
**ART
(ADVANCED RATING
TECHNOLOGY)
INSIDE!**

Personal Lines Rating

User's Guide

[Click here to go to
Table of Contents](#)



Personal Lines Rating User's Guide
Written by Stacey Schifferdecker
Published 1998
Printed in the United States of America

Information in this document is subject to change without notice and does not represent a commitment on the part of Agency Management Services, Inc.

COPYRIGHT

© 1983,1998 Agency Management Services, Inc. All Rights Reserved. No part of this publication may be reproduced, transmitted, or transcribed in any form by any means without the written permission of Agency Management Services, Inc.

SOFTWARE LICENSE NOTICE

The software described in this document is furnished under a software license agreement. The software may be used only in accordance with the terms of the agreement.

LICENSES AND TRADEMARKS

EXCEL-O-RATER is a registered trademark of AMS Rating Services.
All rights reserved.

May include copyrighted material of
MICROSOFT Corporation
Insurance Services Office
BTRIEVE Record Manager from Novell, Inc., 1990
Borland International, Inc., 1983

SERVICE AND SUPPORT

For service and support, call 1-800-749-6563.

Table of Contents

About This Guide	1
ORGANIZATION OF GUIDES	1
VISUAL CUES	2
About This System	3
CHECKING YOUR PACKAGE	3
CHECKING YOUR EQUIPMENT	4
REGISTERING YOUR PRODUCT	5
CHAPTER 1	
Installing and Configuring (no Pathfinder 4.0 or above or Pioneer Plus System)	7
INSTALLING THE AMS RATING MENU	7
CONFIGURING THE AMS RATING MENU	10
Single-User Systems	10
Multi-User Systems	12
INSTALLING YOUR SYSTEM	16
CHAPTER 2	
Installing and Configuring with Pathfinder 4.0 and Above or Pioneer Plus	21
CHAPTER 3	
Starting and Exiting your System	23
STARTING A SINGLE-USER SYSTEM	23
STARTING A MULTI-USER SYSTEM	24
EXITING THE SYSTEM	24

CHAPTER 4	
Moving Around in Your System	25
DEFINITIONS	25
Action Bar	25
Detail Quote	26
Hot Key	26
Pulldown Menu	26
Pushbutton	26
Quick Quote	26
Detail Quote	26
GENERAL WORKFLOW	27
MOVING AROUND ON THE INPUT SCREENS	28
SELECTING OPTIONS ON THE ACTION BAR AND PULLDOWN MENUS	30
FILLING OUT DIALOG BOXES	31
Making a Selection	32
Moving from Section to Section	34
Closing a Dialog Box	34
KEYBOARD SHORTCUTS	35
CHAPTER 5	
Getting Help	37
ADDING OR REVIEWING USER NOTES	38
GOING TO THE INDEX	38
ADDING OR REVIEWING USER NOTES	38
GOING TO THE INDEX	38
SEARCHING FOR A TOPIC	39
GETTING NAVIGATION HELP	39
GOING BACK TO A PREVIOUS HELP SCREEN	39
EXITING THE HELP SYSTEM	39
CHAPTER 6	
Entering Client Information	41
USING THE WORKFLOW DIALOG BOX	41
COMPLETING A QUICK QUOTE	42
COMPLETING A DETAIL QUOTE	47

Starting from the Action Bar 47
 Starting from the Workflow Dialog Box 47
 Starting from the Client List Dialog Box 48
 Filling Out the Auto and Home Screens 50

CHAPTER 7

Rating 61
 RATING ONE OR MORE COMPANIES 62
 SORTING BY LOWEST PREMIUM 63
 PRINTING THE COMPANY SELECT DIALOG BOX 63
 CHANGING THE LISTED COMPANIES 63
 By Group 63
 By Date 64
 VIEWING MESSAGES ABOUT THE COMPANY PLAN 65
 VIEWING PAYMENT PLANS 66
 VIEWING AND EDITING COMPANY NOTEPADS 67
 REVIEWING QUOTING INFORMATION 68
 CLEARING TERRITORIES 69
 SELECTING A COMPANY 69
 VIEWING CLASS CODES, TERRITORY, AND POINTS 70

CHAPTER 8

Entering Group Factors 71

CHAPTER 9

Editing a Quote 73
 EDITING CLIENT INFORMATION 73
 ADDING AN ITEM 74
 COPYING COVERAGE INFORMATION ACROSS A RISK 74
 REMOVING AN ITEM 75
 DOING A QUICK EDIT 75

CHAPTER 10	
Viewing Other Premiums	77
USING THE SHOPPER OPTION	77
USING THE FIELD SHOPPER OPTION	79
CALCULATING A PRO-RATE	81
CHAPTER 11	83
Viewing a Schedule and Summary	83
SCHEDULE	83
QUICK SUMMARY	84
CHAPTER 12	
Saving a Quote	85
USING SAVE AS.....	86
CHANGING THE QUOTE DESCRIPTION	86
CHAPTER 13	
Loading and Deleting Clients	87
ACCESSING THE CLIENT LIST DIALOG BOX	87
SEARCHING FOR A CLIENT	88
LOADING A CLIENT AND QUOTE	89
EDITING A QUOTE DESCRIPTION AND STATUS	90
TRANSFERRING A QUOTE TO ANOTHER AMS RATING SYSTEM	91
DELETING A CLIENT AND QUOTE	92
DELETING A QUOTE ONLY	92
CHAPTER 14	
Printing Quotes and Letters	93
QUOTES	93
LETTERS	95
USING THE QUEUE	96

CHAPTER 15	
Completing and Printing ACORDS	99
FILLING OUT AN ACORD FORM	99
PRINTING AN ACORD FORM	100
SAVING AN ACORD FORM	102
EXITING THE ACORDS FORM PROCESSOR	102
CHAPTER 16	
Setting Defaults and Preferences	103
CREATING AND LOADING DEFAULT SETS	103
SETTING SYSTEM PREFERENCES	109
CHAPTER 17	
Customizing Companies	113
DELETING COMPANIES	113
CREATING PLAN GROUPINGS	114
Adding a Group	115
Changing Lines of Business	117
Changing the Plans in a Group	117
Deleting a Group	118
CHAPTER 18	
Writing Letters	119
ACCESSING THE EDITOR	119
FORMATTING LETTERS	120
Setting Margins	120
Setting Tabs	121
Setting Headers and Footers	121
Positioning Individual Lines	123
LOADING DOCUMENTS AND INCLUDES	123
Loading a Document	124
Loading an Include	125
CREATING DOCUMENTS AND INCLUDES	126
LINKING THE EDITOR TO CLIENT INFORMATION	127

SAVING DOCUMENTS AND INCLUDES	130
MERGING CLIENT INFORMATION	131
DELETING LETTERS	132
PRINTING LETTERS	132
USING THE SEARCH FUNCTION	133
LEAVING THE EDITOR	134

CHAPTER 19

AMS Rating Menu Functions 135

DELETING MULTIPLE FILES	135
PURGING YOUR DATABASE	136
REBUILDING FILES	137
BACKING UP FILES	138
RESTORING FILES	140
CHECKING YOUR DISK STATISTICS	141
CHECKING YOUR DOS VERSION	142
CHECKING YOUR MEMORY	142
EXITING TO DOS	142
CUSTOMIZING YOUR SIGN-ON COMMAND	143
VIEWING UPDATE INFORMATION	144
Viewing an Update Description Before Installing a Diskette	144
Viewing an Update Description After Installing a Diskette	145
TECHNICAL SUPPORT UTILITIES	147
MAPPING WORKSTATION DRIVES	147
STARTING NON-AMS PROGRAMS FROM THE AMS RATING MENU	149
Setting Up the Other Menu	149
Starting "Other" Programs	163

Index	165
--------------------	------------

About This Guide

Before you start working in your rating system, browse through this User's Guide to see what functions the rating package can offer you. We designed this guide to help you efficiently explore and use the rating system regardless of your background with our software or with computers in general. Because it deals strictly with this rating system, we have assumed you are already familiar with general insurance terms and procedures for rating.

Organization of Guides

Your User's Guide is divided into three sections. The first section, *Getting Started*, includes chapters 1-5. It tells you how to install, configure, and start your rating system. It also includes basic information about workflow and moving around the system.

The second section, *Quoting*, includes chapters 6-14. It gives you the information you need to put your client information into the computer and calculate a quote.

Chapters 15-19 make up the third section, *Advanced Functions*. This section contains information about more advanced features of the system.

You may also have received a Training Guide, which is a step-by-step introduction to your rating program.

Visual Cues

Throughout the guide, various icons in the margin cue you to special information:



The tack indicates a general note in the text.



The stop sign indicates a very important, “read-this-before-you-go-any-further” message.



The ribbon indicates a feature new to the rating system--helpful information if you are converting from an older system.



The clock indicates a time-saving feature.

About This System

Your new rating system is a powerful, easy-to-use system that saves you time and money by helping you process more applications in less time. You enter your client information and then rate one or more plans, with the rating system automatically computing rate classes, sub-classes, discounts, surcharges, and factors.

If you care to play “what if” with the rates, you can easily change the deductible, territory, or any other factor and re-rate. When you have a satisfactory rate, you print an ACORD form facsimile ready for submission.

You can even send a customized letter or proposal to your client, automatically merging rate information into your letter.

If you have any problems using this rating system and you can't find the answers in this User's Guide, call Technical Support.

Checking your Package

Your package should include the following items:

- **Diskettes.** Follow the instructions in your Installation Card or User's Guide to install your diskettes.
- **Installation Card.** This card has instructions for installing your system the first time as well as for installing rate updates.
- **User's Guide.** If you have a question, check the User's Guide.
- **Quick Reference Card.** Located in the pocket of your binder, the Quick Reference Card is a summary of shortcuts and commands that you can keep near your keyboard.
- **Hardware Information Card.** Please fill this card out and return it to us.

You *may* also have received Update Bulletins, which explain changes made to the rating program after the documentation was printed.

If your package is missing any of these items or if you need to order additional copies, please call Technical Support.

Checking your Equipment

Your rating system requires the following minimum hardware:

- IBM XT/AT, System II, or IBM 100% compatible MS-DOS 386 Computer
- At least 512K free internal memory (from the DOS prompt) per workstation
- Hard drive with at least 10 megabytes of available storage for the first state and 3 meg for each additional state
- VGA color or monochrome monitor
- IBM or MS DOS version 5.0 or higher
- Any printer capable of compressing print to 16.67 cpi while in the DOS environment

For the ACORD forms, you must have an HP Laserjet Series II compatible printer

Registering Your Product

To register your product with AMS Rating and to help us better serve you should you have any system problems, we need some information about your hardware.

If you are new to AMS Rating, please complete the Hardware Information Card located in your package and return it to us.

If you have other AMS Rating products, you should have already returned a Hardware Information Card. However, please call us if you make any changes to your hardware.

CHAPTER 1

Installing and Configuring (no Pathfinder 4.0 or above or Pioneer Plus System)

The steps for installing your system vary depending on whether you have the Pathfinder 4.0 or above or the Pioneer Plus management system. Pathfinder and Pioneer Plus are agency management programs for such items as accounts payable and receivable. If you have one of these programs, go to chapter 2 for your installation instructions. Otherwise, follow the steps below.

You must install the AMS Rating Menu before you can install your system.

Installing and configuring your system consists of three steps, which you must do in order:

1. Installing the AMS Rating Menu
2. Configuring the AMS Rating Menu
3. Installing the system itself



If you are running under Windows 95, exit Windows completely before installing.

Installing the AMS Rating Menu

If you are installing on an Alloy system, you must be in single-user mode.

The AMS Rating Menu allows you to access programs and set up common information, such as printers. You install this menu first. You then use the **Install AMS Products** option on the Utilities Menu of the AMS Rating Menu to install programs.

The AMS Rating Menu comes to you as a group of “copysets.” A copyset is one or more diskettes of related programs. You install each copyset separately. The diskettes are labeled and numbered: you must install the diskettes in numbered order.

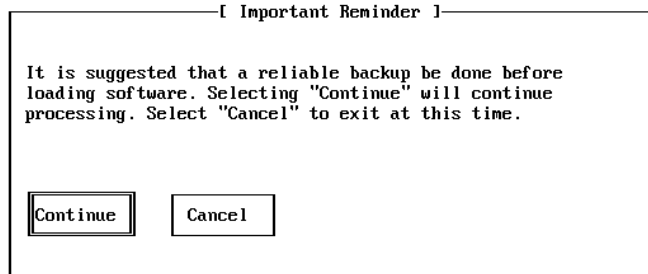
Follow the instructions below to install the AMS Rating Menu. To install on an Alloy system, you must be in single-user mode.

1. Insert the first diskette of the AMS Rating Menu copyset into the selected floppy drive.



In step 2 below, replace the question mark with the drive letter of the selected floppy drive (usually A:).

2. Type **?:INSTALL**
3. Press **[Enter]**. The Important Reminder Box is displayed.



4. Use the chart below to determine your next step:

If you want to...

Continue the installation

Cancel the installation
so you can back up
your files

Then...

Press **[Enter]**. The AMS
Installation Box is displayed.
Continue to step 5.

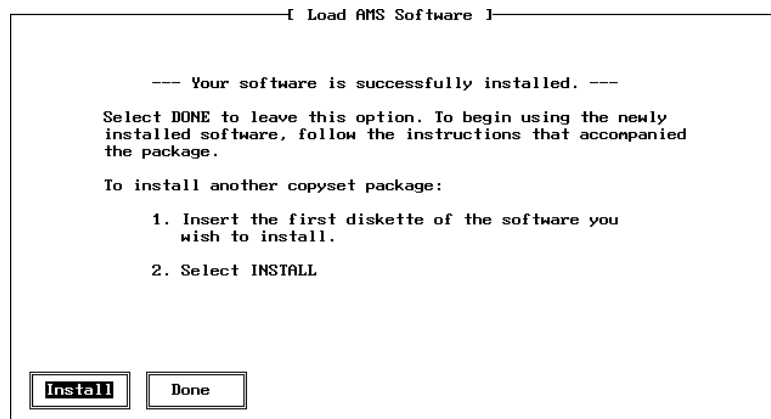
1. Press **[Tab]** to select the
Cancel pushbutton.
2. Press **[Enter]** twice. After
you back up your system,
start the installation process
over again from step 1.

5. Type the drive letter (and the directory name if necessary) where you want to install the AMS Rating Menu.



If you are installing on a network, the path must include a drive that all users can access. Use the letter of a shared network drive.

6. Press **Enter**. The installation process begins.
7. Insert the remaining diskettes in the copyset in order as the computer prompts you. When all the diskettes in the copyset have been loaded, the Load AMS Software Dialog Box is displayed.



8. Press **Enter**. The AMS Rating Menu is now installed and you return to the hard drive prompt.
9. Remove the diskette from the floppy drive. Store your AMS Rating Menu diskettes in a safe place and continue to the next section to configure your AMS Rating Menu.

Configuring the AMS Rating Menu

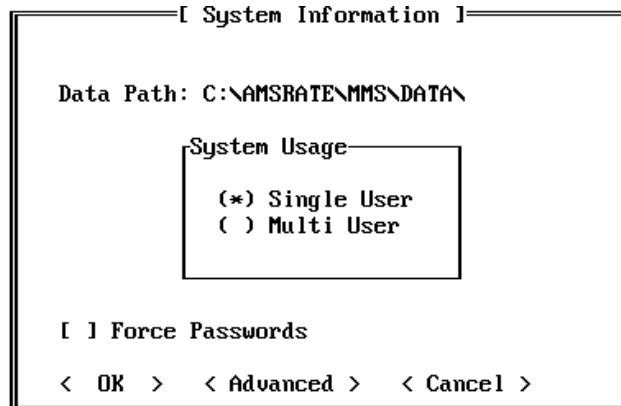
The first time you enter the AMS Rating Menu, you have to set up stations and select printers. You also have to indicate whether it is to be a single-user or multi-user system and enter user information.

The steps for configuring the system vary depending on whether you want to set the system up as single-user or multi-user. To configure your system as multi-user, skip to page 12.

Single-User Systems

To configure the AMS Rating Menu as a single-user system,

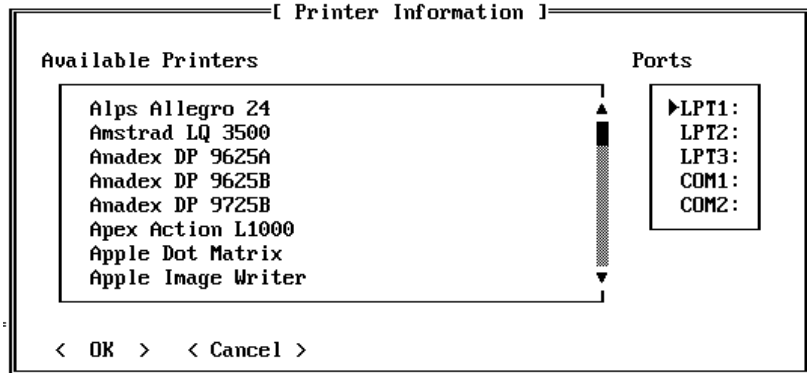
1. At the hard drive prompt where the AMS Rating Menu is stored, type **AMSRATE**
2. Press **Enter**. The System Information Dialog Box is displayed.



3. If you want the user to enter a password when accessing the AMS Rating Menu, press **Tab** until the Force Passwords option is highlighted. Otherwise, skip to step 5.
4. Press **Spacebar** to mark the Force Passwords field.

During configuration, you select one printer. You can add other printers later by selecting Printer from the Setup Menu.

5. Press **[Enter]**. The Printer Information Box is displayed.



6. Highlight the printer you want to select.



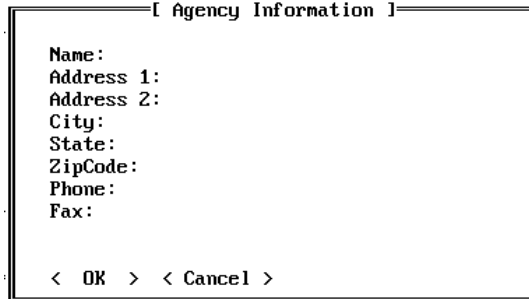
The alphabetical list of printers is first-letter sensitive. Therefore (unless your printer starts with an A), the fastest way to highlight the printer is to type its first letter. The highlight moves to the first printer starting with that letter. If that isn't the printer you want, use the up and down arrow keys to move to the right printer.

If you select COM1 or COM2 as the port, you need to initialize the printer with the DOS "MODE" command.

19. Press **[Tab]** to move to the Ports list box.
20. Use the up and down arrow keys to highlight the port. If you select COM1 or COM2, you need to initialize the printer with the DOS "MODE" command.

During configuration, you enter one agency. You can add other agencies later by selecting the Agency option from the Setup Menu.

9. Press **Enter**. The Agency Information Dialog Box is displayed.



```
[ Agency Information ]
Name:
Address 1:
Address 2:
City:
State:
ZipCode:
Phone:
Fax:
< OK > < Cancel >
```

10. Type your agency's name, address, phone number, and fax number, pressing **Enter** or **Tab** to move from field to field.
11. When the box is filled out, type **Alt** + **O** at the same time to select the OK pushbutton. The AMS Rating Menu is displayed.

Now that you have configured your AMS Rating Menu, continue to *Installing your System*, beginning on page 16.

Multi-User Systems

You must configure your AMS Rating Menu as multi-user if it is being used on multiple stations. You must configure each station individually.

You can also configure a stand-alone computer as multi-user: you may want to do this if more than one person will be using the system.

To configure the AMS Rating Menu for a multi-user system,

1. At the hard drive prompt where the AMS Rating Menu is stored, type **AMSRATE**

If you are starting from an Alloy host, type **AMSRATE HOST**

If you have an Alloy system, the configuration is done automatically. You will need to select a printer later from the Setup Menu.

See the *Advanced Functions* section for instructions on mapping alternate workstation drives.

2. Press **Enter**. If you are at an Alloy host, skip to step 27. Otherwise, the System Information Dialog Box is displayed.

3. Press **Tab** to move to the System Usage section.
4. Press **↓** to mark the Multi User option.
5. If you want the user to enter a password when accessing the AMS Rating Menu, press **Tab** until the Force Passwords option is highlighted. Otherwise, skip to step 7.
6. Press **Spacebar** to mark the Force Passwords field.
7. Press **Enter**. The Station Information Dialog Box is displayed.

8. In the Identifier field, type a name for the station (such as the location or primary user's name).

9. Press **[Tab]** to go to the Monitor Type field.
10. Press **[↓]** to select the appropriate monitor.
11. Press **[Tab]** to go to the Palette Settings field.
12. Press **[↓]** to select the type of palette.

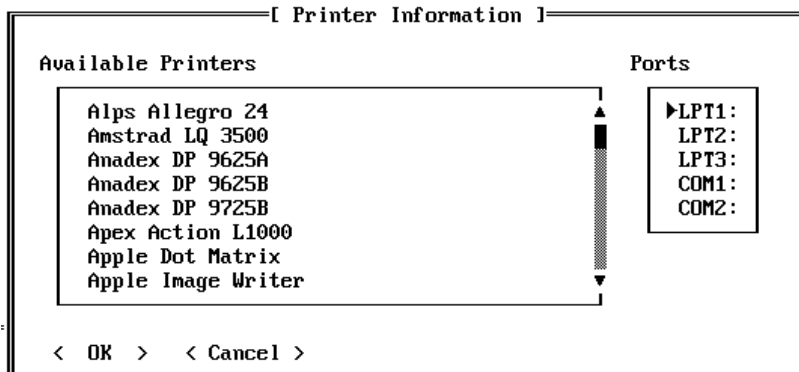


Unless you definitely know you need to change the rest of the fields on this screen, it is best to accept the defaults. Skip to step 19.

If you do need to change a selection, continue with step 13 below. You can also press **[Alt] + the hot key (letter that is a different color) to move directly to a field you want to change.**

13. Press **[Tab]** to go to the Use BIOS field.
14. If direct screen writes should not be allowed, press **[Spacebar]** to check this field (screen display will slow slightly).
15. Press **[Tab]** to go to the Snow Check field.
16. If your monitor flickers or has snow during the display, press **[Spacebar]** to check this option and reduce the problem (screen display will slow slightly).
17. Press **[Tab]** to go to the 24 Line Display field.
18. To view the screens on a 24-line display, press **[Spacebar]** to check this option.
19. Press **[Enter]**. The Printer Information Dialog Box is displayed.

During configuration, you select one printer. You can add other printers later by selecting Printer from the Setup Menu.



20. Highlight the printer you want to select.



If you select COM1 or COM2 as the port, you need to initialize the printer with the DOS “MODE” command.

The alphabetical list of printers is first-letter sensitive. The fastest way to highlight the printer is to type its first letter. The highlight moves to the first printer starting with that letter. If that isn’t the printer you want, use the up and down arrow keys to move to the right printer.

