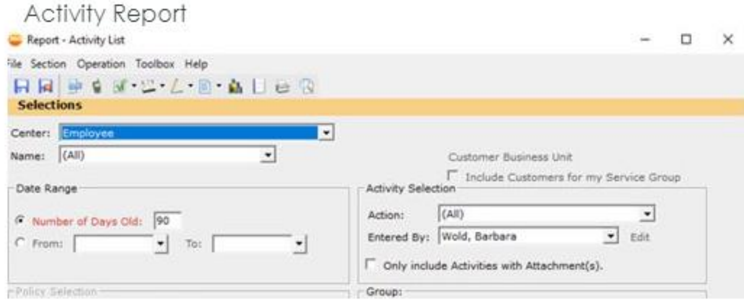
There is now a way to track which user's login using the mobile application. We have a new Activity Action for **Mobile**. If this Activity Action is active it will track who is logged via the Mobile Application.

With an added auditing capability, you will now be able to report on who logged in with the Mobile app. This will help you track how much the mobile app is being used and by whom.

Activity Action

Employee Activity

Activity Report



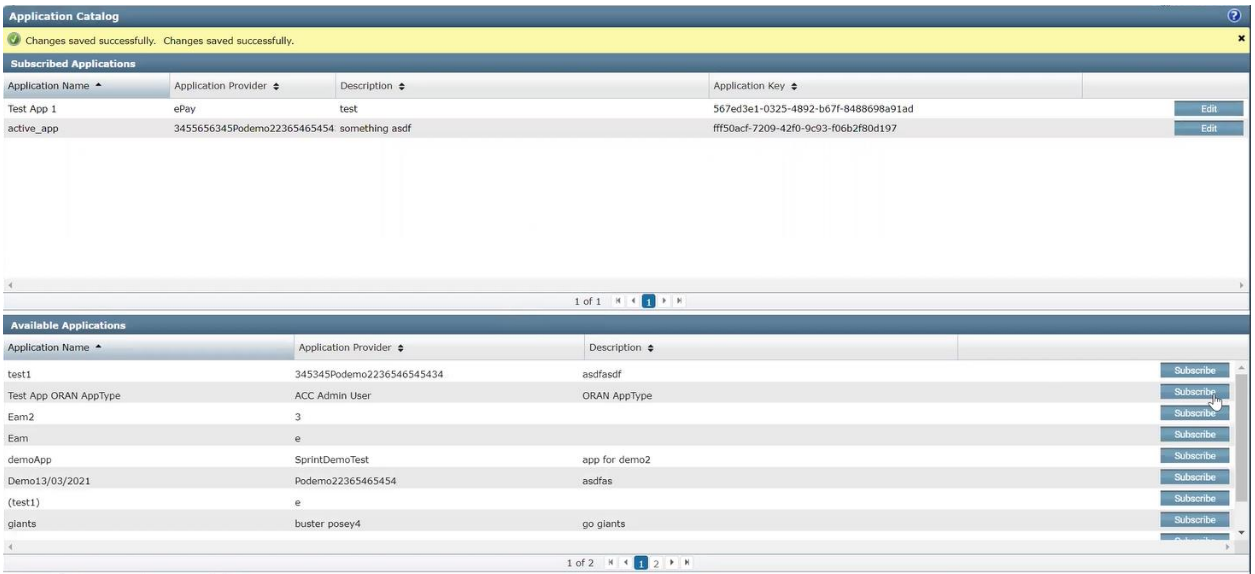
Activity Date	System Date Logged	Entity	Name	Action	Description	Entered By	Transaction Date
7/27/2020 14:14	7/27/2020 14:14	Employee	Barbara Wold	Mobile	AMS360 Mobile - User Login July 27th 2020, 1:14:01 PM	Wold, Barbara	7/27/2020
7/27/2020 14:21	7/27/2020 14:21	Employee	Barbara Wold	Mobile	AMS360 Mobile - User Login July 27th 2020, 1:21:43 PM	Wold, Barbara	7/27/2020
10/21/2020 10:19	10/21/2020 10:19	Employee	Barbara Wold	Mobile	AMS360 Mobile - User Login October 21st 2020, 9:19:38 AM	Wold, Barbara	10/21/2020

Mobile App

API

AMS360 UI for EMS Agency Authorization

There is now an application catalogue accessible for administrators which allows agencies to subscribe to third party applications. To take advantage, an agency will need to contact Vertafore and the third-party application provider.

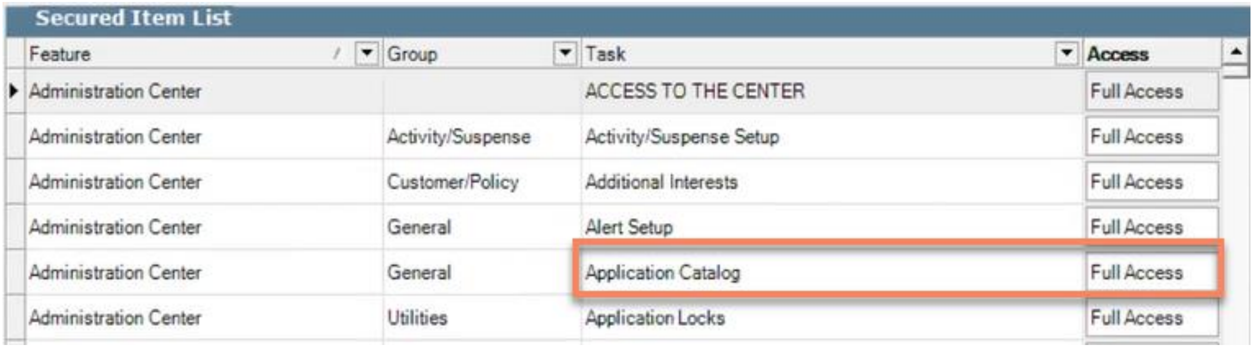


Application Catalog

AGENCY SETUP

1. After contacting Vertafore Support, you will receive an access key code that you will use to connect your 3rd party app. First head to the **Administration** Center. Then, click on **Security Group Setup** under the **General** section. In the Security Group Winform, under the **Secure item list** section, scroll down to the **Application Catalog** task and make sure your permission is set to **Full Access.**

