

AMS Prevail Network Integration for AMS 360 version 3.0

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 v3.0 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:

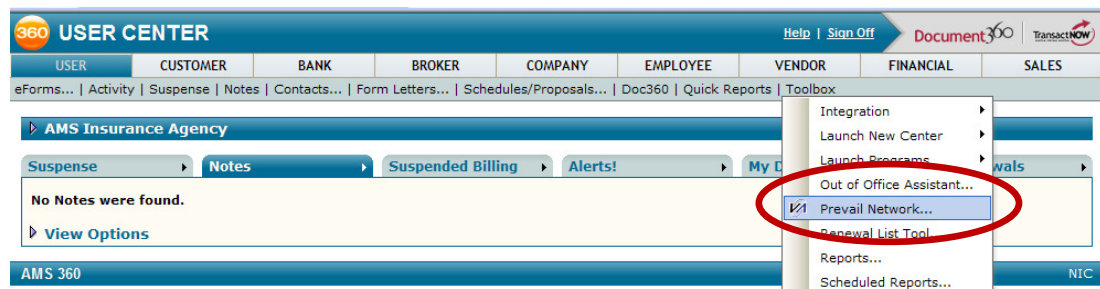
- Set up the premium finance integration
- View a customer loan status
- Process a quote

Agency Setup

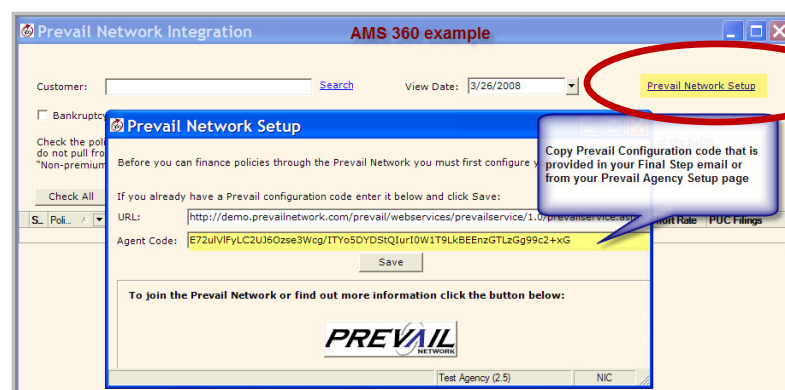
Becoming an AMS Prevail Network member is free (no monthly fee) and an AMS feature.

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 v3.0, accessing your customer loan status is even easier. When you activate a loan via the Prevail Network Marketplace, the loan information displays in the User & Customer Centers. You no longer have to leave AMS 360 for a loan status.

User Center “Prevail Network” Loan Status Tab

On the AMS 360 User Center => Prevail Network Tab you can quickly see the:

- Customer loan Account status for all loans at your agency booked through the Prevail Marketplace.
- Hyperlinks for Premium Financing Details and Customer Accounts
- A report exportable to Excel for further analysis.

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

The screenshot shows the AMS 360 User Center interface. The 'Prevail Account' tab is selected and circled in red. Below the navigation tabs, there is a search area with a 'Show All Agency Loans' checkbox and a 'Finance Company' dropdown menu. The main content area displays a table of loan results. A purple callout box points to the table with the text 'This report is exportable to Excel for analysis.' Another purple callout box points to the 'Insured' column with the text 'Hyperlinks for detailed information about each Loan.'

Account	Finance Company	Agency	Insured	Payment Due	Amount Due	Payoff Amt.	Cancel Date	Account Status
Finance Company: Demo FinancePro Customer								
Agency: ABC Insurance Agency								
10125	Demo FinancePro Customer 425-555-1212	ABC Insurance Agency 555-555-1212	Lindsey Mida (425)354-6311	1/14/2009	\$99.90	\$310.16		Current
4237	Demo FinancePro Customer 425-555-1212	ABC Insurance Agency 555-555-1212	Mida's Touch Construction (206)589-1111 x2311	9/1/2008	\$3,811.15	\$6,631.75	9/25/2008	Cancel
4238	Demo FinancePro Customer 425-555-1212	ABC Insurance Agency 555-555-1212	Mida's Touch Construction (206)589-1111 x2311	9/1/2008	\$2,148.38	\$2,148.38	9/25/2008	Cancel
44	Demo FinancePro Customer	ABC Insurance Agency	Mida's School District	12/3/2008	\$4,210.01	\$30,018.54		Overdue

