



Applied Systems

CLIENT SOLUTIONS NEWS

Helping you make the most of your agency management solutions

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Need a plan for upgrading your agency's hardware?

Applied Systems Network Consultation Service is designed to eliminate the guesswork from your hardware upgrade efforts. Our certified systems consultants will visit your agency to review your current network design and provide a detailed report of recommendations based on your agency's needs.

Our consultants will advise on ways to improve the performance of your existing network; recommend when to upgrade; help plan a network design in preparation for a relocation, merger, or acquisition; and assist in designing remote configurations.

McSweeney & Ricci Insurance Agency, Inc., recently underwent a network consultation and, according to Office Manager Susan M. Riggins, it resulted in "the smoothest upgrade ever."

"As a result of the consultation, we as an agency had a good understanding of what the upgrades would be," Riggins said. "The systems consultants and their coordinator were so well-prepared and so professional that we were completely confident with every step of the installation."

McSweeney & Ricci, a TAM user agency since 1999, operates three offices, including headquarters in Braintree, MA. The agency shared with Applied Systems the goals it hoped to achieve as a result of the network consultation. Riggins said the consultation was very thorough and well-executed, and the company elected to implement all of Applied Systems' hardware recommendations.

The agency was so confident about the upgrade that management decided to order the installation around President's Day weekend, traditionally a heavy car-buying, insurance-active, long weekend.

"The consultants prepared everyone in all of our offices so thoroughly, that we were even prepared for minor stumbling blocks during the installation," Riggins said. "And they were very minor. In fact, except for rebooting, our system was never down during the entire installation."

"Our network performance is faster, and we are saving a lot of time purely as a result of upgraded hardware," Riggins said. "And, we've incorporated a lot more security, making our IT department very happy."

For information on how your agency can benefit from an Applied Systems network consultation, contact Client Solutions or csnews@appliedsystems.com.

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Spring fling

As we launch our new look for Client Solutions News, we are honoring all of the product discounts offered as monthly specials in the January, February and March issues of Client Solutions News.

If you missed these offers* the first time, now through April 29 is another chance to save when you:

- Move from desktop TAM or Vision to TAMOnline or VisionOnline and pay **no migration fee** (minimum savings: \$1,000)
- Migrate to AppliedOnline and get web-based training subscriptions at **25% off** (see "Learn TAM via Internet," in this issue)
- Purchase additional user licenses each at **15% off**
- Purchase fax@vantage software at **15% off** (ask about the new features in version 4.0, available now)

Client Solutions, 800.999.5368, or csnews@appliedsystems.com.

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ACT publishes security guidelines for agencies

A new report alerts agency principals and managers to specific technology-related security risks and highlights actions they should take to protect their businesses. "The Independent Agent's Guide to Systems Security: What Every Agency Principal Needs to Know," was compiled by the Agents Council for Technology (ACT) and published by the Independent Insurance Agents & Brokers of America (IIABA).

The report addresses security risks in a technological environment, but it focuses on concepts and solutions important to agency managers. The authors purposely confine very technical information to footnotes and appendices, emphasizing how important it is for agency managers to appreciate that security issues affect an agency's ongoing success, viability, and community perception. Included in the document are a security self-assessment tool and a sample agency security policy.

Applied Systems gratefully acknowledges the efforts of many industry professionals who contributed to producing the report. In particular, we appreciate the work of Brian Bartosh, Top O'Michigan Insurance Agency, who chaired the committee in charge of the report; Angelyn Treutel, Treutel Insurance Agency; Doug Johnston, executive vice president of Interface Services, Applied Systems; and Greg Shiple, manager of Interface Development, Applied Systems.

Click [HERE](#) to view the entire ACT report. For security-related questions about your Applied Systems agency management products, contact a Client Solutions representative or csnews@appliedsystems.com.

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Learn TAM via Internet

Four series of web-based training courses are available for Q2 2005. Remember that all series are available at a 25 percent discount when you migrate to an AppliedOnline agency management system.

Commercial Lines CSR. A 10-course series to train a commercial lines CSR in all areas needed to perform CSR duties in TAM. Choose April 4-8; May 2-6; or June 6-10. Regular price: \$500.

