



Proposal Builder

Create winning proposals with:

FASTER TIME TO CUSTOMER



- Win more business with fast, accurate proposal creation.
- Standardize the building process.
- Cut the proposal building time from days or weeks to hours.

REDUCE RISK



- Save time with automated content.
- Field level locking.
- Combine data from 3 sources.

IMPROVE PROFESSIONALISM



- Consistency of branding style.
- Inclusion of legal disclaimers, etc.

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Proposal Builder

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.



Proposal Builder is currently only available to on-line and VSSO users.

Proposal Builder Template

Account Managers use the standardized brand styles and content as building blocks to create professional and consistent proposals quickly.

Proposal Customization

WHAT DIFFERENT USERS CAN DO IN PROPOSAL BUILDER

Feature	Account Manager	Admin
View and edit all proposals		y
View and edit client's proposals	y	
Manage settings		y
Manage brand styles		y
Create, edit, and archive proposals	y	
Manage reusable sections		y
Edit reusable sections	y, if sections are Editable	y
Manage proposal templates		y
Edit proposal templates	y, for sections that are not Required	y
Preview and generate proposals	y	

Supported LOBs

When creating proposals, users can import policy and line of business data from AMS360 directly to the position in which they want to include it in their proposal. Nine of the largest commercial line of business are currently supported:

- Business Auto
- Crime
- Commercial Property
- Garage and Dealers
- General Liability
- Inland Marine (C)
- Truckers
- Umbrella (C)
- Worker's Compensation

Example Policy

Commercial Property – supported => data imported to proposal in tables in Commercial Property section

General Liability – supported => data imported to proposals in tables in General Liability section

Boiler and Machinery – unsupported => a 'Custom' section is included

Users can also import the following policy-level data in a section:

- Service Team at the customer level
- Locations at the policy level (ACORD 125, 130)
- Named Insured across policies

Other customer and policy information is importable for the front and back cover pages, click [here](#)).

Launching Proposal Builder

Proposal Builder can be launched from one of four AMS360 Online launch points, depending on a user's permissions

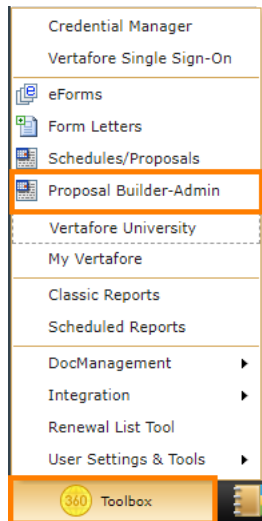


Proposal Builder will launch in the user's default browser, such as Internet Explorer or Google Chrome.

LAUNCH POINT #1 – ADMINS ONLY

This launch point is specifically for Admins to customize Proposal Builder for their organization. They can also view all proposals that have been initiated (i.e. those that are in New, In Progress, or Generated status) from their instance of AMS360.

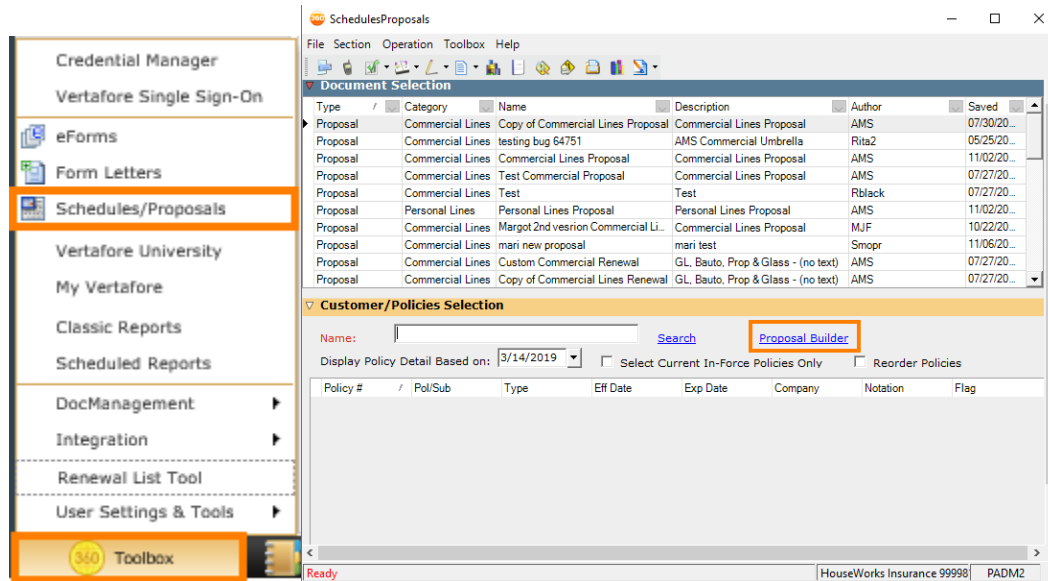
1. Click the 360 Toolbox on the bottom left corner of AMS360.
2. Click Proposal Builder-Admin.



Admins Only Launch Point

LAUNCH POINT #2 - START A PROPOSAL FROM YOUR HOMEPAGE

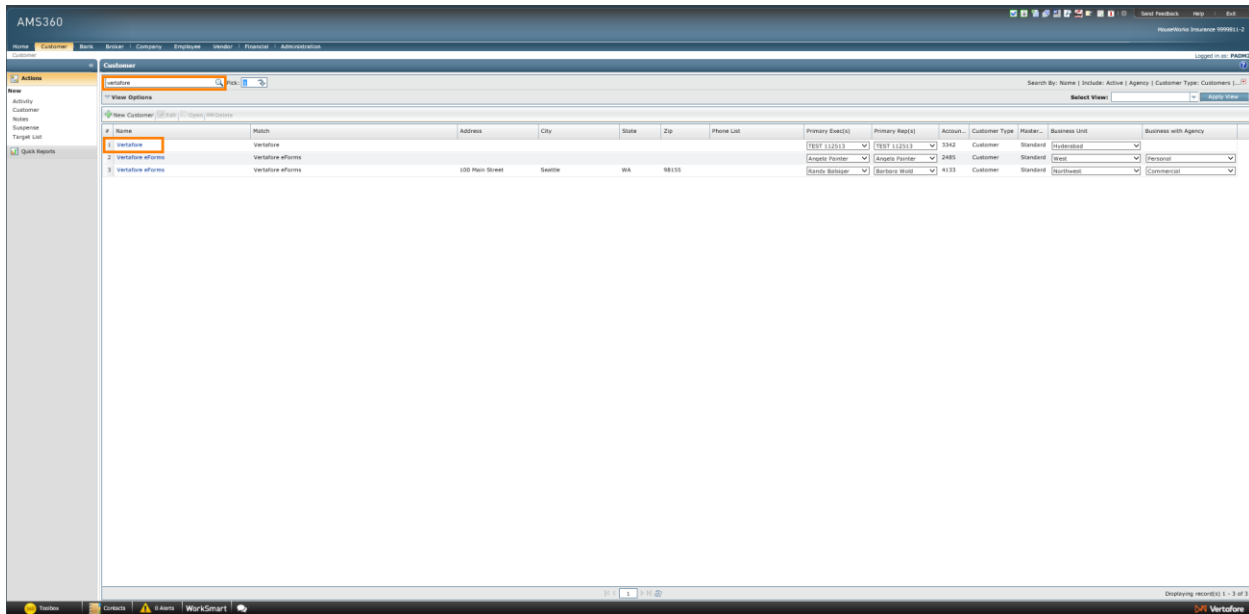
1. Click the 360 Toolbox on the bottom toolbar of AMS360.
2. Click on Schedules/Proposals. You can then choose the customer and the relevant policies with which to build your proposal. To select more than one policy, press CTRL and click the additional policies.
3. When you are ready, click Proposal Builder.



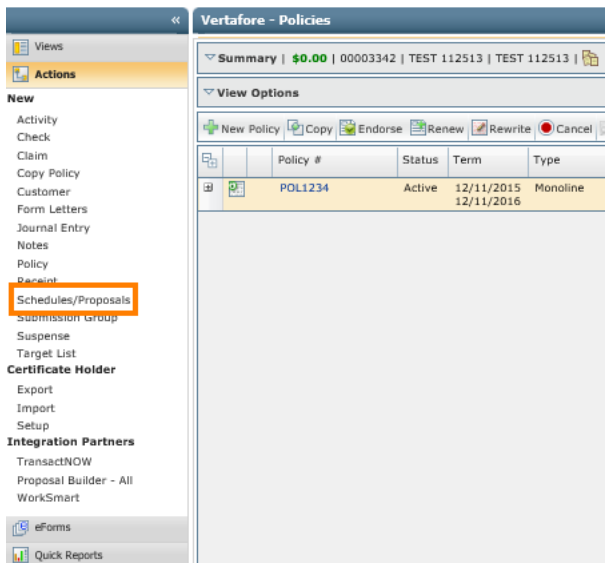
Launching Proposal Builder from the 360 Toolbox

LAUNCH POINT #3 – START A PROPOSAL FROM CUSTOMER VIEW

1. Click on the **Customer** tab.
2. Type a customer name in the search bar, then click **Search**. Click on the appropriate customer, and select the policies to include in your proposal.
3. From the action bar, click **Schedules/Proposals**.
4. Click the **Proposal Builder** link.



Customer Tab



Schedules/Proposals

SchedulesProposals

File Section Operation Toolbox Help

Document Selection

Type	Category	Name	Description	Author	Saved
Proposal	Commercial Lines	Copy of Commercial Lines Proposal	Commercial Lines Proposal	AMS	07/30/20...
Proposal	Commercial Lines	testing bug 64751	AMS Commercial Umbrella	Rita2	05/25/20...
Proposal	Commercial Lines	Commercial Lines Proposal	Commercial Lines Proposal	AMS	11/02/20...
Proposal	Commercial Lines	Test Commercial Proposal	Commercial Lines Proposal	AMS	07/27/20...
Proposal	Commercial Lines	Test	Test	Rblack	07/27/20...
Proposal	Personal Lines	Personal Lines Proposal	Personal Lines Proposal	AMS	11/02/20...
Proposal	Commercial Lines	Margot 2nd vesrion Commercial Li...	Commercial Lines Proposal	MJF	10/22/20...
Proposal	Commercial Lines	mari new proposal	mari test	Smopr	11/06/20...
Proposal	Commercial Lines	Custom Commercial Renewal	GL, Bauto, Prop & Glass - (no text)	AMS	07/27/20...
Proposal	Commercial Lines	Copy of Commercial Lines Renewal	GL, Bauto, Prop & Glass - (no text)	AMS	07/27/20...

Customer/Policies Selection

Name: [Search](#) [Proposal Builder](#)

Display Policy Detail Based on: Select Current In-Force Policies Only Reorder Policies

Policy #	Pol/Sub	Type	Eff Date	Exp Date	Company	Notation	Flag
POL1234	Policy	Monoline	12/11/2015	12/11/2016	ABC Brokerage		Active

Ready | HouseWorks Insurance 99998 | PADM2

Proposal Selection

LAUNCH POINT #4 – START A PROPOSAL FROM POLICY VIEW

1. Click on the **Customer** tab.
2. Type a customer name in the search bar, then click **Search**. Click on the appropriate customer, and select the policy you want to include in your proposal.

Vertafore eForms - Policies										
Summary \$0.00 00004133 Randy Balsiger Barbara A Wold										
View Options										
New Policy Copy Endorse Renew Rewrite Cancel Binder Bill Compare Export All WorkSmart										
Policy #	Status	Term	Type	Company	Description	Latest Tra...	Cost	Billed		
GENERAL LIABILITY	Active	06/09/2018 06/09/2019	General Liability	Chubb Insurance Group		06/09/2018 DB	0.00	0.00		

Policy

3. Click on the **Schedules/Proposals** button.

Policy - Vertafore eForms - GENERAL LIABILITY - (6/9/2018 - 6/9/2019) - [Policy Information]

File Section Transactions Operation Toolbox Window Help

Effective Date: 6/9/2018 Transaction: New business Description: New business

Basic Policy Information

Schedules/Proposals

SchedulesProposals

File Section Operation Toolbox Help

Document Selection

Type	Category	Name	Description	Author	Saved
Proposal	Commercial Lines	Copy of Commercial Lines Proposal	Commercial Lines Proposal	AMS	07/30/20...
Proposal	Commercial Lines	testing bug 64751	AMS Commercial Umbrella	Rita2	05/25/20...
Proposal	Commercial Lines	Commercial Lines Proposal	Commercial Lines Proposal	AMS	11/02/20...
Proposal	Commercial Lines	Test Commercial Proposal	Commercial Lines Proposal	AMS	07/27/20...
Proposal	Commercial Lines	Test	Test	Rblack	07/27/20...
Proposal	Personal Lines	Personal Lines Proposal	Personal Lines Proposal	AMS	11/02/20...
Proposal	Commercial Lines	Margot 2nd vesrion Commercial Li...	Commercial Lines Proposal	MJF	10/22/20...
Proposal	Commercial Lines	mari new proposal	mari test	Smopr	11/06/20...
Proposal	Commercial Lines	Custom Commercial Renewal	GL, Bauto, Prop & Glass - (no text)	AMS	07/27/20...
Proposal	Commercial Lines	Copy of Commercial Lines Renewal	GL, Bauto, Prop & Glass - (no text)	AMS	07/27/20...

Customer/Policies Selection

Name: Vertafore Search Proposal Builder

Display Policy Detail Based on: 2/13/2019 Select Current In-Force Policies Only Reorder Policies

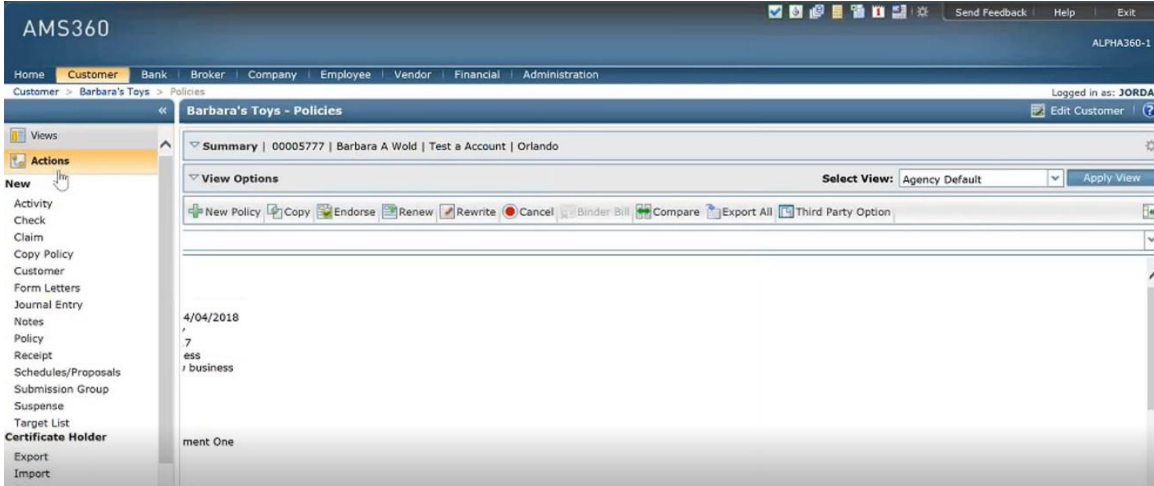
Policy #	Pol/Sub	Type	Eff Date	Exp Date	Company	Notation	Flag
POL1234	Policy	Monoline	12/11/2015	12/11/2016	ABC Brokerage		Active

Ready HouseWorks Insurance 99998 PADM2

Proposal Selection

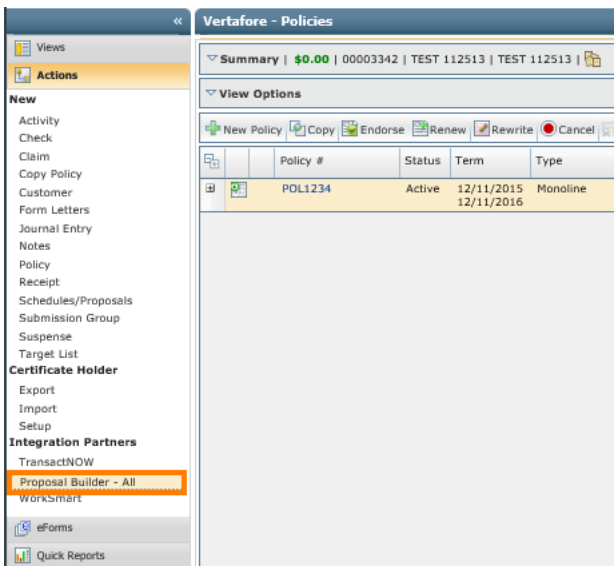
LAUNCH POINT #5 - VIEW AND EDIT PROPOSALS

1. In the Customer tab, search for and select a customer.
2. Click the Actions tab on the left-sided column.



Actions Tab

3. Under Integration Partners, click Proposal Builder - All. This will launch the list of current proposals in Proposal Builder.



Proposal Builder - All

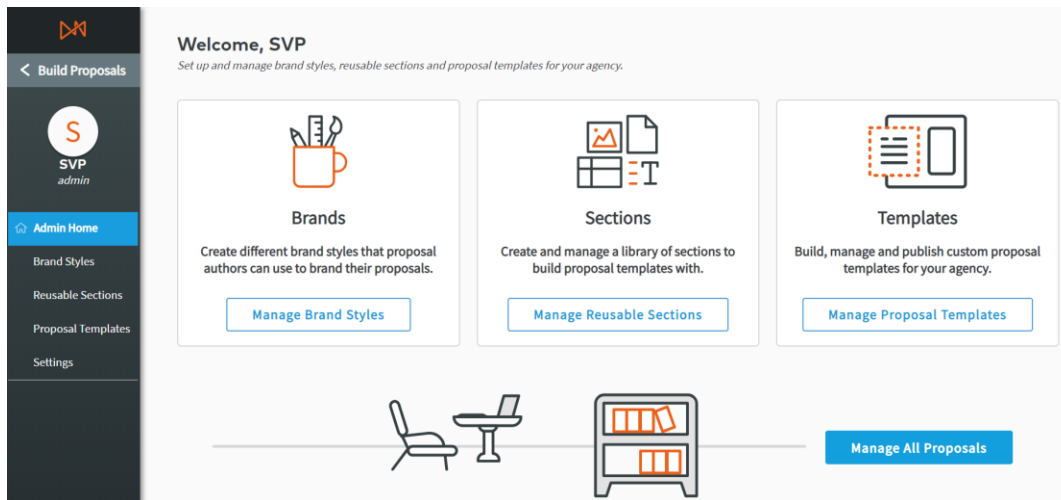
Admin users will be able to view and edit all proposals initiated from their instance of AMS360.

Account Managers will be able to view and edit only the proposals that they have initiated for that customer. To view the proposals, they initiated for another customer, they will need to select that customer from the Customer tab.

Proposal Builder for Admins

Admins can customize every aspect of their organization's proposals to ensure consistent branding style, messaging, and proposal structure. The initial setup can take as little as 20 minutes, but it needs to be completed before Account Managers can begin creating proposals.

To open Proposal Builder to Admin Home, use Launch Point #1 in AMS360 (see the [Proposal Builder Launch Points](#) Section).

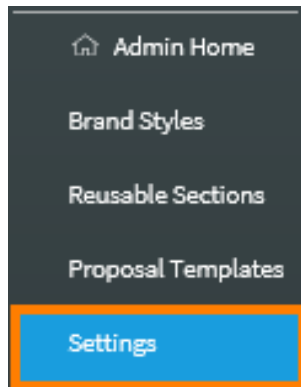


Admin Home

SETTINGS

In **Settings**, you can manage options for proposal creation, storage, and exporting as a Word document.

1. Click the **Settings** tab on the left-sided menu of Proposal Builder.



Settings Tab



Settings

Configure settings that will be applied across all proposals.

[Walk Me Through >](#)

Proposal creation permissions

Allow users to create proposals. Turning the toggle off will prohibit users from creating proposals, allowing admins to edit branding and templates before any new proposals can be created.

Allow proposal creation

Export permissions

Allow export to Word

Exclude Blank Tables

Exclude Blank Tables

Reduce Table Size to Fit Page

When turned on, tables that are too large to fit on a page will automatically scale down to fit. This will break the font-size rules of your Brand Style, and can lead to very small typeface.

Reduce Table Size to Fit Page

Settings Menu

From here the Admin has the option to set up the Proposal Creation Permissions and Export Permissions.