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 shows the AMS 360 Customer Center interface. The top navigation bar includes '360 CUSTOMER CENTER', 'Help | Sign Off', 'Document360', and 'Transact'. Below this is a menu with 'USER', 'CUSTOMER', 'BANK', 'BROKER', 'COMPANY', 'EMPLOYEE', 'VENDOR', 'FINANCIAL', and 'SALES'. A secondary menu lists 'Actions | eForms | Activity | Suspense | Notes | Contacts... | Form Letters... | Schedules/Proposals... | Doc360 | Quick Reports | Toolbox'. The main content area is for 'Shelby's Groom and Board' (ID: 000094). A navigation bar below the header shows 'Policies', 'Prevail Network' (highlighted with a red circle), 'Activity', 'Claims', 'Aged A/R', and 'Register'. The 'Prevail Network Account Status' section displays 'Account #4082-169' with a 'Current' status and the message 'No payments have been made on this account.' It also shows 'Next Payment Amount: \$1,415.18' and 'Due Date: Tuesday, July 08, 2008'. Financing is provided by 'Demo FinancePro Customer'. A yellow bar highlights the 'CONTACT INFO', 'POLICIES', 'PAYMENT HISTORY', and 'ACCOUNT DETAILS' tabs. Below this is a table of payments:

Date	Pmt. #	Description	Total	applied to:						
				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						


The bottom of the interface shows 'AMS 360'.

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

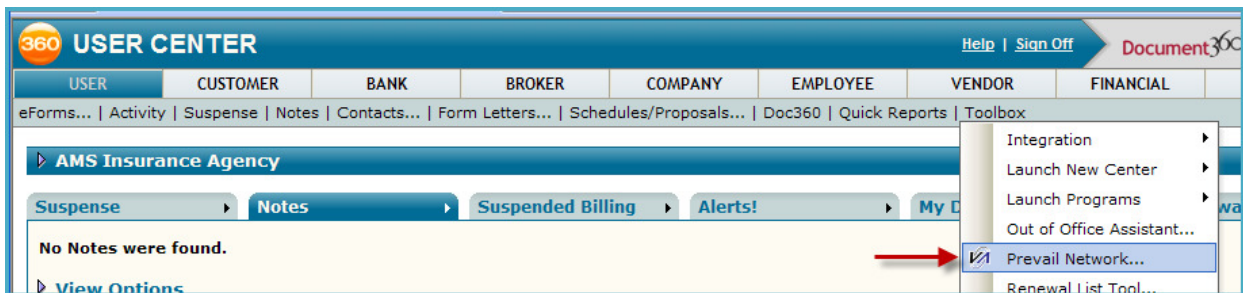
For more information about partnered Finance Companies: visit www.prevailnetwork.com > **Companies in the Network** or contact the AMS Prevail Support Team (support@prevailnetwork.com).

Prevail Network – Premium Finance Quoting

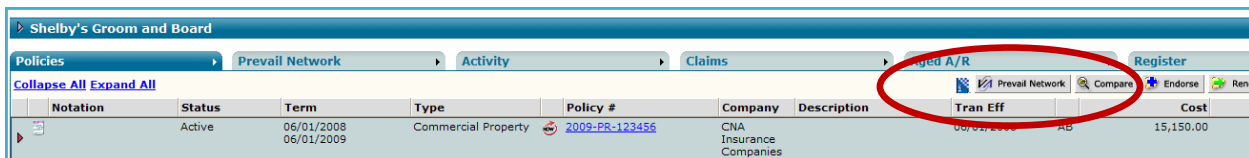


With AMS 360 v3.0, we also added  finance icons throughout the workflow process so you have many options of where you can request a premium finance quote. Multiple touch point access is available at the following sections