19. Press **[Tab]** to move to the Ports list box.
 20. Press **[↓]** to select the port. If you select COM1 or COM2 as the port, you need to initialize the printer with the DOS “MODE” command.
 21. Press **[Enter]**. The User Information Dialog Box is displayed.

[User Information]

Name: Single User
 Password:

Agency: Decker Insurance

< OK > < Cancel >

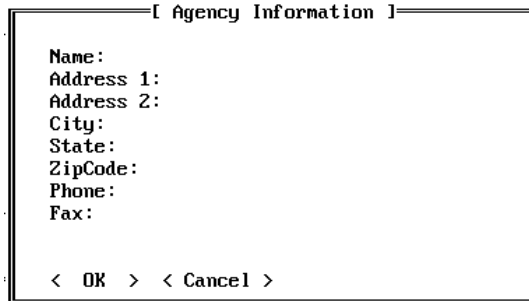
During configuration, you enter one user. You can add other users later by selecting User from the Setup Menu.



During configuration, the Agency field is read-only: your cursor skips this field. The first agency you enter on Agency Information will be the default selection in this field. Once the AMS Rating Menu is configured, you can use the Setup option to enter more agencies and to change the agency selected in this field.

22. In the name field, type the user name.
 23. If you want the user to enter a password, press **[Tab]** to move to the Password field. Otherwise, skip to step 29.
 24. Type the password.
 25. Press **[Enter]**. A confirmation box is displayed.
 26. Type the password again.

29. Press **Enter**. The Agency Information Dialog Box is displayed.



```
[ Agency Information ]
Name:
Address 1:
Address 2:
City:
State:
ZipCode:
Phone:
Fax:
< OK > < Cancel >
```

30. Type your agency's name, address, phone number, and fax number, pressing **Enter** or **Tab** to move from field to field.
31. When the box is filled out, press **Alt** + **O** at the same time to select the OK pushbutton. The AMS Rating Menu is displayed.

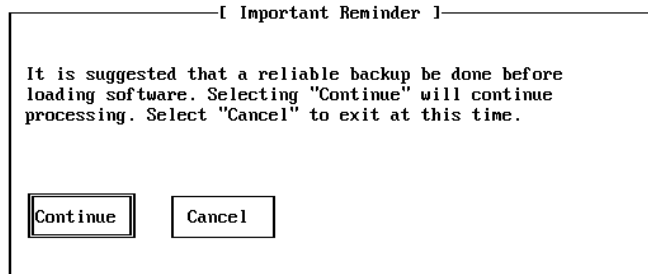
Now that you have configured your AMS Rating Menu, continue to the "Installing your System" section starting below to install your new system.

Installing your System

Once you have installed and configured the AMS Rating Menu, you install the rest of your diskettes using the Install AMS Products option on the Utilities Menu. To do so,

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.

2. Type **I** to select the **Install AMS Products** option from the Utilities Menu. The Important Reminder Dialog Box is displayed.



3. Use the chart below to determine your next step:

If you want to...

Continue the installation

Cancel the installation
so you can back up
your files

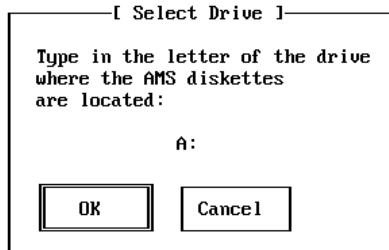
Then...

Press **Enter**. The Select Drive Dialog Box is displayed. Continue to step 4.

1. Press **Tab** to select the Cancel pushbutton.
2. Press **Enter** twice. After you back up your system, start the installation process over from step 1.

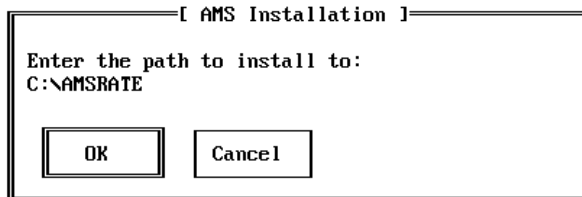
4. If you are installing from Drive A, continue to step 5 now.

If you are installing from another drive, type the drive letter.



5. Insert the first disk of the copyset into the selected floppy drive and press **Enter**. The AMS Installation Dialog Box may be displayed, depending on what you are installing.

If this box is displayed, continue to step 6. Otherwise, skip to step 8.



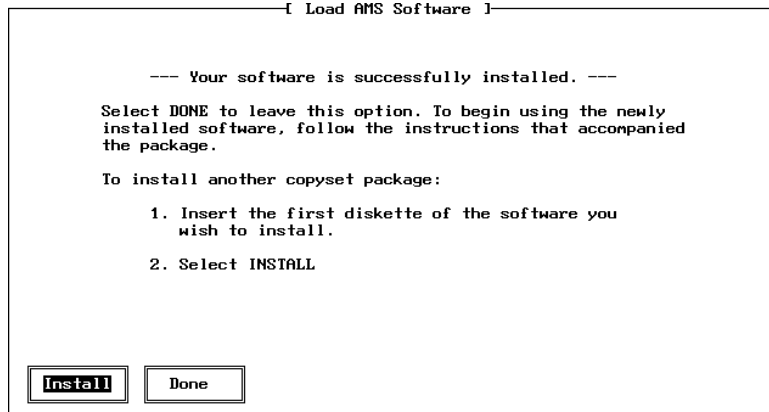
6. Type the drive letter (and the directory name if necessary) where you want to install the program/update.



If you are installing on a network, the path must include a drive that all users can access. Use the letter of a shared network drive.

7. Press **Enter**. The installation process begins.
8. Insert the remaining diskettes in the copyset in order as the computer prompts you to.

When you have loaded all the diskettes in the copyset, the Load AMS Software Dialog Box is displayed.



9. If you have another copyset to install,
 - 9-1. Press **Enter**.
 - 9-2. Insert the first diskette of the new copyset into the same floppy drive.
 - 9-3. Press **Enter**.
 - 9-4. Repeat steps 6-9 for each remaining copyset.
10. Once you have loaded all the copysets,
 - 10-1. Press **Tab** to select the Done pushbutton.
 - 10-2. Press **Enter**. Another Installation Successful message is displayed.
 - 10-3. Press **Enter**. The copyset is now installed and you return to the AMS Rating Menu.

Congratulations! Your system is now installed!

CHAPTER 2

Installing and Configuring with Pathfinder 4.0 and Above or Pioneer Plus

If you have Pathfinder 4.0 and above or Pioneer Plus, you must install ALL your diskettes from the **Load AMS Software** option on the Frontier Menu.

Your AMS programs, including the AMS Rating Menu, Personal and Commercial Lines Rating, and File Miner, come to you as a group of “copysets.” A copyset is one or more diskettes that make up a program. For example, the AMS Rating Menu is one copyset made up of multiple diskettes.

Each copyset is clearly labeled and numbered. When you install a new copyset, always install them in numbered order. Also note that you must install each copyset separately, and you must install the AMS Rating Menu diskettes first.

Follow the instructions below to install your software:



Please note the order in which you install diskettes. You must install the AMS Rating Menu diskettes first.

1. Make sure all users have logged off their systems.
2. Insert the first diskette of the copyset into the selected floppy drive.
3. Select **Setup** from the Frontier Menu.
4. Select **Load AMS Software** from the Setup Menu.

5. Follow the instructions on the screen to complete the installation. You must install every diskette in your package in order for integration to work.
6. After you have loaded all the diskettes, reboot your Frontier System to update the menu and security files.

CHAPTER 3

Starting and Exiting your System

The instructions for starting your system are different for single-user and multi-user systems.

If you use any AMS Management System (Pathfinder 3.5 or above or Pioneer), skip this section. Just start your system as you normally do.

Starting a Single-User System

To start your system,

1. At the hard drive prompt where the AMS Rating Menu is stored, type **AMSRATE**
2. Press **Enter**. If no password is required, the AMS Rating Menu is displayed; skip to step 5. If a password is required, continue to step 3.
3. Type your password.
4. Press **Enter**. The AMS Rating Menu is displayed.
5. Press **Enter** to open the highlighted AMS option. The AMS Menu is displayed.
6. Type **P** to choose Personal Lines. The Workflow Dialog Box is displayed.

When you are ready to begin rating, go to Chapter 6 for instructions.

Starting a Multi-User System

To start your program on a multi-user system,

1. At the hard drive prompt where the AMS Rating Menu is stored, type **AMSRATE**

From an Alloy host, type **AMSRATE HOST**

Use Customize Sign-on from the Utilities Menu to set up a customized file name, making it faster and easier to start up a multi-user system.

If you have set up a customized file name, type **AMSRATE** plus your file name.

2. Press **Enter**.

If you are starting from an Alloy host or if you used a customized file name, the AMS Rating Menu is displayed. Skip to step 5.

Otherwise, the list of users is displayed: continue to step 3.

3. Press **↓** to highlight the user you want to select.
4. Press **Enter**. The AMS Rating Menu is displayed.
5. Press **Enter** to open the highlighted AMS option. The AMS Menu is displayed.
6. Type **P** to choose Personal Lines. The Workflow Dialog Box is displayed.

When you are ready to begin rating, go to Chapter 6 for instructions.

Exiting the System

When you are ready to exit your program, you can press **F3** or select the Exit option from the File Menu.

When you are ready to exit the AMS Rating Menu, press **F3** again or select Exit from the AMS Menu.

CHAPTER 4

Moving Around in Your System

This chapter helps you more easily move around in your program. It covers the following items:

- Definitions
- General workflow
- Moving around on the input screens
- Selecting options on the action bar and pulldown menus
- Filling out dialog boxes
- Keyboard shortcuts

You can use your mouse in this rating system.

Please note that the screens in this section are samples only, and may not be the same screens you see in your system. Also note that this section covers keyboard movements; you can also use your mouse.

Definitions

This section defines common terms used in your rating system.

Action Bar

The **action bar** is the list of choices at the top of your screen. The figure below is an example of an Action Bar. A similar Action Bar appears across the top of each screen.

File List Rate Options Utilities Help,

Each item on the action bar has a **pulldown menu** listing actions the system can do: for example, saving a quote or pulling up messages.

Detail Quote

Detail quote is a rating process in which you complete all fields on the input screens before calculating a quote. Also see *Quick Quote*.

Hot Key

The **hot key** is the highlighted letter of a menu option or pushbutton. It is usually the first letter of the word. You can quickly select an option or pushbutton by pressing Alt + the hot key.

Pulldown Menu

The pulldown menu is the list of choices under each menu of the action bar. It “pulls down” under the menu.

Pushbutton

Pushbuttons are the options in brackets < > on the bottom of a screen or pop-up box that you select to perform an action. The brackets around the default pushbutton are highlighted.

Quick Quote

Quick quote is a rating process in which you answer only specified, necessary questions on a series of pop-up boxes before calculating a quote. You specify through defaults what questions should be included in the Quick Quote. Also see *Detail Quote*.

General Workflow

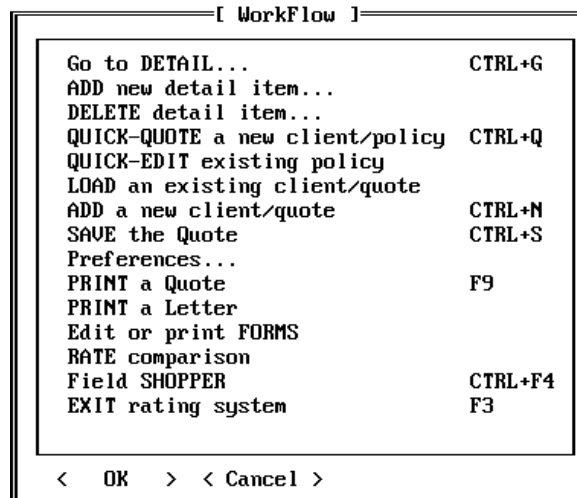
The basic workflow you follow when using the system is outlined below:

1. Type in your client information, including limits and deductibles. You may choose to do a “quick” quote or a “full” quote.
2. Calculate the premium for one or more companies.
3. If necessary, make any changes needed to the client information.
4. Select a company and print quotes and ACORD forms.

Of course, many other options are available in these four basic steps, such as setting defaults and printing letters.

Whenever you don't know how to do something, press **F2** to bring up the Workflow Dialog Box.

Tasks you can perform are listed on the Workflow Dialog Box. An abbreviated version of this box is displayed when you start your system, or you can bring up the full list any time by pressing **F2**. In addition, most tasks are also listed on one of the Action Bar menus at the top of the screen.



The table below lists some other keys for moving around on the input screens:

To...	Press...
Move from one field to the next	Enter or Tab
Move back to a previous field	Shift + Tab
Clear a field	Ctrl + Bksp
Move from column to column	→ or ←

If you have the “**→** to add item” field marked on the Preferences Dialog Box, you can also add an item by pressing **→** in the last completed column.

You can leave a screen as soon as you have filled in all the needed information on that screen. You do not have to press **Enter** through every field. (If you do press **Enter** through every field, when you get to the last field, the system will ask if you want to add another item or go the next screen.) When you are done with a screen, you can go to another input screen, or you can use the Workflow Dialog Box, the Action Bar, or a function key to move to another part of the system.

To move to another screen, either

- Press the **PgUp** or **PgDn** key
- Click on the pushbutton (listed at the bottom of each screen) for the option you want
- Press **Alt** + the pushbutton hot key: to go to the Vehicle Screen, for example, you would press **Alt** + **V**
- Press **Tab** until the pushbutton for the screen you want is highlighted, and then press **Enter**

Selecting Options on the Action Bar and Pulldown Menus

The **action bar** is the list of choices at the top of your screen. The figure below is an example of an Action Bar. A similar Action Bar appears across the top of each screen.

File List Rate Options Utilities Help,

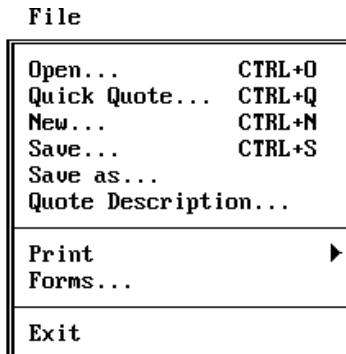
You select an option from the Action Bar to move from one section of a program to another and to tell the program what you want to do.

You can access the action bar by

- Clicking on an item with your mouse
- Pressing **[Alt]** + the hot key
- Pressing **[F10]** to move to the action bar and then typing the hot key

The hot key is usually the first letter of the option. It is also a different color than the rest of the word.

Either way, a menu *pulls down* beneath the option you select, as shown below. This Pulldown Menu lists the individual commands available within that section of the program.



You can select an item from a pulldown menu by either

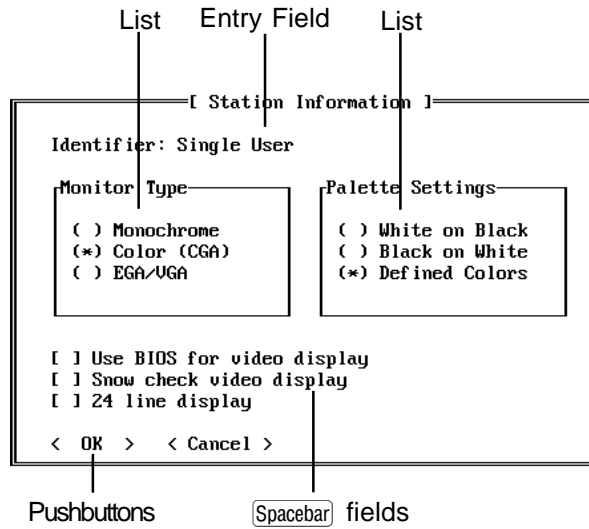
- Clicking on an item with your mouse
- Pressing the hot key

Many items on the pulldown menu also have quick keys listed next to the item. You can press the quick keys to access the item anytime. For example, you can press **Ctrl** + **S** to save a quote instead of going to the File Menu and selecting the Save option.

Filling Out Dialog Boxes

When the rating system needs you to enter additional information, a dialog box may be displayed so you can communicate with the system. When you have “answered” the dialog box, it disappears from the screen.

Below is an example of a dialog box:



Dialog boxes have one or more sections. Our sample dialog box has six sections: an edit field, two lists, two fields, and pushbuttons. The cursor or highlight shows you which section you are in. The following pages tell you how to make selections within a section, move from section to section, and close a dialog box.

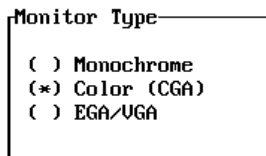
Making a Selection

You make selections in dialog boxes through

- Lists
- Entry fields
- fields

Lists

The figure below shows an example of a list.



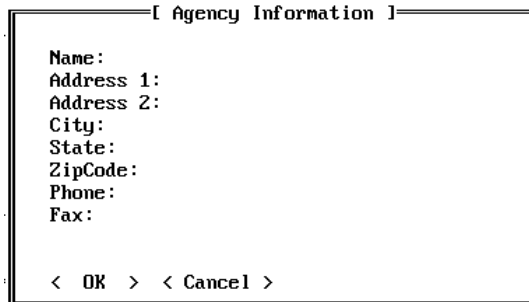
To select an option in a list, press and to move through the choices.

You may also see lists where you can select more than one item. To select items in such a list,

1. Press and to move the highlight to the item you want to select.
2. Press to mark the item.
3. Repeat steps one and two for all other items in the list you want to select.

Entry Fields

In some fields, you type or edit information. These fields are either blank or have text you can edit, as shown in the figure below.



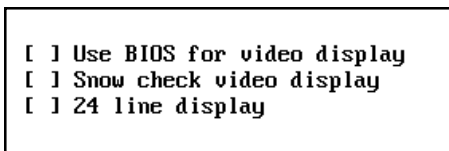
[Agency Information]

Name:
Address 1:
Address 2:
City:
State:
ZipCode:
Phone:
Fax:

< OK > < Cancel >

Fields

Some fields in dialog boxes are entries. To make a selection in a field, press to mark the option. The figure below shows an example of fields.



Use BIOS for video display
 Snow check video display
 24 line display

Moving from Section to Section

How you move from section to section depends on whether you have marked the *RETURN act as TAB field* in the Preferences Dialog Box. When you get your system, this field is unmarked and you must press **Tab** to move from section to section in a dialog box. If you mark the field, then you can press **Tab** or **Enter** to move from section to section.

You can also press **Alt** + the hot key to go directly to a field, or use your mouse to click in a field.

Closing a Dialog Box

Dialog boxes have one or more pushbuttons that you use when you have completed each section of the box, to tell the computer you are done and ready to continue. The figure below shows an example of a set of pushbuttons:

< **OK** > < **Cancel** >

To exit the dialog box, you select the appropriate pushbutton. How you select a pushbutton depends on whether you have marked the *RETURN act as TAB field* in the Preferences Dialog Box. When you get your system, this field is unmarked and you can press **Enter** anytime to accept the default pushbutton and close the dialog box. However, if you have marked this field or you want to select a different pushbutton, you can do so by either

- Clicking on it with your mouse
- Pressing **Alt** + the hot key
- Pressing **Tab** until the pushbutton is highlighted and then pressing **Enter**

Keyboard Shortcuts

The table below lists keys for moving around on input screens:

Key...	Function...
Enter	Move from field to field
Shift + Tab	Move backward from field to field
↑ and ↓	Move through items in a list
Alt + hot key	Select a pushbutton
Spacebar	Move through the options in an F4 options field
F4	See a list of options in an F4 options field

The hot key is usually the first letter of the command. It is also a different color than the rest of the word.

The table below lists Action Bar keys:

Key...	Function...
F10	Moves from the screen to the Action Bar
Enter	If the pulldown menu is not open, opens it. If the pulldown menu is open, selects the highlighted item.
Esc	If the pulldown menu is not open, returns the cursor to the screen. If the pulldown menu is open, closes the menu.
← and →	Moves the highlight from menu to menu
↑ and ↓	Moves the highlight through items in a menu
Alt + hot key	Moves from the screen to a specific option, automatically opening the pulldown menu
hot key	Selects the option on a pulldown menu

See the Quick Reference Card for other function keys.

CHAPTER 5

Getting Help

The AMS Rating Menu and your rating system have an expansive help system containing information about each menu item and field on the system. In addition, you can add your own comments to help screens.

To access the help system, press **F1**. The help screen for the highlighted item appears. See the example help screen below:

```

File List Rate Options Utilities Help (noname)-MI
[ Client Name ]
Client Name
Enter the client's name for this policy by pressing the F4 key to open
the client information detail box, or by simply beginning to type the
client's name, which will also open the client information detail box.
Other client information such as address and phone number may also be
entered from this detail box.

(*) AMS Help ( ) Agency
< OK > < Search > < Index > < Navigation > < Back >

```

```

Prem:0.00 Old Prem:0.00 Diff:0.00
F1=Help Esc=Cancel SHIFT+F1=Index ALT+F1=History |Arrow keys to scroll text,

```

Once you are at the Help Screen, you can

- Add or review User notes
- Go to the index of help topics
- Search for another help topic
- Get help for navigating around the system
- Go back to a previous help screen
- Exit the Help Screen

Adding or Reviewing User Notes

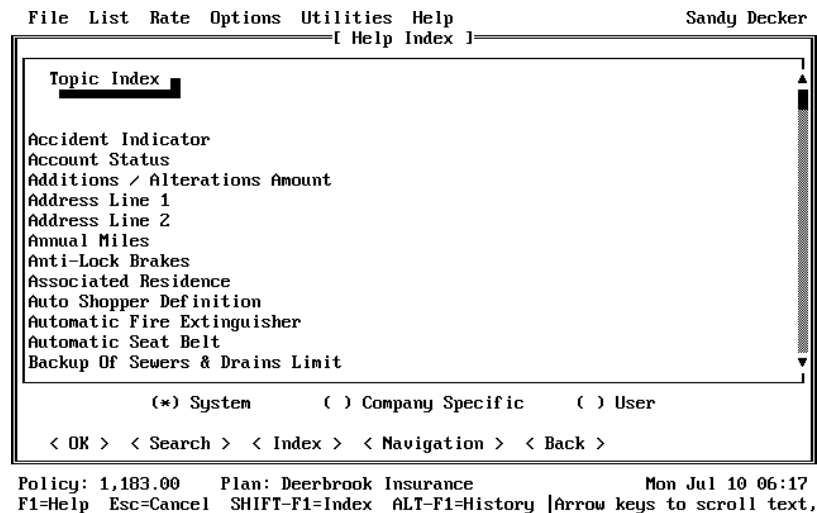
To add or review your own notes about the system,

1. Type **[Alt]** + G to select the AGENCY option.
2. Press **[↑]** to move to the top of the Comments Screen.
3. Type your comments.