Proposal Creation Permissions

The Proposal Creation Permissions manage whether users can create proposals. It is set to 'Off' by default so that you can create your organization's Brand Styles, Reusable Sections, and Proposal Templates before Account Managers attempt to create proposals. When you have created the content that you need, toggle 'On' this permission.

Proposal creation permissions

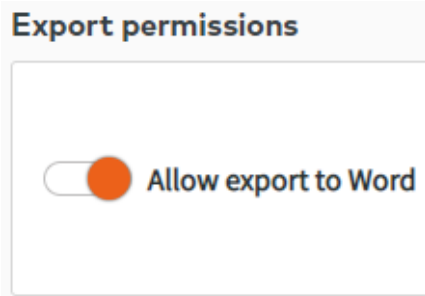
Allow users to create proposals. Turning the toggle off will prohibit users from creating proposals, allowing admins to edit branding and templates before any new proposals can be created.

Allow proposal creation

Settings: Proposal Creation Permissions

Export Permissions

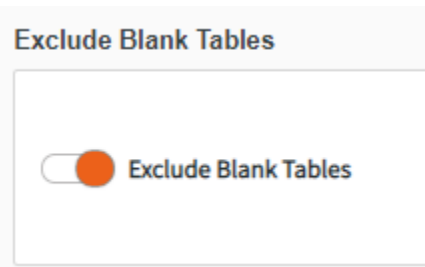
Export Permissions manage whether users can export the proposal to Word for further editing. This setting is 'On' by default.



Export Permissions

Exclude Blank Tables

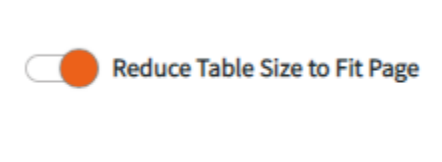
You have the option to exclude blank tables from your proposal.



Exclude Blank Tables

Reduce Table Size to Fit Page

When turned on, tables that are too large to fit on a page will automatically scale down to fit. This will break the font-size rules of your Brand Style and can lead to very small typeface.



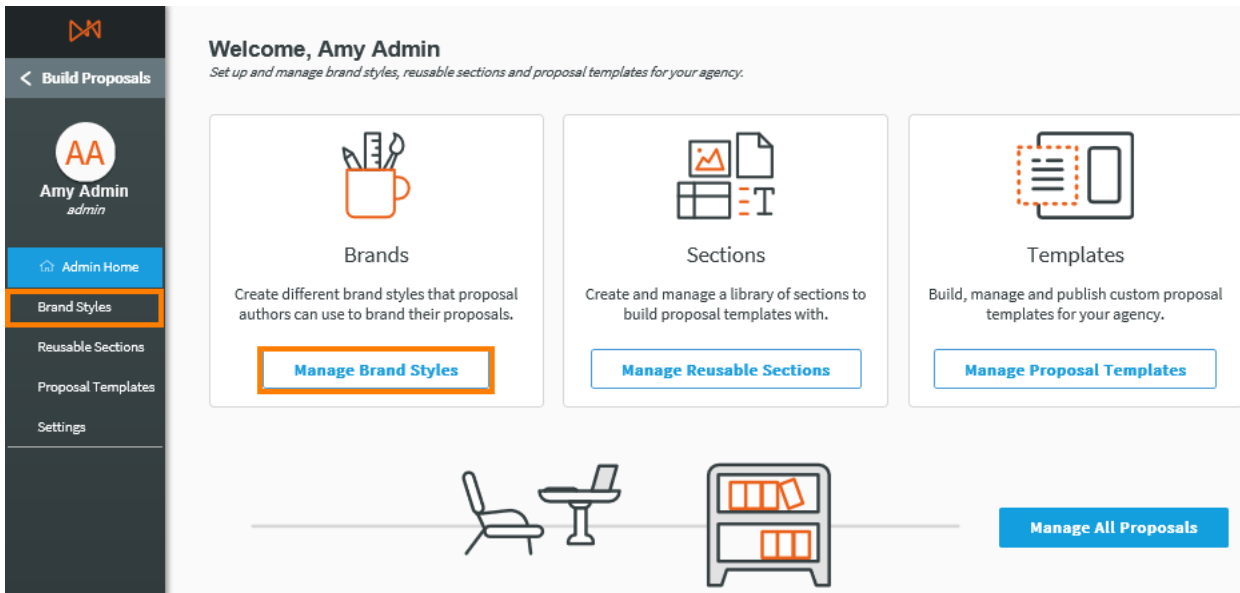
Reduce Table Size to Fit Page

SET UP BRAND STYLES

Brand Styles allows admins to set standard style formats for their organization’s proposals. To begin, click **Manage Brand Style** from the **Admin Home** page, or click **Brand Styles** on the left-sided menu of Proposal Builder.

Create as many different **Brand Styles** as necessary to meet your organization’s needs. For example, you may choose to create a Brand Style for different offices or regions, or create a single Brand Style.

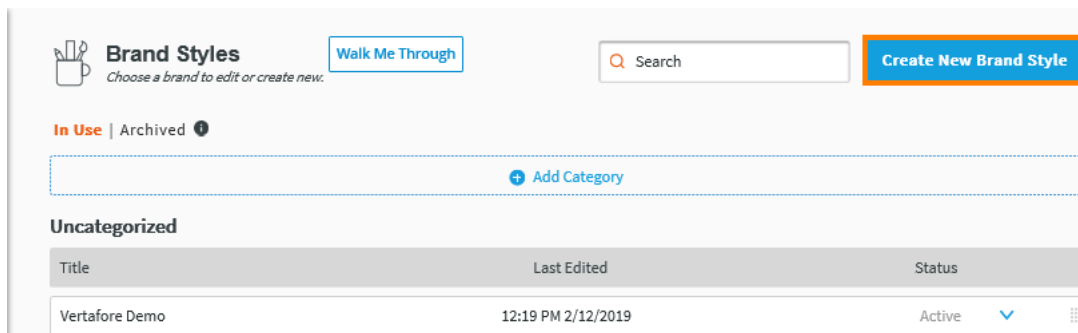
Brand Styles begins with the option of editing an existing brand style or creating a new brand style.



Branding Menu Entry Points

Create New Brand Style

1. If needed, create new **Categories** to organize your Brand Styles.
2. Click **Create New Brand Style** in the top-right corner of the screen.



Create New Brand Style

3. In the modal, name and categorize your new Brand Styles. Click **Save** to continue.

Create Brand Style

Brand Style Name

Category Name

Create Brand

Edit Existing Brand Style

1. To edit an existing brand style, click the Pencil icon on the right-hand side of an existing brand style.

Uncategorized		
Title	Last Edited	Status
Default Brand	10:17 AM 6/1/2018	In Draft <input type="button" value="v"/> <input type="button" value="pencil"/> <input type="button" value="copy"/>

Edit Existing Brand

2. To Copy an existing brand style, click on the Copy icon then name and **Save** your new Copy.

Uncategorized		
Title	Last Edited	Status
Default Brand	10:17 AM 6/1/2018	In Draft <input type="button" value="v"/> <input type="button" value="pencil"/> <input type="button" value="copy"/>

Copy Existing Brand





Copy Brand and Edit

Brand Name

Save Copy Brand and Edit

- You also have the ability to set the status of the existing brand style to In Draft, Active, and Archived:

Uncategorized

Title	Last Edited	Status
Default Brand	10:17 AM 6/1/2018	In Draft    

Set Status

- If you wish to delete a Brand Style, you must first change its status to Archived. A delete (trashcan icon) option becomes available in the Archived view.





Brand Styles
Choose a brand to edit or create new.

[Create New Brand Style](#)

In Use | **Archived**

[+ Add Category](#)

Uncategorized

Title	Last Edited	Status
Default Brand 2	7:49 AM 2/21/2019	Archived    

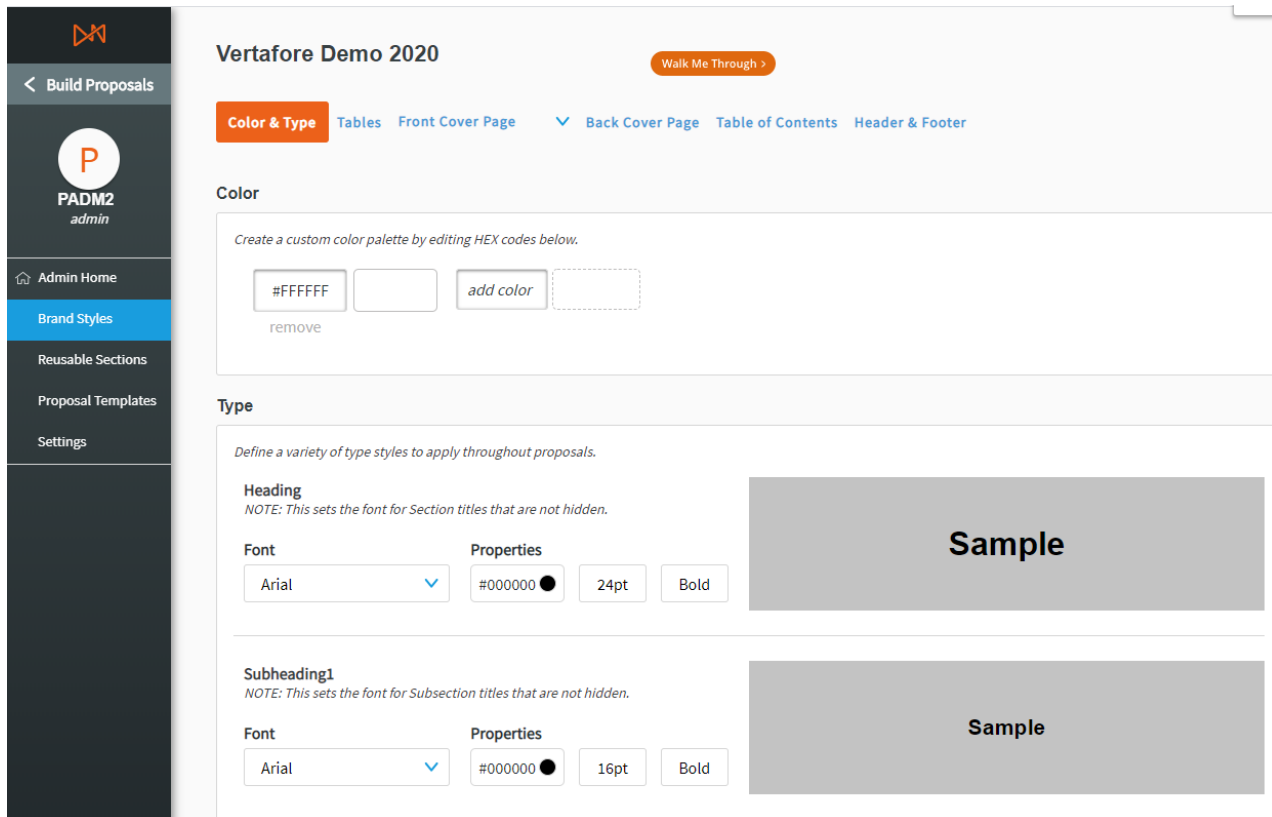
Delete Branding Style Option

Configuring your Brand Style

Creating a new Brand Style or selecting to edit an existing one opens the Brand Style configuration page where you can customize the aspects of your Brand Style:

- Color & Type
- Tables
- Front Cover Page
- Back Cover Page
- Table of Contents
- Header & Footer

Color & Type

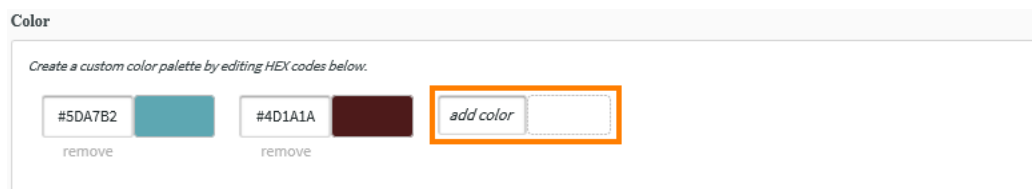


New Brand

Color

You can create a quick-access color palette for your new Brand style. Select as many colors as you need to use throughout your proposals. For example, these colors could be those set out in your organization's style guide.

To choose a color, you can use the color chart or a specific HEX code or RGB combination.



Add Color

Type

In this menu, you can format seven types of text for use in your proposals:

- Heading
- Subheading1
- Subheading2
- Body
- Table Heading
- Caption
- Custom

Type

Define a variety of type styles to apply throughout proposals.

Heading					Sample
Font	Properties				
Arial	#000000	24pt	Bold		
Subheading1					Sample
Font	Properties				
Arial	#000000	18pt	Bold		
Subheading2					Sample
Font	Properties				
Arial	#000000	14pt	Regular		
Body					Sample
Font	Properties				
Arial	#000000	12pt	Regular		
TableHeading					Sample
Font	Properties				
Arial	#000000	14pt	Bold		
Caption					Sample
Font	Properties				
Arial	#000000	10pt	italic		
Custom					Sample
Font	Properties				
Arial	#000000	12pt	italic		

Branding Type Options

In each case, start by selecting your desired font. There are currently four fonts available for Proposal Builder:

- Arial
- Muli (Century Gothic)
- Lato (Calibri)
- Tinos (Times New Roman)
- Arimo (Helvetica)
- Lora (Baskerville)
- Raleway (Verdana)
- Open Sans (Tohoma)
- Source Serif Pro (Georgia)

Then select your color, font size, and style.

Type

Define a variety of type styles to apply throughout proposals.

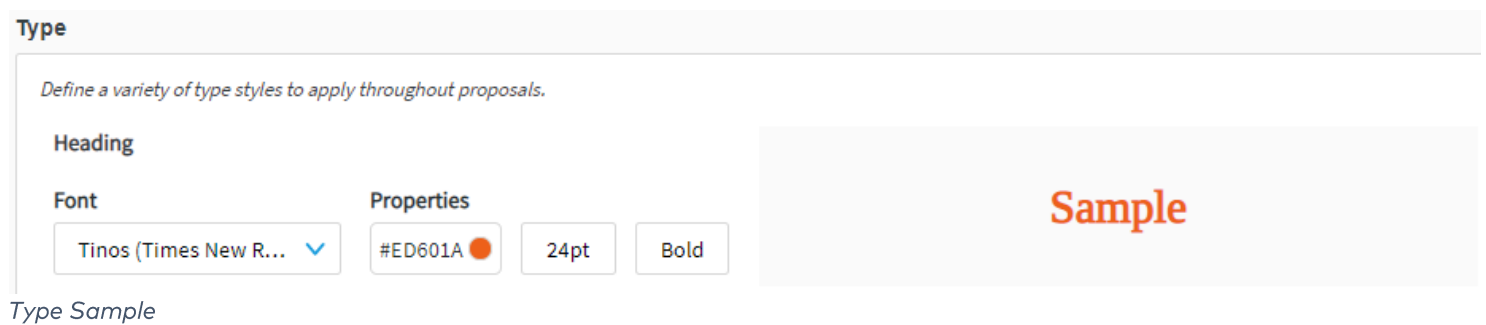
Heading

Font Tinos (Times New R... ▼

Properties #ED601A ● 24pt Bold

Sample

Type Sample



Once you have customized your text types, click **Save**. From here, you can continue to the **Tables** section by clicking **Next**.

Tables

In **Tables**, you can set the standard appearance of each table that will appear in your proposal. You can review and set the color and type style for headers and rows, as well as the color width of the table border.

Vertafore Demo 2020

[Walk Me Through >](#)

[Color & Type](#)
Tables
[Front Cover Page](#)
[Back Cover Page](#)
[Table of Contents](#)
[Header & Footer](#)

Tables

Create a table style for tables in your proposals.

Header

Row Color

#000000 ●

Type Style

TableHeading ▼

Row

Row Color

#FFFFFF ○

Alt Row Color

#EEEEEE ●

Type Style

Body ▼

Border

Color

#B1B1B3 ●

Width

1pt ▼

Preview

1	2	3
Lorem ipsum dolor sit	consectetur adipiscing	Praesent est erat
ultrices et quam	cursus tempor arcu	Curabitur pulvinar
hendrerit mollis	Donec arcu lorem	tincidunt ac sagittis at
vulputate suscipit sem	Vivamus bibendum	malesuada elit
hendrerit mollis	Donec arcu lorem	Nam imperdiet m
Curabitur maximus	urna, non tempus nisi	Quisque eget neque
porttitor		
eu erat elementum	id iaculis dui eleifend	Morbi tempor dignissim
eu sodales metus	feugiat eget	Curabitur dui urna

Branding Table Options

Once you have selected your **Tables** options, click **Save** and continue to the **Front Cover Page** Section by clicking **Next**.

Simple Front Cover Page

In this section, you can configure the appearance of the front cover page for proposals created using a particular Brand Style.

Colorado - Front Range

Color & Type | Tables | **Front Cover Page** | Back Cover Page | Table of Contents | Header & Footer

Orientation

Portrait Landscape

Select a layout template

Logo

Upload and position your logo

Acceptable file types: PNG, JPG, JPEG

Logo ✕

80ce1d50-7f09-4d6f-b...

Cover Page Background

Upload your background image or select a background color

Upload image Select background color

Acceptable file types: PNG, JPG, JPEG
Suggested dimensions: 8.5x11 / 300dpi

Background ✕

red-truck-on-the-high...

Exit

Back

Saved 1:33 PM as Active

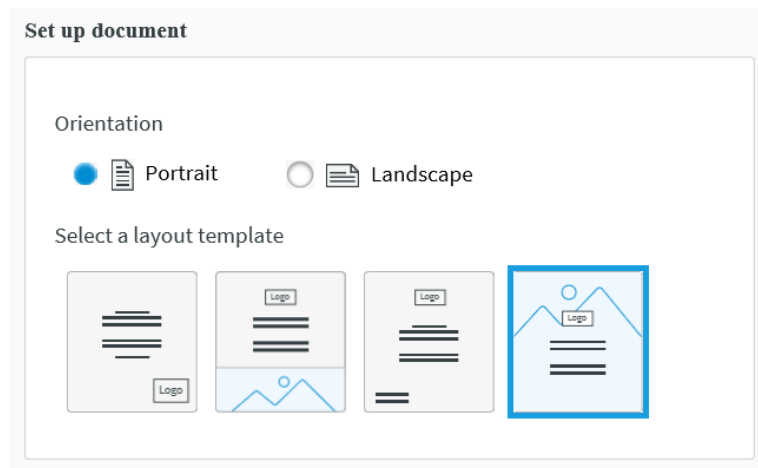
Save

Next

Branding: Front Cover Page Options

Set up Document

1. Select the orientation of your document.
 - Portrait
 - Landscape
2. Next, select the layout template. Here you will have four options that allow you to choose where certain information will go on the proposal's cover page. Below are the four options (reads from left to right). You can preview your selection on the right-hand side of the page.
 - Background color, the logo in the bottom-right corner, text in center of page
 - Background image on bottom third of cover page, logo at the top-center, text in center of page
 - Background color, logo at top-center, text in center of page
 - Background image on full page, logo at center, text at center below logo



Front Cover Page: Set Up Document

Cover Page Background and Logo upload



Here you can upload your Cover Page Background (or set your background color) and Logo. Alternatively, you can choose background color instead of an image. Size and resolution recommendations are included with for the background images of each layout template.

Logo

Upload and position your logo

Acceptable file types: PNG, JPG, JPEG


Logo ✕



Cover Page Background

Upload your background image or select a background color

Upload image Select background color

#ED601A 

Front Cover Page: Background and Logo

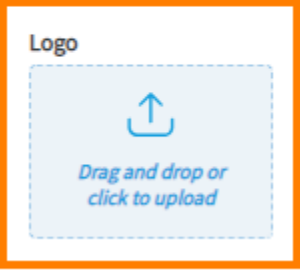
1. Drag and Drop your image into the designated box or click on the box to Upload a Logo.

Logo

Upload and position your logo

Acceptable file types: PNG, JPG, JPEG

Logo



Upload image to preview

Logo

2. Next, select your Cover Page Background:


- Upload Image
- Select background color

Cover Page Background

Upload your background image or select a background color

Upload image Select background color

Acceptable file types: PNG, JPG, JPEG
Suggested dimensions: 8.5x11 / 300dpi

× 


Upload Image

OR:

Cover Page Background

Upload your background image or select a background color

Upload image Select background color



Select background color

Document Text

You can select and format which text appears on your cover page by choosing which to toggle **On** or **Off**. You can also select different Type Styles and Colors for each piece of text.