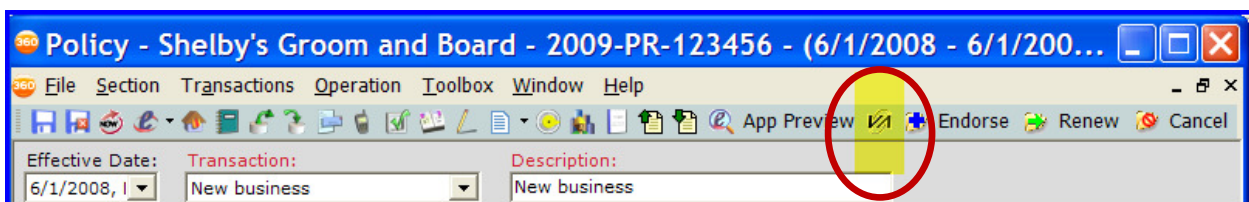
Toolbox menu item for quoting access throughout the system



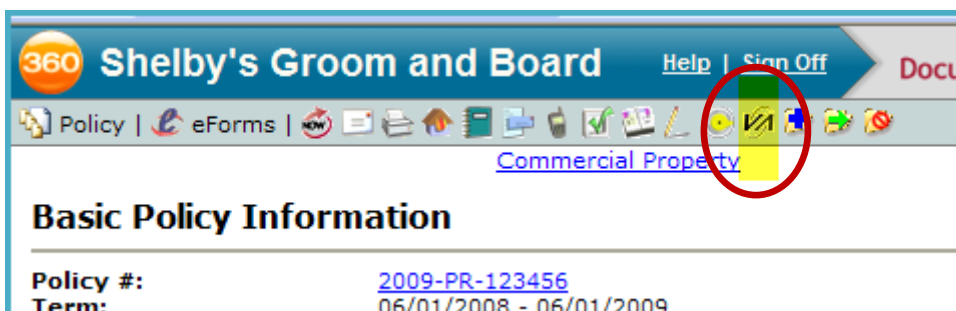
Prevail Network button added to the Policy workflow section



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:

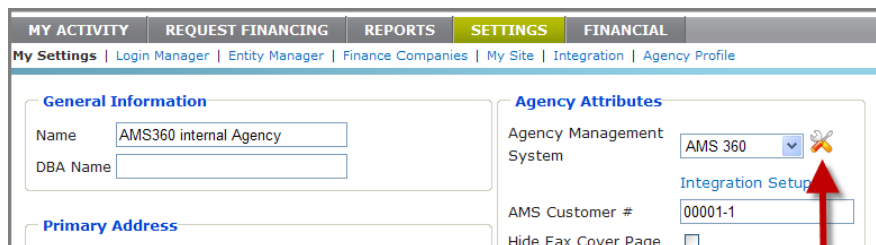
If your agency is located in one of the 37 “Fee legal” States, not sure, log a Focus support case on how to setup your Agency Fee markup in the AMS Prevail Network.

Locating the Prevail Network Agency Code:

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

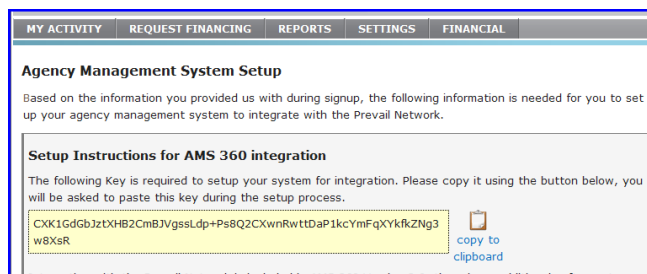
Settings > My Settings

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 (scissors) 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 instructions for AMS 360 integration. A key is displayed in a yellow box: 'CXK1GdGbJztDXH2CmBJVgssLdp+Ps8Q2CXwnRwttDaP1kcYmFqYkfkZNg3w8XsR'. A 'copy to clipboard' button is located to the right of the key.

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**