Going to the Index

Each screen in the Help System is listed in the Index of topics. You can move from topic to topic by going to the index.

To go to the index, press either **[Shift]** + **[F1]** OR **[Alt]** + **I**. The **Topic Index** is displayed.



To select a topic from the index,

1. Highlight the topic you want to view.
2. Press **[Enter]**.

Searching for a Topic

To search for a specific topic,

1. Type **[Alt] + S** to select the SEARCH pushbutton and display the Search Dialog Box.
2. Type the word or phrase for which you are searching.
3. Type **[Alt] + S** to select the SHOW TOPICS pushbutton. A list of topics matching your description is displayed.
4. Highlight the topic you want to select.
5. Type **[Alt] + G** to select the GO TO pushbutton. The help screen for the selected topic is displayed.

Getting Navigation Help

To get help for moving around your system, press **[Alt] + N** to select the Navigation pushbutton.

Going Back to a Previous Help Screen

As you move from topic to topic, you “layer” Help Screens on top of each other. To move backwards through the layers, press either **[Alt] + B** OR **[Alt] + F1**.

Exiting the Help System

When you are ready to exit the Help System, type **[Alt] + O** to select the OK pushbutton, or press **[Esc]**.

Chapter 6

Entering Client Information

In your comparative rating program, you can do a “quick quote,” in which only pre-determined questions are asked, or a detail quote, in which you answer all questions. This chapter covers

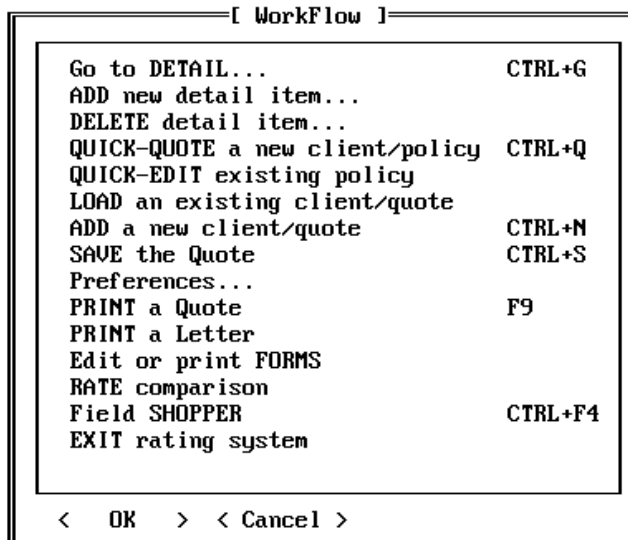
In a quick quote, you only answer questions that you have set up as being vital to a quote.

- Using the Workflow Dialog Box
- Completing a Quick Quote
- Completing a Detail Quote

Using the Workflow Dialog Box

Whenever you don't know how to do something, press **F2** to bring up the Workflow Dialog Box.

The Workflow Dialog Box lists tasks you can perform in your rating program. The options on the Workflow Dialog Box vary depending on where you are in the program.



The Workflow Dialog Box is displayed automatically when you start your program. However, you can also bring up the Workflow Dialog Box any time from any screen by either

- pressing **F2**

OR

- selecting the **Workflow** option from the Options Menu

Once you see the Workflow Dialog Box, you

1. Press **↓** and **↑** to highlight the option you want to select.
2. Press **Enter**.

You can use the Workflow Dialog Box to start a new quote:

	Select...	To...
Also Ctrl + Q	QUICK-QUOTE a new client/policy	Start a quick quote for a new (not previously saved) client and policy
Also Ctrl + N	ADD a new client/quote	Start a new detail quote for a new client

Completing a Quick Quote

When you complete a quick quote, you only answer questions that you have set up as being vital to a quote. The Advanced Functions section tells you how to set up what questions you want to answer during a quick quote.

You can do a quick-quote for a new client or for a loaded client (for example, if you have rated auto for a client and now want to rate home).

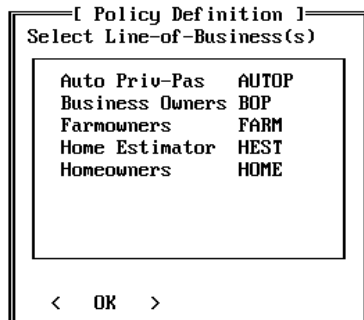
If you begin a new quote without saving one you were already working on, the rating system asks if you want to save before continuing.

To complete a quick quote,

1. To start the quick quote, either
 - Select **QUICK-QUOTE a new client/policy** from the Workflow Dialog Box
 - Select Quick Quote from the File Menu
- OR
- Press **Ctrl** + **Q** to quick-quote a new client/policy

The Policy Definition Dialog Box is displayed.

The choices on your Policy Definition Dialog Box vary according to what rating systems you have loaded.



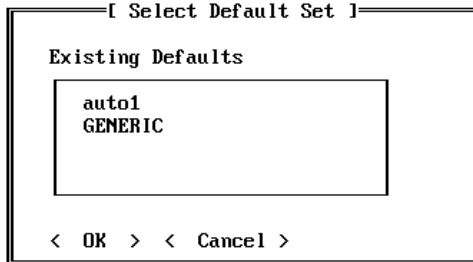
2. Press **↓** and **↑** to select the line of business you want.
3. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.
4. If you have more than one state of rating, the State Determination Dialog Box is displayed.
 - 4-1. Press **↓** and **↑** to highlight the state you want to rate.
 - 4-2. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.
5. If you marked Pre-Select Defaults on the Preferences Dialog Box, the Select Default Set Dialog Box is displayed. On this dialog box, you choose a default set to be pre-loaded.

For more information about the Preferences Dialog Box, see the *Advanced Functions* section.

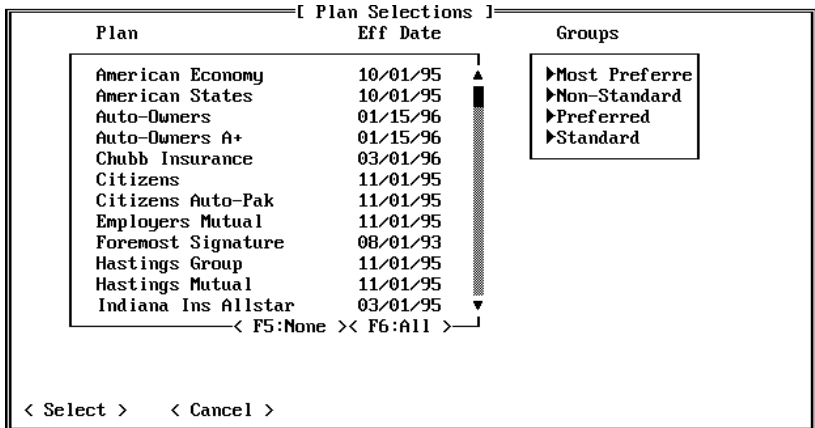
To choose a default set,

5-1. Press **↓** or **↑** to highlight the default set you want to load.

5-2. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.



6. If you marked Pre-Select Plans on the Preferences Dialog Box, the Plan Selection Dialog Box is displayed.



On this dialog box, you mark in advance the plans you want to quote:

- To mark all plans, press **F6**
- To mark individual plans, highlight each plan you want to mark, and press **Spacebar** to mark it

When all the plans you want to quote are marked, press **Alt** + **S** to choose **SELECT**.

The first Quick-Quote box is displayed.

See the *Advanced Functions* section for instructions on adding fields to and deleting fields from the quick-quote.

Remember that the fields displayed on the quick quote boxes vary depending on what you have selected in the default sets. Below is a sample quick quote box:

AUTOP Quick quote	
How many total Vehicles?	1
Vehicle	
Yr Make Model	
Year	
Make	
Model	
Location/ZIP	* 1:44801
Driver	* 1:
Bodily Injury	100/300
Prop Damage	100
Mini Tort	Yes
PIP	
PIP Ded	Full
PIP Coord	Full PIP
PIP/WL Exclude	No Exclusion
# Reject WL	0
< OK > < Previous > < Exit > < Add Vehicle > < Remove Vehic >	

To complete quick-quote boxes,

1. Complete the field the cursor is in.

Each field is either an edit field or an options field. In an edit field, you type the requested information. In an options field, you can either:

- Press **Enter** to accept the displayed default
- Press **Spacebar** to roll through all the options one after the other, pressing **Enter** when the option you want to select is displayed
- Type the first letter of the option you want to select
- Press **F4** to bring up a list of the available options, from which you can select

If you aren't sure what to enter in a specific field, press **F1** to see the on-line field help.

Company questions are marked with a question mark.

Some fields are marked with a colored (usually yellow) question mark. These indicate company-specific questions. You can press **F1** to see what company the question is for and to get more information about how to answer the question.

2. Press **Tab** to go to the next field.
3. When the box is complete, press **Alt** + **N** to select the NEXT pushbutton and continue to the next dialog box.

Once you complete the last dialog box in the Quick Quote, the Company Select Dialog Box is displayed. You can now begin rating, or you can go to the input screens to add information that was not asked on the quick quote screens. To add information,

1. Press **Esc** to exit the Company Select Screen.
2. Change or add whatever information you need to on the input screens.
3. Press **F8** to return to the Company Select Screen for rating.

Go to the "Rating" chapter for further instructions.

Completing a Detail Quote

If you begin a new quote without saving one you were already working on, the rating system asks if you want to save before continuing.

The steps for starting a detail quote vary depending on how you start and whether the client is new or has been saved. This section covers

- Starting from the Action Bar
- Starting from the Workflow Dialog Box
- Starting from the Client List Dialog Box
- Filling Out the Auto and Home Screens

Starting from the Action Bar

Also **Ctrl** + **N**.

To start a new quote from the action bar, select the New option from the File Menu:

If you haven't saved an earlier quote, the rating system asks if you want to save first.

1. Type **Alt** + **F** to open the File Menu.
2. Type **N** to select the New option.

The Policy Definition Dialog Box is displayed. Go to the Filling out the Auto and Home Screens section on page 50 to continue.

Starting from the Workflow Dialog Box

If you haven't saved an earlier quote, the rating system asks if you want to save first.

To use the Workflow Dialog Box to start a new quote,

1. Press **F2** to bring up the Workflow Dialog Box.
2. Highlight **ADD a new client/quote**.
3. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.

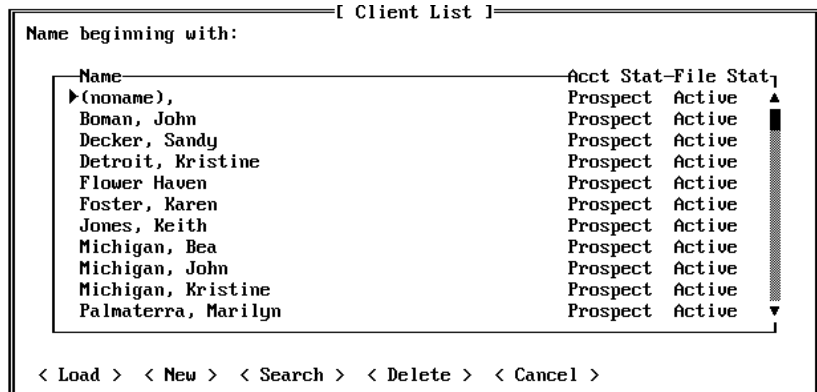
The Policy Definition Dialog Box is displayed. Go to the Filling out the Auto and Home Screens section on page 50 to continue.

Starting from the Client List Dialog Box

The Client List Dialog Box lists all the clients you have saved. You can use this box to start a new quote for a new or an existing client. You can only start detail quotes using the Client List Dialog Box.

You access the Client List Dialog Box by selecting either

- **Load an Existing Client** from the Workflow Dialog Box
- OR
- **Open** from the File Menu.



To start a new quote for a new client,

1. At the Client List Dialog Box , type **[Alt] + N** at the same time to select the New pushbutton.

The Policy Definition Dialog Box is displayed. Go to the Filling out the Auto and Home Screens section on page 50 to continue.

To start a new quote for an existing client,

If you already have a client on your system and want to do another quote for that client (for example, you have rated their auto and now want to rate their home), follow the instructions below:

1. At the Client List Dialog Box, either type the name of the client you want to load (skip to step 3), type part of the name, or press **Tab** to move to the list of clients.
2. Press **↓** and **↑** to highlight the client for whom you want to create the new policy.
3. Press **Alt** + **L** to select the Load pushbutton, or click on the Load pushbutton with your mouse. The Quote List Dialog Box is displayed, listing all existing policies for this client.

[Quote List]

Client: Decker, Sandy

Quote Description	Type	Status	EffDate
Lake States	AUTOP		

< Load > < Transfer > < New > < Edit > < Delete > < Cancel >

4. Type **Alt** + **N** at the same time to select the NEW pushbutton.

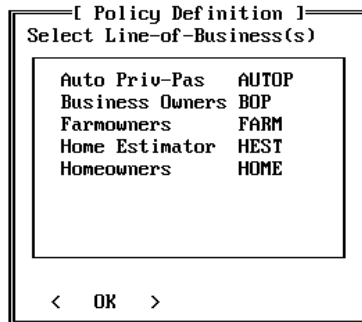
The Policy Definition Dialog Box is displayed. Go to the “Filling out the Auto and Home Screens” section to continue.

Filling Out the Auto and Home Screens

Once you start a new policy, you fill out several information boxes before you get to the Auto or Home screens. You must always choose your line of business. Depending on your system and preferences, you may also need to choose a state, a default set, and plans to rate.

The choices on your Policy Definition Dialog Box vary according to what rating systems you have loaded.

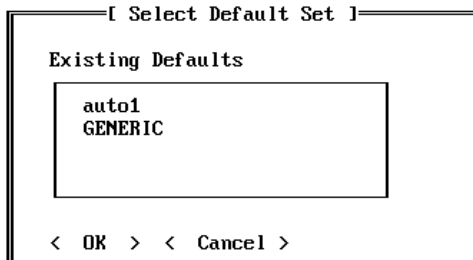
1. On the Policy Definition Dialog Box,
 - 1-1. Press **↓** and **↑** to select the line of business you want.
 - 1-2. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.



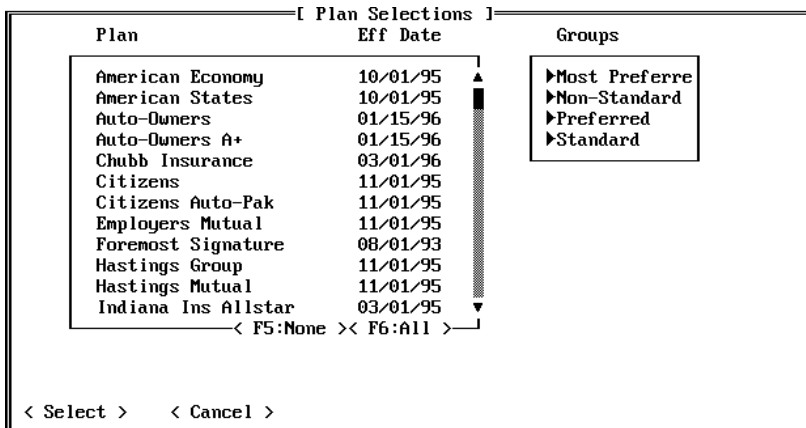
2. If you have more than one state of rating, the State Determination Dialog Box is displayed.
 - 2-1. Press **↓** and **↑** to highlight the state you want to rate.
 - 2-2. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.
3. If you marked Pre-Select Defaults on the Preferences Dialog Box, the Select Default Set Dialog Box is displayed. On this dialog box, you choose a default set to be pre-loaded.

To choose a default set,

- 3-1. Press **↓** and **↑** to highlight the default set you want to load.
- 3-2. Press **Alt** + **O** to select the OK button, or click on the OK button with your mouse.



4. If you marked Pre-Select Plans on the Preferences Dialog Box, the Plan Selection Dialog Box is displayed.



On this dialog box, you mark in advance the plans you want to quote:

- To mark all plans, press **F6**
- To mark individual plans, highlight each plan you want to mark, and press **Spacebar** to mark it

When all the plans you want to quote are marked, press **[Alt] + S** to choose SELECT.

Once you fill out these information boxes, the Auto or Home Summary Screen is then displayed. Below is a sample Auto Summary Screen. Both Auto and Home consist of a Summary Screen and related additional screens: for example, a coverage screen, violation screen, scheduled personal property screen, etc. The pushbuttons on the bottom of the screen indicate the available other screens. You fill out the fields on each screen and then go to another screen.

```

File List Rate Options Utilities Help (noname)-MI
[ AMS Rating Auto Summary ]
-----
Policy
Client Info (noname) |▲
Eff Date 09-15-1997
Auto With None
Orig Eff Date
Home With None
Status New
Policy Term 12 Months
Force MultiCar No
Yrs Loss Free 0
Hastings Grp ? (No group)

2:Driver Age Status Sex Class
1: 0 Married Male

3:Violation Date Driver

1:Vehicle Coverage BI PD UM PIP OTC COLL Prem
1: Car 100/300 100 100/300 Full 100 250

< Coverage > < Vehicle > < Driver > < Violation > < Addl Cov >

Prem:0.00 Old Prem:0.00 Diff:0.00
F2=Workflow F3=Exit F6=Review F8=Rate F9=Print |F4,DBLCLICK=Detail
    
```

Filling out the Fields on a Screen

On each screen, you fill out the applicable fields and then press **Enter** or **Tab** to go to the next field. Each field is either an edit field, an **F4**=Detail field, or an options field:

Type of Field	What You Do
Edit Field	Type the requested information
F4 =Detail field	Press F4 or click on the field with your mouse to bring up another dialog box in which you enter detailed information
Options Field	You can either <ul style="list-style-type: none"> • Press Enter to accept the default • Press Spacebar to scroll through the options, pressing Enter when the option you want to select is displayed • Type the first letter of the option you want to select • Press F4 to bring up a list of options from which you can select

If you aren't sure how to complete a specific field, either check the prompt line or press **F1** to see the on-line field help.

The following sections cover some specific fields/types of fields within auto and home rating.

Answering Company Questions

Company-specific question fields are marked with a colored question mark. You can press **F1** to see what company the question is for and to get more information about how to answer the question.

Applying an Auto/Home Discount

If you choose the same company in the Auto With and Home With fields on the Summary Screen, an auto/home discount will be applied for that company. If you want to apply the auto/home discount for all companies, choose “All” in these fields.

Applying a Renewal Discount

Choose “Renewal” in the Status field on the Summary Screen.

Applying a Multi-Car Discount

If you enter more than vehicle, a multi-car discount is applied automatically. If you enter only one vehicle but need to apply a multi-car discount anyway, select “Yes” in the Force MultiCar field on the Auto Summary Screen.

Applying a Loss Free Discount

Type the number of years the applicant has been loss-free in the *Yrs Loss Free* field on the Summary Screen.

Adding or Viewing Family Members and Dependent Information

Press in the Client Info field on the Summary Screen to open the Client Info Box.

Applying Work Loss Coverage

Fill in the Annual Income field on the Driver Screen as well as the Family Members and Dependents fields on the Client Info Box.

Entering Vehicle and Driver Information

You can enter vehicle and driver information on the Coverage Screen, or you can wait and enter vehicle information on the Vehicle Screen and driver information on the Driver Screen.

Looking up the ISO Symbol

During symbol lookup, the anti-theft, air bags, auto seatbelts, performance, four wheel drive, anti-lock brakes, and body construction information is also filled in, based on standard equipment.

You can look up the ISO symbol through the VIN number or through make and model information.

To look up the symbol through the VIN, type the VIN in the VIN field on the Yr Make Model Dialog Box or on the Vehicle Screen. When you press **Enter**, the symbol and other information is filled in.

To look up the symbol through the make and model, you select your make, model, and body style from the Symbol Lookup Box.

Symbol Lookup

Make	
ACURA ALFA ROMEO AUDI	▲ ▼
Model	
▶ INTEGRA GSR INTEGRA LS INTEGRA RS	▲ ▼
Body, Engine, Symbol, Performance	
▶ HATCHBACK 3 DR MANUAL 4 CYL 1.8L DOHC	17
SEDAN 4 DR MANUAL 4 CYL 1.8L DOHC	15
< OK > < Cancel > < Not Listed.. > TAB=Select Make/Model/Body	

If you have Automatic Lookups marked in the Preferences Box, the Symbol Lookup Box displays automatically when you press **Enter** in

the Make field on the Yr Make Model Box. Otherwise, you can press **F4** in the Symbol field on the Vehicle Screen.

To make a selection from this box,

1. Highlight the vehicle make: type the first character of the make to move to that section of the list, and then press **↓** until the make is highlighted.
2. Press **Tab** to move to the Model section of the box.
3. Highlight the vehicle model.
4. Press **Tab** to move to the Body section of the box.
5. Highlight the body choice.
6. Type **Alt** + **O** to select the OK pushbutton.

Assigning Drivers



To assign drivers to vehicles, press **F4** in the Driver field on the Coverage Screen or in the Vehicle Driven field on the Driver Screen. The Vehicle/Driver Matchup Box is displayed, and you can press **Spacebar** to select who drives each vehicle the most and which vehicle is driven the most.

[Vehicle/Driver Matchup]											
<p>Select driver to be rated on this vehicle.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">94 FORD TAUR</td> <td style="width: 50%;">David</td> <td style="width: 5%; text-align: right;"> ▼</td> </tr> <tr> <td>97 NISS QUES</td> <td>Sandy</td> <td></td> </tr> </table>	94 FORD TAUR	David	▼	97 NISS QUES	Sandy		<p>Select vehicle driven most often by this driver.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Sandy</td> <td style="width: 50%;">97 NISS QUES</td> </tr> <tr> <td>David</td> <td>94 FORD TAUR</td> </tr> </table>	Sandy	97 NISS QUES	David	94 FORD TAUR
94 FORD TAUR	David	▼									
97 NISS QUES	Sandy										
Sandy	97 NISS QUES										
David	94 FORD TAUR										
<p>< OK > < Cancel ></p>											

Changing a Split Territory Selection

1. Press **F4** in the *Yr Make Model* field.
2. Press **↓** to highlight the *Territory* field.
3. Press **F4**
4. Press **↓** to highlight the correct territory.
5. Press **Enter**.

Entering an At-Fault Accident

If you choose an AFA code on the Conviction Screen, be sure to enter a damage amount, if applicable, or the company may not charge for the conviction.

Applying a Non-Smokers Discount in the Home Line of Business

Select YES in the *Non-Smoker* field on the Summary Screen.

Applying or Viewing Endorsements in the Home Line of Business

1. Go to the Coverages Screen.
2. Press **↓** to highlight the *Miscellaneous Coverages* field.
3. Press **F4** to bring up the detail box.
4. Press **↓** to highlight the *Endorsements* field.
5. Press **F4** to view the list of available endorsements.