- Proposal Name
- Policy Period
- Presented By Name
- Account Representative
- Account Representative Email
- Account Executive
- Agency Contact Info
- Presented On Date
- Insured Customer Name
- Effective Date

Color & Type
Tables
Front Cover Page
Back Cover Page
Table of Contents
Header & Footer

Document Text

Proposal Name

Type Style
Heading ▼

Type Color
#000000 ●

Policy Period

Type Style
Subheading1 ▼

Type Color
#FFFFFF ○

Presented By Name


Type Style
Body ▼

Type Color
#1761A0 ●

Account Representative

Type Style
Body ▼

Type Color
#4164D8 ●



Front Cover Page: Document Text

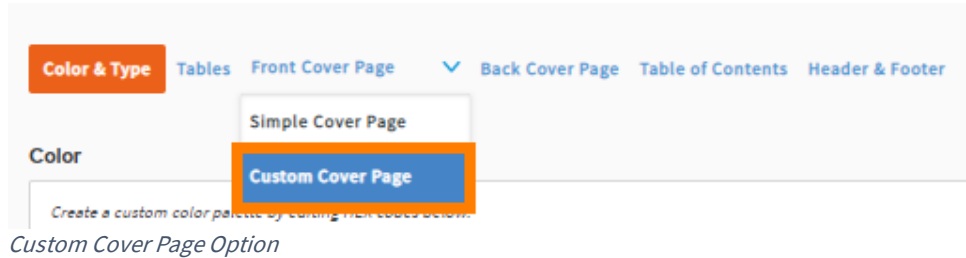
Once you've selected your Front Cover Page options, click **Save** and continue to the Back Cover Page by clicking **Next**.

Custom Front Cover Page

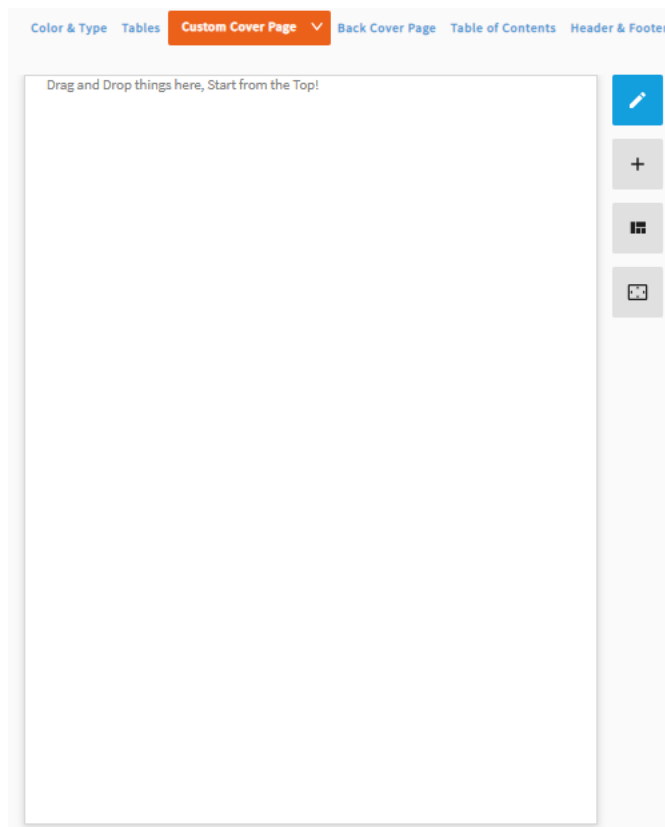


Note: The Customer Cover Page editor is not supported by Internet Explorer (IE) or Edge. Please use Google Chrome for the best experience. You can copy and paste the URL from the top of this page into Chrome and edit there.

1. In the **Brand Styles Section**, click the drop-down arrow next to **Front Cover Page** and click **Custom Cover Page**.



Custom Cover Page Option



Custom Cover Page (Landing Page)

Note: The right-side menu is where you will be able to:



- Edit Content
- Add Content
- Move/Delete Content
- Resize Content

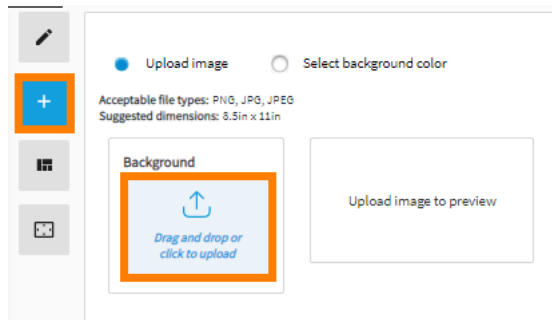


Cover Page Features

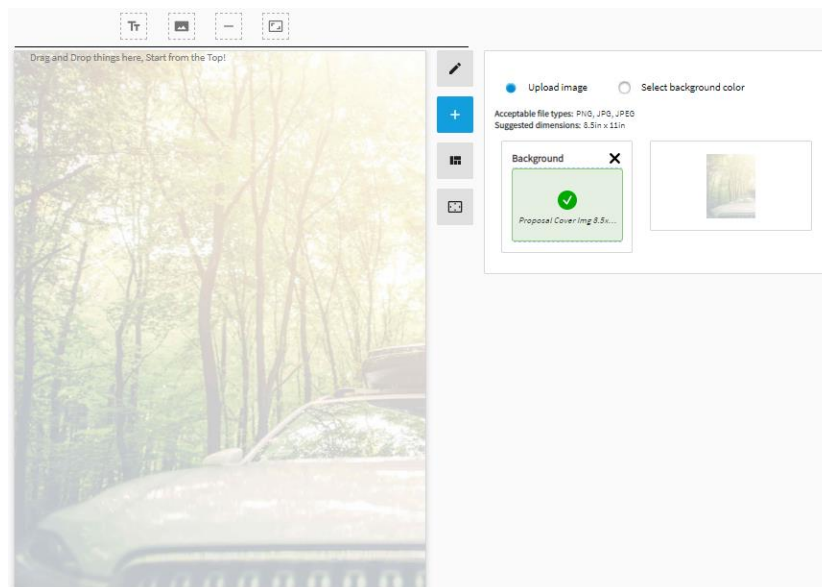


The Custom Cover Page section enables you to design your cover page any way you want in any order. However, we suggest following the steps below for your first time.

2. Begin by adding a **Background** to your cover page. Click the **Add** button and then either drag your image to the **Background** box or click the **Drag and drop** or click to upload button. Upload your image from your file browser and click **Open**.

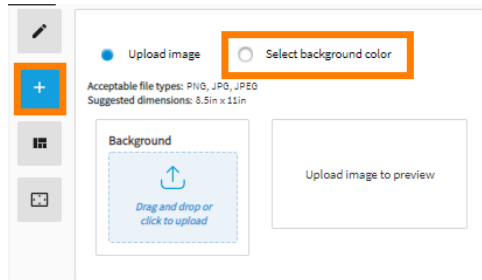


Upload Background

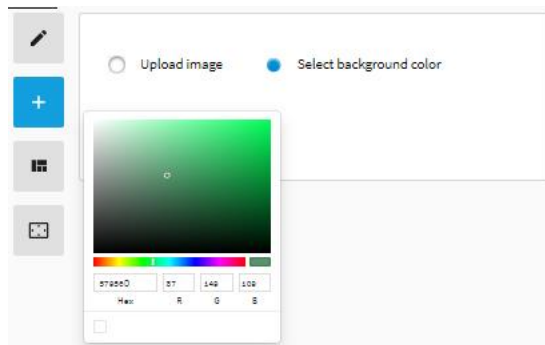


New Background

- If you do not want a background image you have the option to set a Background Color or choose to not include a background and continue to step 3 below.



Select Background Color



Select Color

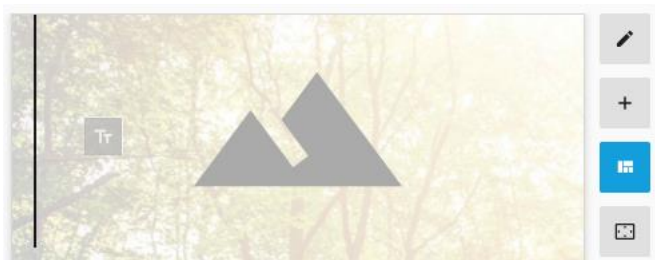
Adding Elements

- This section will cover how to add elements to your cover page:
 - Text boxes
 - Images
 - Dividers
 - Spacers
- When adding any element, you need to look for the solid black line that appears when you are dragging it to the desired location.

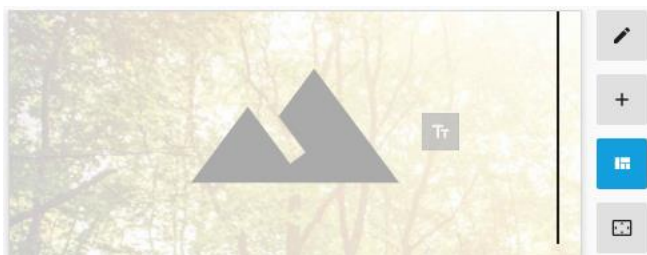


Adding Elements

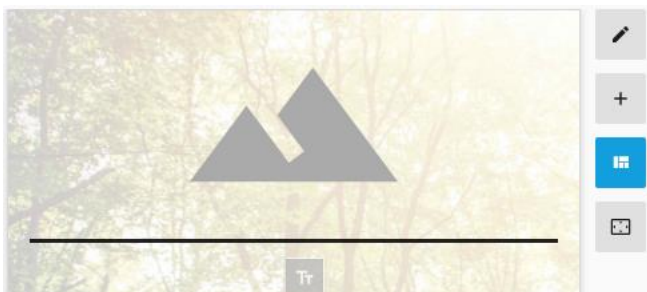
- Depending on where you want to place an element, you will notice that the black line will move accordingly.



Add Element to the Left

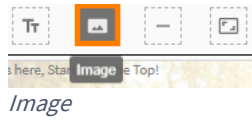


Add Element to the Right



Add Element to the Bottom

- Next, you can add your company's logo or other images by clicking the Image icon at the top and dragging the icon onto the cover page.



- You will notice a new image holder pop up on your cover page.

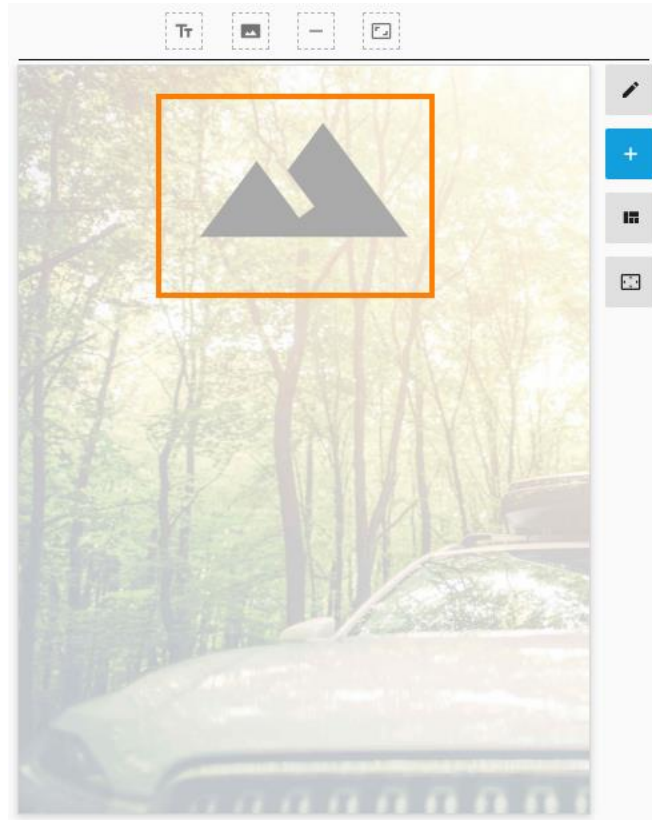


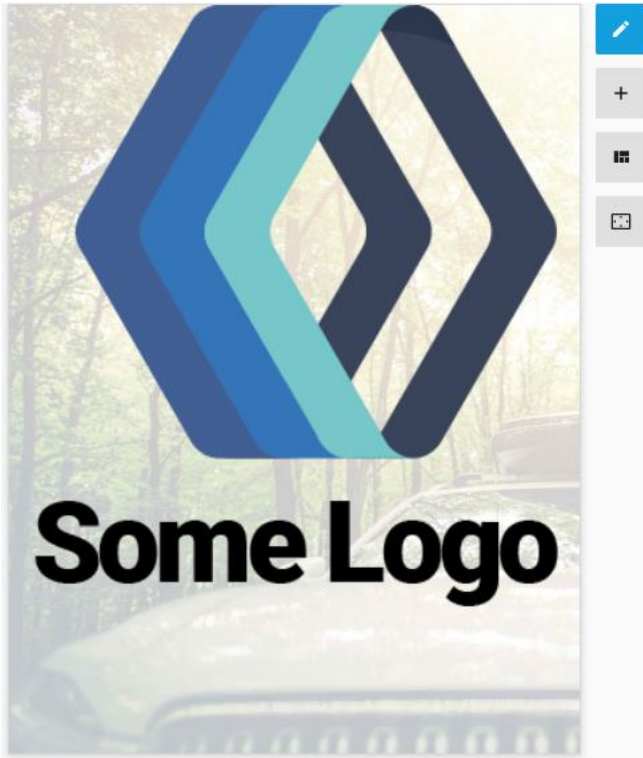
Image Holder

- Click the Edit button (pencil icon) on the right-hand side, and then click the image holder. You'll notice a box appear that says click to upload. Click the box.



Edit Image

5. Choose your logo from your file browser and click Open. You will now see your logo over your background. The logo may appear either very large or small, so you will need to resize the logo.



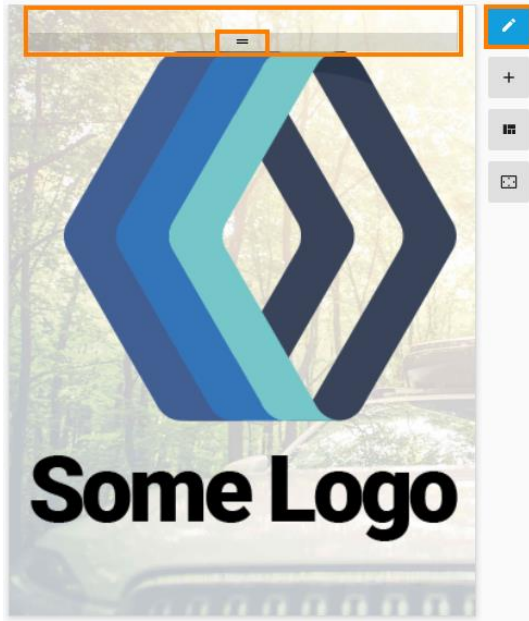
New Logo

6. To resize your logo, click the Add button. Then click-and-drag the Spacer option to the top, left or right sides of the cover page, depending on how you want the logo positioned.



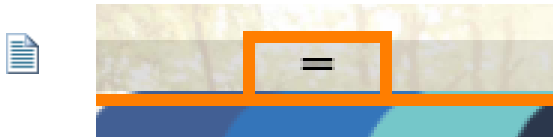
Add Spacer

7. Once your Spacers are placed, you can adjust them in the Edit section. Notice the box at the top. From Edit, you can drag the Spacer down to where you want your logo to be located.

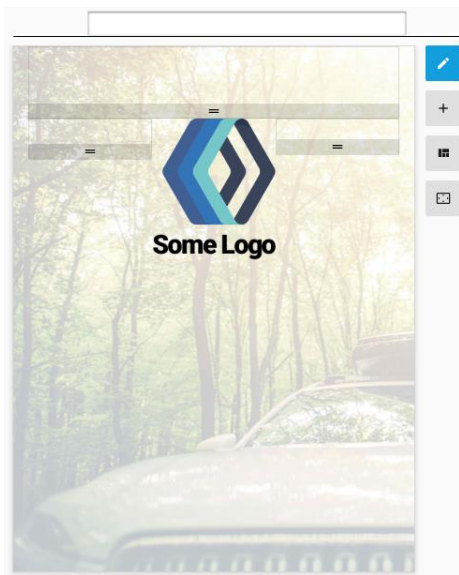


Editing Spacers

Note: Be sure to click-and-drag the two lines on the Spacer.



Adjusting a Spacer



Completed Spacing

- With your Logo set, we can move on to adding Text to your cover page.

8. Click the Add button. Click-and-drag the Text box to where you would like text to be placed on your cover page.

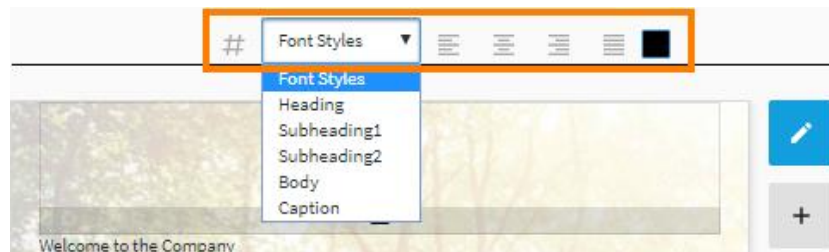


Adding Text



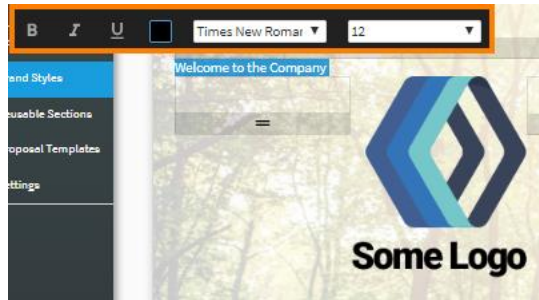
New Text Box

9. To add text, click the Edit button and then begin typing in the text box. Once you have entered your text, you have two options for editing:
 - a. On the top of the cover page, you will notice a bar with several different options.
 - i. # Insert Dynamic Field
 - ii. Select Font Style (this is pulled from the Color and Type section of the Brand Styles that you previously set). You can go back to that section and edit as needed.
 - iii. Alignment Options
 - iv. Justify
 - v. Font Color



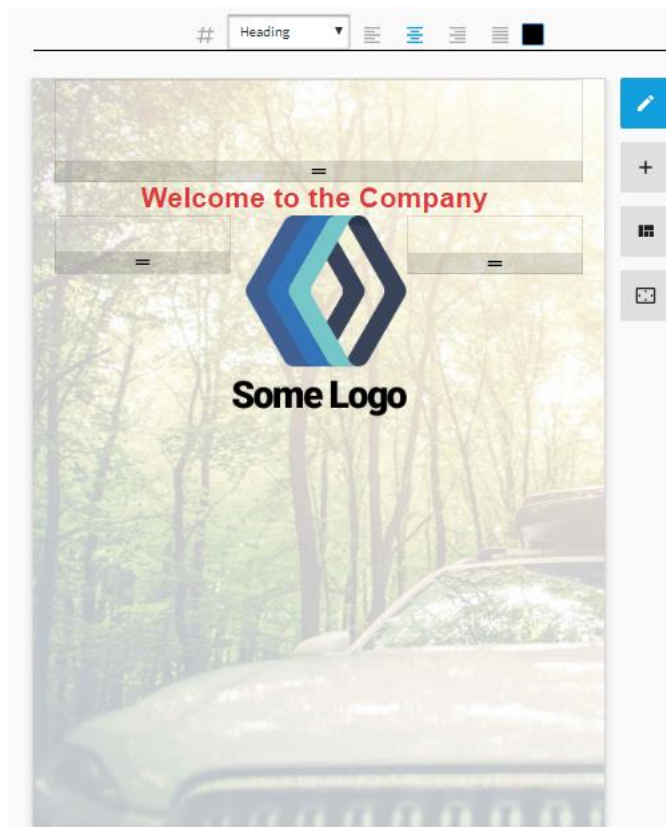
Top Text Editor

- b. If you click and highlight your text, you will notice another option for editing text. Your options include:
 - i. Bold
 - ii. Italicize
 - iii. Underline
 - iv. Font Color
 - v. Font Style
 - vi. Font Size



Alternate Text Editor

- Once your options are selected for your text, click out of the text box to see how your cover page is looking.

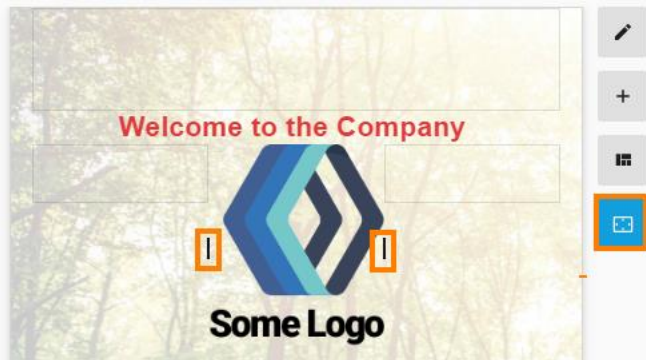


Cover Page with Text

- 10. Once your Front Cover Page is complete, click save at the bottom.

