

AMS Prevail Network Integration for AMS 360 version 2.5

The AMS Prevail Network is your premium finance solution and is a core feature in AMS 360. You can now directly finance your premiums without having to re-key your policy information into various finance companies' web sites to get quotes.

Now with AMS 360 v2.5 when you activate loans in the AMS Prevail Network, the loan status displays in the customer's account.

After reviewing this document, you will be able to:

- Set up the premium finance integration
- View a customer loan status
- Process a quote

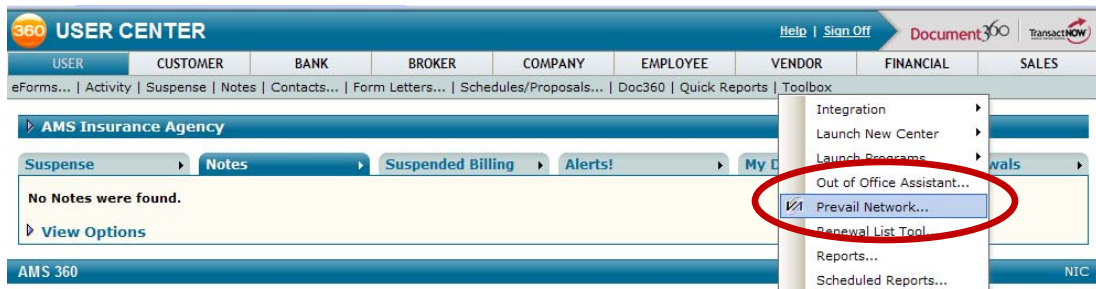
Agency Setup

Becoming an AMS Prevail Network member is free (no monthly fee) and an AMS feature.

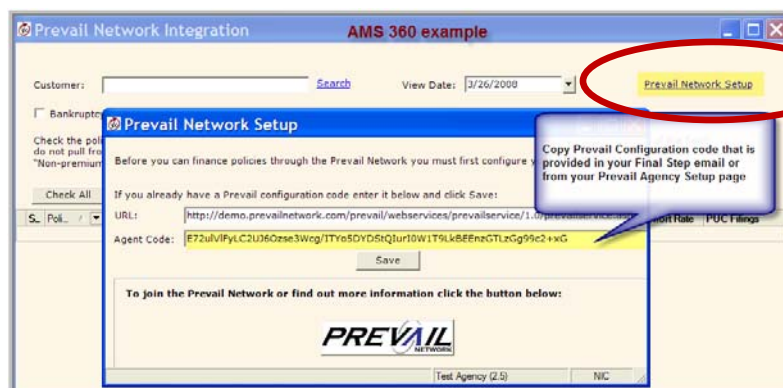
When you sign up for Prevail, an email is sent with a link to your Agent Code. You will need to copy (Ctrl+C) and paste (Ctrl+V) the key into the Agent Code field. If you need to access your Agent Code refer to the additional information below. Once the Agency code has been copied and saved into the Prevail Network setup then integration is activated for anyone who has access.

AMS 360:

Toolbox \ Prevail Network



The Prevail Network dialog box appears. Select the **Prevail Network Setup** link.



- **URL** – The URL is created for you. You do not need to change this field.
- **Agent Code** - The key is unique to each agency. Copy your Agent Key from the Email link. To locate your agent key – refer to the additional information section below.

Added Premium Financing features

Loan Status via Prevail Network Tab

Now with AMS 360 v2.5, accessing your customer loan status is even easier. When you activate a loan via the Prevail Network, the loan information displays in your customer tab and you no longer have to leave AMS 360 for a loan status.

Customer level “Prevail Network” loan Status tab

On the Prevail Network customer tab you can quickly see the

- Customer loan Account status
- Contact info
- Policies tied to the loan
- Payment History and Account Details

Note: If you do not see the Prevail Network as a tab option, contact your system administrator.