For more information about the endorsement, press **F1** for a Help Screen.

Adding Additional Items

There are multiple ways to add items (drivers, vehicles, violations, scheduled personal property, etc.).

One way to add additional items is to press **Ctrl** + **A** at the same time (selecting the **Add** option from the List Menu).

If you marked the **to add item** field on the Preferences Dialog Box, you can also press **→** to add an item.

Finally, if you press **Enter** in the last field on a screen, the system asks if you want to add an item or go to the next section. On the last screen, it asks if you want to add an item or go to rating.

Deleting an Item

To delete an item (for example, remove a vehicle, driver, or item of scheduled personal property),

1. Go to the screen for the item you want to delete.
2. Press **→** to go to the column where your item is located.
3. Press **Ctrl** + **R** to remove the column.

OR

1. Go to the screen for the item you want to delete.
2. Press **→** to go to the column to be deleted.
3. Press **Alt** + **L** to open the List Menu.
4. Type **R** to select the Remove option.

Moving from Screen to Screen

To move from screen to screen, you can

- Press **PgDn** or **PgUp**
- Type **Alt** plus the hot key (letter that is a different color than the rest of the word) of the pushbutton you want to select
- Click on the pushbutton with your mouse
- Press **Tab** until that pushbutton is highlighted and then press **Enter**

Also, if you press **Enter** in the last field on a screen, the system asks if you want to add an item or go to the next section. On the last screen, it asks if you want to add an item or go to rating.

Going to Rating

Once you have entered all your client information, press **F8** to go to the Company Select Dialog Box and begin rating. Or, if you press **Enter** in the last field on the last screen, the system asks if you want to add an item or go to rating.

See the “Rating” chapter for further instructions.

Chapter 7

Rating

To access the Company Select Dialog Box for rating, either

- Press **F8**
- Select **RATE comparison** from the Workflow Dialog Box
- Select the **Company List** option from the Rate Menu.

[Company Select]						
Plan	Term	G	Eff Date	Liab	PhyDam	Other Total Code
Am. Fell. Broad	S		04/01/97			
Am. Fell. Dynamic	P		04/01/97			
Citizens	S		07/01/97			
Citizens Auto-Pak	P		07/01/97			
Hastings Group	P		05/01/97			
Hastings Mutual	S		05/01/97			
MAIPF	N		10/01/97			
Progressive Ins.	S		09/15/97			
State Mutual Ins.	S		01/01/97			
Titan Insurance	N		08/18/97			

< F5:None >< F6:All >

< Rate > < *Notepad > < Sort > < ReView > < Terr > < AllRts >
 < Select > < Message > < Payplan > < Print > < Groups > < Cancel >

From the Company Select Dialog Box, you can

- Rate one or more companies
- Sort by lowest premium
- Print the dialog box
- Change the companies listed on the dialog box by group or rate effective date
- View messages about the highlighted company plan
- View payment plans
- View and edit company notepads
- Review quoting information for a company
- Clear territories
- Select a company

Rating One or More Companies

You can rate one company at a time, several companies at once, or all companies at once.

To rate one company,

1. Highlight the company you want to rate.
2. Press **Enter**. The highlighted company is rated.

To rate more than one company but not all of them,

1. Highlight a company you want to rate.
2. Press **Spacebar** to mark the company.
3. Repeat steps 1 and 2 for all companies you want to rate.
4. Press **Alt** + **R** at the same time to select the Rate option and rate all marked companies.

To rate all companies at once,

1. Press **F6** to mark all the companies.
2. Press **Alt** + **R** at the same time to select RATE and rate all marked companies.

After rating, the Code column on the Company Select Dialog Box may display one of the following codes:

Code...	Definition...
----------------	----------------------

C	indicates that a change was made to the input information you entered. Usually, a limit or deductible was changed to meet a company requirement.
I	the risk is defined as ineligible to the company.
S	underwriting guidelines indicate the risk should be submitted to the company.
U	the rating system is unable to rate the quote.

Sorting by Lowest Premium

To change the order in which companies are listed on the Company Select Dialog Box, type **[Alt] + O** at the same time to select SORT. You can switch between alphabetical order to lowest premium.

Printing the Company Select Dialog Box

To print a copy of the Company Select Dialog Box, type **[Alt] + P** at the same time to select PRINT.

Changing the Listed Companies

You can change the companies listed on your Company Select Dialog Box by group or rate effective date.

By Group

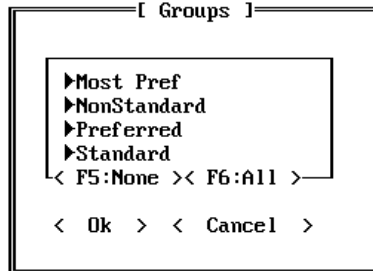
You can also create your own groups. See the *Advanced Options* section for more information about this feature.

You can use the Group option to change, by category, the companies listed on the Company Select Dialog Box. For example, you could list only Standard companies, or only Standard and Preferred companies.

To change the listed companies,

1. Press **[Alt] + G** at the same time to select the Group pushbutton. The Groups Dialog Box is displayed, listing categories of companies.

2. Groups that you want displayed on the list must be marked. To mark and unmark companies, you can
 - Press **F5** to unmark all the groups
 - Press **F6** to mark all the groups
 - Press **Spacebar** to mark or unmark the highlighted group



3. Once the groups you want are marked, press **Alt** + **O** to select the OK pushbutton. You return to the Company Select Dialog Box, which lists only companies in the groups you marked.

By Date

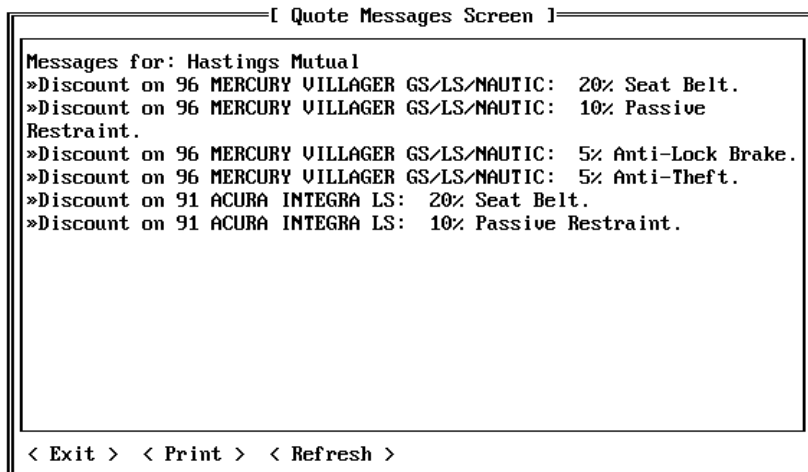


When the Company Select Dialog Box first displays, it lists the most current rate dates for your companies. To view all available rates for your companies, type **Alt** + **A** to select the ALLRTS button.

To return to the most current rates only, press **Alt** + **E** to select the NEWRTS button.

Viewing Messages about the Company Plan

To view messages for the highlighted company, type **[Alt] + M** at the same time to select MESSAGE. The Quote Messages Dialog Box is displayed.



At the Quote Messages Screen, you can press **[Alt] + X** to return to the Company Plan Dialog Box, **[Alt] + P** to print the messages, or **[Alt] + R** to refresh and update the box so it only displays messages for your current quote.

Viewing Payment Plans

To view company payment plans, type **[Alt] + Y** at the same time to select **PAYPLAN**. The Payment Plans Dialog Box is displayed.

Plan	EffDate	PayPlan	Down	Pmts	PmtAmt	Total
Hastings Mutual	05/97	4 Pay	203.75	3	206.75	824.00
Hastings Group	05/97	4 Pay	203.75	3	206.75	824.00
Citizens Auto-P	07/97	3 Pay	275.00	2	278.00	831.00
Citizens Auto-P	07/97	Monthly	275.00	4	137.50	825.00
Citizens	07/97	3 Pay	301.00	2	304.00	909.00
Citizens	07/97	Monthly	301.00	4	150.50	903.00
Hastings Group	05/97	2 Pay	407.50	1	410.50	818.00
Hastings Mutual	05/97	2 Pay	407.50	1	410.50	818.00
Citizens Auto-P	07/97	2 Pay	412.50	1	412.50	825.00

Order by:
 Down-payment Payment Amount Total Premium

< Select > < Print > < Messages > < Details > < Cancel >

To change the order in which the payment plans are listed,

Press To Select this Order

- [Alt] + D** Down-payment
- [Alt] + Y** Payment Amount
- [Alt] + T** Total Premium

You can also

- Select a company - **[Alt] + S**
- Print the list of payment plans - **[Alt] + P**
- View the messages - **[Alt] + M**
- View payment plan details - **[Alt] + E**



To return to the Company Select Dialog Box, press **[Esc]** or type **[Alt] + C** to select CANCEL.

Viewing and Editing Company Notepads

The company notepads are a place where you can keep underwriting notes and reminders about each company. To view or edit a company notepad,

1. Highlight the company whose notepad you want to view.
2. Type **[Alt] + N** at the same time to select NOTEPAD. The notepad for the highlighted company is displayed.

[Company Notepad: Hastings Mutual]

AMS Rating notes:

User notes:

< Save > < Clear > < Cancel >

3. If you have notes to add to the notepad, type them in the User notes section.
4. When you are done viewing/editing the notepad, type **[Alt] + S** to save the notes and return to the Company Select Dialog Box.



You can also clear the notes by typing **[Alt] + L** to select the Clear pushbutton.

If a company has notes in the Notepad, that company is marked with an asterisk on the Company Select Dialog Box.

Reviewing Quoting Information



You can review detailed quote information from the Company Select Dialog Box before selecting a company:

1. Press **↓** or **↑** to arrow to the company you want to review.
2. Press **Alt** + **V** at the same time to choose the Review pushbutton.
The first Quote Review Screen for the selected company is displayed.

Date: 11-25-1997		Eff Date: 11-25-1997	
Am. Fell. Dynamic Auto Quote for Larry 1.1 Michigan			
[Coverages]	[1]	[2]	[]
Vehicle	97 MISS QUES	91 acur inte	
Driver	Lisa Michigan	Larry 1.1 Michi	
Bodily Injury	100/300 98.59	100/300 123.00	
Property Damage	50 5.20	50 6.60	
Mini Tort	No 0.00	No 0.00	
PIP	Full 252.00	Full 315.00	
PIP Coord	Full PIP 0.00	Full PIP 0.00	
PPI/MCCA	Yes Yes 7.80 24.00	Yes Yes 9.80 24.00	
UM BI	100/300 16.00	100/300 20.00	
UIM BI	100/300 0.00	100/300 0.00	
DTC (Comp)	500 76.80	100 122.40	
Collision	500 302.00	250 435.39	
Collision Form	Basic	Broad	
Towing	No Coverage 0.00	No Coverage 0.00	
Ext Transport	No Coverage 0.00	No Coverage 0.00	
Prem: 1,055.19	450.60	604.59	

< Page Up > < Page Down > < Next Comp > < Prev Comp > < Select > < Cancel >

F1=Help ESC=Cancel TAB=Next |Enter number (CTRL+BKSP=clear)

You can press **PgUp** and **PgDn** to move between the Quote Review Screens. You can also press **Alt** + **N** to move to the review screens for the next company, **Alt** + **P** to move to the review screens for the previous company, or **Alt** + **S** to select a company and return to the coverage screens.

See the "Selecting a Company" section for more information about selecting a company.

Clearing Territories



If a company you rate splits your zip code into two or more territories, you select a territory during rating. If you later need to change the selection, type **Alt** + **T** to choose the TERR pushbutton. All territory selections will be cleared, so you can select different territories.

Selecting a Company

You can also press **Esc** to go back to the input screens without selecting a company.

Once you have decided which company to place the client with, you need to select that company. When you quote, your input information (such as limits and deductibles) may be changed to meet a company requirement. Once you select a company, those changes are transferred to the input screens.

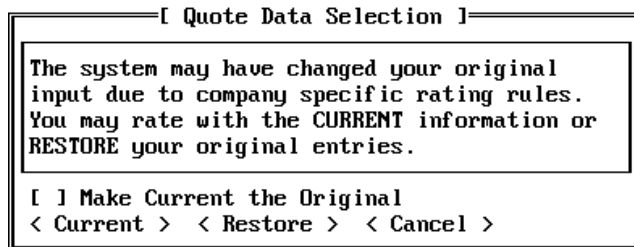
To select a company,

1. Highlight the company you want to select.
2. Type **Alt** + **S** at the same time to choose SELECT. You return to the Coverage Screen, which now lists the company and premium information.

If you make changes to the input screen that you want to save, choose Clear Company from the Rate Menu before you press **F8**.

If you later want to...

- **modify your original input**, choose Clear Company from the Rate Menu. Any changes from this point will become part of the original input.
- **change to the detail information for another company**, press **F8**. The Quote Data Selection Screen is displayed.



To return to your original input, type **Alt** + **R** to choose the RESTORE button. Any changes you made since you last quoted will be discarded. Choose this option to view detailed information for another company.

To keep the input as it currently is on the input screens, type **Alt** + **C** to choose the CURRENT button. All changes, including any you made since you last quoted, will be retained.

You can also press **Spacebar** to mark the Make Current the Original field. If you mark this field, the quote as it currently is on the input screen replaces the original quote information permanently. If you later restore, the quote returns to this point rather than to what you originally entered.

Viewing Class Codes, Territory, and Points

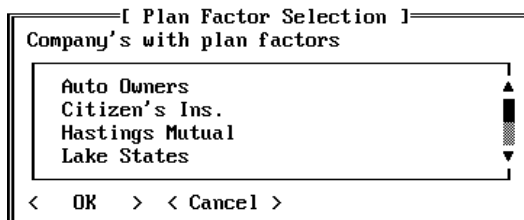
To view class codes, territory, and points after selecting a company, press **F4** in the Yr Make Model field on the Coverages Screen.

Chapter 8

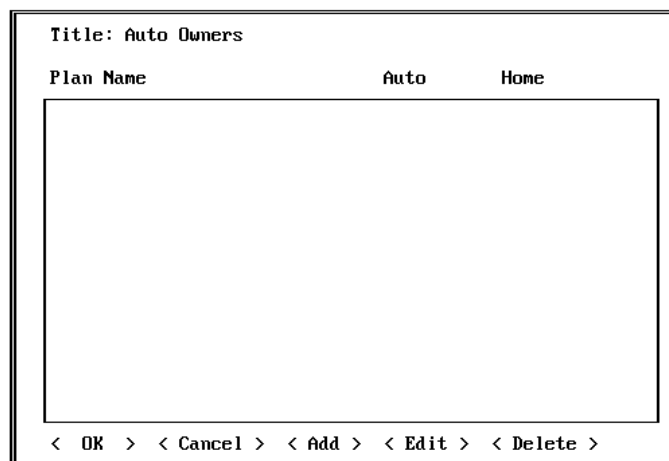
Entering Group Factors

To enter factors for your groups,

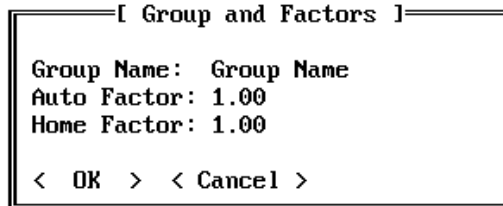
1. Choose the Group Factors option from the Utilities Menu. The Plan Factor Selection Dialog Box is displayed, listing companies that have plan factors.



2. Highlight the company for which you want to add factors.
3. Press **[Alt] + O** to select the OK button. The list of groups for the selected company is displayed.



4. Type **[Alt] + A** to select the ADD pushbutton. The Group and Factors Dialog Box is displayed.



5. Type the name of the group and the auto and home factors, pressing **[Tab]** to move from field to field.
6. Press **[Alt] + O** to select the OK pushbutton. You return to the group listing.
7. When you are done adding groups, type **[Alt] + O** to select the OK pushbutton and exit the group listing.

To edit group factors,

1. Choose the Group Factors option from the Utilities Menu. The Plan Factor Selection Dialog Box is displayed, listing companies that have plan factors.
2. Highlight the company for which you want to add factors.
3. Press **[Enter]**. The list of groups for the selected company is displayed.
4. Highlight the plan name for which you want to edit factors.
5. Press **[Enter]**. The Group and Factors Dialog Box is displayed.
6. Update the name of the group and the auto and home factors as needed, pressing **[Tab]** to move from field to field.
7. Press **[Alt] + O** to select the OK pushbutton. You return to the group listing.
8. When you are done, type **[Alt] + O** to select the OK pushbutton and exit the group listing.

Chapter 9

Editing a Quote

If you need to make changes to your policy information, you can edit, add, and remove items on the coverage screens, or you can do a quick-edit using the Quick-Quote screens.

Editing Client Information

After rating, you may need to change information that you entered. For example, you may need to adjust limits and deductibles. To edit client information,

1. Go to the screen for the item you want to edit.
2. Move the highlight to the item to be changed.
3. Depending on the field you are editing, you either type the new information or press **Spacebar**, the first letter, or **F4** to select an option.

Keep in mind that, if you marked the Automatic Rate Calculation option in the Preferences Dialog Box, the premium re-calculates with every change you make. To save time when making changes, press **F4** and select your new option from the menu. If you use **Spacebar** to change options, the system re-rates for every selection.

Adding an Item

To add an item to your quote,

1. Go to the line of business for the item you want to add.
2. Type **[Ctrl] + A** at the same time to select the **Add** option from the **List Menu**.

Copying Coverage Information Across a Risk

When you add a new item, the coverage from the previous column is automatically copied. To copy coverage information from another column or to make later changes, you can use the Copy option. You can copy one field or the entire column.

1. Move the highlight to the field or column from which you want to copy. For example, if you are copying from Vehicle 1 to Vehicle 2, move the highlight to the Vehicle 1 column.
2. Press **[Ctrl] + C**. The Set Value Dialog Box is displayed.

[Set Value]

(*) Copy CURRENT field only
 () Copy COVERAGE fields only
 () Copy ALL fields

Target Column(s)

Vehicle 2

< F5:None >< F6:All >
 SPACEBAR=Mark/Unmark

< OK > < Cancel >



3. Press **↓** and **↑** to indicate if you want to copy the highlighted field only, all coverage fields, or all fields.
4. Press **Tab** to the Target Columns section.
5. Press **↓** and **↑** to move through the list of columns, pressing **Spacebar** to mark any column to which you want the coverage copied.
6. Press **Alt** + **O** to select the OK button. The coverage information is copied.

Removing an Item

To delete an item from your quote,

1. Go to the line of business for the item you want to delete.
2. If the line of business has more than one item, move the cursor to the item you want to delete.
3. Type **Ctrl** + **R** at the same time to select the **Remove** option from the **List Menu**.
4. Press **Enter** to confirm that you want to delete this item.

Doing a Quick Edit

If you want to edit a quote using the Quick-Quote screens instead of the coverage screens,

1. Select the **QUICK-EDIT existing policy** option from the Workflow Dialog Box. The Quick Quote Setup Dialog Box for the loaded client is displayed.
2. Make any necessary changes to the information on the quick-quote screens.

Chapter 10

Viewing Other Premiums

The Shopper and Shop Field options allow you to view alternative premiums, and the Pro-Rate option lets you calculate premiums for a specific time period.

Using the Shopper Option

The Shopper option is only available in the Auto line of business and from the Auto Coverage Screen. It allows you to view premiums for other limits and deductibles. You must rate before you use Shopper.

1. At the Auto Coverage Screen, select **Shopper** from the Rate Menu. The Shopper Screen is displayed.

```

[ Shopper Screen ]
Shop coverages on Liability or OTC/Collision?
< Liability > < OTC/Coll > < Cancel >
  
```

2. Press **[Alt]** + the hot key (**L** for liability or **O** for OTC/Coll) to select liability limits or deductibles. The Auto Shopper Definition Dialog Box is displayed.

```

[ Auto Shopper Definition ]
Seven limits can be shopped, Mark with SPACEBAR.

OTC:          Collision:
No Coverage   No Coverage
▶Full         ▶Full
▶50           ▶50
▶100          ▶100
▶150          ▶200
▶200          ▶250
▶250          ▶300
▶300          ▶400

< OK > < Cancel >
  
```

If you mark more than seven options, the first seven you mark will be shopped.

3. Mark the options for which you want to see premiums. You can shop up to seven options:

3-1. Press **↓** and **↑** to move through the list of options.

3-2. Press **Spacebar** to mark or unmark an option. You can also press **F5** to mark all options or **F6** to unmark all options.

4. Press **Enter**. The Shopping Dialog Box is displayed, displaying a table of premiums for the options you selected.

[PHYSICAL DAMAGE SHOPPING]				
Vehicle Premiums:		Current	Selected	Difference
1:97 NISS QUES (500/500)=		414	477	63
Collision				
Comp	250	400	500	
250	477	460	426	
500	465	448	414	
1,000	457	440	406	
<p>Highlight the desired premium and press ALT+S to select</p> <p>< OK > < Select > < Next Veh ></p> <p> < Print... > < Prev Veh ></p>				

5. Use the table below to determine your next step:

If you want to...	Then...
Select a different premium	<ol style="list-style-type: none"> 1. Press ↓ and ↑ to highlight the premium you want. 2. Type Alt + S at the same time to choose SELECT.
See the premiums for another vehicle	Type Alt + N to go to the next vehicle or Alt + V to go to the previous vehicle
Leave the Shopping Dialog Box	Press Alt + O to select OK
Print the screen	Press Alt + P to select PRINT

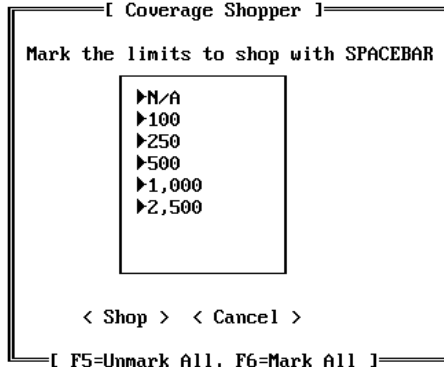
Using the Field Shopper Option

The Field Shopper lets you view premium changes caused by any field that has options. You must rate and select a company before you use Field Shopper.

To use the Field Shopper to compare prices,

1. Go to a field for which coverage options are available.
2. Press **Ctrl** + **F4** to select Shop Field from the Rate Menu. The Coverage Shopper Dialog Box is displayed, with all options for the field marked.

- Press **[Spacebar]** to mark and unmark options so only the options for which you want to see premiums are marked.



- Press **[Alt] + S** to select the SHOP pushbutton. The Coverage Shopper Matrix Dialog Box is displayed, listing the premium for each option and the difference between it and the currently selected premium. You can press your arrow keys to move around the box, and the premium difference will update as you move from field to field.