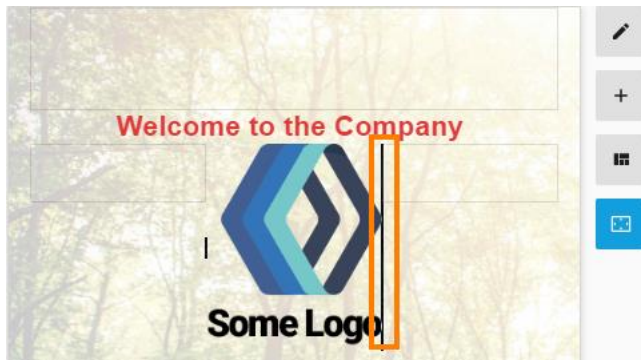
Resize Feature

1. In this section, you can resize any of the elements. Click the **Resize** button on the right-hand side menu.

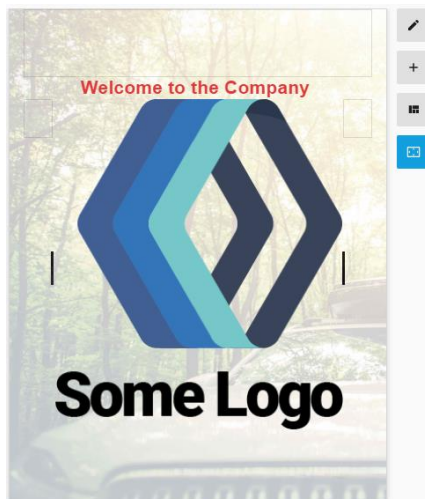


Resize Feature

2. You will now see small black lines on either side of your element. When you hover over the lines, they will expand so you can easily see what side you are adjusting. Click the black line of the side you wish to expand and drag.



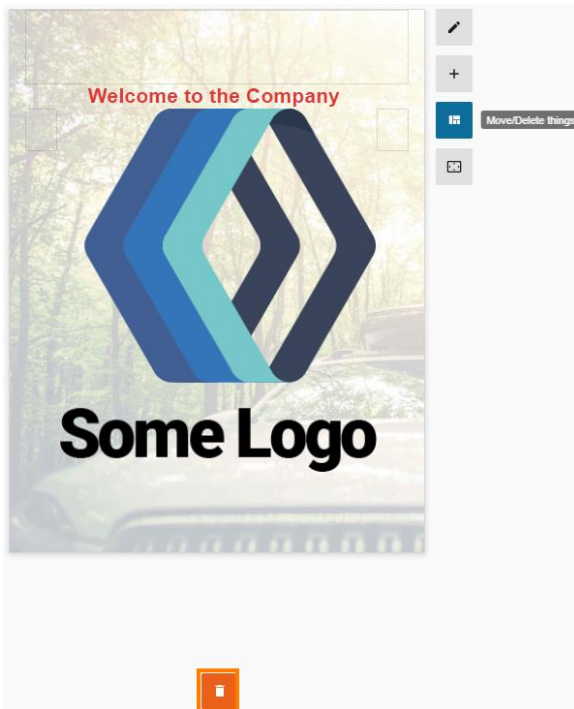
Preparing to Resize



Resized Logo/Image

Delete Feature

1. In this section, you can delete the items you have added. Click the **Move/Delete** button on the right-hand side menu.



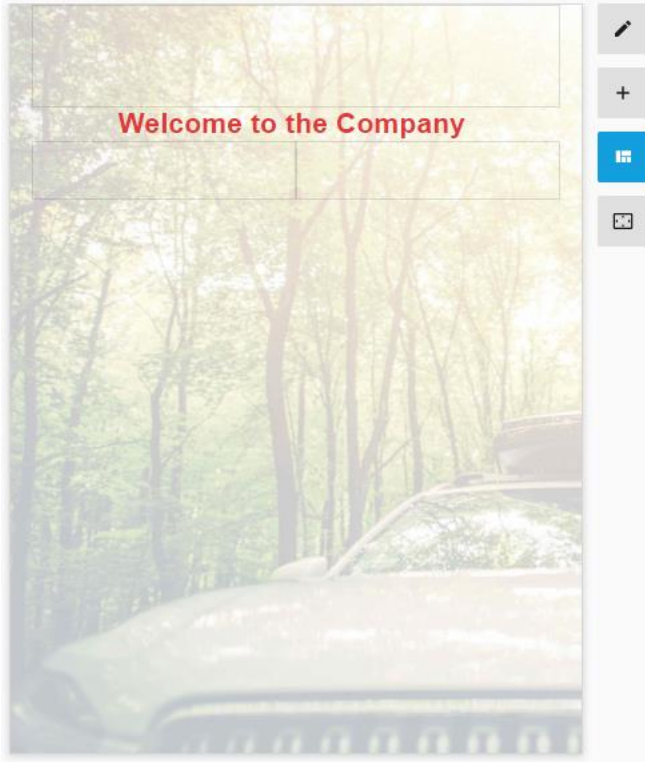
Delete Feature

2. Notice the orange trash can at the bottom. Select the item you would like to delete and drag it to the trash can.



Delete Image

3. The item you selected is no longer in view.



Deleted Item

Back Cover Page

As with the Front Cover Page, you can:

- Set up the Document's Orientation and Layout
- Upload a Logo
- Set a Cover Page Background
- Add Agency Contact information.

VertaforeTester4


[Color & Type](#) [Tables](#) [Front Cover Page](#) **[Back Cover Page](#)** [Table of Contents](#) [Header & Footer](#)

Name **Category**

Set up document

Orientation
 Portrait Landscape

Select a layout template

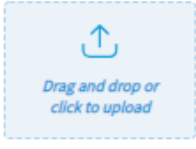


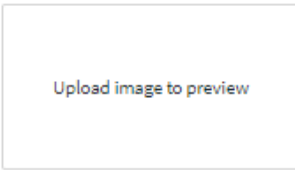
Logo

Upload and position your logo


Acceptable file types: PNG, JPG, JPEG

Logo


Drag and drop or click to upload


Upload image to preview

Address Line 1
Address Line 2
City, State, Zip Code
Telephone (000) 000-0000
Email
(address@domain.com)


Company Name

Back Cover Page: Select Background Color

Once you've selected your Back Cover Page options, click **Save Brand** continue to the Table of Contents by clicking **Next**.

Table of Contents

You can decide whether to include a table of contents in your proposals.

The screenshot shows the 'Table of Contents' configuration page in the Vertafore Demo. The 'Table of Contents' toggle is turned off, and the text below it reads 'Table of Contents will NOT be included'. The left sidebar shows the user 'PADMIN2 admin' and navigation options like 'Brand Styles', 'Reusable Sections', and 'Proposal Templates'.

Table of Contents (Off)

If you choose to include a Table of Contents, you will be able to configure the appearance of:

- Sections
- Subsections
- List Type
- Dotted Line

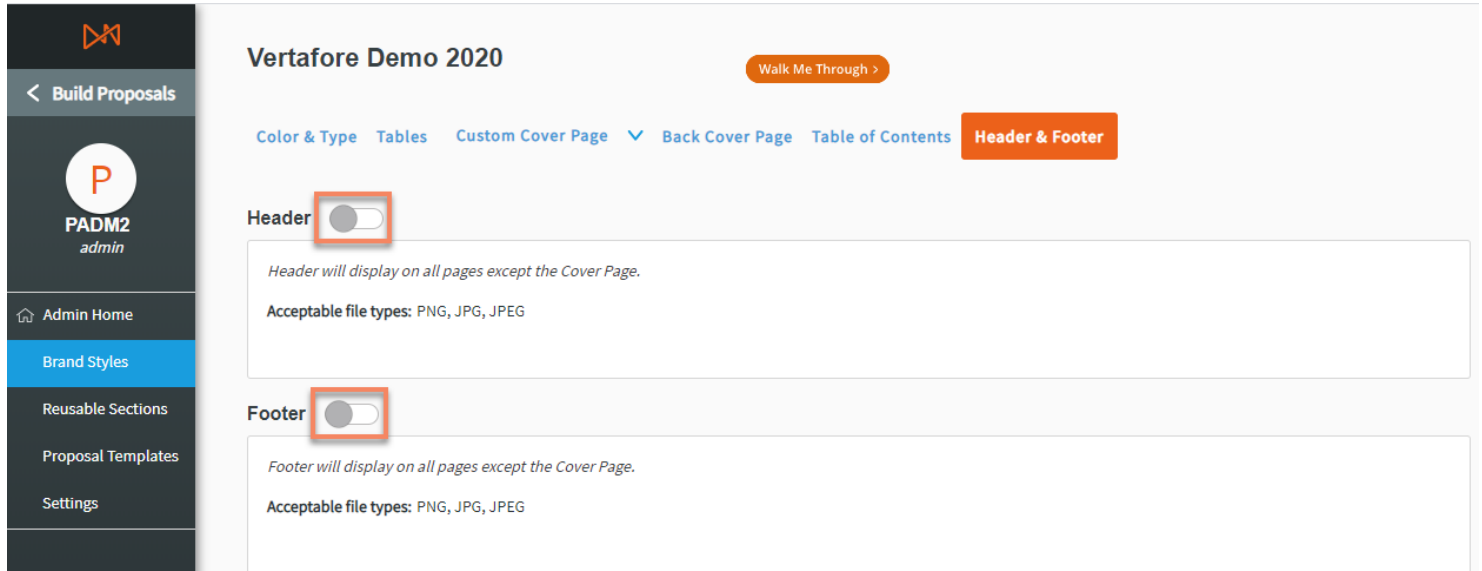
The screenshot shows the 'Table of Contents' configuration page with the feature turned on. The 'Table of Contents' toggle is now on, and the text below it reads 'Table of Contents will be included'. The configuration options are expanded to show 'Sections' (Type Style: Body), 'Subsections' (Type Style: Body), 'List Type' (with a grid of options including 1., a., b., 1.1, 1.2, I., A., B., II., 01., a., b., 02.), and 'Dotted Line' (with a dropdown menu showing 'None' selected).

Table of Contents (On)

Once you have formatted your Table of Contents, click Save and continue to the Header & Footer Section by clicking Next.

Header & Footer

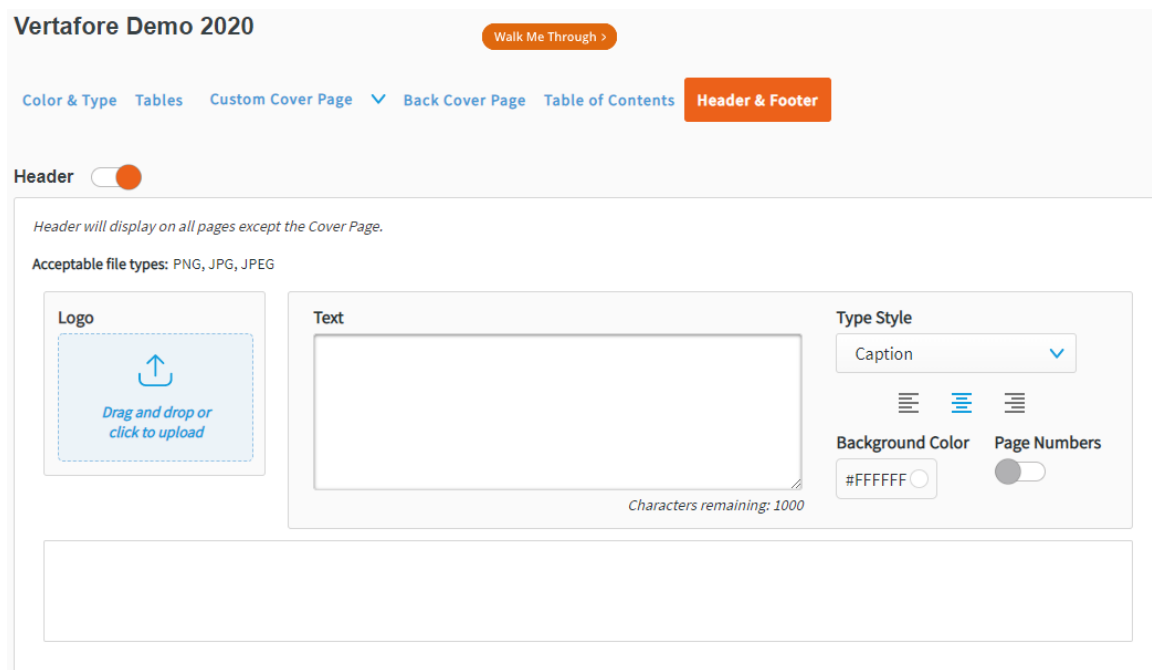
In this menu, you can choose to include and customize a header and/or footer, which will appear on all pages of your proposals except for the cover pages and the table of contents.



Header Options (Off)

For each header and footer, you can:

- Upload a Logo positioned to the left-hand side
- Include up to 1000 characters of Text
- Select a Type Style for the text
- Add a Background Color
- Align the Logo on the Left, Right, or Center
- Include Page Numbers



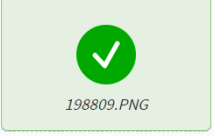
Header Options

Footer

Footer will display on all pages except the Cover Page.

Acceptable file types: PNG, JPG, JPEG

Logo



Logo Alignment: Left

Text

This document was prepared for the purposes of presenting the capabilities of Proposal Builder. Many insurance companies will use this space for a disclaimer.


Characters remaining: 842

Type Style

Caption

Background Color #FFFFFF

Page Numbers

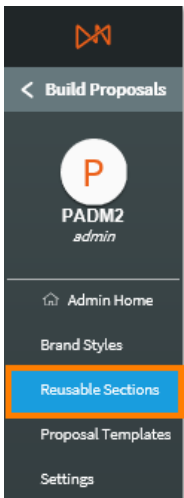


This document was prepared for the purposes of presenting the capabilities of Proposal Builder. Many insurance companies will use this space for a disclaimer.

1

Footer Options

When finished, click Save and move on to Reusable Sections.



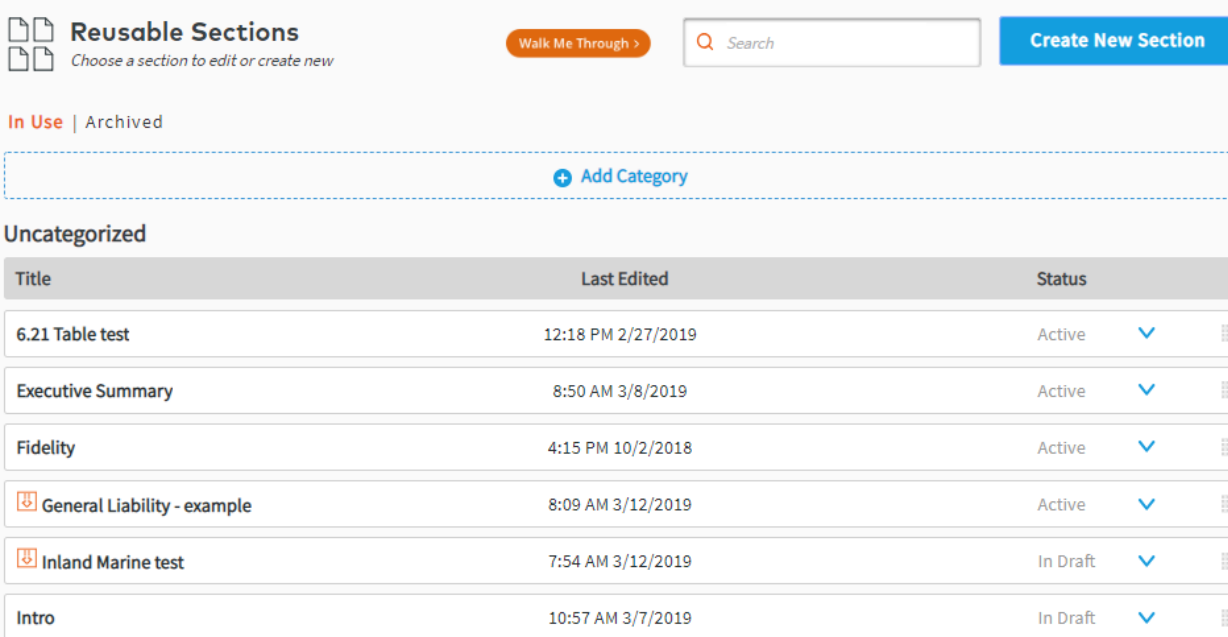
Reusable Sections

Remember: Brand Styles must be in Active status to be used in creating proposals.

SET UP REUSABLE SECTIONS

In **Reusable Sections**, you can create standardized sections for proposals, such as introductions, line of business sections, and legal disclosures. This helps to standardize content across the proposal templates that you will create. For ease of access, you can also create different categories in which to save your sections. This could, for example, simplify your organization of Reusable Sections across different offices, regions, or end use.

To begin, click **Reusable Sections** on the left-sided menu of Proposal Builder.





Reusable Sections
Choose a section to edit or create new

Walk Me Through > Search Create New Section

In Use | Archived

+ Add Category

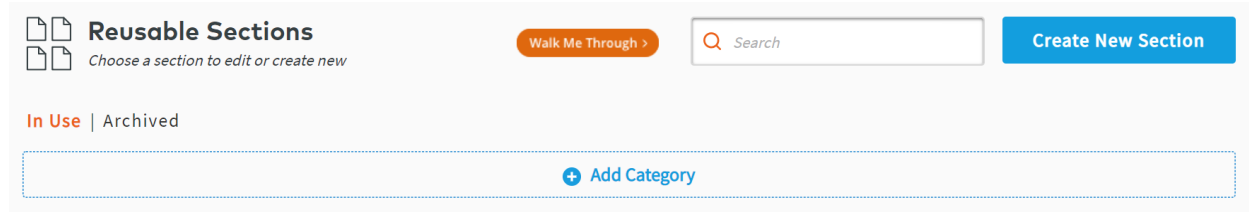
Uncategorized

Title	Last Edited	Status
6.21 Table test	12:18 PM 2/27/2019	Active
Executive Summary	8:50 AM 3/8/2019	Active
Fidelity	4:15 PM 10/2/2018	Active
 General Liability - example	8:09 AM 3/12/2019	Active
 Inland Marine test	7:54 AM 3/12/2019	In Draft
Intro	10:57 AM 3/7/2019	In Draft

Section Library

Categories

1. Click **Add Category** to add a new category of Reusable Sections, to help you organize them.



The screenshot shows the top navigation bar of the 'Reusable Sections' page. On the left, there are two document icons, the title 'Reusable Sections', and a subtitle 'Choose a section to edit or create new'. In the center, there is a 'Walk Me Through >' button and a search box with a magnifying glass icon and the text 'Search'. On the right, there is a blue 'Create New Section' button. Below the navigation bar, there are tabs for 'In Use' (highlighted in orange) and 'Archived'. A dashed blue box contains a '+ Add Category' button.

Add Category



The screenshot shows a modal window titled 'Add New Category'. It contains a text input field labeled 'Category Name'. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Save'.

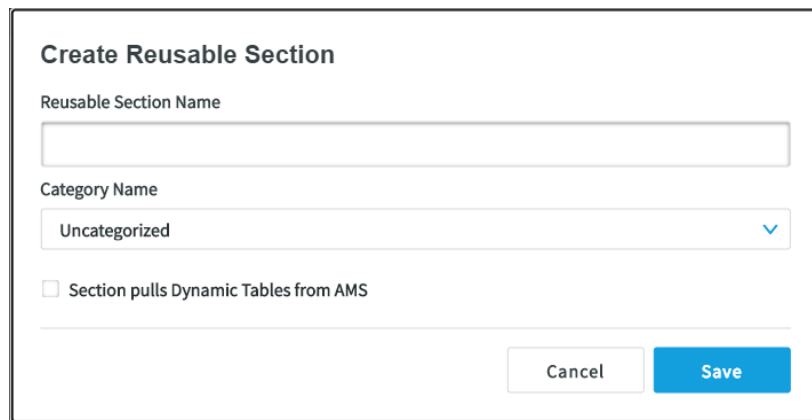
Add New Category

Create Reusable Sections

You can create two kinds of Reusable Sections:

1. Sections that contain user-created content only, such as text, tables, and images.
2. Sections that contain line of business data from AMS360 alongside other user-created content.