The screenshot displays the AMS 360 Customer Center interface. At the top, there is a navigation bar with tabs for USER, CUSTOMER, BANK, BROKER, COMPANY, EMPLOYEE, VENDOR, FINANCIAL, and SALES. Below this, a breadcrumb trail shows the path: Shelby's Groom and Board > Policies > Prevail Network > Activity > Claims > Aged A/R > Register. The 'Prevail Network' tab is highlighted in green and circled in red. The main content area shows the 'Prevail Network Account Status' for account #4082-169. It includes a 'Current' status section with the message 'No payments have been made on this account.' and a 'Next Payment Amount' of \$1,415.18 due on Tuesday, July 08, 2008. Below this, there are tabs for CONTACT INFO, POLICIES, PAYMENT HISTORY, and ACCOUNT DETAILS. The 'ACCOUNT DETAILS' tab is selected, showing a table of payments with columns for Date, Pmt. #, Description, Total, and applied to (Principal + Interest, Setup Fee, Late Charge, NSF Fee, Cancel Fee, Other). The table shows two scheduled payments due on 7/8/2008 and 8/1/2008, both for a total of \$1,415.18.


Date	Pmt. #	Description	Total	Principal + Interest	Setup Fee	Late Charge	NSF Fee	Cancel Fee	Other
7/8/2008	1	Scheduled Payment Due	\$1,415.18	\$1,415.18					
8/1/2008	2	Scheduled Payment Due	\$1,415.18	\$1,415.18					

When you work with one of our marketplace finance companies, the loan information will pull back into your customer record.

For more information about partnered Finance Companies: visit www.prevailnetwork.com > **Companies in the Network.**

Prevail Network – Premium Finance Quoting



With AMS 360 v2.5, we also added  finance icons throughout the workflow process so you have many options of where you can request a premium finance quote. Multiple touch point access is available at the following sections

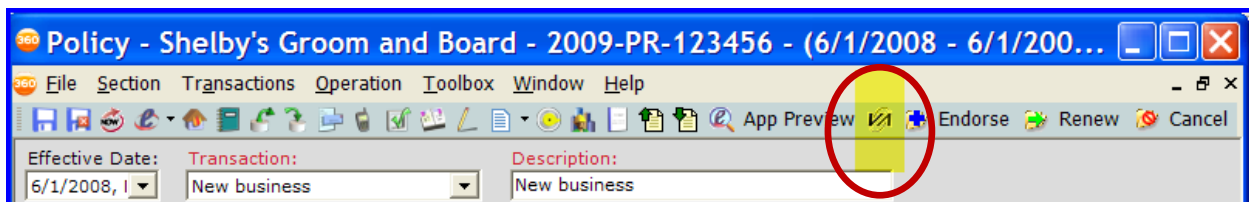
Toolbox menu item for quoting access throughout the system



