

# TransactNOW® – Agency Guide to eDocs & Messages (Activity Notes) Setup

## Contents

About this Manual .....	2
Contact Us .....	2
Standard Disclaimer.....	2
Copyright.....	2
Introduction .....	3
eDocs & Messages (Activity Notes) Download in TransactNOW.....	3
What is the TransactNOW eDocs & Messages (Activity Notes) Capability? .....	3
Benefits to Agents .....	5
eDocs & Messages (Activity Notes) FAQs .....	5
Overview of TransactNOW eDocs & Messages .....	7
What is TransactNOW?.....	7
TransactNOW eDocs & Messages (Activities and Notes) Software Requirements.....	7
TransactNOW eDocs & Messages Configuration .....	9
AMS360 (not using Vertafore Single Sign-On – VSSO).....	9
AMS360 (with VSSO) or Vertafore Agency Platform .....	10
Local or Standalone Version of TransactNOW .....	12
Network Version of TransactNOW Instructions .....	13
TransactNOW eDocs & Messages Workflow .....	14
Sagitta, AFW, Prime, and InStar Users.....	14
AMS360 users (not using Vertafore Single Sign-On) .....	14
AMS360 users (with VSSO) or Vertafore Agency Platform.....	15
Vertafore Single Sign-On (VSSO) View .....	16
TransactNOW Document Attachment Capability as part of eDocs & Messages.....	17
TransactNOW Document Attachment Workflow .....	17

## About this Manual

This manual provides information about installing and configuring the TransactNOW eDocs & Messages (Activity Notes) capability. The information in this manual is intended for system and network administrators responsible for installing and maintaining the TransactNOW software on your agency's workstations. This manual assumes you are familiar with TransactNOW, the Windows operating system and desktop computers.

## Contact Us

Vertafore is dedicated to helping your profitability through increased productivity and tighter connectivity with your carriers. If you have questions or comments, we look forward to hearing from you. To contact Vertafore Support, visit My Vertafore at [support.vertafore.com](http://support.vertafore.com) or call Customer Care at 800.444.4813.

To find the latest list of our current TransactNOW carrier partners, go to [www.vertafore.com](http://www.vertafore.com), click **Resources, Connectivity Partner Lists**, then select the **TransactNOW Carrier Partner List**, or click [here](#).

## Standard Disclaimer

The staff of Vertafore, Inc. has taken due care in preparing these instructions; however, nothing herein modifies or alters in any way the standard terms and conditions by which this software package was acquired, nor increases in any way Vertafore, Inc.'s liability to the customer. In no way shall Vertafore, Inc. be liable for incidental or consequential damages in connection with or arising from the use of the software package, the accompanying guide, or any related materials.

## Copyright

©2015 Vertafore. All rights reserved.

All other brand and product names are trademarks or registered trademarks of their respective owners.

# Introduction

## eDocs & Messages (Activity Notes) Download in TransactNOW

eDocs & Messages (Activity Notes) is an ACORD standard method of download where carriers can send their agents communications in a more secure way than email. Vertafore offers eDocs & Messages download through its TransactNOW product. Currently, eDocs & Messages download does not automatically integrate to clients or policies in Vertafore management systems. However, it is still a very effective and secure means of receiving information and documents than standard email.

## What is the TransactNOW eDocs & Messages (Activity Notes) Capability?

TransactNOW's eDocs & Messages functionality provides a secure gateway for participating carriers to send agency partners information that is typically sent via fax or email. There are various types of notes a carrier may wish to send – examples are Cancellation Notices, Claims Status Notifications, Billing information, etc. In addition to policy related notifications, carriers can send an eDocs & Messages as a general notice, such as are traditionally posted on a carrier's website – e.g., underwriting limitations due to impending weather.

Some carriers also have the ability to send attachments in an eDocs & Messages.

For a video demonstration on eDocs & Messages (Activity Notes) usage, see [VID146](#) in [My Vertafore](#). We also provide How-To videos for setting up eDocs & Messages for specific versions outlined in this document, except for the network version. Please click [here](#) to visit the TransactNOW video channel in My Vertafore.

### eDocs & Messages (Activity Notes) Download can notify:

- An agent that the carrier is interested in quoting on an appetite submissions.
- The results of a submitted quote request: interested, interested but need more information (and what that information is), not interested – these messages could also include attachments.
- Agency Partners that a market has been reserved.
- An agent that the status of a quote submission: declined, interested in quoting, interested but need more information (and what that information is) – these are also text messages and could include attachments.

### Also, eDocs & Messages Download can be used to send:

- Policy DEC pages which agents typically download from carrier websites.
- A required document to be completed, forms that need signatures, worksheets that need to be filled out and returned, etc.
- A list of expiring policies / cancellation notifications.
- An updated copy of Policy Document(s).
- Final notices (e.g. cancellation for nonpayment).
- Receipt of payment (for policy pending cancellation, reinstatements, etc).
- Communication of expiring passwords, new user credentials, or deleted users.



- Warnings alerting agencies to a moratorium on writing new business due to conditions, e.g. new homeowners policies directly in the path of an oncoming hurricane.
- A request for more information from agent while policy is being underwritten.
- Marketing / newsletter / “top agent selected!” notifications to agency.
- Insurer confirmation of policy changes from direct client requests to the insurer.
- Pending or completed audit notices.
- Various claim activities.
- Carrier policy download setup packets that an agency would need to set up the carrier for policy download in the agency’s management system.
- Notices of new coverage offerings or updates to company unique coverage codes that will be sent in policy download.