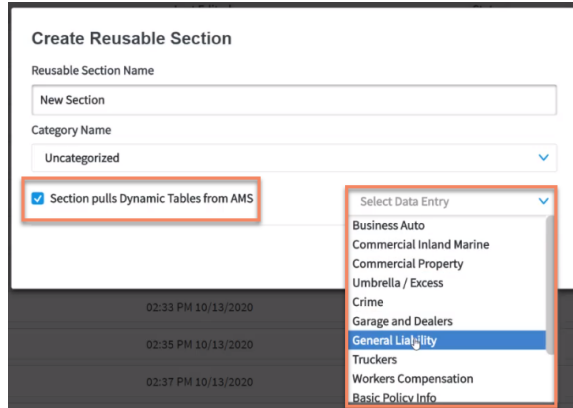
In each case, click **Create New Section** in the upper-right corner of the **Reusable Sections** page. You can now name and categorize it. If your Reusable Sections will only contain user-created content, click **Save**.



The screenshot shows a modal window titled 'Create Reusable Section'. It contains a text input field for 'Reusable Section Name', a dropdown menu for 'Category Name' with 'Uncategorized' selected, and a checkbox labeled 'Section pulls Dynamic Tables from AMS'. At the bottom right, there are 'Cancel' and 'Save' buttons.

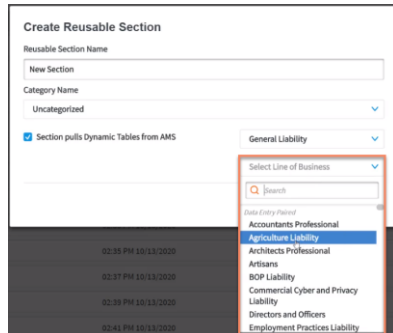
Create Reusable Section

1. To create a section that includes data from AMS360 for a particular line of business, tick the box next to **Section pulls Dynamic Tables from AMS**. You will need to choose a **Select Data Entry (SDE)** from the dropdown menu.

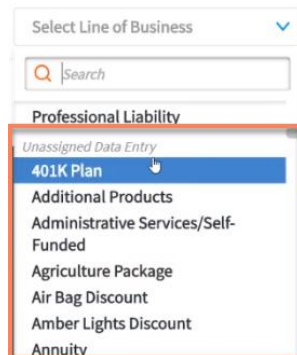


Select Data Entry

2. You will then need to select a **Line of Business** from the drop-down menu. The top portion of this list shows Lines of Business that have this specific SDE associated to it, as seen in the LOB setup in AMS360 admin.
 - a. You will also notice here that there are some Lines of Business with no SDEs associated (see below). If you want to set up sections for these, they will appear in the second portion of the dropdown.



Select Line of Business



Unassigned Data Entry

3. When finished, click **Save** and you will be taken to the Section Editor.

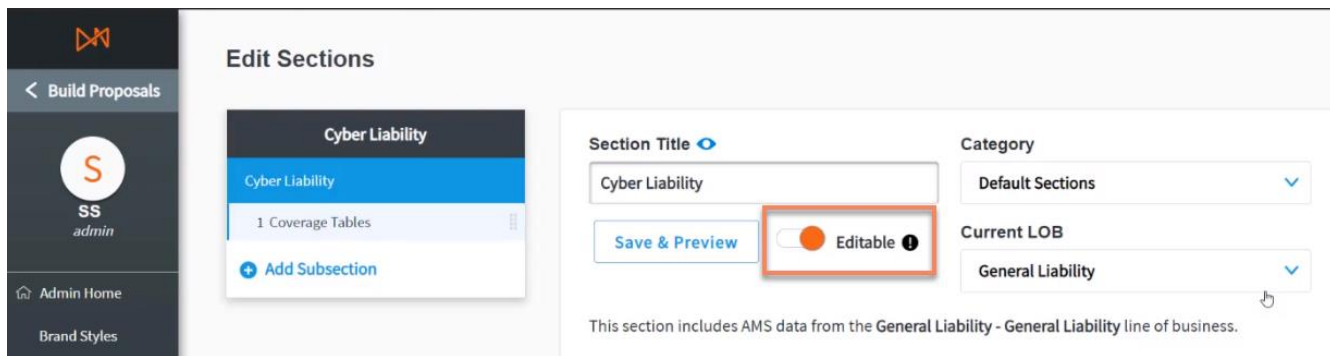
Section Editor

Editable Section toggle

Admins can decide whether a particular section can be edited or not by the Account Managers. This means that the Admin can build the section to be standardized for their organization and potentially mark this content as fixed for all users, so that it is identical in each proposal.

In Section Editor, toggle 'On' or 'Off' as desired

- On: Editable: Account Manager can edit content, including adding, deleting, and renaming subsections.
- Off: Not Editable: Account Manager cannot edit the content of section in any way.

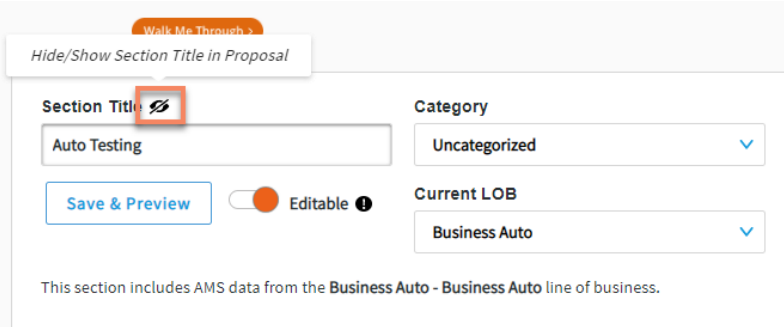
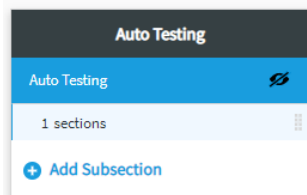


Section Editor-Editable Toggle

Optional Titles

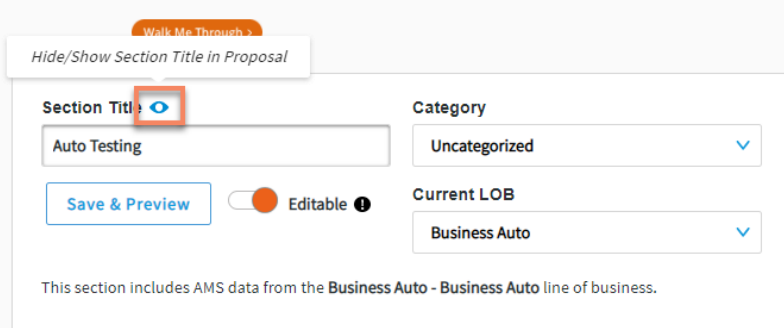
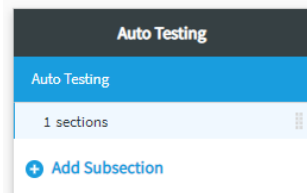
- Admin users now have the option to show or hide titles of their Reusable sections and/or Subsections.

Edit Sections



Title hidden in Section

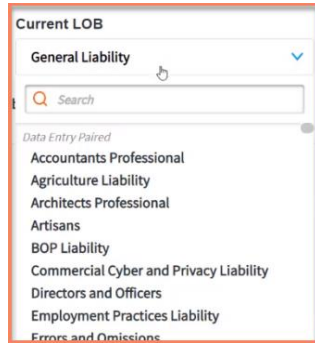
Edit Sections



Title visible in Subsection

Current LOB

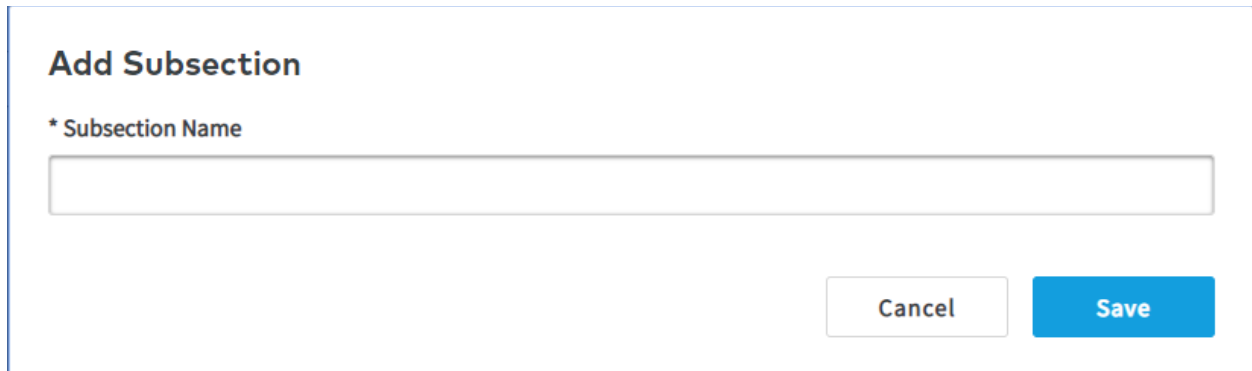
- If you already have a section set up for a LOB that shares an SDE, it's easy to make the adjustment to the correct LOB. Simply edit the section, and on the first page you will see a dropdown to change the LOB. Just a reminder that you will only be able to select LOBs that are associated to the SDE, or ones from the unassigned list.



Current LOB

Add a Subsection without AMS360 data

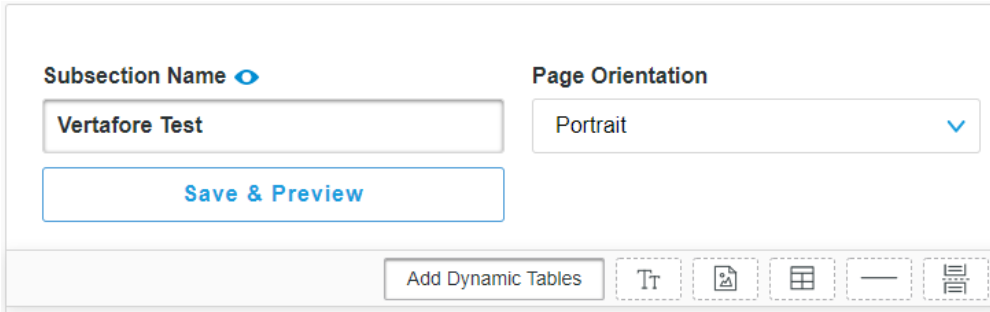
1. Click Add Subsection.
2. Name your subsection, then click Save.



Add Subsection

Within each subsection, you can include a combination of five elements:

- Text block(s)
- Image(s)
- Table(s)
- Divider Line(s)
- Page Break(s)
- Add Dynamic Tables (if importing data from AMS360)



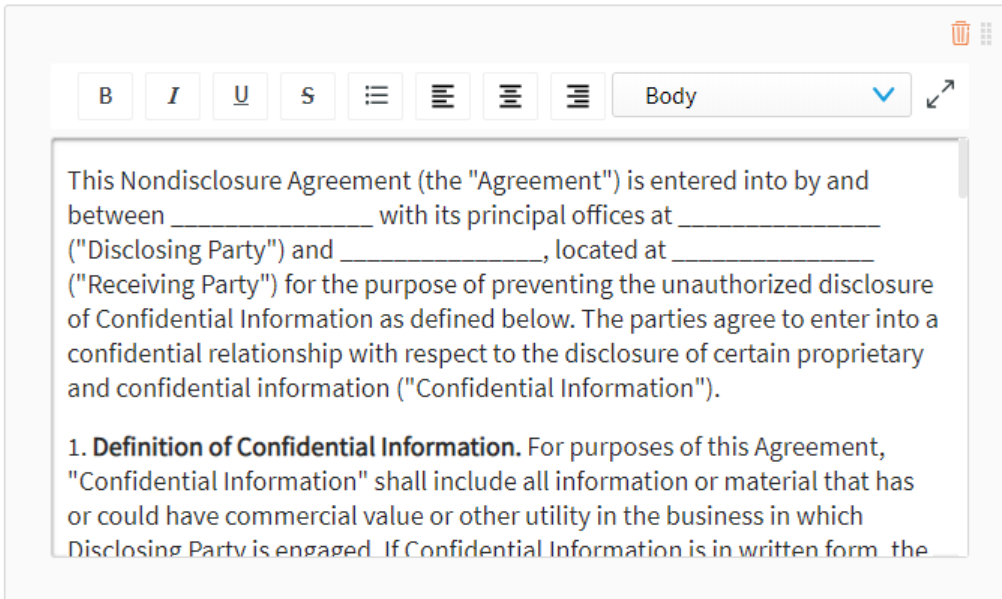
The form contains two main sections: 'Subsection Name' and 'Page Orientation'. The 'Subsection Name' field contains the text 'Vertafore Test'. The 'Page Orientation' dropdown menu is set to 'Portrait'. Below these fields is a 'Save & Preview' button. At the bottom of the form is a toolbar with icons for 'Add Dynamic Tables', 'Text', 'Image', 'Table', 'Divider Line', and 'Page Break'.

Five Elements

To include one of these elements, drag and drop it into the subsection. You can then edit it and re-order the elements.

You have the option to include:

- **Text Block:** Enter and format text using standard Word editing options





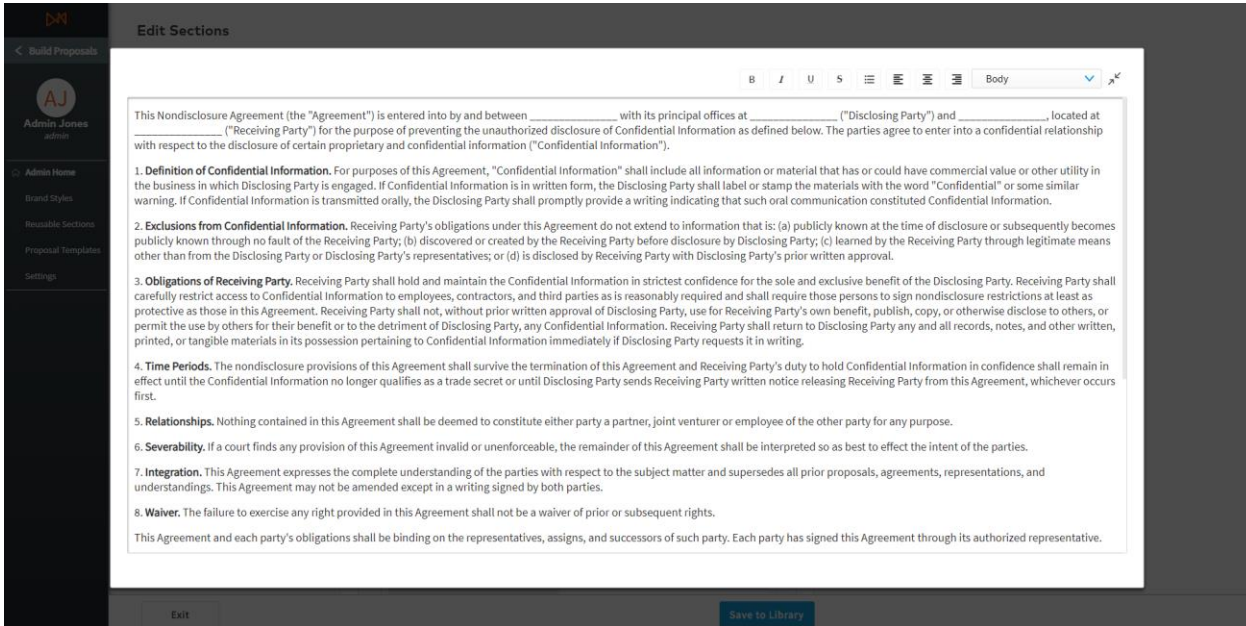
The text block editor shows a rich text editor interface. The top toolbar includes buttons for Bold (B), Italic (I), Underline (U), Strikethrough (S), Bulleted List, Numbered List, Indent Left, and Indent Right. A dropdown menu is set to 'Body'. The main text area contains the following text:

This Nondisclosure Agreement (the "Agreement") is entered into by and between _____ with its principal offices at _____ ("Disclosing Party") and _____, located at _____ ("Receiving Party") for the purpose of preventing the unauthorized disclosure of Confidential Information as defined below. The parties agree to enter into a confidential relationship with respect to the disclosure of certain proprietary and confidential information ("Confidential Information").

1. Definition of Confidential Information. For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which Disclosing Party is engaged. If Confidential Information is in written form, the

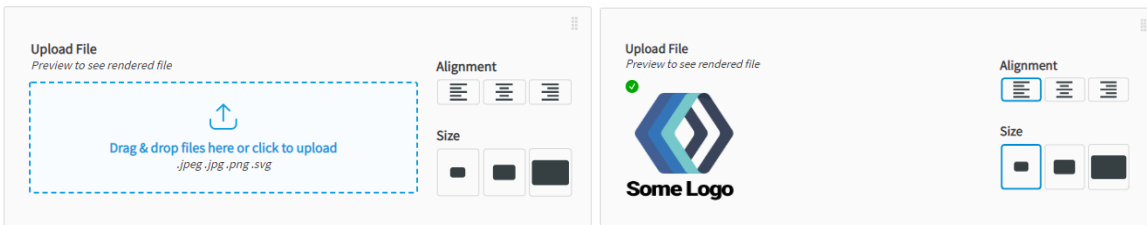
Text block editor

If you need to edit a significant amount of text, you can click the  to expand the editor to a larger view. Click the  to return to the standard editor view.



Expanded text editor

- **Add File:** Upload an image (.jpeg and .png) or a .pdf and set its alignment and size within the subsection
 - We recommend 1 or 2 page PDFs only, and when uploaded they will fill the page.



Uploading an image

- **Add Table:** Enter data and edit the structure of your tables using the buttons on the left-hand side to add or remove columns and rows. Hover over each button for an explanatory tooltip.

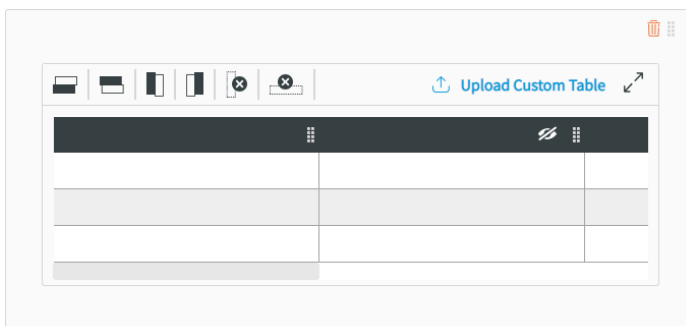
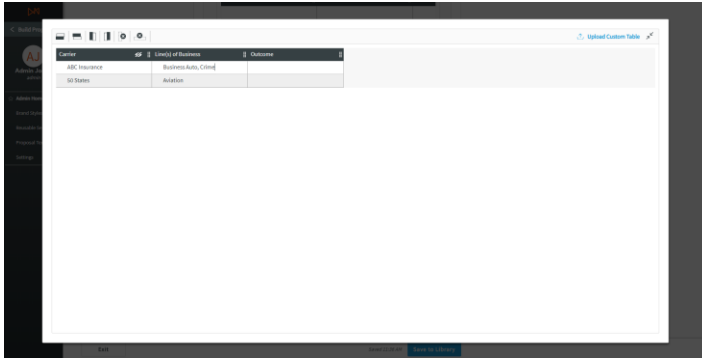


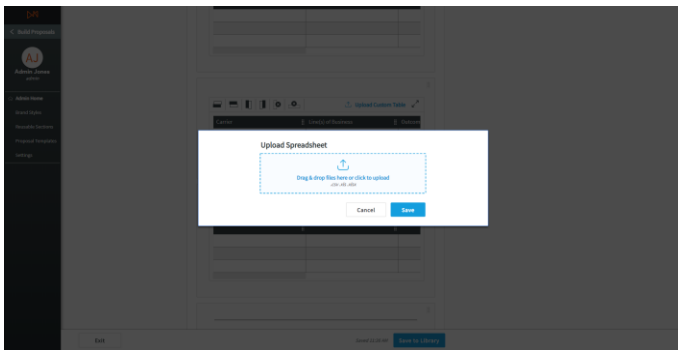
Table editor

As with text editing, you can expand the editor to a larger view.