Prevail Network button added to the Policy workflow section



Policy View icon task bar



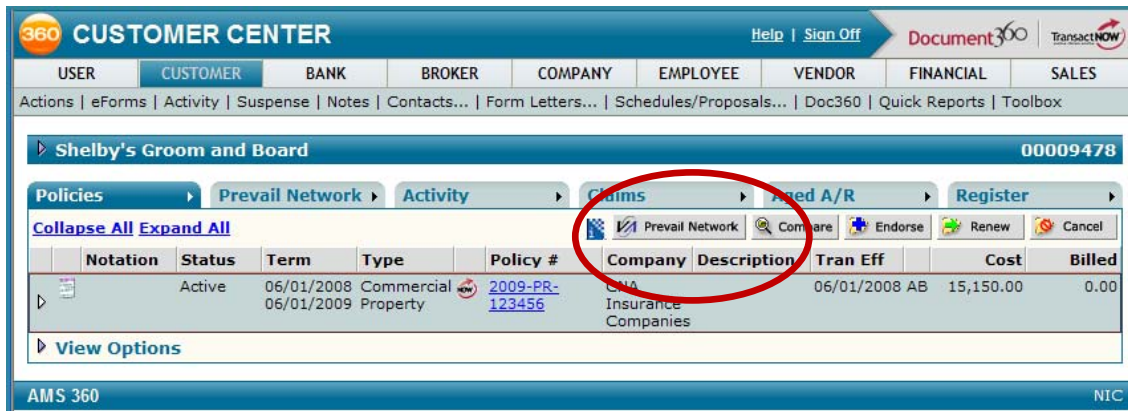
Dec Page View icon task bar



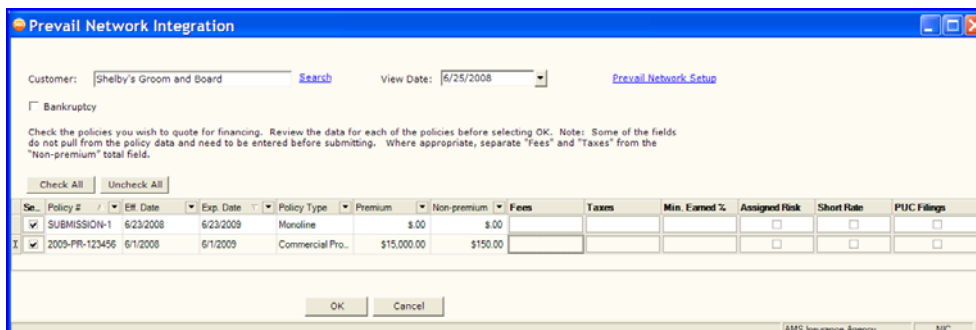
Processing a Premium Finance Integration Quote

*Before you use Prevail for the first time you will need to enable the integration. Please refer to the Agency Setup for more instructions.

If you are working with a customer or a prospect click on the Prevail Network icon button



The Prevail Network dialog box appears. Check the policies and/or submissions that you would like to finance. If needed, add the additional information where appropriate.



Note: Where appropriate, separate “Fees” and “Taxes” from the “Non-premium” field. AMS 360 combines the Fees and Taxes Totals (see example below).



Once you have made the changes, click the OK button to export the data for a premium finance quote.

Additional Information

Business Units:

If you have multiple Business Units (Division/Department) setup in AMS 360, log a Focus support case on how to setup a business unit in the AMS Prevail Network

Fee legal State:


If your agency is located in one of the 37 “Fee legal” States, not sure, log a Focus support case on how to setup your Agency Fee markup in the AMS Prevail Network.

Locating the Prevail Network Agency Code:

Log into the AMS Prevail Network: www.prevailnetwork.com

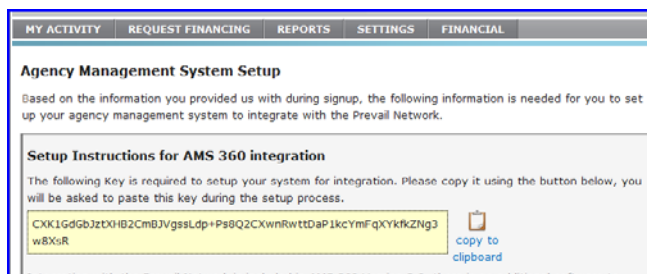
Settings > My Settings

Select the tools icon next to your Agency Management system.



The screenshot shows the 'My Settings' page in the AMS 360 interface. The 'SETTINGS' tab is active. Under 'Agency Attributes', the 'Agency Management System' is set to 'AMS 360'. A red arrow points to a tools icon (wrench and screwdriver) next to the dropdown menu. Below it, the 'Integration Setup' link is visible. The 'AMS Customer #' is '00001-1'.

Copy to clipboard



The screenshot shows the 'Agency Management System Setup' page. It contains a section titled 'Setup Instructions for AMS 360 integration' with a text box containing a long alphanumeric key: 'CXX1GdGbJztD0H2CmBJVgssLdp+Ps9Q2CXwnRwttDaP1kcYmfqYkfkZNg3w8XsR'. A 'copy to clipboard' button is located to the right of the text box.

Additional Questions?

For questions regarding the installation and workflow of the AMS Prevail Network software, please log a FOCUS support case.

If you have questions relating to the premium finance quote, please contact the finance company.

**Thank you for choosing to be a part of the AMS Prevail Network --
Your Premium Finance Solution**