Security Group Setup

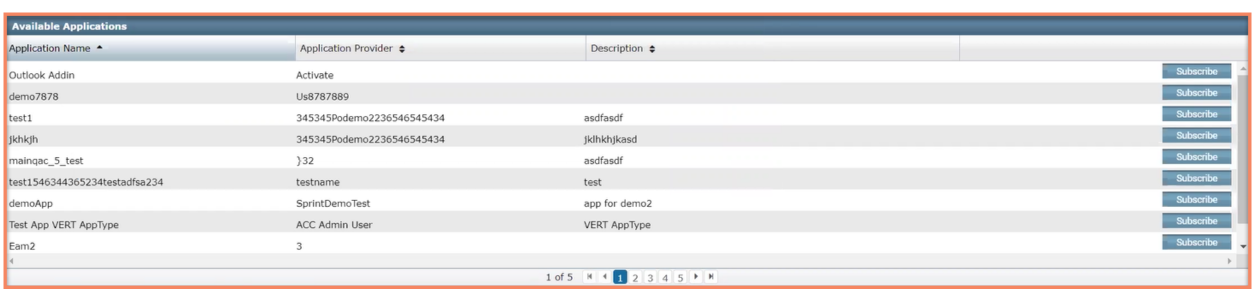


Application Catalog

2. Now that you have access, click on Application Catalog under the **General** section.

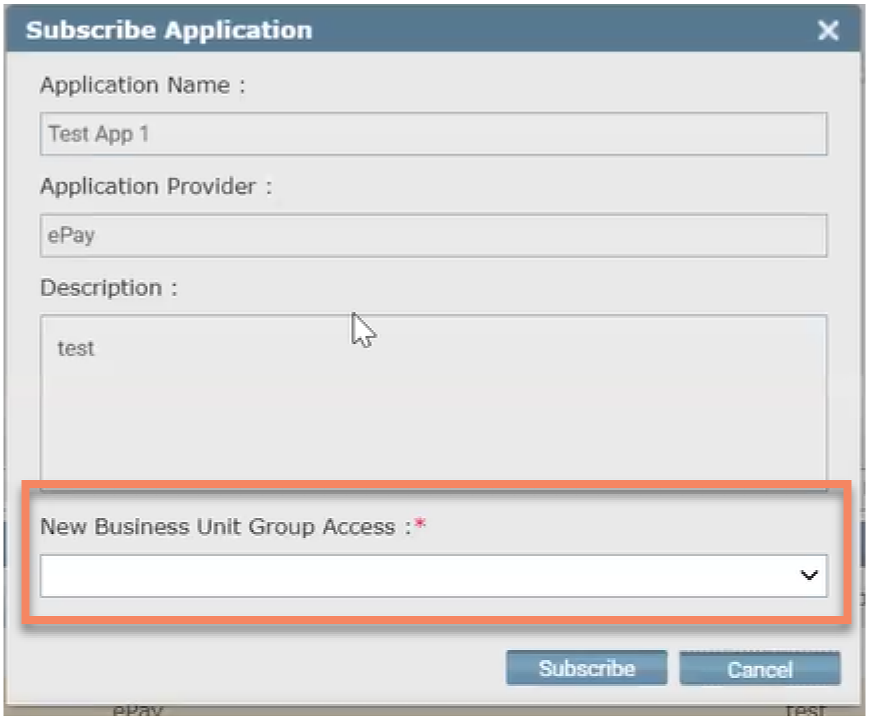
General: Application Catalog

3. You will now see the new **Application Catalog** page; at the bottom you will notice the list of **Available Applications.** From here you can select which Applications you want to subscribe to.



Available Applications

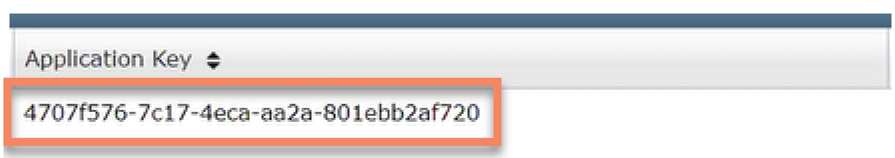
4. Click on **Subscribe** and then select a **Business Unit Access Group** from the drop-down. Finally, when you are ready click on **Subscribe** and save the changes. You will now see the **Application** you are subscribed to in the top section. From here you can always edit the applications you are subscribed to.



Subscribe Application

Subscribed Applications

5. Finally, you can use the application key that is created and send it to the Application Provider to connect your AMS360 database.



Application Key

Defects Fixed

- Added keyboard shortcuts to the description field in the Outlook Add-in feature
- Fixed an issue with customer statements showing the time of the policy term:
    - **Defect:** 10/14/2020 12:00:00AM – 10/14/2021 12:00:00AM
    - **Fix:** 10/14/2020 – 10/14/2021
- Fixed an issue with the customer statement report:
    - **Defect:** 10/14/2020 – 01/01/9999
    - **Fix:** 10/14/2020 – Continuous
- Fixed an issue with saving the Type of Business on Service Agreements
- Fixed an issue with alerts failing to generate for increased full-term premiums