Covg Option	Covg Actual	Covg Total	Policy Total	Premium Diff
No Coverage		0	1124	-123
20/40		36	1213	-34
50/100		58	1235	-12
200/200		72	1249	2
100/300		70	1247	0
300/300		85	1262	15
200/400		79	1256	9
250/500		83	1260	13
300/500		86	1263	16

5. Use the table below to determine your next step:

If you want to... Then...

Select an option	<ol style="list-style-type: none"> 1. Press ↓ and ↑ to highlight it. 2. Press Alt + S to select the SELECT pushbutton. You return to the updated Rating Summary Screen.
Shop different options	<ol style="list-style-type: none"> 1. Press Alt + R to select RESHOP 2. Repeat steps 3-5.
Exit the Shopper	Press Esc or Alt + C to cancel the shopping
Print the screen	Press Alt + P to select PRINT

Calculating a Pro-Rate

You can calculate a pro-rated premium before or after quoting.

1. Choose Pro-Rate from the Utilities Menu. The Pro-Rate Calculator Box is displayed.

```

┌─── Pro-Rate Calculator ──┐
| Term:                    6 Month           |
| Beginning Date:         11251997          |
| Ending Date:           05-25-1998         |
| Premium:               0.00              |
|                           |               |
| Number of Days:        |               |
| Pro-Rated Premium:     |               |
|                           |               |
| < ProRate > < Cancel > |
└──────────────────────────┘
  
```

2. If you have quoted, the Beginning Date defaults to the effective date of the policy. Otherwise, it defaults to the current date. If you need a different date, type it in MMDDYY format.
3. Press **Tab** to move to the Ending Date field.

4. Type the ending date of the time period in MMDDYY format.
5. Press **Tab** to move to the Premium field.
6. If you have already quoted, the premium is displayed in the premium field. Otherwise, type in the premium amount.
7. Press **Alt** + **P** to select the ProRate pushbutton. The premium is displayed in the Pro-Rated Premium field and the number of days in the time period is displayed in the Number of Days field.
8. When you are done calculating the pro-rate, press **Esc** or type **Alt** + **C** to close the Pro-Rate Calculator Dialog Box.

Chapter 11

Viewing a Schedule and Summary

You can view schedules for each detail item and a quick summary of the overall line of business.

Schedule

From the auto or home detail screens (not the Summary Screens), you can view schedules. To view a schedule,

1. Go to the detail screen for which you want to see the schedule.
For example, to see a Vehicle Schedule, go to the Vehicle Screen.
To see an SPP Item Schedule, go to the SPP Screen.
2. Type **[Alt] + L** to open the List Menu.
3. Type **H** to select the **Schedule** option. The schedule is displayed.

Vehicle Schedule							
Vehicle	BI	PD	UM	PIP	OTC	COLL	Prem
1:95 DODG GRAN	100/300	100	20/40	Full	100	250	

< OK > < PRINT >

4. If you want to print the schedule,
 - 4-1.Type **[Alt] + P** to select the PRINT button. The Printer Selection Dialog Box is displayed.
 - 4-2.Press **[↓]** until the printer you want is highlighted.
 - 4-3.If you need to change the Form Feed or Print to Queue fields, press **[Tab]** to move to the appropriate field and then press **[Spacebar]** to mark or unmark it.
 - 4-4.Type **[Alt] + P** to select the PRINT button. The schedule prints and you return to the detail screen.

If you do not want to print the schedule, press **[Alt] + O** to select the OK button when you are done viewing the schedule.

Quick Summary



To view a quick summary, press **[F6]** or select the Quick Summary option from the List Menu.

Date: 11-25-1997		Citizens Auto Quote for Larry 1.1 Michigan		Eff Date: 11-25-1997	
[1]		[2]		[]	
Vehicle	97 NISS QUES		91 acur inte		
Driver	Lisa Michigan		Larry 1.1 Michi		
Bodily Injury	100/300	62.00	100/300	62.00	
Property Damage	100	4.00	100	4.00	
Mini Tort	No	0.00	No	0.00	
PIP	100	97.00	100	92.00	
PIP Coord	Full PIP	0.00	Full PIP	0.00	
PPI/MCCA	Yes Yes 6.00	9.00	Yes Yes 6.00	9.00	
UM BI	100/300	20.00	100/300	20.00	
UIM BI	100/300	0.00	100/300	0.00	
OTC (Comp)	500	50.00	100	70.00	
Collision	500	166.00	250	203.00	
Collision Form	Basic		Broad		
Towing	No Coverage	0.00	No Coverage	0.00	
Ext Transport	No Coverage	0.00	No Coverage	0.00	
Prem:	880.00	414.00	466.00		

< Page Up > < Page Down > < Next Comp > < Prev Comp > < Select > < Cancel >
 F1=Help ESC=Cancel TAB=Next |Enter number (CTRL+BKSP=clear)

You can press **[PgUp]** and **[PgDn]** to move between the Quote Review Screens.

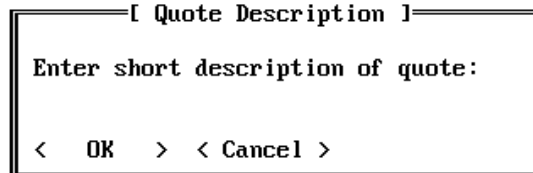
Chapter 12

Saving a Quote

To save a quote, type **Ctrl** + **S** at the same time, or select the **Save** option from the File Menu.

If you are saving the quote for the first time,

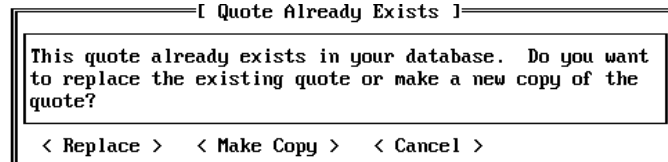
the Quote Description Box is displayed.



1. Type a short description of the quote.
2. Press **Alt** + **O** to select the OK pushbutton.

If you have saved this quote before,

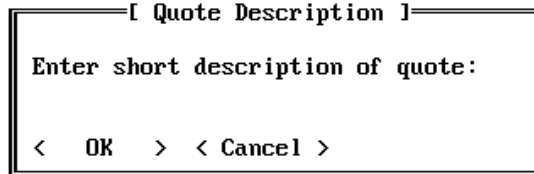
a box displays asking if you want to replace the existing quote or make a new copy of the quote



1. If you want to replace the existing quote, type **R** to choose the REPLACE pushbutton.

If you want to make a copy, type **M** to choose the MAKE COPY pushbutton.

2. If you chose to make a copy, the Quote Description Dialog Box is displayed.



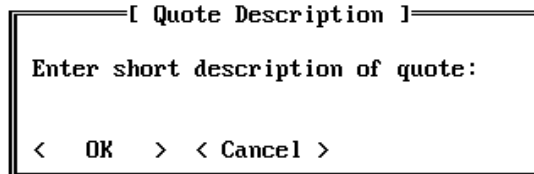
3. Type a description of the quote.
4. Type **[Alt] + O** to select the OK pushbutton.

Using Save As

With the Save As option, you can save multiple copies of your quotes. For example, you may want to save the same quote with different companies or with different coverage information.

To use Save As,

1. Select the Save As option from the File Menu. The Quote Description Dialog Box is displayed.



2. Type a description of the quote.
3. Type **[Alt] + O** to select the OK pushbutton.

Changing the Quote Description

To change the description of your quote, choose the Quote Description option from the File Menu and type the new description.

Chapter 13

Loading and Deleting Clients

You load and delete clients and policies from the Client List and the Quote List Dialog Boxes. This chapter shows you how to

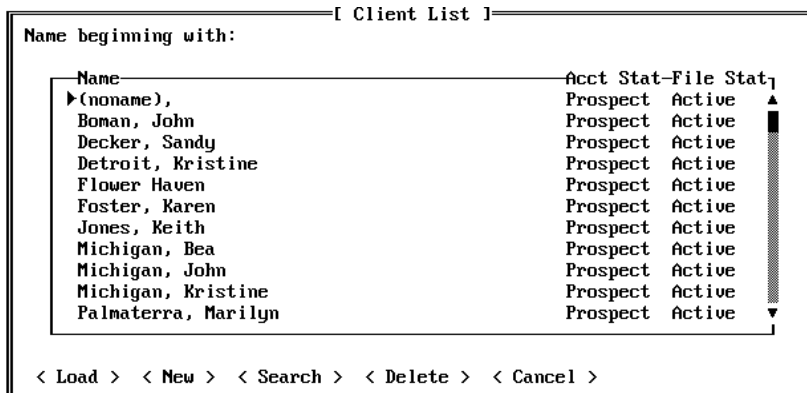
- Access the Client List Dialog Box
- Search for a Client
- Load a Client and Quote
- Edit a Quote Description and Status
- Transfer a Quote to another AMS Rating System
- Delete a Client and Quote
- Delete a Quote Only

Accessing the Client List Dialog Box

You access the Client List Dialog Box by selecting either

- **Load an Existing Client** from the Workflow Dialog Box
- OR
- **Open** from the File Menu

You can also press **Ctrl + O** to access the Client List Dialog Box.



Searching for a Client

There are several ways to find the name of a client on the Client List Dialog Box.

Option 1: Highlight the Name

If your client list is not very long, just press **Tab** to move to the list of clients and then press **↓** and **↑** to highlight the client you want to load.

Option 2: Name Beginning With Field

If you have a lot of names in your client list, you may wish to use the Name Beginning With field to limit the names displayed:

1. Type the name of the client (or part of the name) in the Name Beginning With field.
2. Press **Enter** to display only names that match what you typed in step 1.
3. If necessary, press **Tab** to move to the list of clients and then press **↓** and **↑** to highlight the client you want to load.

Option 3: Search Box

If you want to search by the effective date, expiration date, or phone number rather than by the client name, you can use the Search function:

1. On the Client List Dialog Box, press **Alt** + **R** to select the SEARCH pushbutton. The Client Search Dialog Box is displayed.
2. Press **Spacebar** to choose Effective Date, Expiration Date, or Phone Number as the search factor.
3. Press **Tab**.

4. Type the beginning date or phone number for your search.
5. Type the ending date or phone number for your search.

6. Press **Enter** to begin the search. The Client Search Dialog Box show all clients who have effective/expiration dates or phone numbers between your beginning and ending information.
7. Press **↓** and **↑** to highlight the client you want to select.
8. Press **Alt** + **S** to select the SELECT pushbutton. You return to the Client List Dialog Box. The client you selected on the Client Search Dialog Box is highlighted.

Loading a Client and Quote

To load a client and quote,

See the *Searching for a Client* section for instructions on how to highlight a client.

1. Highlight the client you want to load.
2. Press **Alt** + **L** to select the LOAD pushbutton. The Quote List Dialog Box is displayed, listing all policies for this client.

3. Press **[↓]** and **[↑]** to highlight the quote you want to load.
4. Press **[Alt] + L** to select the LOAD pushbutton. The Rating Summary Screen for this client and quote is displayed.

To return to the Client List Dialog Box and select a different client, press **[Esc]**.

[Quote List]

Client: Decker, Sandy

Quote Description	Type	Status	EffDate
Lake States	AUTOP		

< Load > < Transfer > < New > < Edit > < Delete > < Cancel >

Editing A Quote Description and Status

The Quote List Dialog Box includes quote description and status fields, which you can edit:

See the *Searching for a Client* section for instructions on how to highlight a client.

1. Highlight the client you want to edit.
2. Press **[Alt] + L** to select the LOAD pushbutton. The Quote List Dialog Box is displayed, listing all policies for this client.
3. Press **[↓]** and **[↑]** to highlight the quote you want to edit.
4. Press **[Alt] + E** to select the EDIT pushbutton. The Quote Edit Dialog Box is displayed.
5. The Quote Description field displays the saved company. If you want to change this entry, type a new description.



When you save a quote, the Quote Description field changes back to display the company name.

6. Press **[Tab]** to move to the Status field.
7. Type a status description.
8. Press **[Alt] + O** to select the OK pushbutton. You return to the Quote List Dialog Box.

[Quote Edit]

Client Sandy Decker Prospect

Quote Description: Hastings Group
Status: new

Policy Number	Company	ST-Code	EffDate	ExpDate	Premium
(none)	Hastings Gro MI	AUTOP	04/03/97	10/03/97	878.00

< OK > < Cancel >

Transferring a Quote to another AMS Rating System

If you have other AMS rating systems, such as company-specific systems, you can transfer quotes saved in this comparative rating system to another system:

See the *Searching for a Client* section for instructions on how to highlight a client.

1. Highlight the client you want to transfer.
2. Press **[Alt] + L** to select the LOAD pushbutton. The Quote List Dialog Box is displayed, listing all policies for this client.
3. Press **[↓]** and **[↑]** to highlight the quote you want to transfer.
4. Press **[Alt] + T** to select the TRANSFER pushbutton.
5. If you have more than one system to which you can transfer, a list of options is displayed. Press **[↓]** and **[↑]** to highlight the system to which you want to transfer.

6. Press **Enter**. A verification box is displayed.
7. Press **Enter** again. The new rating system opens, with all quoting information transferred.

Deleting a Client and Quote

To delete a client,

See the *Searching for a Client* section for instructions on how to highlight a client.

1. On the Client List Dialog Box, highlight the client you want to delete.
2. Type **Alt** + **D** at the same time to select the Delete pushbutton.
3. Confirm or cancel the deletion:

To confirm the deletion, just press **Enter**.

To cancel the deletion, type **Alt** + **N** at the same time to select the No pushbutton.

Deleting a Quote Only

To delete a quote but not the client,

See the *Searching for a Client* section for instructions on how to highlight a client.

1. On the Client List Dialog Box, highlight the client whose quote you want to delete.
2. Press **Enter**. The Quote List Dialog Box appears, listing all quotes for this client.
3. Press **↓** and **↑** to highlight the quote you want to delete.
4. Type **Alt** + **D** at the same time to select the Delete pushbutton.
5. Confirm or cancel the deletion:

To confirm the deletion, just press **Enter**.

To cancel the deletion, type **Alt** + **N** at the same time to select the No pushbutton.

Chapter 14

Printing Quotes and Letters

You can print quotes and letters with your rating system.

Quotes

You can also press **F9** to print a quote.



To print a quote,

1. Type **Alt** + **F** at the same time to select and open the File Menu.
2. Type **P** to select the Print option. The Print Sub-Menu displays.
3. Type **Q** to select the Quote option.
4. If you have made changes since last rating, a box displays asking if you want to re-rate before continuing. Press either **Enter** to re-rate or **Alt** + **N** to continue without re-rating.
5. If the *Print Optional Ded* field on the Preferences Dialog Box is marked **Ask**, then a box displays asking if you want to print optional deductibles. Press either **Enter** to print the optional deductibles or **Alt** + **N** if you don't want to print them.

The Print Quote Dialog Box is displayed.

[Print Quote]

<p>Forms</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Auto Short Quote Auto Detail Quote Rating Messages </div> <p style="text-align: center;">< F5:None >> F6:All ></p> <p>Printer</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> ▶ Okidata 192/193 IBM LaserPrinter HP LaserJet Series 4 </div>	<div style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Print Heading <input type="checkbox"/> Print to Queue <input type="checkbox"/> Enhance Printout <input type="checkbox"/> Download Laser fonts <input checked="" type="checkbox"/> Non-Graphical Laser </div> <p style="text-align: center;">1 Number of Copies</p> <p>Producer: Single User</p> <p>Agency: Sandy Decker Insurance</p>
< Print > < Cancel >	



Whenever all the fields display the correct information, skip to step 17. If all the default options are correct, you can skip to step 17 now.

These options vary depending on the type of printer and the selected form, so all the options may not be accessible on your screen.

6. Press and to highlight the document you want to print.
7. Press .
8. If more than one printer is listed, press and to highlight the printer on which you want to print.
9. Press .
10. In the *Print Heading*, *Print to Queue*, *Enhance Printout*, and *Non-Graphical Laser Print* fields, press to mark or unmark the appropriate options:
 - Mark *Print Heading* if you want the agency's name and address to appear at the top of the printout
 - Mark *Print to Queue* if you want the printout sent to the printer queue for later printing, rather than printed immediately
 - Mark *Enhance Printout* if you are printing on a dot matrix printer and need final rather than draft quality
 - Mark *Non-Graphical Laser Print* if you are printing on a laser printer and want draft rather than final quality
11. Press .
12. Type the number of copies you want to print.
13. Press .
14. If the default producer option is not correct, press , the first letter, or to select another option.
15. Press .
16. If the default agency option is not correct, press , the first letter, or to select another option.
17. If all the information is now correct, press . The quote prints to the selected printer.

You can edit and add producers and agencies through the **Setup Menu** on the **AMS Rating Menu**. See the *Getting Started* section for instructions.

Letters

Your rating program includes several letters that you can use as is. You can also use the Editor to edit these letters or write your own letters. See the *Advanced Functions* section for instructions on editing and writing letters. This section covers how to print a letter.

When you print a letter, your client information is automatically input into the letter, so you do not have to re-enter it. To print a letter,

1. Type **[Alt] + F** at the same time to select and open the File Menu.
2. Type **P** to select the Print option. The Print Sub-Menu appears.
3. Type **L** to select the Letter option. The Print Letter Dialog Box is displayed.

[Print Letter]		
Letter	Filename	
Automobile Cover Letter	ARTAUTO	[] Print to Queue
Automobile Cover Letter	AUTO	
Sample auto letter with column	CARQUOTE2	
Sample Automobile quote letter	CARQUOTE	
< F5:None >< F6:All >		
Printer		1 Number of Copies 60 Lines per Page
►Okidata 192+ w/o IBM Graphics		Producer: Single User
		Agency: Decker Insurance Agency
< Print > < Cancel >		



Whenever all the fields display the correct information, skip to step 14. If all the default options are correct, you can skip to step 14 now.

4. Press **[↓]** and **[↑]** to highlight the letter you want to print.
5. Press **[Tab]**.
6. If more than one printer is listed, press **[↓]** and **[↑]** to highlight the printer on which you want to print.

7. Press **Tab**.
8. If you want to send the letter to the queue for later printing rather than printing it now, press **Spacebar** to mark Print to Queue.
9. Press **Tab**.
10. Type the number of copies you want to print.
11. Press **Tab**.
12. Type the number of lines to print on each page. For a laser printer, this field should be 60. For other printers, it should be 66.
13. If the default producer option is not correct, press **Spacebar**, the first letter, or **F4** to select another option.
14. Press **Tab**.
15. If the default agency option is not correct, press **Spacebar**, the first letter, or **F4** to select another option.
16. If all the information is now correct, press **Alt** + **P** to select the PRINT pushbutton. The letter prints to the selected printer.

Using the Queue

To print items that you have sent to the queue,

1. Type **Alt** + **F** at the same time to select and open the File Menu.
2. Type **P** to select the Print option. The Print Sub-Menu appears.
3. Type **U** to select the Queue option. A box is displayed asking if you want to print or delete the queue
4. Type **P** to print or **D** to delete.
5. If you chose to print the queue, a box is displayed asking if you want to be prompted between print jobs. Type **Y** for yes or **N** for no.

Printing begins.

If you said Yes to prompting between jobs, you will be asked before each item in the queue whether or not to print it.

6. A box is displayed asking if you want to delete the queue. Type **Y** for yes or **N** for no.
7. If you said Yes, a verification box is displayed double-checking that you want to delete the queue. Type **Y** to delete the queue or **N** to save it.

Chapter 15

Completing and Printing ACORDS

This chapter covers

- Filling out an ACORD form
- Printing an ACORD form
- Saving an ACORD form
- Exiting the ACORD Form Processor

Filling Out an ACORD Form

To fill out an ACORD form,

1. Type **[Alt] + F** at the same time to open the File Menu.
2. Type **F** to select the **Forms** option.
3. If you have made changes since last rating, a box displays asking if you want to re-rate before continuing. Press either **[Enter]** to re-rate or **[Alt] + N** to continue without re-rating.

The Forms Processor Action Bar appears, and an ACORD form is loaded. Some fields will be pre-filled with information from the coverage screens.

4. If this is the form you want to fill out, you can begin filling it out immediately. For help figuring out how to fill in a field, check the prompt line at the bottom of the screen.

The following keys will help you fill out the form:

Press...	To...
Enter	Move from field to field
F9 or PgDn	Move to the next page of the form
F8 or PgUp	Move to the previous page of the form

You can also use the Prev Page and Next Page options on the Page Menu to move from page to page.

If you want to go to another form, use the following keys:

Press...	To...
F7	See a list of forms from which you can select
F5	Go to the previous form
F6	Go to the next form

You can also use the Prev, Next, and Load options on the Form Menu to move to another form.

Printing an ACORD Form

When you are ready to print the ACORD form,

1. Type **Alt** + **F** at the same time to select and open the Form Menu.

2. Type **P** to select the **Print** option. The Print Dialog Box appears.

[Print Forms]

Forms

ACORD Auto Application	<input type="checkbox"/>	Enhance Printout
ACORD Auto ID Card	<input type="checkbox"/>	Download Laser fonts
ACORD MI Cert No Fault	<input type="checkbox"/>	Non-Graphical Laser
MI Auto Supplement App (M)	<input type="checkbox"/>	Print Empty Pages
ACORD MI Cert No Fault - State Cpy		
MI Collision Ins Opt Notice		

< F5:None >< F6:All >

Printer

▶Okidata 192/193	▲	1 Number of Copies
Epson LX 800	■	Producer: Single User
IBM LaserPrinter	▼	Agency: Sandy Decker Insurance

< Print > < Cancel >

[F5=Unmark All. F6=Mark All]



Whenever all the fields display the correct information, skip to step 14. If all the default options are correct, you can skip to step 14 now.

3. Press and to highlight each form you want to print, and then press to mark them.
4. Press .
5. If more than one printer is listed, press and to highlight the printer to which you want to print.
6. Press .
7. In the *Enhance Printout*, *Download Laser Fonts*, and *Non-Graphical Laser Print*, and *Print Empty Pages* fields, press to mark the appropriate options:
 - Mark *Enhance Printout* if you are printing on a dot matrix printer and need final rather than draft quality
 - Mark *Download Laser Fonts* the first time you print to a laser printer each session
 - Mark *Non-Graphical Laser Print* if you are printing on a laser printer and want draft rather than final quality
 - Mark *Print Empty Pages* if you want to print a blank form

8. Press **Tab**.
9. Type the number of copies you want to print.
10. Press **Tab**.
11. If the default producer option is not correct, press **Spacebar**, the first letter, or **F4** to select another option.
12. Press **Tab**.
13. If the default agency option is not correct, press **Spacebar**, the first letter, or **F4** to select another option.
14. If all the information is now correct, press **Enter**. The document prints to the selected printer.

