

InStar / AMS Prevail Network Integration

The AMS Prevail Network is pleased to provide you with the InStar to Prevail Network integration utility program. The integration is a core feature in the InStar management system.

Overview

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

Integration Setup Requirements

- R MSXML5.dll – The InStar program requires this .dll file and will generate an error message if the file is not found. This .dll file is included with version Sr- 8.2.1. (For other versions see the troubleshooting information as part of this documentation.)
- R Prior to Sr-8.2.1, you will need to contact InStar support for a password to enter data in the setup fields on the *Main System Setup* window.
- R You must have a policy entered for the client before you can add a finance agreement quote.

Main System Setup

- From the menu bar, select **Main Menu > Setup System > Main System**.
- Click the *Edit* button and scroll down to the Prevail Network / FP Integration section of the window. (At the bottom of the page)

Note: If you don't see this section, contact InStar support



Prevail Network / FP Integration:

Please enter full address

Website URL

Site ID

Agency Code


Login

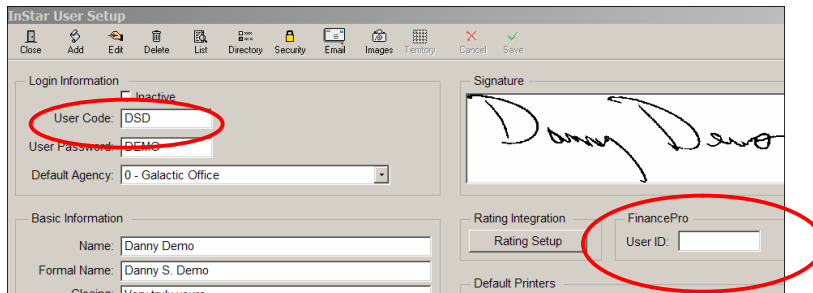
Password

Enter in the following:

- **Prevail Network/FP Integration:** Check the box
- **Website URL:** Copy (Ctrl+C) and paste (Ctrl+V) the URL provided by the Prevail Network. If you do not have this information, contact: support@prevailnetwork.com .
- **Site ID:** 0 (zero)
- **Agency Code:** AMS customer number
- **Login:** AMS Customer number
- **Password:** AMS Customer Number

Users Setup

- Go to **Main Menu à Setup System à User.**
- Click the List Icon to get your list of InStar Users.
- Double click on the User you want to update
- Click the Edit icon  to make changes to the user.

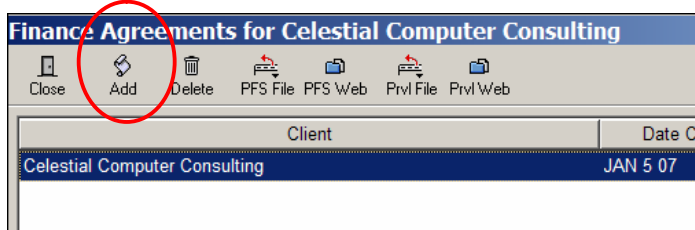


- In the **FinancePro>User ID field** - enter the User Code.
- Click the Save icon.

Note: This step will need to be completed for all users.

Using the AMS Prevail Network Premium Finance Integration

- On the *Customer Information* window, highlight a policy header.
- From the menu bar, select **Main Menu > Rating > Prevail Premium Finance Quote.**
(This will open the *Finance Agreements* window listing any previous quotes you have added.)



- To add a new quote, click the *Add button*. (This opens the *Prevail Premium Finance Quote* window in edit mode.)