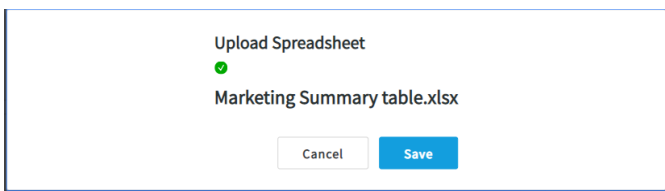


Expanded table editor

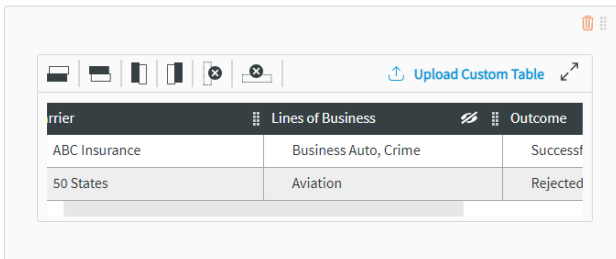
If you have already prepared data outside of your management system, such as a marketing summary or premium summary, you can upload this data from a spreadsheet into Proposal Builder using the Upload Custom Table feature. This works with CSV, XLS, and XLSX files.



Upload custom table



Upload confirmation



Uploaded custom table

- **Divider Line:** Add line to separate content within the subsection.

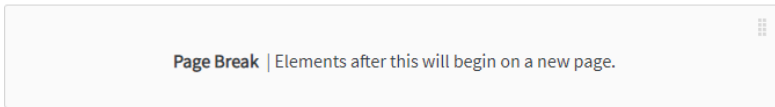


Divider Line

- **Page Break:** Insert a page break to start content on a new page.



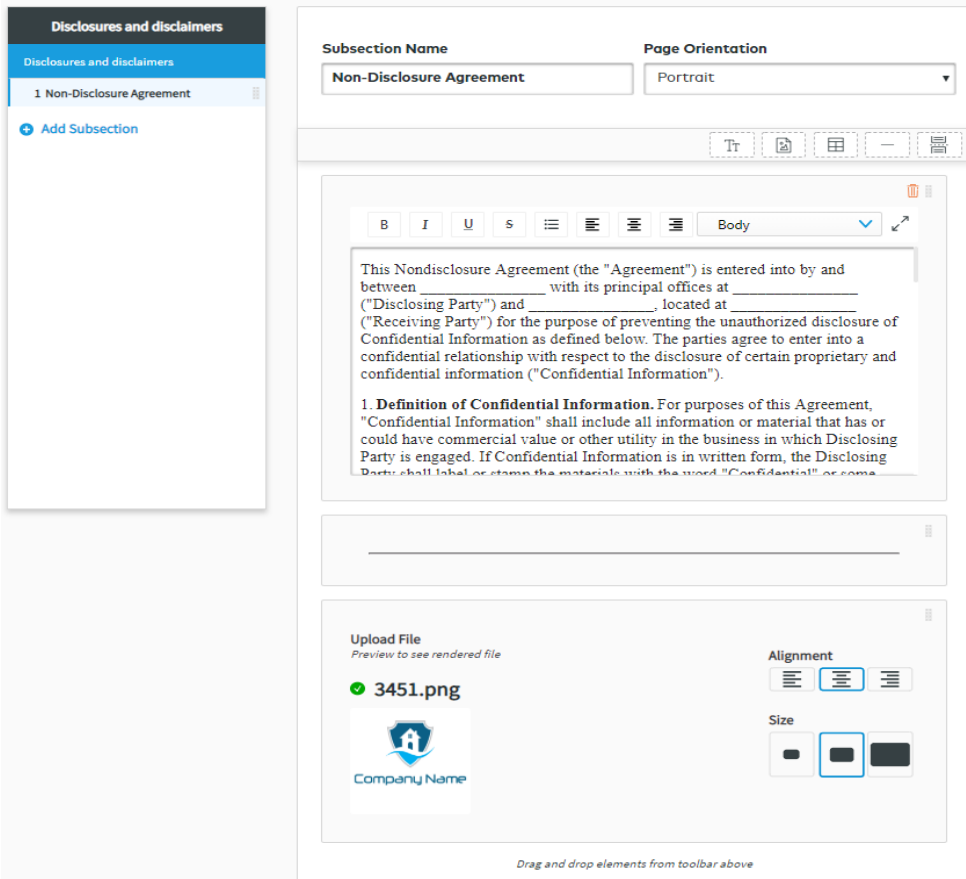
Page breaks are automatically built between Sections, and breaks adapt based on orientation to prevent images and text blocks from being cropped.



Page Break

After creating your section and its subsections, click **Save to Library and Exit** to return to the Reusable Sections menu.

Edit Sections



Disclosures and disclaimers

Disclosures and disclaimers

1 Non-Disclosure Agreement

+ Add Subsection

Subsection Name **Page Orientation**

Tr [Image] [Table] [Minus] [Print]

B I U S [List] [Align] [Text] [Body]

This Nondisclosure Agreement (the "Agreement") is entered into by and between _____ with its principal offices at _____ ("Disclosing Party") and _____, located at _____ ("Receiving Party") for the purpose of preventing the unauthorized disclosure of Confidential Information as defined below. The parties agree to enter into a confidential relationship with respect to the disclosure of certain proprietary and confidential information ("Confidential Information").

1. **Definition of Confidential Information.** For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which Disclosing Party is engaged. If Confidential Information is in written form, the Disclosing Party shall label or stamp the materials with the word "Confidential" or some

Upload File
Preview to see rendered file

3451.png

Company Name

Alignment [Left] [Center] [Right]

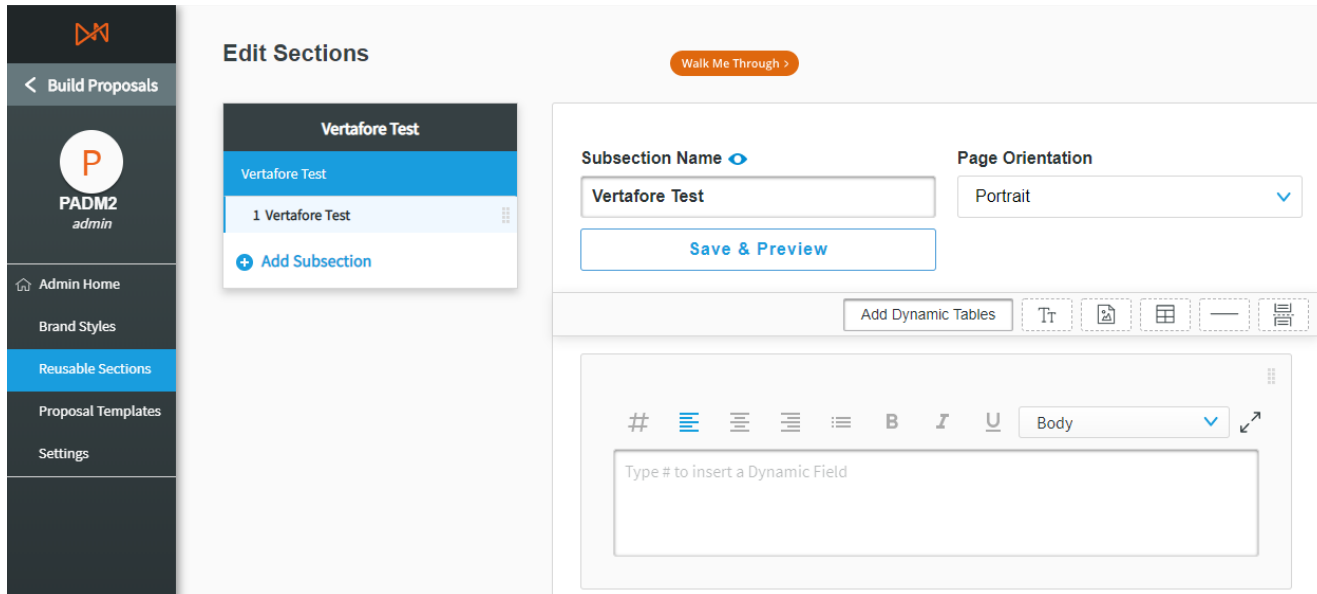
Size [Small] [Medium] [Large]

Drag and drop elements from toolbar above

Example of a finish section

Add a Subsection with AMS360 data

If you have created a new section that can import AMS360 policy and line of business data, you can add placeholders amongst other elements by clicking **Add Dynamic Tables** in a subsection that you have created. For example, you may wish to combine coverage limits and vehicle schedule information from AMS360 with additional information that users need to input themselves.

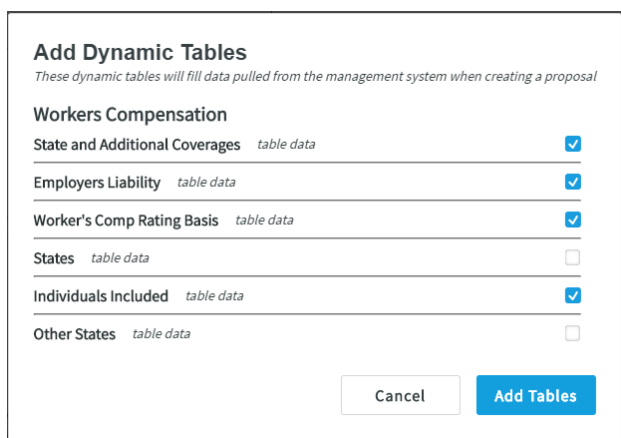


Add a Dynamic Elements

When you select to **Add Dynamic Tables**, a modal will appear from which you can choose which tables to include from the line of business you selected when you created the section. As an example, the modal in the screenshot below gives the user the choice to include the Business Auto tables.

1. Tick the boxes of the tables you wish to add to your subsection.
2. Click **Add Tables**.

The placeholders will be replaced by data imported from AMS360 when the Account Manager starts a proposal from their AMS360 launch point.



Selecting Dynamic Elements

Edit Sections

Walk Me Through >

Vertafore Test

Vertafore Test

1 Vertafore Test

+ Add Subsection

Subsection Name 

Vertafore Test

Page Orientation

Portrait


Save & Preview

Add Dynamic Tables



 State and Additional Coverages

Coverage Description	Limit 1	Limit 2

 Employers Liability

Coverage	Limit	Disease

Dynamic Element placeholders

After adding your Dynamic Elements placeholders, you can also add other elements that you require to complete the section, such as text, images, or tables.

Edit Sections

[Walk Me Through >](#)

Vertafore Test

Vertafore Test

1 Vertafore Test

+ Add Subsection

Subsection Name ↻

Page Orientation

Portrait
▼

Save & Preview

Add Dynamic Tables

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Body
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↗

Type # to insert a Dynamic Field

📄 **State and Additional Coverages** ☰

☰
☰
✕
↗

Coverage Description	Limit 1	Limit 2

Combining Dynamic Elements with other elements

- When finished, click **Save to Library** and **Exit** to return to the **Reusable Sections** menu. When you have created all the **Reusable Sections** that you required, click on **Proposal Templates** on the left navigation bar to start building your proposal templates.



Note: There has been a significant update to how data is displayed from AMS360. AMS now displays the table titles that will get pulled over, in addition you can now hide columns and reorder them.



Remember: Reusable Sections must be in Active status to be used in creating proposals.

SET UP PROPOSAL TEMPLATES

With **Proposal Templates**, you can preset the order in which Reusable Sections appear in your organization's proposals. This will help standardize their appearance. From the Proposal Templates menu, you can create categories to help organize proposal templates. Each proposal template can also be described by **Account Size** and **Insurance Class** for additional ease of classification.



Depending on how you have set up your Reusable Sections, you might want to categorize your proposal templates by region or state, target industry, or another helpful way to organize your Proposal Templates.

1. Click Create New Template.

Title	Last Edited	Status
1.17 JP	12:59 PM 6/11/2020	Active
11.26 JP	01:50 PM 7/14/2020	Active
11/26	01:25 PM 7/14/2020	Active
12.4 JP	12:24 PM 8/18/2020	Active

Templates Home Page

2. Enter your Template Name, select a Category Name, and click Save.

Create New Template

Setting whether a section is Required

The Admin can use the Required toggle to set whether a section must be included when a user chooses a particular template. To set whether a Reusable Section is Required:

1. Click and drag a section into the proposal template structure
2. Toggle 'On' or 'Off' whether the section is required
 - A. 'On': Required: The user cannot delete the section
 - B. 'Off': Not Required: The user can delete

Interaction between Required and Editable











Section settings	Account Manager functionality
Required, Not Editable	<ul style="list-style-type: none"> • Cannot rename or delete the section from the proposal. • Cannot add, edit, or rename subsections.
Required, Editable	<ul style="list-style-type: none"> • Cannot rename or delete the section from the proposal. • Can add new subsection(s), rename, edit or delete existing subsections.
Not Required, Editable	<ul style="list-style-type: none"> • Can delete sections from proposal. • Can add new subsection(s), rename, edit or delete subsections.
Not Required, Not Editable	<ul style="list-style-type: none"> • Can delete sections from proposal. • Cannot add, edit, or rename subsections.

From here, you will be brought to the Template Structure page where you can drag and drop the different Sections you have created.

Template Structure

Name: Category:







Table of Contents

1	 Named Insured	Required <input checked="" type="checkbox"/>	
2	 Business Auto	Required <input type="checkbox"/>	
3	 Commercial Property	Required <input checked="" type="checkbox"/>	
4	 General Liability	Required <input type="checkbox"/>	
5	 Service Team	Required <input checked="" type="checkbox"/>	


Add Reusable Sections

Drag and drop into template

Line of Business

-  Inland Marine (C)
-  Umbrella (C)
-  Crime
-  Garage and Dealers
-  Truckers
-  Workers Compensation

Basic Policy Information

-  Locations

Template Structure

In the Table of Contents Section, you can add Reusable Sections and order them as required.

Click Save to Library to finish.



Remember: Brand Styles, Reusable Sections, and Proposal Templates must be in Active status to be used in creating proposals

Proposal Builder for Account Managers



Admins need to complete the initial setup before Account Managers can create proposals.

To create a new proposal, use Launch Points # 2, 3, 4, or 5 depending on where you are in AMS360 (see the [Proposal Builder Launch Points](#) Section).

IMPORTING AMS360 DATA TO PROPOSAL BUILDER

Proposal Builder imports policy and line of business data from AMS360 according to which data placeholders are included in a proposal template and which additional supported lines of business are included in the policies being translated.

- If a supported line of business is included in both the policy being translated and the Proposal Template, then the section containing the line of business data will appear in the position set by the Proposal Template.
- If a supported line of business is not present in the policy being translated but is included in the Proposal Template, then the placeholder section for that line of business will be dropped from the Table of Contents.

CREATE A NEW PROPOSAL

When the data import completes from AMS360, the Start a Proposal page will display in Proposal Builder. This page gives details of the policies, their component lines of business, and their expiry dates. You can now name your proposal and select a template and brand. After reviewing that all the required policies are present, click **Start Proposal**.

Start a proposal for Acme Midnight Studios

Proposal Name *

Select a Template *

Select a Brand *

The Policies included in your Proposal will be determined by the template you select


Note: If you would like to pull over different or additional policies, return to your management system, modify your policy selection(s), and relaunch Proposal Builder.

[Start Proposal >](#)

Start Proposal

If you do not complete these steps, a message will appear to give you instructions.

Start a proposal for ABC

 A proposal name is required, A brand selection is required, A template selection is required

Proposal Name *

Select a Template *

Select a Brand *

Proposal Error Message

Table of Contents

After starting a proposal, you will be taken to the Table of Contents editing page. Based on the content of the template you selected on the Start a Proposal page, you will be able to re-order existing sections of the proposals, add new Sections and Subsections, and/or delete sections that were not set to be Required by the Admin.

Required and Editable options

As discussed, [here](#) sections and subsections can be set to be Required and/or Editable by the Admin user. In the Table of Contents view, the Required status is shown by the presence or the absence of a 'trash can' icon when the user hovers over a section or sub-section.

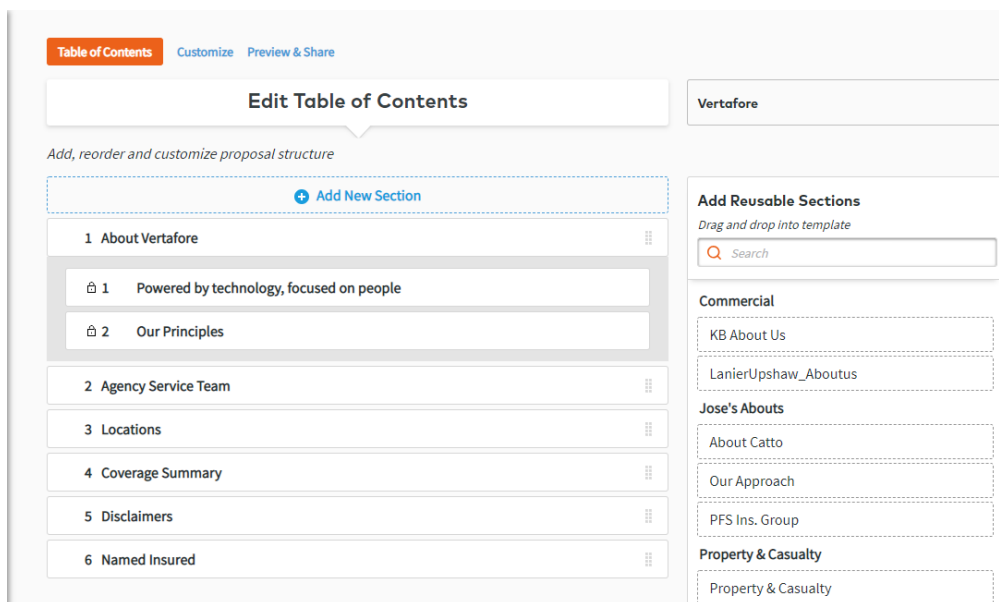


The Editable status is shown by the absence or presence of a lock icon when the user hovers over a section or sub-section.



Admins set the initial order of a particular proposal template. If the Table of Contents is not in the desired order, Account Managers can change the Reusable Section order and/or delete unnecessary sections if those sections have been set to be Not Required.

You can drag and drop the different boxes in the Table of Contents tab.

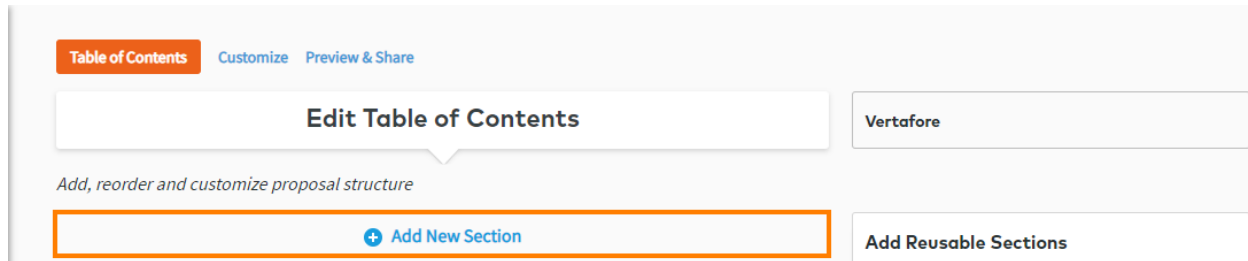


Edit Table of Contents

Add a Section

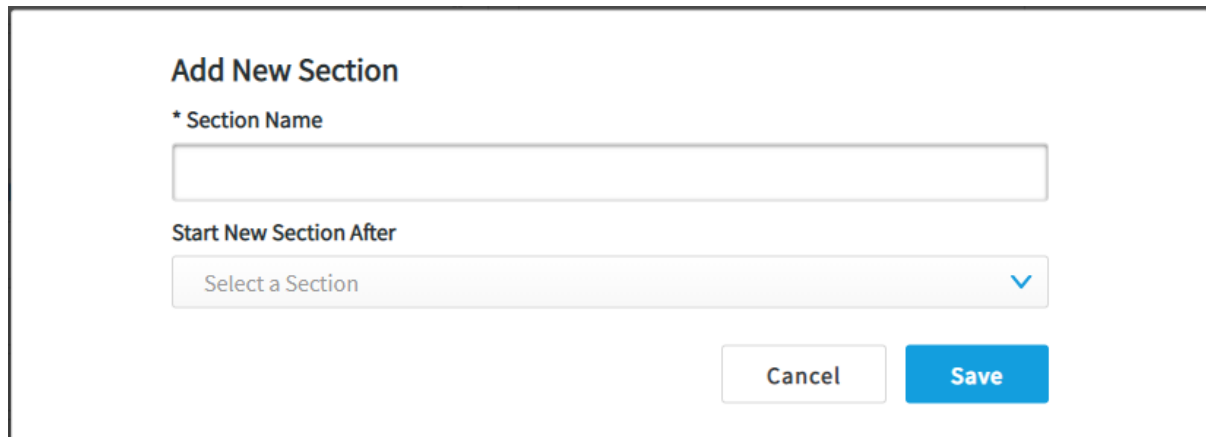
If you need to add a section to the proposal, you can click **Add New Section** to add it the table of contents. The section will be not Required and Editable.