Saving an ACORD Form

To save the ACORD form(s) you have filled out for a client,

1. When you are ready to save, type **Alt** + **F** at the same time to select and open the Form Menu.
2. Type **S** to select the **Save** option.

The form(s) are saved.

Exiting the ACORDS Form Processor

To exit the ACORD forms and return to the Policy Rating Summary Screen, either press **F3** or select the **Exit** option from the Form Menu.

If you try to exit and you haven't saved the form(s), a question will pop up asking if you wish to save.

CHAPTER 16

Setting Defaults and Preferences

This chapter covers how to

- Create and load default sets
- Set system preferences

Creating and Loading Default Sets

Your system comes with some default sets already created, and you can create your own as well. For example, you may want to create default sets for each of your most common limits. That way, when you start a new quote, you can select a default set and most of the fields on the Coverage Screen will be pre-filled.

You cannot edit the Generic default set.

To select a default set before starting a new quote,

If you have the Pre-Select Defaults option on the Preferences Dialog Box marked, then a list of defaults will display when you start a new quote. To select the default set you want,

1. Press **↓** or **↑** to highlight the default set you want.
2. Press **Enter**.

You can also bring up the list of default sets by pressing **⇧ Shift** + **F9** or by selecting Defaults from the Utilities Pulldown Menu and then selecting Sets from the Default Sub-Menu.

To create a default set,

1. Type **Alt** + **U** to open the Utilities Menu.
2. Type **D** to select the Defaults option.
3. Type **E** to select Editor. The Default Screen is displayed.

File View LOB Default Name:GENERIC

View Name	Default Value	Prev Value	Quick Quote

F1=Help |File management commands

4. Press **Enter** to open the File Menu.
5. Press **Enter** to select the highlighted Setup option. The Default Setup Dialog Box, which lists existing default sets, is displayed.

[Default Setup]

Existing Defaults

GENERIC

< Edit > < Add > < Delete > < Cancel >

6. Type **[Alt] + A** to select the ADD pushbutton. The Add Default Dialog Box is displayed.

7. Type the name you want to assign to this default set.
8. Press **[Tab]**.
9. If you have more than one default, press **[Spacebar]** to select a base default.
10. Type **[Alt] + O** to select the OK pushbutton.
11. Type **V** to open the View Menu.
12. Use the arrow keys or hot key to select the screen for which you want to set defaults. The Default Screen displays all the fields from the selected screen.
13. Press **[Enter]** to move from column to column, setting defaults and marking options. You can also press **[↓]** or **[↑]** to move up and down through a column.

Some screens have more fields than you can see at once. If the lower right corner of the screen says **[PAGE DOWN]**, then you need to press **[PgDn]** to access any additional fields.

See the list below for help completing the columns:

- In the **Default Value** column, either type the default or press **[F4]** to select from the list. When you start a new quote using this default set, the fields will be pre-filled with the information from this column.
- In the **Use Prev Value** column, press **[Spacebar]** to mark or unmark the fields. If you mark it, then when you start a new

quote using this default set, the field will default to whatever you entered in the same field for the previous item.

- In the **Ask on Quick Quote** column, press **Spacebar** to mark or unmark the fields. If you mark it, then when you start a new quick quote using this default set, the field will be asked on the quick quote screens.
14. When you are done setting defaults for this screen, you can either set defaults for another screen or exit the default editor.

To set defaults for another screen,

- 14-1. Type **Alt** + **V** to open the View Menu.
- 14-2. Use the arrow keys or hot key to select the screen for which you want to set defaults. The system asks if you want to save the defaults you set for the current screen.
- 14-3. Press **Enter** to select the Yes pushbutton and save the defaults. The defaults for the current screen are saved, and the Default Screen displays all the fields from the newly selected screen.
- 14-4. Repeat step 13 for the new screen.

To exit the default editor,

- 14-1. Type **Alt** + **F** to open the File Menu.
- 14-2. Type **X** to select the Exit option. If you didn't save the final screen, the system asks if you want to save.
- 14-3. Press **Enter** to select the Yes pushbutton and save the defaults. You return to the rating screens.

To change lines of business,

1. Type **[Alt] + L** to open the LOB Menu. This menu lists all lines of business on your system. The current line of business is listed but cannot be highlighted.
2. Press **[↓]** or **[↑]** to highlight the line of business you want to select.
3. Press **[Enter]**.

To check the line of business, look at the screen options listed on the View Menu.

To edit a default set,

1. Type **[Alt] + U** to open the Utilities Menu.
2. Type **D** to select the Defaults option.
3. Type **E** to select Editor. The Default Screen is displayed.
4. Press **[Enter]** to open the File Menu.
5. Type **L** to select the Load option. A box listing default sets is displayed.
6. Highlight the default set you want to edit.
7. Type **[Alt] + O** to select the OK pushbutton.
8. Type **V** to open the View Menu.
9. Use the arrow keys or hot key to select the screen for which you want to set defaults. The Default Screen displays all the fields from the selected screen.
10. Make whatever changes you wish to make to the default set.
11. When you are done editing defaults for this screen, you can either edit defaults for another screen or exit the default editor.

To edit defaults for another screen,

- 11-1. Type **[Alt] + V** to open the View Menu.
- 11-2. Use the arrow keys or hot key to select the screen for which you want to set defaults. The system asks if you want to save the defaults you set for the current screen.
- 11-3. Press **[Enter]** to select the Yes pushbutton and save the defaults. The defaults for the current screen are saved,

and the Default Screen displays all the fields from the newly selected screen.

- 11-4. Repeat step 13 for the new screen.

To exit the default editor,

- 11-1. Type **[Alt] + F** to open the File Menu.
- 11-2. Type **X** to select the Exit option. If you didn't save the final screen, the system asks if you want to save.
- 11-3. Press **[Enter]** to select the Yes pushbutton and save the defaults. You return to the rating screens.

To change a default set and save it under a new name,

You can use the base default option to create a new default set while keeping the original. For example, say that you want one default set with 50/100 limits and one with 100/300 limits, with all the other information the same. Rather than entering all the information twice, you can create the 50/100 default set, and then use it as the base for the 100/300 default set. All you would have to change is the limits.

See pages 104-105 if you need help accessing the Add Default Dialog Box.

On the Add Default Dialog Box,

1. Type the new name for the default in the New Name field.
2. Press **[Tab]** to the Base Default field.
3. Press **[Spacebar]** to choose the default set you want to change.
4. Press **[Enter]**.

Now you can change whatever you need to in the new default set. It will be saved under the new name, and your original default set is unchanged.

Setting System Preferences

Other setup items you can change on your system are listed in the Preferences Dialog Box. To change system preferences,

1. Select the **Preferences** option from the Options Menu. The Preferences Dialog Box is displayed.

```

[ Preferences ]

[X] Automatic rate calculation
[ ] Show rating messages
[X] Show rating wait message
[X] Automatic lookups
[X] RETURN act as TAB
[ ] Overwrite quote on save

[ ] Pre-Select Plans
[X] Pre-Select Defaults
[X] -> to add item
[X] Ask for quote description
Ask Print Optional Ded
  3 min(s) Screen saver delay (0=never)

<  OK  >  < Cancel >

```

2. Use the definitions in the following table to determine your preferences. For most fields, you press to mark or unmark the field; the only exceptions are
 - the Mins Screen Saver Delay field, where you type the number of minutes without keyboard or mouse activity to wait before activating the screen saver
 - the Print Optional Ded field, in which you press or to select an option

Field	Definition
Automatic Rate Calculation	If you mark this field, the premium recalculates automatically whenever you change input information. Marking this option may slow processing speed.

Field	Definition
Show Rating Messages	If you mark this field, then messages display during quoting when input information is changed or is deemed ineligible/submit by the underwriting guidelines. Marking this option may slow processing speed.
Show Rating Wait Messages	If you mark this field, Wait messages display when you rate or re-rate.
Automatic Lookups	If you mark this field, the territory, symbol, and county are looked up automatically.
Return act as Tab	<p>If you mark this field, you can use Tab or Enter to move from field to field in a dialog box. To close a dialog box, you would need to move to a pushbutton and then press Enter, or type Alt + the pushbutton hot key.</p> <p>If you leave the field unmarked, you must use Tab to move from field to field. Pressing Enter at any time closes the box.</p>
Overwrite quote on save	<p>If you mark this field, then when you make changes to a saved quote and re-save it, the changed quote automatically replaces the original.</p> <p>If you leave the field unmarked, the system asks whether you want to replace the original quote or make a copy.</p>
Pre-Select Plans	If you mark this field, then a Plan Selection Dialog Box appears when you start a new quote, allowing you to select companies before you enter input information.



Field	Definition
Pre-Select Defaults	If you mark this field, then a Default Selection Dialog Box appears when you start a new quote, allowing you to select a default set.
<input type="checkbox"/> to add item	If you mark this field, you can press <input type="checkbox"/> to add an item.
Ask for quote description	If you mark this field, you will be asked for a quote description whenever you save a quote.
Print Optional Ded	If you say Yes in this field, then the printout will include premiums for other deductible choices. If you say Ask in this field, then whenever you print a quote, you will be asked whether to include the optional deductibles.
___ Mins Screen Delay	Screen saver saves your screen from Saver “burnout” that can occur if the same text is on the screen too long. When activated, screen saver displays a constantly moving message. You type the number of minutes to go without touching the keyboard before the screen saver is activated. To turn the screen saver off, type 0 in this field.

- When you are done setting preferences, type + 0 to select the OK pushbutton.

CHAPTER 17

Customizing Companies

To customize your rating system, you can delete companies and you can create your own groups of companies to supplement the regular groups (most preferred, preferred, standard, and non-standard) that come with your system. You cannot change the companies assigned to the regular groups.

Deleting Companies



To delete companies from your rating system,

1. Type **[Alt] + U** to open the Utilities Menu.
2. Type **C** to select Delete Company. The Delete Company Box is displayed.

[Delete Company]

State	Line of Business
►MI	Homeowners Private Passenger Automobile

< Process > < Cancel >

3. If you have more than one state, press **[↓]** to select the state from which you want to delete.
4. Press **[Tab]** to the Line of Business section.
5. Press **[↓]** to select the line of business from which you want to delete.
6. Press **[Alt] + P** to select the PROCESS button. The Delete Effective Dates Dialog Box is displayed, listing all available effective dates for all your companies.

[Delete Effective Dates]

Private Passenger Automobile (MI)

Company	EffDate	Plans
American Fellowship	10/01/94▲	Am. Fell. Broad
American Fellowship	04/01/97■	Am. Fell. Dynamic
Citizens	01/01/97	
Citizens	07/01/97	
Hastings Mutual	11/01/96	
Hastings Mutual	05/01/97	
MAIPF	10/01/96	
MAIPF	07/01/97	
MAIPF	10/01/97	
Progressive	12/20/96▼	

< F5:None > < F6:All >

< Delete > < Cancel >

7. Press **[↓]** through the list of companies, pressing **[Spacebar]** to mark any company you want to delete.
8. When all the companies you want to delete are marked, press **[Alt] + D** to select the DELETE button. A confirmation box is displayed.
9. Press **[Enter]** to confirm the deletion or **[Esc]** to cancel.

Creating Plan Groupings

You can create your own groups of companies to supplement the regular groups (most preferred, preferred, standard, and non-standard) that come with your system. You cannot change the companies assigned to the regular groups.

Adding a Group

To create your own groups,

1. Type **[Alt] + U** to open the Utilities Menu.
2. Choose the Plan Grouping option. The Group Assignment Dialog Box is displayed.

[Group Assignment]		
Product: AMS Rating	LOB: Auto Priv-Pas	State: MI
[Groups]	[Plans]	[Eff. Date]
Most Preferred	American Economy	10/01/95
Non-Standard	American States	10/01/95
Preferred	Auto-Owners	01/15/96
Standard	Auto-Owners A+	01/15/96
	Chubb Insurance	03/01/96
	Citizens	11/01/95
	Citizens Auto-Pak	11/01/95
	Employers Mutual	10/01/93
	Employers Mutual	11/01/95
	Foremost Signature	08/01/93
	Hastings Group	07/01/94
	Hastings Group	11/01/95
	Hastings Mutual	07/01/94

=> Press the spacebar to mark/unmark plans. <=

< Save > < Exit > < Add... > < Delete... > < Setup... >

3. Type **[Alt] + A** to choose the Add pushbutton. The Add Group Dialog Box is displayed.

[Add Group]	
Enter the name of the new group:	
Name:	
< Add >	< Cancel >

4. Type the name of the group.

5. Press **[Enter]**. A box is displayed asking if you want to use a system-defined group as the basis for the new group.

[Question]

Do you wish to create this group from a system defined group?

< Yes > < No >

6. If you want to create the group from a system-defined group, type **Y** and continue to step 7. The companies in that group will be in your new group. Otherwise, type **N** and skip to step 8.
7. A box listing the system-defined groups is displayed. To mark the groups whose companies you want defaulted in your new group, press **[↓]** and **[↑]** to move through the list, pressing **[Spacebar]** to mark groups.

[AARP]

Mark the group(s) to use as a template, then press the <Done> button.

Most Preferred
 Non-Standard
 Preferred
 Standard

< Done > < Cancel >

8. Press **[Enter]**. The Group Assignment Dialog Box is re-displayed. If you chose a group or groups as the template, those companies are already marked.
9. Press **[Tab]** to move to the list of companies.
10. To mark all companies that you want included in your group, press **[↓]** and **[↑]** to move through the list, pressing **[Spacebar]** to mark or unmark companies.
11. When only the companies you want to include in your group are marked, press **[Alt] + S** to save the group.
12. Press **[Alt] + X** to exit the Group Assignment Dialog Box.

Changing Lines of Business

To change the line of business for which you are creating groups,

1. Type **[Alt] + U** to open the Utilities Menu.
2. Choose the Plan Grouping option. The Group Assignment Dialog Box is displayed.
3. Type **[Alt] + T** to choose the Setup pushbutton. The Setup Plans Dialog Box is displayed.

[Setup Plans]

LOB: Auto Priv-Pas ▾

State: MI

Product: AMS Rating

< OK > < Cancel >

4. Press **[Spacebar]** to choose the line of business.
5. If you need to change the state or product, press **[Tab]** to that field, and press **[Spacebar]** to change it.
6. Press **[Alt] + O** to choose the OK pushbutton.

Changing the Plans in a Group

To change the plans you have assigned to a group,

1. Type **[Alt] + U** to open the Utilities Menu.
2. Choose the Plan Grouping option. The Group Assignment Dialog Box is displayed.
3. Press **[↓]** and **[↑]** to highlight the group whose plans you want to change.
4. Press **[Tab]** to move to the list of companies.
5. Press **[↓]** and **[↑]** to move through the list, pressing **[Spacebar]** to mark or unmark companies.

6. When only the companies you want to include in your group are marked, press **[Alt] + S** to save the group.
7. Press **[Alt] + X** to exit the Group Assignment Dialog Box.

Deleting a Group

You can only delete groups that you have created. You cannot delete the system-defined groups.

To delete a group,

1. Type **[Alt] + U** to open the Utilities Menu.
2. Choose the Plan Grouping option. The Group Assignment Dialog Box is displayed.
3. Type **[Alt] + D** to choose the Delete pushbutton. The Delete Groups Dialog Box is displayed.
4. To mark the groups that you want to delete, press **[↓]** and **[↑]** to move through the list, pressing **[Spacebar]** to mark groups.
5. Press **[Enter]**. A confirmation box is displayed.
6. Press **[Enter]** again to confirm the deletion.

CHAPTER 18

Writing Letters

The Editor is a simple yet powerful word-processing program that allows you to create, maintain and print personalized form letters to send to clients and prospects. It includes automatic word wrap and re-formatting features, so you do *not* need to press **Enter** at the end of every line. The letters can be up to 250 lines long. Once you reach 250 lines, you cannot add lines at the end of your letter. If you insert lines elsewhere, all lines pushed past 250 will be lost.

This chapter tells you how to

- Access the Letter Editor
- Format your letter
- Load documents and includes
- Write documents and includes and link them to client data
- Save documents and includes
- Delete letters
- Print letters
- Leave the Letter Editor

Accessing the Editor

To access the Editor from the AMS Rating Menu,

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **E** to select the **Editor** option. The Editor Screen appears, with the New Letter Dialog Box open.

If you want to start a new letter, you can do so immediately.

If you want to do other tasks (for example, load a letter or set margins), press **[Esc]** to remove the New Letter Dialog Box before continuing.

Formatting Letters

Before you begin a letter, you may want to define some specifications and format the letter. This section covers how to

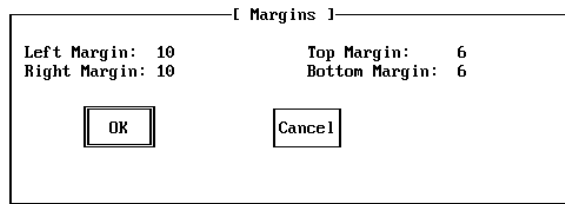
- Set margins
- Set tabs
- Set up headers and footers
- Position individual lines (i.e. center and left/right justify)

The notched line below the Action Bar (each notch represents a space on an 80-character line) shows your margins and tabs: margins are indicated by brackets while plus signs indicate tabs.

Setting Margins

To set margins for your document,

1. From the Editor Screen, type **[Alt] + L** at the same time to select and open the Layout Menu.
2. Type **M** to select the **Margins** option. The Margins Dialog Box is displayed.



3. Type in your margin dimensions (from 0 to 20).



Margins are set in columns (left and right) and lines (top and bottom). For example, the left margin is the number of columns from the left side of the page and the top margin is the number of lines from the top of the page.

4. Press **Enter**. The Editor Screen reappears and the ruler changes to reflect the left and right margins (the top and bottom margins are only reflected when you print).



If most of your letters use the same margins, you can set default margins. To do so, select Defaults on the Layout Menu in step 2. These margins will automatically be set for every letter, although you can change them for particular letters using the Margins option.

Setting Tabs

To change the tab stops,

1. From the Editor Screen, type **Alt** + **L** at the same time to select and open the Layout Menu.
2. Type **T** to select the **Tabs** option. The cursor moves to the ruler.
3. Press **←** and **→** to move the cursor along the ruler, pressing **Spacebar** where you want to set or remove a tab.
4. When you are done changing tabs, press **Enter**.

Setting Headers and Footers

Headers and footers are titles you can place at the top and bottom of each page.

Headers and footers are titles you can put at the top and bottom of each page of a letter. Headers are at the top of the page and footers at the bottom. Each document can have a header, footer, or both.

Positioning Individual Lines

Individual lines can be centered, left-justified, or right-justified.

You cannot center a line that contains a keyword.

To *center* a line,

1. Place your cursor on the line you want to center.
2. Highlight **Center Line** from the Edit Menu.
3. Press .

To *left-justify* a line (position it to begin at the left margin),

1. Place your cursor on the line you want to left-justify.
2. Highlight **Left Justify Line** from the Edit Menu.
3. Press .

To *right-justify* a line (position it so the last character is against the right margin),

1. Place your cursor on the line you want to right-justify.
2. Highlight **Right Justify Line** from the Edit Menu.
3. Press .

Loading Documents and Includes

A document is a full letter. An include is part of a letter, such as the letterhead, that you can "include" in other letters.

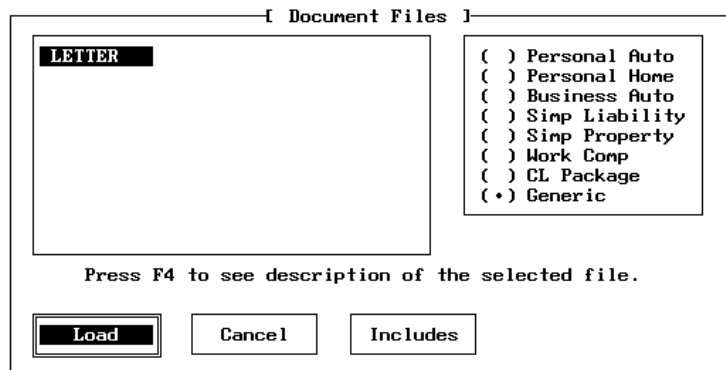
The Editor has two types of letters: documents and includes. Documents are regular, complete letters. Includes are letters or parts of letters that you write in advance and use as part of other letters (such as your agency letterhead). Includes help you save time by reducing the time it takes to write individual letters.

Your system comes with some documents and includes already created for you. You can also create your own. The easiest way to create a letter is to combine various includes.

Loading a Document

To load a document (whether one that came with the system or one you created yourself),

1. From the Editor Screen, type **Alt** + **F** at the same time to select and open the File Menu.
2. Type **L** to select the **Load Document** option. The Document Files Dialog Box appears, listing the documents for the active line of business.



3. If the line of business you need is active, skip to step 6. Otherwise, press **Tab** until the cursor is in the Line of Business section.
4. Press **↓** and **↑** to select the line of business you want.
5. Press **Tab** to move to the list of documents.
6. Press **↓** and **↑** to highlight the document you want to load. (If you need to see a description of a document, press **F4**).
7. Press **Enter**.

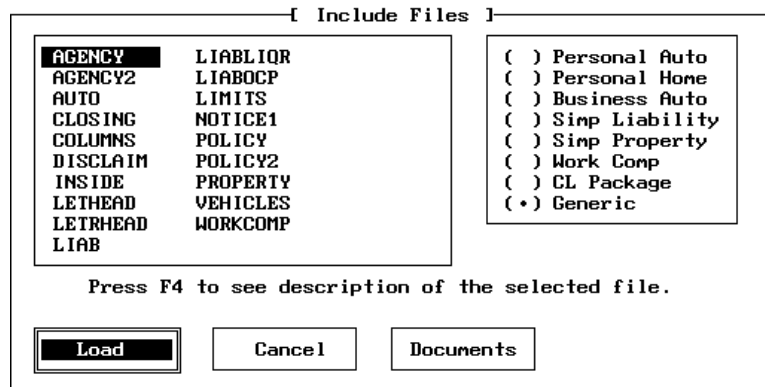
The document is loaded.

Loading an Include

There are two ways to load an include.

Option 1

1. From the Editor Screen, type **[Alt] + F** at the same time to select and open the File Menu.
2. Type **L** to select the **Load Document** option. The Load Document Dialog Box is displayed.
3. Press **[Tab]** to select the Includes pushbutton.
4. Press **[Enter]**. The Include Files Dialog Box is displayed, listing all includes.



5. Press **[↓]** and **[↑]** to highlight the include you want to load (to see a description of the include, press **[F4]**).
6. Press **[Enter]**. The Editor Screen reappears with the loaded include.

Option 2

1. Place your cursor at the point in the letter where you want the include to begin.
2. Press **[Alt] + F** to move to the File Menu.
3. Type **I** to select the **Load Include** option. The Include Files Dialog Box appears, listing all includes.
4. Press **[↓]** and **[↑]** to highlight the include you want to load (to see a description of the include, press **[F4]**).
5. Press **[Enter]**. The Editor Screen reappears with the loaded include.