Personal Lines CSR. A 10-course series to train a personal lines CSR in all areas needed to perform CSR duties in TAM.

Choose April 18-22; May 16-20; or June 13-17. Regular price: \$500.

TAM Accounting Series. A six-course series to train an accounting staff member on TAM accounting basics. Choose April 4-8; May 23-27; or June 27-July 1. Regular price: \$300.

Advanced Accounting Series. Covers Balancing Company Payables and Balancing Aged Receivables. Offered two times on May 25. Regular price: \$150.

To inquire about courses or to register, contact Client Solutions at 800.999.5368 or csnews@appliedsystems.com.

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There's gold in that portal

If you could access a gold mine, would you dig in?

As an Applied Systems customer, you have access to a "users-only" area of our website, and it is, indeed, your own veritable gold mine. The customer portal on www.appliedsystems.com leads you to nuggets of information available only to Applied Systems users.

Through the portal, you can:

- quick-link to KnowledgeBase, the ASCnet site, Applied Systems Support, and product updates
- "attend" Applied University, our training center featuring information on free training as well as ICBT, multimedia training for Vision, and WBT
- get up-to-date information on our Interface Services, including batch and real-time, as well as Transformation Station

- link to Client Solutions, including this newsletter and back issues that address products and services to help our customers achieve productivity gains and profit increases
- access all additional information available on the Applied Systems website

It's easy to access your portal:

- Visit www.appliedsystems.com
- On the Home page, click on ASI Web Portal Users Login, located at lower left.
- Enter your user name—first initial & last name; and your password; click 'Submit'
- Now at your Portal Home, you can access all the info listed above—and more!

Add www.appliedsystems.com to your Favorites list so the Web Portal is easily accessible. Visit often: It's the timeliest, easiest way to mine the information that provides the power to make you more profitable. For assistance, contact Client Solutions or csnews@appliedsystems.com.

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Upgrade enhances faxing service

"Our company relies on fax@vantage for our faxing service. fax@vantage 4.0.0 is one of the best fax upgrades to date. It was simple to upgrade, and it has been very stable for our company."

--Larry Vargo, System Administrator
Arthur J. Gallagher & Co. of MN, Inc.

After a very successful Beta phase, fax@vantage 4.0.0 is in general release and available [HERE](#) on the Applied Systems website.

The fax@vantage upgrade includes a number of enhancements, including compatibility with Brooktrout TruFax and TR114 Intelligent Fax Boards; compatibility with direct inward dialing in conjunction with the TR114 board; compatibility with Windows 2003 server operating system; improved security enhancements on received faxes; and added thumbnail fax image to the final status report.

Eric Byers, AVP Product Development for Transportation Specialists Insurance Agency, Inc., said of his agency's experience with fax@vantage 4.0.0: "We utilize eight phone lines in our fax server, and I would encourage anyone with fax@vantage to use the Brooktrout boards. In conjunction with the new release, they have contributed greatly to a more stable operating environment."

For information on fax@vantage 4.0.0, contact a Client Solutions representative or email us at: csnews@appliedsystems.com.

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Webcast to feature benefits of TAM/Aptus integration

Plan now to participate in "Customer Advantages to Integration: BenefitPoint Aptus and Applied Systems TAM," a webcast on the integrated solution that allows agencies to transfer customer account, policy, and commission data between the two systems in real time, eliminating the need for duplicate entry of data.

Through web services technology, Applied Systems and BenefitPoint have integrated their applications to provide agencies with a complete overview of their insurance business within TAM, expanding data management and reporting capabilities.

The 45-minute interactive presentation by product experts will begin at 11 a.m. Pacific Time on Wednesday, April 20. To participate, click [HERE](#) or, contact a Client Solutions representative or email us at: csnews@appliedsystems.com

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*Offers cannot be used in conjunction with any other promotions or discounts from Applied Systems. Orders placed with Applied Systems prior to this promotion are not eligible for this special. These offers do not apply to expenses billed in addition to certain services rendered, any type of maintenance fees or to hardware sold outside of the 50 United States.

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