1. Click Add New Section.



Adding a Section

2. Enter the name of the new Section and select where the Section should be placed on the Table of Contents.



The screenshot shows the 'Add New Section' dialog box. It has a title 'Add New Section'. Below the title is a text input field labeled '* Section Name'. Below that is a dropdown menu labeled 'Start New Section After' with the text 'Select a Section' and a downward arrow. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

Name the Section

Add a Subsection

1. Click Add Subsection to add a subsection to any Editable section where you need to add more content.

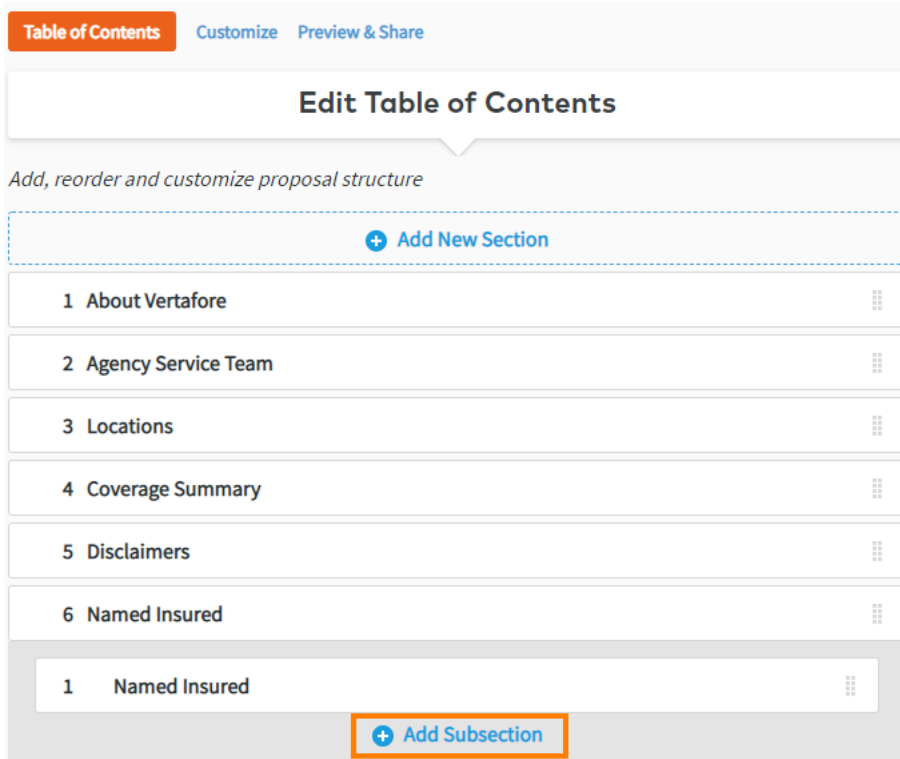


Table of Contents Customize Preview & Share

Edit Table of Contents

Add, reorder and customize proposal structure

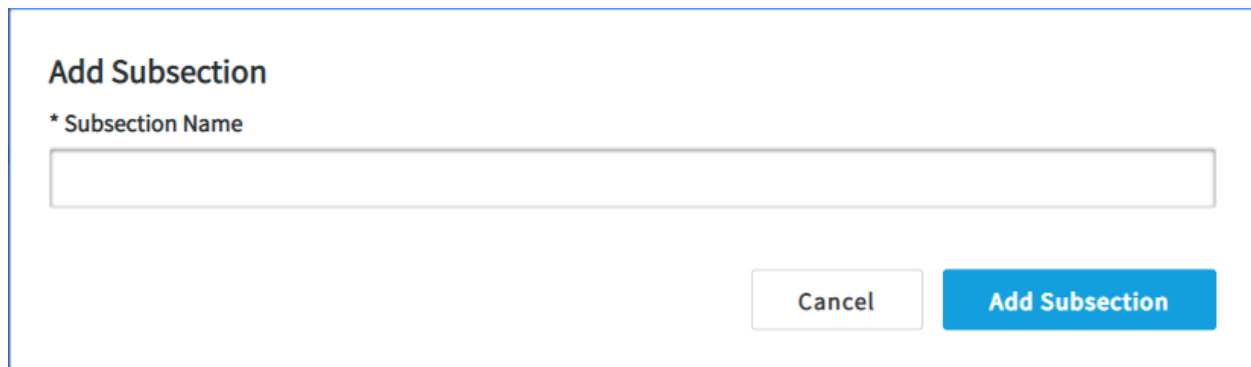
+ Add New Section

- 1 About Vertafore
- 2 Agency Service Team
- 3 Locations
- 4 Coverage Summary
- 5 Disclaimers
- 6 Named Insured
 - 1 Named Insured

+ Add Subsection

Add Subsection from TOC

2. Click Add Subsection and name it.



Add Subsection

* Subsection Name

Cancel Add Subsection

Customize a Subsection

3. When finished adding sections and subsections, click **Save** and then **Next** at the bottom of the screen.

Customize Proposal by Section

After confirming the order of the sections in your proposal, you can now customize these sections and their subsections by adding, editing, or removing text blocks, images, tables, dividing lines, and/or page breaks.

Required and Editable options

As discussed [here](#), Sections and Subsections can be set to Required and/or Editable by the Admin user. In this view, Required sections and subsections are denoted by the absence or presence of the 'trash can' delete button. You can only delete a section if it's not required.

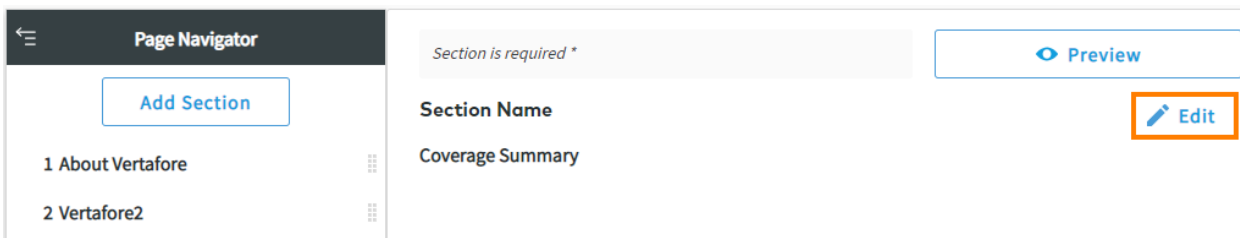


In this view, Editable sections and subsections are denoted by the absence or presence of the lock icon on a section or subsection item.

Where a section is Editable (i.e. there is no lock icon), its subsections can be edited by the user. If a lock is visible this means that the admin has made this section un-editable.



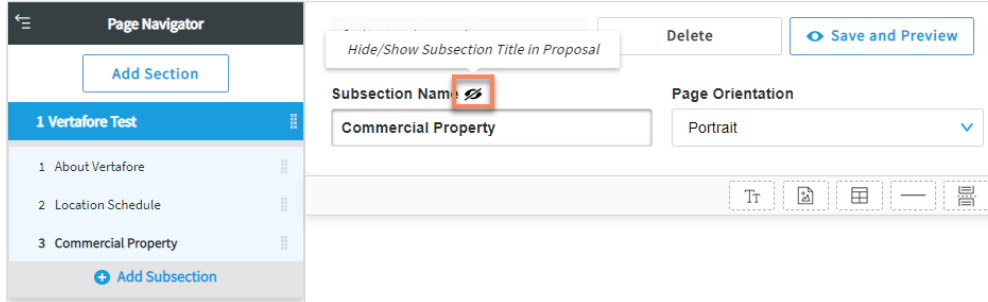
If you wish to edit a section, select that section and click the Edit button. This will allow you to edit the elements in the section's subsections in the same way as the Admin.



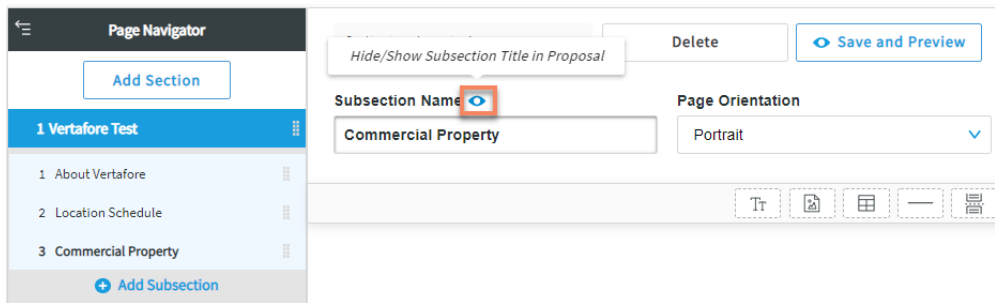
NOTE: Editing a section in this mode detaches it from the Reusable Section on which it was based. This means that any updates to the original Reusable Section will NOT be reflected in the section you edited.

Optional Titles

- Account Managers now have the option to show or hide titles of their Reusable sections and/or Subsections.

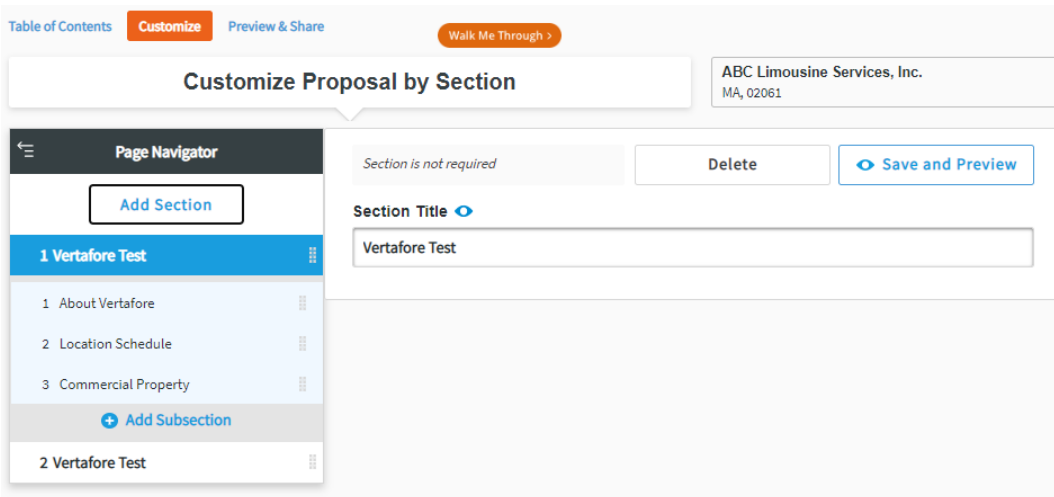


Title hidden in Section



Title visible in Subsection

- See the [Admin section](#) for details on adding and editing elements in subsection.



Customize Proposal

Section Preview

While editing a section, click **Save and Preview** to see what it would look like in the final document. You can then review and adapt it accordingly. Alternatively, if you no longer need that section, you can **Delete** it.

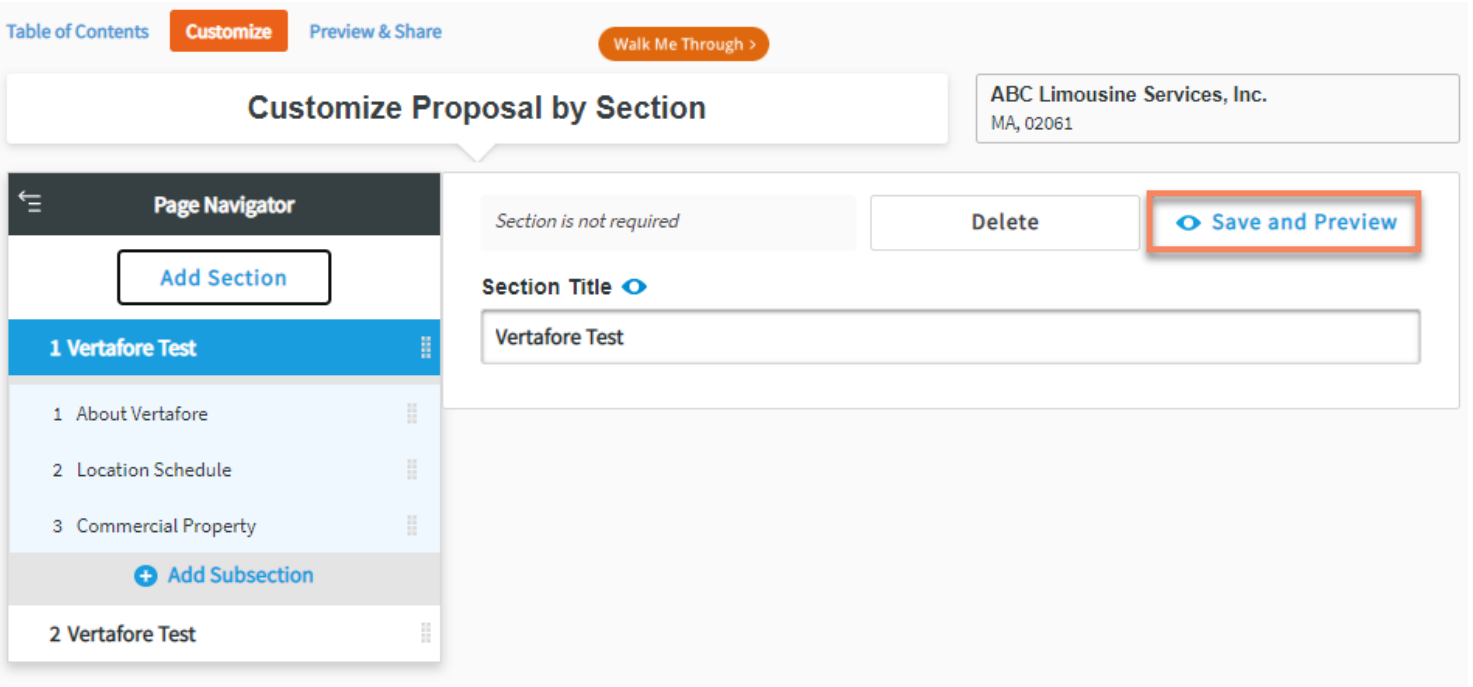



Table of Contents **Customize** Preview & Share Walk Me Through >

Customize Proposal by Section

ABC Limousine Services, Inc.
MA, 02061

Section is not required

Delete **Save and Preview**

Section Title 

Vertafore Test

Page Navigator

Add Section

1 Vertafore Test

- 1 About Vertafore
- 2 Location Schedule
- 3 Commercial Property

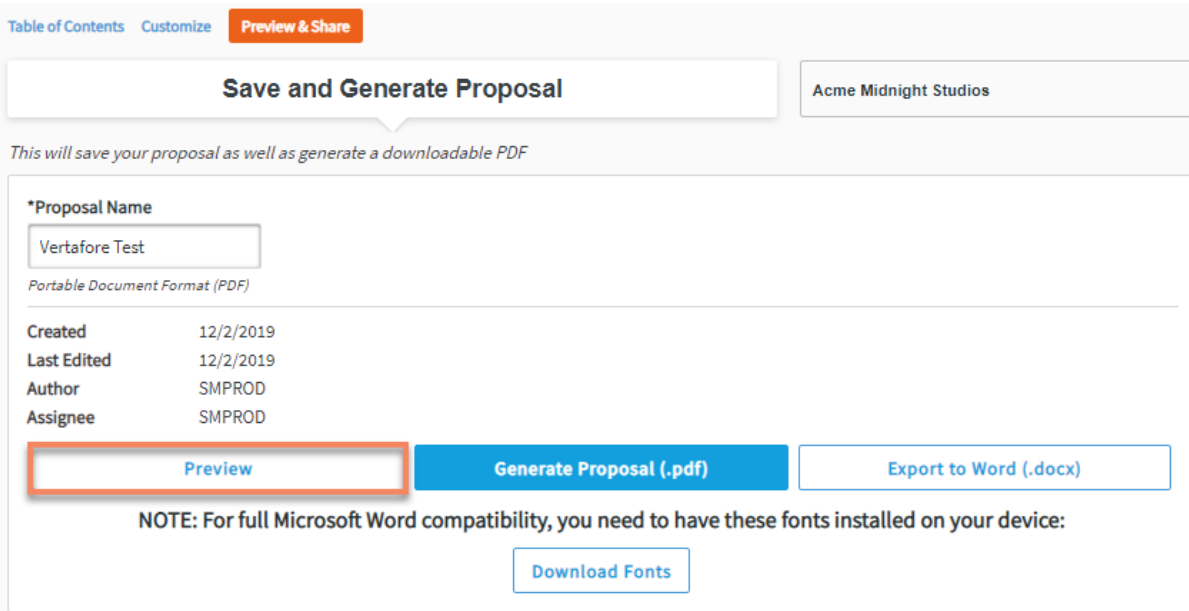
+ Add Subsection

2 Vertafore Test

Section Preview

Preview & Export Proposal

Once you have finished customizing your proposal, click **Preview** to see what the full document would look like.



The screenshot shows the 'Save and Generate Proposal' interface. At the top, there are navigation tabs: 'Table of Contents', 'Customize', and 'Preview & Share' (which is active). Below the tabs, there is a header area with 'Save and Generate Proposal' on the left and 'Acme Midnight Studios' on the right. A sub-header reads 'This will save your proposal as well as generate a downloadable PDF'. The main content area includes a form for the proposal name, currently set to 'Vertafore Test'. Below the name field, it says 'Portable Document Format (PDF)'. There is a metadata table with the following information:

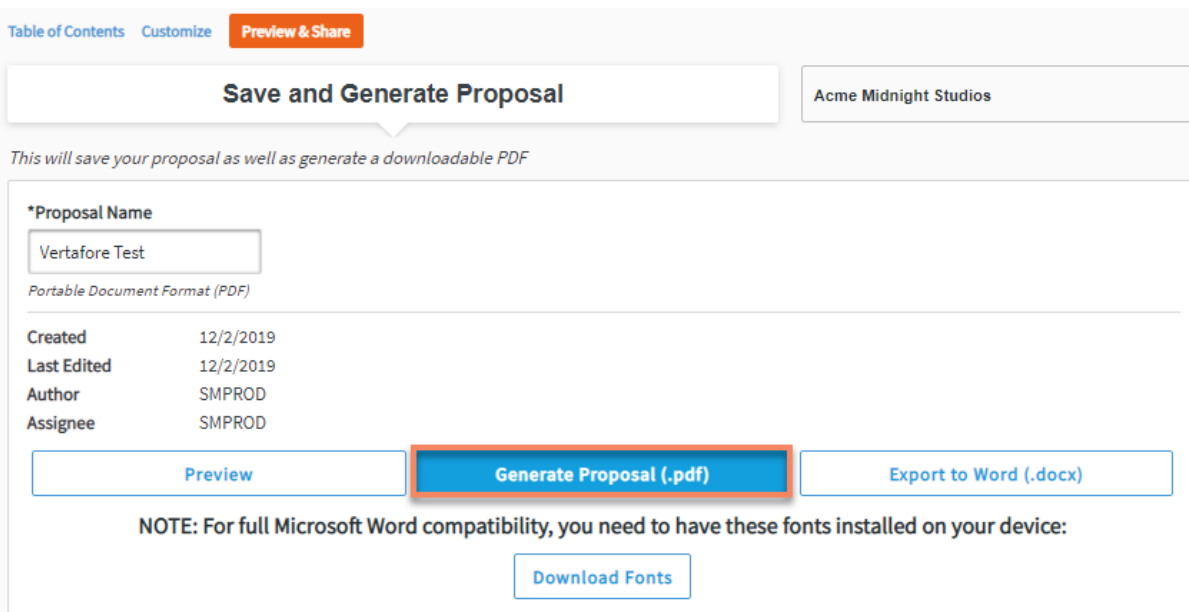
Created	12/2/2019
Last Edited	12/2/2019
Author	SMPROD
Assignee	SMPROD

Below the table are three buttons: 'Preview' (highlighted with a red border), 'Generate Proposal (.pdf)', and 'Export to Word (.docx)'. A note below the buttons states: 'NOTE: For full Microsoft Word compatibility, you need to have these fonts installed on your device:'. Below the note is a 'Download Fonts' button.

Preview Proposal

If you are satisfied with the proposal, click **Generate Proposal (.pdf)** to save the proposal as a .pdf. Alternatively, you can choose to export it as a Word document to refine it further.