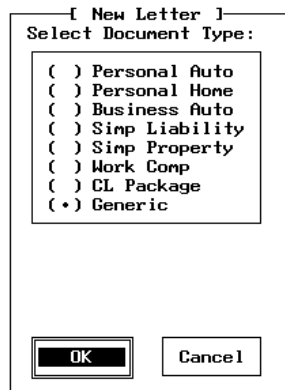
Creating Documents and Includes

To start a new letter,



If you just opened the Editor and the New Letter Dialog Box is already on the screen, start these instructions with step 3.

1. From the Editor Screen, type **[Alt] + F** at the same time to open and select the File Menu.
2. Type **N** to select the **New Document** option. The New Letter Dialog Box is displayed.



3. Use the arrow keys to select the line of business from which you want to merge information. For example, if you were writing a proposal letter for auto insurance, you would select Personal Auto. If you did not need to merge information from a program, you would select the Generic option.
4. Press **Enter**.

Now you can simply type your letter. See the next section on how to link your letter to client data so that you can merge them.

Linking the Editor to Client Information

You can merge client information into either documents or includes. If you want to merge information, you first must tell the system which program you want to merge with.

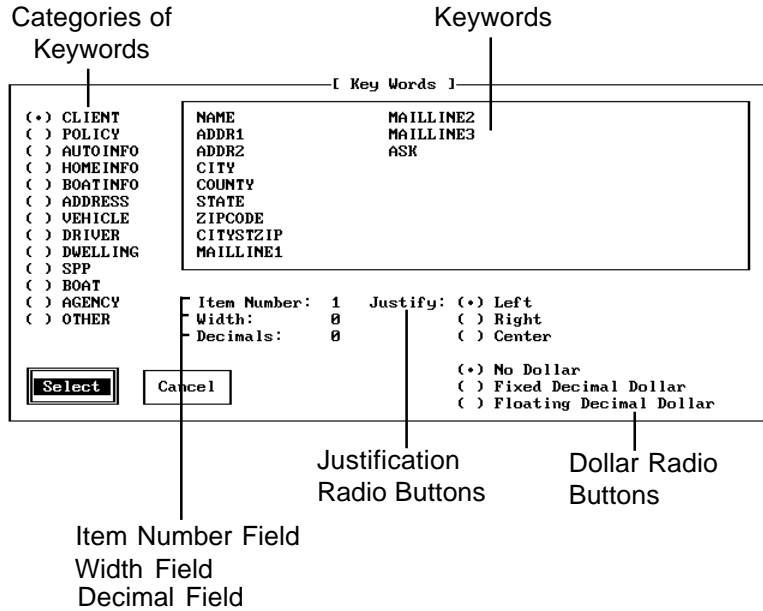
When you come to a spot in the letter where you want to insert client information (for example, the client's name and address), you use *keyword variables*. These are words that are linked to client data. When you merge or print a letter, the keywords are replaced with client data (See Merging Client Information).

Keyword variables are words that are linked to client data.

A special keyword you can place in letters is "ASK." Whenever you print a letter with the ASK keyword, the computer will ask you what text you want to insert into the letter in place of ASK. You can enter up to 60 characters.

The ASK keyword allows you to insert up to 60 characters into a letter when printing.

You access the keywords through the Key Words Dialog Box. Below is an example.



To place a keyword in a letter,

1. Position your cursor at the place in the letter where you want the keyword information.
2. Press **[F4]**. The Key Words Dialog Box appears.
3. Select the keyword you want:
 - 3-1. Press **[↓]** to move through the list of keyword categories.
 - 3-2. Press **[Enter]** in each category to see the keywords in that category.
 - 3-3. When you see the keyword you want, press **[Tab]**. The first keyword in the list box becomes highlighted.
 - 3-4. Press **[↓]** to highlight the keyword you want.
 - 3-5. Press **[Tab]**.

Once you have selected your keyword, the procedure is different depending on whether you selected a numeric or a non-numeric keyword (Numeric keywords are marked with an asterisk).

If you selected a *numeric* keyword, the cursor moves to the Width field. To complete the screen,

1. In the Width field, type the maximum number of characters in your variable.
2. Press . You move to the Decimals field.
3. Type the number of characters you want to the right of the decimal.
4. Press . You move to the Dollar radio buttons.
5. Move the radio button to indicate if you want no dollar sign, a fixed dollar sign (always stays in the same place, regardless of the amount -- \$10.00 or \$ 1.00), or a floating dollar sign (moves depending on the amount -- \$10.00 and \$1.00).
6. Press to accept the keyword information and return to the Editor screen. The keyword variable appears.

If you selected a *non-numeric* keyword, the cursor again moves to the Width field.

To complete the screen,

1. In the Width field, type the maximum number of characters in your variable.
2. Press . You move to the justification radio buttons.
3. Move the radio button to left-justify, right-justify, or center the variable within the column width.
4. Press to accept the keyword information and return to the Editor Screen. The keyword variable appears.

Also notice the **Include Keyword Variable** listed under the Other category. When you use the Include keyword variable, you put a code in your letter telling the system to put the specified include in your letter. The include will actually appear when you merge the letter.

To use the Include keyword variable,

1. Place your cursor at the point in the letter where you want the include to begin.
2. Press **F4** to access the Key Words Dialog Box.
3. Press **↓** and **↑** to move the radio button to the **Other** option.
4. Press **Tab**.
5. Select the *Include* keyword variable.
6. Press **Enter**. The Include Files Dialog Box is displayed.
7. Highlight the include you want.
8. Press **Enter**. The Editor Screen reappears with the **INCLUDE** keyword and the name of the include in place.

Saving Documents and Includes

Once you have written a document or include, you can save it:

1. On the Editor Screen, type **Alt** + **F** at the same time to select and open the File Menu.
2. Type **S** to select the **Save Document** option. The Save Dialog Box is displayed.

[Save]

File Name: _____
Description: _____

(•) Document File
() Include File

() Personal Auto
() Personal Home
(•) Generic

Save Cancel

3. Type a name for your letter.
4. Press **Tab** to move to the Description field.
5. Type a description of the letter (optional).
6. Press **Tab**.

7. Use the arrow keys to select whether you want to save the letter as a document or an include.
8. Press **Tab**.
9. Press **↓** and **↑** to select the line of business under which you want to save the letter.
10. Press **Enter**.

Your letter is saved.

Merging Client Information

Once your document or include is complete and you have saved it, you can preview the format merging with sample information. To do so, follow the instructions below:

1. From the Editor Screen, type **Alt** + **F** at the same time to select and open the File Menu.
2. Type **M** to select the **Merge Document** option. The Document Files Dialog Box is displayed, listing the documents for the active line of business.
3. If the line of business you need is active, skip to step 6. Otherwise, press **Tab** until the cursor is in the Line of Business section.
4. Use the arrow keys to select the line of business you want.
5. Press **Tab** to move to the list of documents.
6. Use the arrow keys to highlight the document you want to merge. (If you need to see a description of a document, press **F4**).
7. Press **Enter**.

The merged letter is displayed on your screen.

Deleting Letters

If you no longer need a stored letter, you can delete it from your system. To do so, follow the instructions below:

1. From the Editor Screen, type **[Alt] + F** at the same time to select and open the File Menu.
2. Type **D** to select the **Delete Document** option. The Document Files Dialog Box is displayed, listing the documents for the active line of business.
3. If the line of business you need is active, skip to step 6. Otherwise, press **[Tab]** until the cursor is in the Line of Business section.
4. Use the arrow keys to select the line of business you want.
5. Press **[Tab]** to move to the list of documents.
6. Use the arrow keys to highlight the document you want to merge. (If you need to see a description of a document, press **[F4]**).
7. Press **[Enter]**. A warning message is displayed, verifying that you want to delete the letter.
8. To continue the deletion, press **[Enter]**.

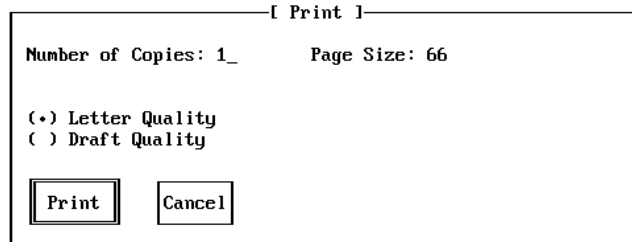
To cancel the deletion, press **[Tab]** to select the No pushbutton and then press **[Enter]**.

Printing Letters

To print a letter with client information merged into it, you need to print from the corresponding program (for example, personal lines rating, commercial lines rating, or File Miner). To print a generic letter or to print a letter with the keyword variables rather than the merged information,

1. Check that your printer is turned on, is ready to print, and has enough paper.
2. Load the letter you want to print.

3. Type **Alt** + **F** at the same time to select and open the File Menu.
4. Type **P** to select the **Print** option. The Print Dialog Box appears.



[Print]

Number of Copies: 1_ Page Size: 66

(*) Letter Quality
() Draft Quality

Print Cancel

5. Indicate
 - The number of copies (default is one.)
 - The length of page (default is 66)
 - Whether you want draft or letter quality
6. Press **Enter**.

Using the Search Function

The Letter Editor includes a search function so you can search your document for every occurrence of a word or part of a word.

To use the search function,

1. Place the cursor at the position in the document where you want the search to begin.
2. Press **Alt** + **S** at the same time. The Search Menu appears with Find highlighted.

3. Press **Enter**. The Find Dialog Box is displayed.
4. In the Find Dialog Box,
 - 4-1. Type the search factor (the letter, group of letters, or word that you want to search for).
 - 4-2. Press **Tab** to move to the Ignore Case field.
 - 4-3. If you want to find all instances of your search factor, both upper- and lower-case, press **Spacebar** to mark Ignore Case.
 - 4-4. If you only want to find your search factor when it is a complete word, press **Spacebar** to mark Whole words only. (For example, if your search factor was “for“ and you marked Whole words only, the system would *not* stop at “before“ or “forecast.”)
 - 4-5. Press **Enter**. The cursor moves to the next occurrence of the search factor in your letter.

You can continue searching for the next occurrence of this same search factor by

- Pressing **F6**
- OR
- Returning to the Search Menu and selecting Find Next

Leaving the Editor

When you are ready to leave the Editor, either select **Exit** from the File Menu or press **F3**. You return to the AMS Rating Menu.

The system always reminds you to save your letters if you try to leave the Letter Editor without doing so.

CHAPTER 19

AMS Rating Menu Functions

This chapter covers the following AMS Rating Menu functions:

- Deleting multiple files
- Purging your database
- Rebuilding files
- Backing up files
- Restoring files
- Checking your disk statistics
- Checking your DOS version
- Checking your memory
- Exiting to DOS
- Customizing your sign-on command
- Viewing update information
- Using the Technical Support Utilities
- Mapping workstation drives
- Starting non-AMS programs from the AMS Rating Menu

Deleting Multiple Files

You can do a “batch” delete by effective/expiration date or by line of business.

1. From the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **D** to select the **Database** option. The Database Menu is displayed.

3. Type **B** to select the **Batch Delete** option. The Batch Processor Dialog Box is displayed.

[Batch Processor]

Date Restriction

(*) Effective Date From: 06-10-95
() Expiration Date To: 07-10-95
() None

Line of Business

▶Auto Priv-Pas
Homeowners
Personal Pkg

< F5:None > F6:All >

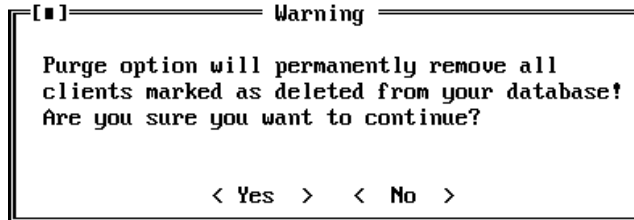
< Process . . > < Cancel >

4. Press and to select a type of date restriction.
5. Press . If you selected Effective or Expiration Date in the Date Restriction section, continue to step 6. Otherwise, go to step 8.
6. Type the beginning and ending dates of the time period.
7. Press to go to the Line of Business section.
8. Press and to select the line of business.
9. Press . All policies in the selected line of business and with effective /expiration dates in the time period are deleted.

Purging your Database

When you delete clients from your database, they are no longer listed in the Client List Dialog Box, but they are not physically removed from the hard drive. You must use the Purge option to remove all deleted clients from your hard drive. To use the Purge option from the AMS Rating Menu,

1. Type **U** to open the Utilities Menu.
2. Type **D** to open the Database menu item.
3. Type **P** to select Purge. A warning message displays verifying that you want to remove all deleted clients from your hard drive.



4. Press **Alt** + **Y** to select the Yes button and continue the purge, or **Alt** + **N** to select the No button and cancel.
5. If you continued, the files are purged. When the purge is complete, a box displays telling you the purge is complete. Press **Enter** to return to the Database sub-menu.

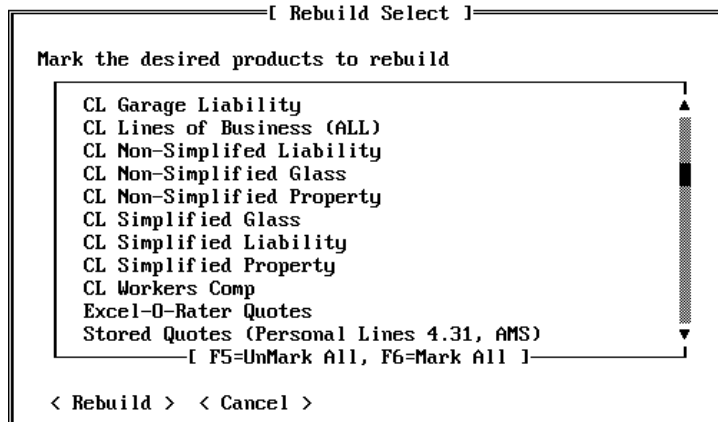
Once you have purged, you need to rebuild your files. See the next section for instructions on rebuilding your files.

Rebuilding Files

You may be asked to rebuild your files, or you may want to rebuild them if you have deleted many clients/policies. To do so,

1. From the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **D** to select the **Database** option. The Database Menu is displayed.

3. Press **[Enter]**. The Rebuild Select Dialog Box is displayed.



3. Press **[↓]** and **[↑]** to move through the list of systems, pressing **[Spacebar]** to mark each system you want to rebuild. If you want to rebuild all of the systems, just press **[F6]** to mark everything.
4. Press **[Enter]**. The rebuild begins. When it is complete, a message appears on your screen.
5. Press **[Enter]** to return to the Rebuild Select Dialog Box.
6. To exit the Rebuild Select Dialog Box, press **[Alt] + C** at the same time or press **[Esc]**.

Backing Up Files

To backup files,

1. From the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **B** to select the **Backup** option. The Backup Select Dialog Box is displayed, listing all types of files on your system that can be backed up.

3. Press **↓** and **↑** to move through the list of topics, pressing **Spacebar** to mark each topic you want to backup. If you want to backup all of the topics, just press **F6** to mark everything.

```

┌ Backup Select ─┐
│
│ Mark the desired topics to backup
│
│ ┌───────────────────────────────────────────────────────────┐
│ │ AMS Rating System                                         │
│ │ Commercial Lines Forms                                   │
│ │ Commercial Lines Quotes                                  │
│ │ Configuration Files                                       │
│ │ Excel-O-Rater Letters & Proposals                       │
│ │ Excel-O-Rater Stored Quote Files                        │
│ │ Excel-O-Rater System & Company Files                   │
│ │ Hartford Rating System                                   │
│ │ Stored Quotes (Personal Lines 4.31, AMS)                │
│ └───────────────────────────────────────────────────────────┘
│ ┌───────────────────────────────────────────────────────────┐
│ │ F5=UnMark All, F6=Mark All ───────────────────────────┐
│ └───────────────────────────────────────────────────────────┘
│
│ Backup Name: Backup Name
│
│ < Backup > < Cancel >

```

4. Press **Tab** to move to the Backup Name field.
5. Type a name for the backup (for example, the date or the topic being backed up)
6. Press **Enter**. The Backup Estimates Dialog Box is displayed, listing the number of files and bytes that will be backed up and the number of diskettes that will be required.

```

┌ Backup Estimates ─┐
│
│ The requested backup has the following statistics:
│
│ Total files:   72      Total bytes:  2,003,360
│
│ ┌───────────────────────────────────────────────────────────┐
│ │ Estimated disks required ───────────────────────────┐
│ │ 360K (low-density)  5.25"      6                    │
│ │ 1.2M (high-density) 5.25"      2                    │
│ │ 720K (low-density)  3.50"      3                    │
│ │ 1.44M (high-density) 3.50"      2                    │
│ │ 2.88M (ultra-density) 3.50"      1                    │
│ └───────────────────────────────────────────────────────────┘
│
│ Backup Drive: A
│
│ < Backup > < Cancel >

```

7. Type the letter of the floppy drive to which you want to backup.
8. Press **Enter**.

9. Insert a formatted diskette into that drive.



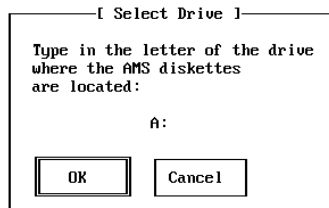
If the diskette is not blank, press **Alt + E to erase the disk, **Alt** + N to insert another diskette, or **Alt** + C to cancel the backup process. The selection you make for the first non-blank diskette will apply to all diskettes.**

10. Press **Enter**. The file(s) are backed up. If more diskettes are needed, insert them when directed by the computer.
11. When the backup is complete, press **Enter** to return to the AMS Rating Menu. Be sure to label the backup diskette(s).

Restoring Files

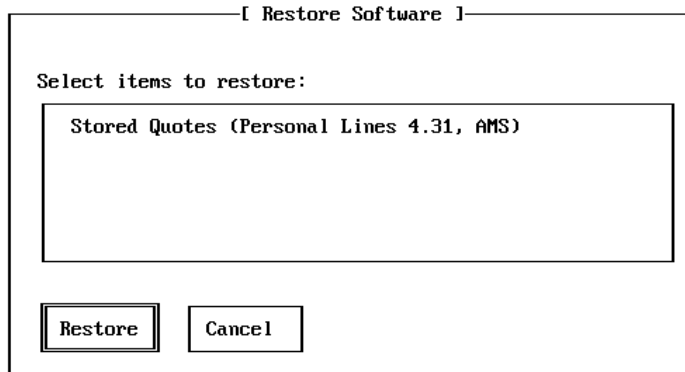
If you need to restore files you have backed up,

1. From the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **R** to select the **Restore** option. The Select Drive Dialog Box is displayed.



3. Insert the first diskette of the backup into the floppy drive from which you want to restore.
4. If the Select Drive Dialog Box already displays the drive letter for the drive from which you are restoring, skip to step 5. Otherwise, type the letter of the correct drive.

5. Press **Enter**. The Restore Software Dialog Box is displayed.



6. Press **↓** and **↑** to move through the list of topics, pressing **Spacebar** to mark each item you want to restore.
7. Press **Enter**. The restore begins.
8. Insert the remaining diskettes (if there are any) in order as prompted by the computer.
9. When the restore is complete, press **Enter** to return to the AMS Rating Menu.

Checking your Disk Statistics

Check Disk does not work on network drives.

To check how much space and memory are used and available on your hard drives,

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **O** to select the **DOS** option. The DOS Sub-Menu appears.
3. Type **C** to select the **Check Disk** option. The Additional Parameters Dialog Box is displayed.
4. Type the letter of the drive you want to check.
5. Press **Enter**. Your disk statistics are displayed on the screen.
6. Press **Enter** to return to the Utilities Menu.

Checking your DOS Version

To check the DOS version installed on your computer,

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **O** to select the **DOS** option. The DOS Sub-Menu appears.
3. Type **V** to select the **Version** option. Your version number is displayed on the screen.
4. Press to return to the Utilities Menu.

Checking your Memory

If you have MS DOS 5.0 or greater, you can check your available memory:

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **O** to select the **DOS** option. The DOS Sub-Menu appears.
3. Type **M** to select the **Memory Check** option. The memory statistics are displayed on the screen.
4. Press to return to the Utilities Menu.

Exiting to DOS

To exit to DOS without closing the AMS Rating Menu,

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **O** to select the **DOS** option. The DOS Sub-Menu appears.
3. Type **O** to select the **OS Shell** option. You go to the DOS prompt.

4. When you are done at the DOS prompt and ready to return to the AMS Rating Menu,

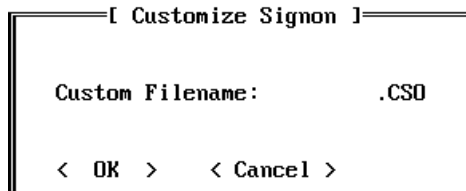
4-1. Type **EXIT**

4-2. Press .

Customizing Your Sign-On Command

Customize Signon is useful on multi-user systems, where you have to select a station and user each time you start the AMS Rating Menu. The Customize Signon option allows you to save your station and user sign-on selections so that you get to the AMS Rating Menu more quickly. To use this option,

1. At the AMS Rating Menu, type **U** to select and open the Utilities Menu.
2. Type **C** to select the **Customize Signon** option. The Customize Signon Dialog Box appears.



```
[ Customize Signon ]
Custom Filename:      .CS0
< OK >      < Cancel >
```

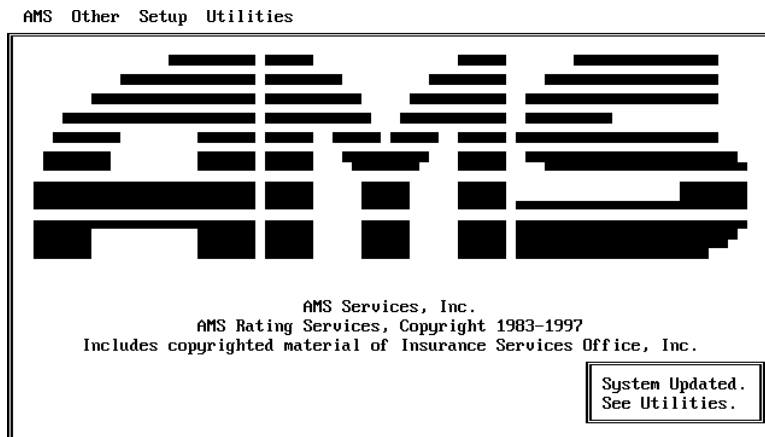
3. Type the file name you want to use when signing on to the AMS Rating Menu.
4. Press .

Now, when you start the AMS Rating Menu, type **AMSRATE** plus your sign-on file name. See the *Getting Started* booklet for complete start-up instructions.