InStar Management Software SR-8.2.5 Phone 888-425-1088 Fax 509-783-3430

File Edit Main Menu Document Mgt. Quotes Commercial Tracking Help

Prevail Premium Finance Quote

Client # 20026 Client Name: Celestial Computer Consulting Total Premium: 3,493.00 Agreement Date: JAN 5 07

Buttons: Add Policy, Edit Policy, Delete Policy, Cancel, Save

Policy # PKG983762098
 Coverage Type: Commercial Package
 Effective Date: AUG 25 05 Term (Months): 12
 Coverage: 08/25/2005 Cancel Days: 0
 Auditable Loss Payee Requested Commercial

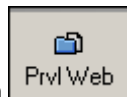
Down Payment: 0.00 Down Pay %: 0.000
 Min. Earned %: 10
 Taxes & Fees: Add to Down Payment Finance
 Policy Fee: 0.00 Sales Tax: 0.00
 Policy Premium: 3493.00

Company: Select
 Name: Reliance Insurance Company Group
 Addr 1: 4 Penn Center Plaza
 Addr 2:
 City/St/Zip: Philadelphia PA 19103
 Phone #: 215-864-4000 Fax #:
 Email:

General Agent: Select
 Name:
 Addr 1:
 Addr 2:
 City/St/Zip:
 Phone #:
 Fax #:
 Email:

Policy #	Type	Company	Term	Eff Date	Premium
PKG983762098	Commercial Package	Reliance Insurance Company Group	12	AUG 25 05	\$3,493.00

- Click the **Add Policy** button to display the list of policies for this client. (You may select one or more policies and click the **OK** button to add them to the list of policies for this quote.) This will fill some of the fields.
- If you need to make changes the policy before exporting, like adding a fee or tax, click the **Edit Policy** button. Once you have entered in the additional information, click **Save**.
 (Note: You can also edit the policy information on the premium finance web site.)



- Click the **Prvl Web** Icon to send the policy / policies out to the premium finance web site.
- You will be prompted to confirm you want a premium finance quote. Click **Yes** to proceed.

STOP Export Finance Agreement for Celestial Computer Consulting?

Yes No

The premium finance web site will launch with “Real Time” premium finance quotes.

Additional Information / Trouble Shooting

- **Edit an Existing Quote**

Now that a Quote has been generated, it can be edited by clicking *Add*, which takes you back to the AMS Prevail Network window.

If this policy has been updated, it can be exported to a file or to the AMS Prevail Network website.

The *Delete* button will allow you to delete older finance agreements.

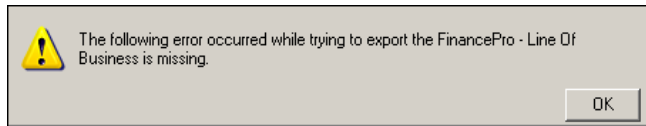
Client	Date Created	Total Premium	Executed
A-1 SECURITY &	MAR 4 05	3,824.00	NO



- The **Prvl File** icon is used by AMS support in trouble shooting any issues or questions that come up in the integration.

- **Line Of Business Missing box**

When exporting a policy to the Prevail Network, if you receive this message box, click the **OK** button to continue.



- **MSXML5.dll Exception Error**

When exporting to the AMS Prevail Network website, the following error may appear:



- Go to **Main Menu > Setup System > Main System**. Scroll down to the Prevail Network / *FP Integration* section of the window. (At the bottom of the page)
- Check that the URL link:
 - 1) The link has changed. Contact **support@prevailnetwork** to confirm your agency URL.
 - 2) The link has been misspelled. Check the spelling within the *Website URL* field to see if a letter has been either dropped, added or transposed.

- **MSXML5.DLL Not Found**

The most recent link from the Microsoft website for downloading a substitute file for the MSXML5.dll is located at:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=3144b72b-b4f2-46da-b4b6-c5d7485f2b42&displaylang=en>

- Select the *msxml.msi* file (5MB).
- Click *Save to Desktop*.
- Double-click on the *msxml.msi* file.
- Respond to dialogue questions.
- Click *Next > Accept > Next* (Customer Info Screen [verify the user name]) > *Next*.
- Click the *Install Now* Button.
- Click *Finish*.

Questions?

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

If your InStar dialog screens look different than these instructions, it may be due to the version you are on. Please contact InStar support and they will be glad to help with installing the integration.

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

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