- In order for you to see the **Export to Word** button, the admin must enable this feature in **Settings**.



This screenshot is identical to the one above, showing the 'Save and Generate Proposal' interface. In this version, the 'Generate Proposal (.pdf)' button is highlighted with a red border, indicating the next step in the process.

Generate Proposal



Note: You will need to download and install the font styles from Microsoft Word on your personal machine to have them appear properly in Word.

Table of Contents Customize **Preview & Share**

Save and Generate Proposal Acme Midnight Studios

This will save your proposal as well as generate a downloadable PDF

***Proposal Name**
Vertafore Test
Portable Document Format (PDF)

Created	12/2/2019
Last Edited	12/2/2019
Author	SMPROD
Assignee	SMPROD

[Preview](#) [Generate Proposal \(.pdf\)](#) [Export to Word \(.docx\)](#)

NOTE: For full Microsoft Word compatibility, you need to have these fonts installed on your device:

[Download Fonts](#)

Download Fonts

You will then be able to view the different stored versions of the proposal on the All Proposals page.

Admin Home >

V
VALD
admin

All Proposals

Table of Contents Customize **Preview & Share**

Save and Generate Proposal Acme Midnight Studios

This will save your proposal as well as generate a downloadable PDF

***Proposal Name**
Vertafore Test
Portable Document Format (PDF)

Created	12/2/2019
Last Edited	12/2/2019
Author	SMPROD
Assignee	SMPROD

[Preview](#) [Generate Proposal \(.pdf\)](#) [Export to Word \(.docx\)](#)

NOTE: For full Microsoft Word compatibility, you need to have these fonts installed on your device:

[Download Fonts](#)

All Proposals Tab

All Proposals/View and Edit Proposals

This page contains the proposals that have been initiated, which means that are in New, In Progress, or Generated status. For Admins, the page lists all proposals generated by their agency. For Account Managers, the page shows all proposals that they initiated for the specific customer.

View and Edit Proposals Sort By: Status ▼

Active | Archived

Client	Status	Proposal Name	Author	Assignee	Last Edited	
Vertafore eForms	Generated	crime crime crime	PADM2	PADM2	03:43 AM 2/24/2020	

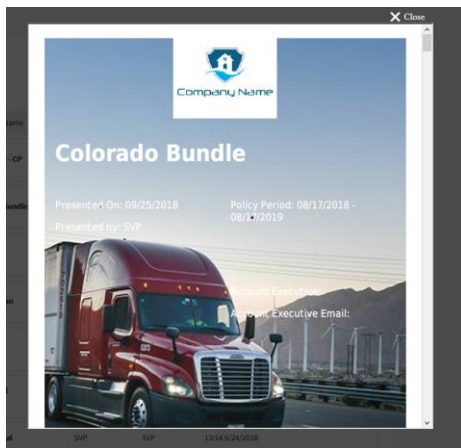
View and Edit Proposals



Edit, Preview, Archive

From this page, you can choose to:

- Edit an existing proposal that is New, In Progress, or Generated. This resumes the proposal creation flow.
- Preview a proposal that is In Progress or Generated.



Proposal preview

- Archive your proposal, this moves your proposal to the Archived tab, where it can be stored. You also have the option to delete the proposal if you no longer need it.

View and Edit Proposals Sort By: Status ▼

Active Archived

Client	Status	Proposal Name	Author	Assignee	Last Edited	
Vertafore eForms	Generated	crime crime crime	PADM2	PADM2	02:10 PM 8/26/2020	

Deleting and Archived Proposal

Other information translated from AMS360

POLICY LEVEL DATA ON START A PROPOSAL PAGE

- Policy ID
- Policy Expiry Date

FRONT COVER PAGE TEXT

- Policy Period
- Effective Date
- Account Representative Name
- Account Representative Email
- Account Executive Name
- Account Executive Email
- Agency Contact Info for Agency, Division, Branch, Department, Group
- Insured Customer Name
- Presented By (user's name in full)

AMS360 Data Mapping

BUSINESS AUTO

Coverage Table in Proposal Builder:

Coverage	Limit	Deductible	Symbol
Amount to Reconcile Min	\$10	\$25	
Anti-Theft Device	\$100	\$50	
Accidental Death Benefits	\$1,000	\$1,000	

Data in AMS360:

Level	State	Location	Coverage	Form Section	Sort Order #	Limit 1	Limit 2	Premium	Ded Type	Ded Amt	Number of	Rate	Miscellaneous In
Line of Business			Accidental Death Benefits	Liability	1	1,000	2,000	300.00	Per claim	1,000		50.00000	
State	CA		Anti-Theft Device	Misc. Physical Damage	2	100	200	300.00	Flat	50	2	10.00000	
Location		00002, 456 W Sesame St, Denver, CO, 80122	Amount to Reconcile Min	Collision	3	10	20	30.00	Disappearing	25	1	5.00000	
												\$630.00	

Hired / Non-Owned / Drive Other Car Table in Proposal Builder:

Coverage	Limit 1	Limit 2	Deductible Type	Deductible	Rate	Number of
Increased Limits Factor	\$150	\$250	Disappearing	\$500	50	1
Comprehensive	\$1,500	\$2,500	Flat	\$5,000	500	2
Specified perils	\$15,000	\$25,000	Per accident	\$50,000	550	3
Collision	\$15	\$25	Per claim	\$50	5	4
Other Than Collision	\$123	\$456	Per claim	\$789	78	12
Auto loan	\$111	\$222	Per accident	\$333	88	56
Drive other car	\$987	\$654	Flat	\$555	77	34

Data in AMS360:

Hired/Non-Owned/Drive Other Car Delete

State: CA Cost of Hire: 100 If Any Basis? Yes No # Days: 365
 # Vehicles: 25 Class: Hired Liability Rate: Hired PD Rate:
 Primary Coverage? Yes No Minimum Premium Applies? Yes No

Hired/Borrowed

1 Coverage: Increased Limits Factor
 2 Limit 1: 150 3 Limit 2: 250 Premium: 100.00
 5 Ded. Amt: 500 4 Ded. Type: Disappearing 6 Rate: 50.00000 7 Number of: 1

Comprehensive
 Limit 1: 1,500 Limit 2: 2,500 Premium: 1,000.00
 Ded. Amt: 5,000 Ded. Type: Flat Rate: 500.00000 Number of: 2

Spec C of L
 Limit 1: 15,000 Limit 2: 25,000 Premium: 10,000.00
 Ded. Amt: 50,000 Ded. Type: Per accident Rate: 550.00000 Number of: 3

Collision
 Limit 1: 15 Limit 2: 25 Premium: 10.00
 Ded. Amt: 50 Ded. Type: Per claim Rate: 5.00000 Number of: 4

Additional Rates / Premiums

Non-Owned Delete

State: CO
 Class: Group Type: Employees Number of: 5 Percent: 50
 Social Service Agency? Yes No Individual Liability? Yes No

Other Than Collision
 Limit 1: 123 Limit 2: 456 Premium: 99.00
 Ded. Amt: 789 Ded. Type: Per claim Rate: 78.00000 Number of: 12

Additional Rates / Premiums

Drive Other Car Delete

State: AZ Number Employed: 100 Number Covered: 100
 Class:

Drive other car
 Limit 1: 987 Limit 2: 654 Premium: 321.00
 Ded. Amt: 555 Ded. Type: Flat Rate: 77.00000 Number of: 34

Additional Rates / Premiums

Coverage	Limit 1	Limit 2	Ded Type	Deduct	Premium	Form Section	Num Of	SortNo	Rate	Applies To	Miscellaneous Information
1 Auto loan	2 111	3 222	4 Per accident	5 333	33.00	Additional PIP	6 56		7 88.00000	Truckers	
\$33.00											

Driver Schedule Table in Proposal Builder:

Driver Number	Name	Date of Birth	License State
1	Joe Johnson	04/10/1985	AK

Data in AMS360:

Driver Information New Edit Delete

Get Drivers Re-number

Driver	Name	Address	City	State	Zip	Date of Birth	SSN	Sex	Marital Status	State Licensed	Year Licensed	Drivers License #	Comm Driver Since
0001	Joe Johnson	888 W S St	Denver	CO	80222	04/10/1985	456-32-178	Male	Dom Partn	AK	2001	147258369	2005

Vehicle Schedule Table in Proposal Builder:

1 Vehicle Number	2 Year	3 Make	4 Model	5 VIN	6 PIP/PPI	7 UM/UIM	8 Medical	9 Comprehensive Deductible	10 Collision Deductible
1	2018	Subaru	Outback	741852	yes	yes	no	\$2,300	\$5,100

Data in AMS360:

Vehicle Information

Get Vehicles

Copy Existing Vehicle

From Vehicle #: To #: By: Number:

Exclude From Update	Vehicle #	Cust Veh #	Year	Make	Model	VIN	Body Type	Cost New	Purchase Date	Sym Age	Lic Plate
<input type="checkbox"/>	00001	00001	2018	Subaru	Outback	741852	4 door extended cab	30,000	01/03/2019		4FT56

Coverage	Form Section	Sort #	Limit 1	Limit 2	Premium	Ded Type	Ded Amt	Valuation	Number of
6 Accidental Death Benefits	Liability	1	1,000	2,000	300.00	Per claim	1,000		
PIP-Basic	Personal Injury Protection	2							
Comprehensive	Comprehensive	3					2,300		
7 Collision	Collision	4					5,100		
Combined single limit	Liability	5	2,500						
Uninsured motorist BI split limit	Uninsured Motorist	6	500	330					
								\$300.00	

Garage Location Schedule Table in Proposal Builder:

1 Policy Location	2 Garage Location #	3 Address 1	4 Address 2	5 City	6 State	7 Zip
1	1	8500 Phoenix Blvd		Phoenix	AZ	85001
2	2	456 W Sesame St		Denver	CO	80122

Data in AMS360:

Garage Locations

Get All Policy Locations

Policy Location	Garage Location #	Address 1	Address 2	City	State	Zip
00001	00001	8500 Phoenix Blvd		Phoenix	AZ	85001
00002	00002	456 W Sesame St		Denver	CO	80122

GARAGE AND DEALERS

Coverage and Limits Table in Proposal Builder:

Coverage ¹	Limit 1 ²	Limit 2 ³	Deductible ⁴	Premium ⁵
Accidental Death Benefits	\$1,000	\$2,000	\$50	\$100.00
Acquisition	\$3,000	\$4,000	\$20	\$200.00
Alaska Attorney Fees	\$4,000	\$5,000	\$100	\$300.00

Data in AMS360:

▼ Garage Coverages/Limits New Edit Delete

Get Coverages

Coverage Level	Coverage	St.	Locat...	Limit 1	Limit 2	Deductible	Premium	Form Section	Sort #
Line of Business	Accidental Death Ben...			1,000	2,000	50	100.00	Personal Injury...	1
▶ Location	Acquisition		00003, 7...	3,000	4,000	20	200.00	Liability	2
State	Alaska Attorney Fees	AK		4,000	5,000	100	300.00	Collision	3

Garage Locations Table in Proposal Builder:

Location # ¹	Address ²	City ³	State ⁴	Zip ⁵
1	123 W Sesame St	Denver	CO	80122

Data in AMS360:

▼ Garage Loc New Edit Delete

Get All Policy

Location #	Address	City	St.	Zip
▶ 00001	123 W Sesame St	Denver	CO	80122

Liability – Garage Operations Table in Proposal Builder:

Location #	Class I Regular	Class I Other	Class II Under 25	Class II Other	No. of Dealer Plates	No. of Repair Plates	No. of Trans Plates
1	2	24	10	20	45	15	12

Data in AMS360:

Liability - Garage Operations									New	Edit	Delete
Lo. #	Class I Regular	Class I Other	Class II Under 25	Class II Other	No. of Dealer Plates	No. of Repair Plates	No. of Trans Plates				
00001	2	24	10	20	45	15	12				

Garage Keepers Table in Proposal Builder:

Location #	Coverage	Location Limit	No. of Autos	Ded. Per Auto	Max. Ded. Per Loss	Premium
1	Spec Perils(GD)	\$3,000	3	\$6	\$9	\$6,400.00
1	Comp(GD)	\$2,000	2	\$5	\$8	\$3,200.00
1	Collision(GD)	\$1,000	1	\$4	\$7	\$1,500.00
1	Acquisition	\$500	10	\$11	\$12	\$7,000.00

Physical Damage Table in Proposal Builder:

Location #	Coverage	Location Limit	No. of Autos	Ded. Per Auto	Max. Ded. Per Loss	Premium
1	Amount to Reconcile Min	\$3	50	\$25	\$100	\$100.00

Data in AMS360:

Physical Damage

Loc. / Address City State Zip Code
 00001 123 W Sesame St Denver CO 80122

Garage Location: 00001, 123 W Sesame St, Denver, CO, 80122

Coverage	Location Limit	No. of Autos	Ded. Per Auto	Max. Ded. per Loss	Premium
Amount to Reconcile Min	3	50	25	100	\$100.00

Garage Keepers

Garage Keepers Type: Legal Liability (Primary Basis)

Coverage	Location Limit	No. of Autos	Ded. Per Auto	Max. Ded. per Loss	Premium
Acquisition	500	10	11	12	\$7,000.00
Collision(GD)	1,000	1	4	7	\$1,500.00
Comp(GD)	2,000	2	5	8	\$3,200.00
Spec Perils(GD)	3,000	3	6	9	\$6,400.00

Vehicle Storage Table in Proposal Builder:

Location #	Type of Facility	Garage Risk Code	Physical Damage Period	Storage Limit
1	Building	Dealers	Policy Year	\$1,200

Data in AMS360:

Vehicle Storage

Lo. / Type of Facility Garage Risk Code Physical Damage Period Storage Limit
 00001 Building Dealers Policy Year \$1,200.00

Dealers Physical Damage

Coverage	New or Used	Owned	Financed	Owned and Financed
Comprehensive	New	Yes		
Specified Perils	Used		Yes	
Collision	New			Yes

Data in AMS360:

Dealers Physical Damage

Dealers Physical Damage

	Your Interest in Covered Autos You Own	Your Interest only in Financed Covered Autos	Yours and Financed Interests in Covered Autos
Comprehensive	<input checked="" type="checkbox"/> New <input type="checkbox"/> Used	<input type="checkbox"/>	<input type="checkbox"/>
Specified Perils	<input type="checkbox"/> New <input checked="" type="checkbox"/> Used	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collision	<input checked="" type="checkbox"/> New <input type="checkbox"/> Used	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Driver Schedule

Driver Number	Name	Address	Licensed State	Used Vehicle Number	Use Percentage
1	John Smith	321 W Moutnain Rd	CO	1	75.00
2	Sally Sue	456 N Coast Way	CA	2	25.00

Data in AMS360:

Driver Information Update Cancel

[Get Drivers](#) Re-number

Driver #	Name	Date of Birth	Driver License #	State Licensed	Year Licensed	Driver Excluded
0001	John Smith	04/18/1988	987654321	AS	2003	<input type="checkbox"/>
0002	Sally Sue	03/03/1980	789456123	CA	1995	<input checked="" type="checkbox"/>

Driver #:

Name & Address

Name:

Address:

City:

State: Zip:

Personal Information

Date of Birth:

SSN:

Sex:

Marital Status:

License, Experience & Use

Driver Excluded

State Licensed: Year Licensed: Drivers License #:

Commercial Driver Since: Hire Date: Use Veh #: Percent Use:

Vehicle Schedule Table in Proposal Builder:

Vehicle #	Customer Vehicle #	Year	Make	Model	VIN
1	1	2017	Ford	F150	1234567
2	2	2018	Toyota	Tacoma	888888

Data in AMS360:

Vehicle Information New Edit Delete

[Get Vehicles](#)

Copy Existing Vehicle

From Vehicle #: To Vehicle #:

Exclude From...	Vehicle #	Customer Vehicle #	Year	Make	Model	VIN
<input type="checkbox"/>	00001	00001	2017	Ford	F150	1234567
<input checked="" type="checkbox"/>	00002	00002	2018	Toyota	Tacoma	888888

WORKERS COMP

Worker's Comp Rating Basis

Location	State	Classification Code	Classification	Rating Basis	Exposure	Premium
2	CO			Population	10	\$100.00
1	CA	123	classification	Number of employees	12	\$6.00

Data in AMS360:

Classification/Rating In Update Cancel

State	Location	Class Code	Classification	Rate	Exposure	Premium
CA	00001	123	classification	50.00000	12	\$6.00
CO	00002			1000.00000	10	\$100.00

State:
 Location #:
 Class Code:
 Categories, Duties, Classification:
 Number of Employees:
 Total: # of Full-Time: # of Part-Time:

Rating Basis:
 Exposure (Remuneration):
 Rate:
 Premium:

Coverage/Limits Table

Coverage Description	Limit 1	Limit 2	Limit 3
<u>Adjst. to reconcile-exp mod. premium</u>	\$700	\$800	\$900
<u>Acquisition</u>	\$100	\$200	\$300
<u>Add'l medical</u>	\$400	\$500	\$600

Data in AMS360:

Additional Coverages New Edit Delete

Coverage Level	Coverage	State	Location	Limit 1	Limit 2	Limit 3	Ded Type	Deductible	Premium	Sort.
Line of Business	Acquisition			100	200	300	Coinsurance	25	\$60.00	1
State	Add'l medical	CA		400	500	600	Dollars	100	\$210.00	2
Location	Adjst. to reconcile-exp mod. premium		00001	700	800	900	Flat	150	\$400.00	3

\$ 670.00

GENERAL LIABILITY

Liability Classification Table in Proposal Builder:

1	2	3	4	5
Location Number	Classification	Class Code	Premium Basis	Exposure
1	Classification	123	M	\$500

Data in AMS360:

1	2	3	4	5
Lo. /	Classification	Code	Basis	Exposure
00001	classification	123	Admissions	500

Location #:	00001	Class Code:	123
Classification:	classification		
Premium Basis:	Admissions	Rate:	
Exposure:	500	Prem/Ops:	100.00000
Territory:	1	Products:	200.00000
		Premium:	
		Prem/Ops:	50.00
		Products:	100.00

Limits of Liability Table in Proposal Builder:

1	2
Coverage	Limit
Products/Completed Ops Aggregate	\$300
Fire Damage	
General Aggregate	\$100
Medical Expense	
Employee Benefits	
Personal & Advertising Injury	
Each Occurrence	

Data in AMS360:

1	2
Coverage	Limit 1
General Aggregate	100
Products/Completed Ops Aggregate	300
Personal & Advertising Injury	
Each Occurrence	
Fire Damage	
Medical Expense	
Employee Benefits	

TRUCKERS

Coverage/Limits Table in Proposal Builder:

Coverage	Covered Auto Symbols	Limit 1	Limit 2	Limit 3	Limit 4	Deductible
Accidental Death Benefits		\$100	\$200			\$1,000

Driver Schedule Table in Proposal Builder:

Driver Number	Name	Address	Licensed State	Used Vehicle Number	Use Percentage
1	Joe Johnson	123 S Sesame St	CO	515	10.00

Data in AMS360:

▼ Driver Info
Update Cancel

[Get Drivers](#)
Re-number

Driver #	Name	Date of Birth	Driver License #	State Licensed	Year Licensed	Driver Excluded
0001	Joe Johnson	04/17/1987	15935748625	AL	2005	<input checked="" type="checkbox"/>

Driver #:

Name & Address

Name:

Address:

City:

State:

Personal Information

Date of Birth:

SSN:

Sex:

Marital:

License, Experience & Use

Driver Excluded

State Licensed: Year Licensed: Driver License #:

Commercial Driver Since: Hired Date: Use Veh #: Percent Use:

Vehicle Schedule Table in Proposal Builder:

Vehicle Type	Company Owner	Non-owned	Long Term Lease	Trip Lease	Local	Intermediate	Long Distance	Territory/Zone
Private Passenger Autos								
Semi-Trailers								
Full Trailers	1	2	3	4	5	6	7	8
Refrigerated Trailers								
Service Trucks								
Tractors								
Tank Trailers								
Trucks								
Tank Semi-Trailers								
Other	9	10	11	12	13	14	15	16

Data in AMS360:

Equipment Information	Co Owned	Non Owned	L.T. Lease	Trip Lease	Local	Inter-Mediate	Long Distance	Terr/Zone
Full Trailers	1	2	3	4	5	6	7	8
Other	9	10	11	12	13	14	15	16
Private Passenger Autos								
Refrigerated Trailers								
Semi-Trailers								
Service Trucks								
Tank Semi-Trailers								
Tank Trailers								
Tractors								
Trucks								