Viewing Update Information

A View Updates option on the Utilities Menu allows you to see a description of an update either before or after an update diskette has been installed.

After you install an update diskette, a box displays in the lower right corner of your menu screen to remind you to view the update descriptions.

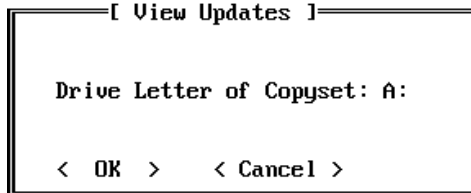


F1=Help F3=Exit |AMS Family of Products

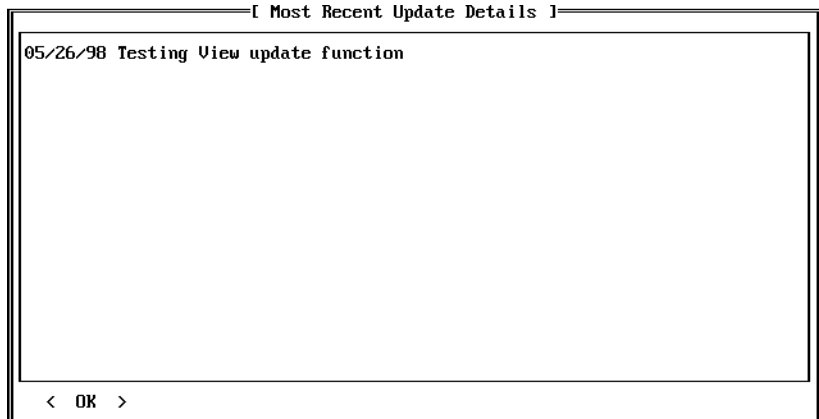
Viewing an Update Description Before Installing a Diskette

1. On the AMS Rating Menu, type **U** to open the Utilities Menu.
2. Type **V** to open the View Updates menu item.

3. Type **B** to select View Before Install. A box displays asking for the drive letter where the copyset is located.



4. Put your update diskette in a floppy drive and type the drive letter in the box.
5. Press . A description of the update is displayed.

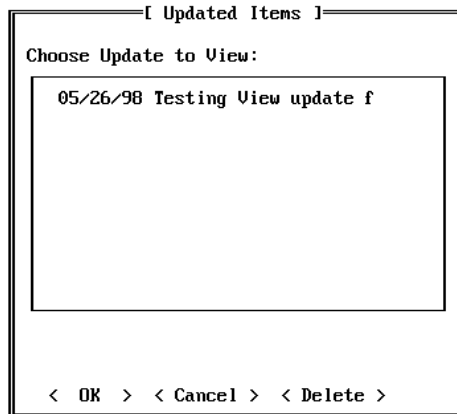


6. When you are done viewing the description, press to return to the AMS Rating Menu.

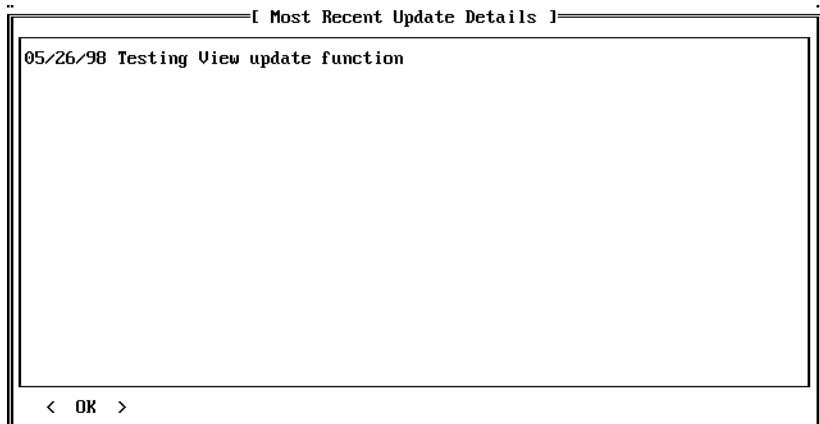
Viewing an Update Description After Installing a Diskette

1. On the AMS Rating Menu, type **U** to open the Utilities Menu.
2. Type **V** to open the View Updates menu item.

3. Type **I** to select View Installed Update. A list of updates is displayed.



4. Press **↓** or **↑** to highlight the update you want to view.
5. Type **Alt** + **O** to select the OK button. A description of the update is displayed.



6. When you are done viewing the description, press **Enter** to return to the list of updates.
7. You can now view another update, press **Alt** + **D** to delete the description of the highlighted update from your hard drive, or press **Esc** to return to the AMS Rating Menu.

Technical Support Utilities

The Technical Support Sub-Menu located on the Utilities Menu has five options:

- Hardware Information
- Text File Editor
- File Manager
- Printer Codes
- DOS with Btrieve

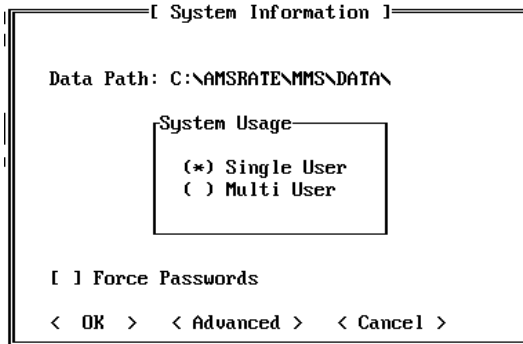
These options help the Technical Support Representatives when you call in. They will instruct you in using the options if you need to use them. **DO NOT USE THESE OPTIONS ON YOUR OWN!**

Mapping Workstation Drives

An Advanced option is available through the System Information Dialog Box. On peer-to-peer systems and other environments, this option lets you map up to six host drives and their alternate workstation drives.

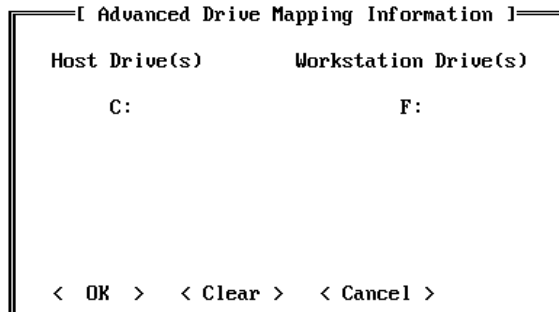
Once you map drives, please note that all copysets must be installed from the Station 01 Host, and only the host can change the system information and drive mappings.

The System Information Dialog Box comes up automatically during system donfiguration, or you can bring it up by choosing System from the Setup Menu on the AMS Rating Menu.



To enter mapping information,

1. On the System Information Dialog Box, type **[Alt] + A** to choose the **ADVANCED** pushbutton. A verification box is displayed.
2. Type **Y** to choose the **YES** pushbutton. The **Advanced Drive Mapping Information Box** is displayed.



3. Type the host drive letters and corresponding workstation drive letters, pressing **[Enter]** to move from field to field.
4. When you are done, press **[Alt] + O** to return to the System Information Box.

Starting Non-AMS Programs from the AMS Rating Menu

The Other Menu allows you to access any program stored on your computer from the AMS Rating Menu. This section tells you how to set up the Other Menu and use it to access non-AMS programs.

Setting Up the Other Menu

This section tells you how to

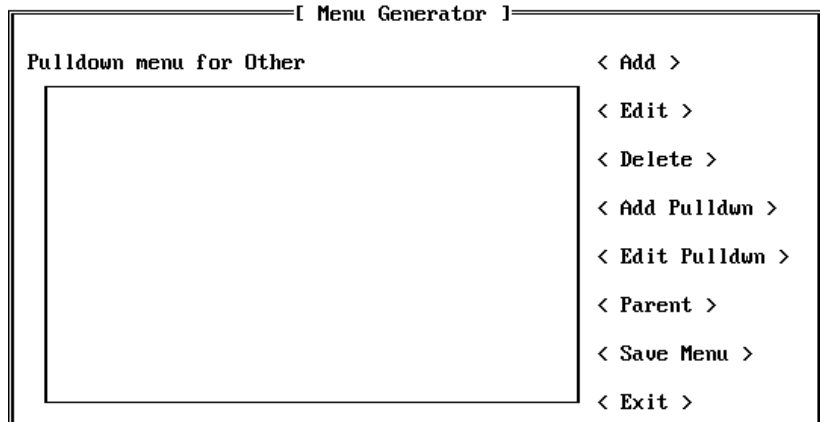
- Access the Menu Generator Dialog Box
- Add items to the Other Menu
- Use the Directory Browser Dialog Box
- Edit Other Menu options
- Delete Other Menu options
- Add pulldown menus
- Edit pulldown menus
- Save the changes to the menu
- Exit the Menu Generator Dialog Box

Accessing the Menu Generator Dialog Box

The Menu Generator Dialog Box allows you to add and edit options on the Other Menu. To access this box,

1. At the AMS Rating Menu, type **S** to select and open the Setup Menu.

2. Type **O** to select the **Other Menu** option. The Menu Generator Dialog Box is displayed.



From this box, you can add or edit individual options on the Other Menu, delete options, and add or edit pulldown menus.

You can set up a program so it is listed directly on the Other Menu or so it is listed as a sub-menu to an option on the Other Menu. If you are using a sub-menu, the *parent* is the option on the Other Menu itself through which you open the sub-menu. For example, the **DOS** option on the Utilities Menu has a pulldown menu attached to it. **DOS** is the parent option.

If you want to list an item on a sub-menu, use the Add Pulldown or Edit Pulldown options.

Adding an Option to the Other Menu

The only required information when you add an option is

- The name of the file to execute
- The drive/directory where the file is located
- The name you want on the Other Menu

However, you can also include other information, such as a hot key and/or a quick key for the menu option.

You can use the “quick” screen or the “advanced” screen to add options. The quick screen lists only required fields, while the advanced screen lists all fields. The table below lists the differences. For definitions of these options, check the Help Screen.

Field	Quick Screen	Advanced Screen
Menu Type	PULLDOWN W/ NO PULLDOWN only	PULLDOWN W/ NO PULLDOWN or PULLDOWN W/ PULLDOWN
Hot Key	None	Any letter in menu name
Status Line	None	Whatever you enter
Menu Order	Order item is added	Order you specify
Current Status	Always ACTIVE	ACTIVE, INACTIVE, or blank
Quick Key	None	Selected key
Parameters	None	Whatever you enter
Var. Param	None	Whatever you enter
Pre Function	CLS & BANNER	CLS ONLY, BANNER ONLY, CLS & BANNER, blank
Post Function	Pause	Pause or blank

Follow the instructions below to add an option to the **Other Menu** using either the quick or the advanced screen:

1. From the Menu Generator Dialog Box, type **Alt** and **A** at the same time to select the Add pushbutton. (You can also press **Tab** to highlight this pushbutton and then **Enter** to select it.) The Directory Browser Dialog Box is displayed.
2. Select the executable file for the program you are adding to the menu.



If you aren't sure how to use the Directory Browser Dialog Box to select a file, see the "Using the Directory Browser" section on page 156.

3. When you have selected the appropriate file, press **Enter**. The Menu Item Information Dialog Box (Quick) appears, with the Command Line field already filled in with the drive, directory, and file information.



If you need to return to the Directory Browser Dialog Box to change any of the Command Line information, select the Browser pushbutton.

```
[ Menu Item Information ]
Menu Name:  ~Menu name goes here
Working Dir:
Command Line: C:\CAPTURE\SAVE.EXE
< Update > < Cancel > < Browser... > < Advanced... >
```

4. In the Menu Name field, press **Ctrl** and **←Bksp** at the same time to clear the field.
5. Type the name for the program as you want it listed on the Other Menu.
6. Press **Tab** to move to the Working Dir field.
7. Type the drive and directory where this program stores data, creates work files, etc. For example, if the program is a word processing program, where do you want to store the documents?

8. If you DO NOT want to add any advanced options, press **Enter**. You return to the Menu Generator Dialog Box, and the new program name is listed in the Pulldown menu for Other list.

If you want to add any advanced options, continue to step 9.

9. Press **Alt** and **A** at the same time to select the Advanced pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it.) The Menu Item Information Dialog Box (Advanced) is displayed. The following fields will already be filled in with data from the Menu Item Information Dialog Box (Quick):

- Menu Name
- Program Name
- Extension
- Directory
- Working Dir

You can change any of these fields. In addition, you can access the Directory Browser Dialog Box by selecting the Browser pushbutton.

```

[ Menu Item Information ]
Menu ID: 6140
Menu Type:      PULLDOWN w/ NO PULLDOWN
Menu Name:      Capture
Hot key:
Status Line:
Menu Order:      1
Current Status: ACTIVE
Quick Key:
Quick Key Desc:
Quick Key Disp:

[ EXEC INFO ]
Program Name:   SAVE
Extension:      EXE
Parameters:
Var. Param:
Directory:      C:\CAPTURE
Working Dir:
Pre Function:   CLS ONLY      Post Function: PAUSE
[X] Unload Btrieve

< Update > < Browser... > < Cancel >

```

10. Complete the fields you want to complete, pressing **[Tab]** to move from field to field. ALL OF THE FIELDS ARE OPTIONAL, except those already filled in from the quick screen. For example, all you might want to do is add a hot key. Once you have filled out the Hot Key field, you can skip to step 11.

Use the following table to help you determine what to enter in each field. If you need further definitions of any items, check the Help Screens.

Field...	Entry...
Menu Type	Press [Spacebar] to select an option: <ul style="list-style-type: none"> • PULLDOWN W/ NO PULLDOWN if the option will <i>not</i> have a second pulldown menu attached to it. • PULLDOWN W/ PULLDOWN if the option will have a second pulldown menu (a sub-menu) attached to it.
Menu Name	Type the program name as you want it to be listed on the Other Menu .
Hot Key	Type the hot key for the menu item. This must be a letter from the menu name.
Status Line	Type the text to appear on the prompt line when this menu item is highlighted.
Menu Order	Type the order in which this item should be listed on the Other Menu .
Current Status	Press [Spacebar] to select an option: <ul style="list-style-type: none"> • ACTIVE if you want to be able to select the option from the Other Menu. • INACTIVE if you want the option listed on the Other Menu but you do not want to select it.

Field	Entry
Quick Key	Press <input type="text" value="Spacebar"/> to select the quick key to be assigned to this menu item. (The quick key allows you to select the option by pressing the key instead of opening the Other Menu .)
Quick Key Desc	If you selected a quick key and want it to be listed on the prompt line, type the prompt line description.
Quick Key Disp	If you entered a Quick Key Desc, press <input type="text" value="Spacebar"/> to select an option: <ul style="list-style-type: none">• DISPLAY ON STATUS LINE if you want the quick key and description listed on the status line.• <none> (blank) if you do not want the quick key and description listed on the status line.
Program Name	Type the name of the file to be executed when you select this menu item (no extension).
Extension	Type the file extension for the file listed in the Program Name field.
Parameters	Type parameters for the file being executed.
Var. Param	Type any user prompts for parameters to be entered when the program starts up.
Directory	Type the drive and directory where the file from the Program Name field is located.
Working Dir	Type the drive and directory where this program stores data, creates work files, etc.

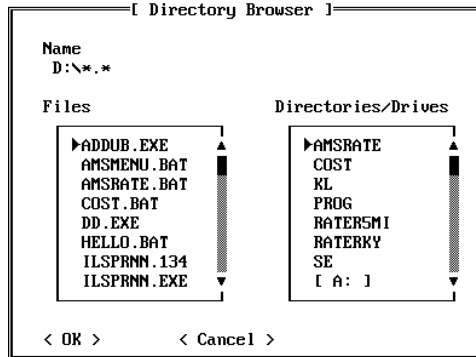
Field	Entry
Pre Function	Press <input type="text" value="Spacebar"/> to select an option: <ul style="list-style-type: none">• CLS ONLY if you just want the screen cleared before the program begins.• BANNER ONLY if you just want the “Loading Program” message displayed before the program begins.• CLS & BANNER if you want the screen cleared and the message displayed before the program begins.• <none> (blank) if you want the program to begin without clearing the screen or displaying the message.
Post Function	Press <input type="text" value="Spacebar"/> to select an option: <ul style="list-style-type: none">• PAUSE if you want the "Press any key..." message when you return to the AMS Rating Menu.• <none> (blank) if you just want to return to the AMS Rating Menu

11. When you have completed the screen, press . You return to the Menu Generator Dialog Box, and the new program name is listed in the Pulldown menu for Other list. You can now add another menu option, edit a menu option, etc.

Using the Directory Browser

When you add an option to the Other Menu, you must tell the AMS Rating Menu what file to open and where that file is located. To help you give this information, the AMS Rating Menu includes a **Directory Browser Dialog Box**. This dialog box displays all the files in a selected drive and directory on your system. For example,

the figure below displays the files in the AMSRATE directory on drive D.



By changing the drive and directory, you can view all the files on your system, and can select the file you want.

In order to select a file, you must first find the drive and directory where the file is located. There are two ways to find the drive and directory: using the Name field or using the Directories/Drives list.

Name Field

1. If necessary, press **Ctrl** and **←Bksp** at the same time to clear the Names field.
2. Type the drive (and directory, if there is one) where you think the file is located. For example, type C:\RATER to list the files in the RATER directory on the C drive. (You can also type the file name if you know it.)
3. Press **Enter**. If you type a drive/directory only, the Files list changes to reflect the files in the drive/directory, and you can select one from the list. If you typed the file name in step 2 as well, you return to the Menu Item Information Dialog Box.

To use the Directories/Drives list,

1. Type **[Alt]** and **D** at the same time to move the highlight to the Directories/Drives list.
2. Use the arrow keys to highlight the option you want. You can
 - Move to another drive -- to look at the files in D:, highlight the [D:] option.
 - Move to a directory/subdirectory in the same drive/ directory -- if the Name field lists D:\MMS and you want to look at the files and directories in the D:\MMS\DATA directory, highlight the DATA option.
 - “Back up” a directory level -- If the Name field lists D:\MMS\DATA and you want to look at the files and directories in D:\MMS, highlight the “. . ” option (always the first option in the list).
3. When the option you want is highlighted, press **[Enter]**. The Name field changes to reflect the selected drive/directory, and the Files list changes to list the files in this drive/directory.
4. Repeat step 2 until you are at the drive/directory you want.

When you are at the correct drive and directory, the Files list will display the file you want. To select the file,

1. Type **[Alt]** and **F** at the same time to move the highlight to the Files list.
2. Use the arrow keys to highlight the file you want to select.
3. Press **[Enter]**. You return to the Menu Item Information Dialog Box.

Editing Menu Items

To edit an option on the Other Menu,

1. On the Menu Generator Dialog Box, use the arrow keys to highlight the menu item you want to edit.

2. Type **Alt** and **E** at the same time to select the Edit pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it.) The Menu Item Information Dialog Box (Quick) appears.
3. Use the table below to determine your next step:

To change the... Then...

Menu Name or Working Dir	<ol style="list-style-type: none"> 1. Press Tab to go to the field you want to change. 2. Make the necessary change.
Command Line	<ol style="list-style-type: none"> 1. Type Alt and B at the same time to select the Browser pushbutton. The Directory Browser Dialog Box appears. 2. Make the necessary change. 3. Press Enter to return to the Menu Item Information Dialog Box (Quick).
Advanced Options	<ol style="list-style-type: none"> 1. Type Alt and A at the same time to select the Advanced pushbutton. The Menu Item Information Dialog Box (Advanced) appears. 2. Press Tab to go to the field you want to change. 3. Make the necessary change.

4. When you have made all your changes, press **Enter**. You return to the Menu Generator Dialog Box.

Deleting Menu Items

To delete an option from the Other Menu,

1. On the Menu Generator Dialog Box, press **↓** and **↑** to highlight the menu item you want to delete.
2. Type **Alt** and **L** at the same time to select the Delete pushbutton (or press **Tab** to highlight this pushbutton and then press **Enter** to select it). A verification box appears.
3. To continue the deletion, press **Enter**.

To cancel the deletion, press **Tab** to select the No pushbutton and then press **Enter**.

You return to the Menu Generator Dialog Box.

Adding Pulldown Menus

If you select the PULLDOWN W/ PULLDOWN option in the Menu Type field on the Menu Item Information Dialog Box (Advanced), you can add a sub-menu to the option. For example, you might want to group three word processing programs into one sub-menu off of the Other Menu. An example of a PULLDOWN W/ PULLDOWN menu is the **DOS** option on the Utilities Menu.

To add a pulldown menu to an option on the Other Menu,

1. On the Menu Generator Dialog Box, press **↓** and **↑** to highlight the menu item to which you want to add the pulldown menu. The item you select must have PULLDOWN W/ PULLDOWN selected in the Menu Type field on the Menu Item Information Dialog Box (Advanced).
2. Type **Alt** and **D** at the same time to select the Add Pulldown pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it). The Menu Item Information Dialog Box (Quick) is displayed.

4. Complete the information for the option, following the instructions for Adding an Option to the Other Menu beginning on page 151.

Editing Pulldown Menus

To edit a pulldown menu for an item on the Other Menu,

1. On the Menu Generator Dialog Box, press **↓** and **↑** to highlight the parent menu item where the sub-menu you want to edit is located.
2. Type **Alt** and **T** at the same time to select the Edit Pulldown pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it). The pulldown menu list changes to list the pulldown menu items attached to the selected option.
3. Use the arrow keys to highlight the pulldown menu item you want to edit.
4. Type **Alt** and **E** at the same time to select the Edit pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it). The Menu Item Information Dialog Box (Quick) is displayed.
5. Follow the instructions in the Editing Menu Items section on page 158 to make the necessary changes.

To return to the listing of parent menu items, select the Parent pushbutton.

Saving Menu Changes

Before you exit the Menu Generator Dialog Box, save the changes you have made to the Other Menu:

1. Type **Alt** and **S** at the same time to select the Save pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it).

The changes are saved.

If you forget to save before you exit, a warning box will give you the chance to save then.

Exiting the Menu Generator Dialog Box

To exit the Menu Generator Dialog Box,

1. Type **Alt** and **X** at the same time to select the Exit pushbutton. (You can also press **Tab** to highlight this pushbutton and then press **Enter** to select it).

If you already saved any changes, you return to the Setup Menu.

If you did not save your changes, the Changes not Saved Dialog Box is displayed. Continue to step 2.

2. If you want to save the changes, press **Enter**. You return to the Setup Menu.

If you do not want to save the changes, press **Tab** to select the NO pushbutton and then press **Enter**. You return to the Setup Menu.

Starting “Other” Programs

All non-AMS programs are listed under the Other Menu. To start one of these programs,

1. From the AMS Rating Menu, type **O** to select and open the Other Menu.
2. Either type the hot key letter of the program you want to open (if there is a hot key), or use the arrow keys to highlight it and then press .