TransactNOW eDocs & Messages supports the following list of Activity Types:

- Notice of Completed Audit
- Notice of Pending Audit (voluntary or on-premises)
- Notice of final cancellation
- Overdue Payment List (Cancellation Notice Not Yet Issued)
- List of payments on cancelled policies
- List of payments on reinstated policies
- Pending Cancellation for Non-Pay
- Notice of Premium Finance (comes from premium finance company)
- Urgent Bulletins (e.g. disaster conditions or binding restrictions)
- Claim activity - existing claim
- New Claim (FNOL/FROI)
- Claims Payment- existing claim
- Communication from underwriter - Immediate response. Requires immediate response (e.g., New business or endorsement question in order to issue)
- Communication from underwriter - No response. No response expected from agency client specific (e.g., Broker of Record change or Advanced notification of non-renewal)
- Communications with underwriter - Response not urgent (e.g., Request for policy information, Pre-renewal updates)
- Communication with underwriter - Submission Updates - Confirmation submission received
- Electronic Memo - the default to use when there is no other eDocs & Messages Type that is complimentary/applicable/appropriate for a given Business Purpose Type Code.
- Direct Notice of a Mid-Term Cancellation
- Direct Notice of Non-Renewal
- Password Expiration - This code is used with eDocs & Messages response transaction to enable carriers to notify agencies when their password is due to expire.
- Policy Changes - Insurer confirmation of agent requests
- Policy Changes - Insurer confirmation of direct client requests to Insurer
- Policy Transaction - Used to communicate a policy documents is being attached.

**Note** Not all transaction types above are supported by each carrier that can send eDocs & Messages (Activity Notes). It is a best practice to confirm with your carrier which transactions you can expect to receive. The eDocs & Messages carrier certification document on [My Vertafore](#) will show what types the carrier is certified to send.

## Benefits to Agents

- File attachments and notices sent by your carriers reduces the time you spend having to go out to the carrier sites and download them to your agency. This saves your agency time and money!
- Paperless! For agencies who have gone paperless, this is a big improvement. No more paper generated in your office for policy documents. You can receive the policy file attachments, save them to your clients in your database, and even forward them to your insureds. Most carriers let you choose which copy of the policy you want to receive. If you choose the insured copy, you'll have it right there to forward to them. No more scanning and emailing or printing and mailing.
- Not all policies in your agency management system receive policy download from your carriers. With eDocs & Messages download, your agency will receive renewal term policy documents and endorsements when they are generated at the company. You can then go into your agency management system and enter the information to update the policy, create the renewal term, and invoice the policy.
- For renewals, this will reduce the amount of policies that end up on your Expiration Reports for you follow up. This is a great way to stay on top of the policies in your management system when policy download is not available.
- eDocs & Messages download also gives your agency a check and balance on the policies. With the Suspense items in your system, your CSRs can check what the suspense item is and compare it against the policy documents in eDocs & Messages to confirm they have the right information.
- Improved Workflows! Getting this information directly from your carriers when it happens in their systems will save you time and make your agency workflows more efficient.

## eDocs & Messages (Activity Notes) FAQs

- 1. Which Vertafore products is this capability available for?**
  - a. The Vertafore applications that offer this capability are: Sagitta, AMS360 and AMS360 with VSSO and Vertafore Agency Platform, AFW, InStar, and Prime.
- 2. I don't know my IVANS Y Account information – what do I do?**
  - a. In order for the TransactNOW eDocs & Messages Capability (with or without document attachments) to work, TransactNOW must be personalized with your agency or location's IVANS information (Y ID, Y Account and password). If you do not know this, please contact IVANS at [tmsupport@ivansinsurance.com](mailto:tmsupport@ivansinsurance.com) or call 1.800.548.2675. IVANS also offers a real-time chat support option. To access this, please visit [www.ivans.com](http://www.ivans.com).
- 3. Do eDocs & Messages, or the Attachments sent via TransactNOW, automatically update into my agency management system?**
  - a. No, currently there is no automatic update into the agency management system of the information sent to you via TransactNOW eDocs & Messages capability (with or without document attachments). However there are many ways to manage this information within the product. You can forward, print, or save the information to a file. Then, use

your local document management workflow to attach this into your agency management system. The value here is that you do not have to login into your carriers' systems to download documents. They are sent to you when the carrier has made a change.

**4. Are the eDocs & Messages, or the Attachments sent via TransactNOW, recorded in my agency management system's download report?**

- a. No, currently neither the eDocs & Messages nor the Attachments sent, are tracked or recorded as part of the agency management system's download report. That said, neither is going out to your carrier sites to retrieve this information or documents, or the emails the carriers send recorded in the download reports.
- b. However, the notes or information sent in eDocs & Messages can be copied and pasted into your agency management system where it is most useful to your agency.

**5. I am on the network version of TransactNOW and I do not have the "IVANS Single Policy Resend" option as an available carrier. What can I do?**

- a. The carrier partner list for your network version of TransactNOW must be updated. To do this, please follow these instructions:
  - i. Log on to TransactNOW Network Managed Administration Server (e.g., where the database of user IDs and passwords are stored).
  - ii. Open Internet Explorer and go to <http://ams.transactnow.com/carrierlist.asp>
  - iii. From the **File** menu, click **Save As**.
  - iv. Navigate to the TNPM/Data directory on your server.
  - v. In the FILE NAME field, replace CarrierList.asp with **CarrierList.xml**
  - vi. Click **Save**.
  - vii. Answer **YES** to replace the existing file.
- viii. At this point, the list of available carriers has been updated, but you may not be able to see it yet if you go back into the TransactNOW Network Managed Server. In order to see it, you must reset IIS. It's very easy to do:
  1. Go to a dos prompt on the server (click on Start, then Run, then type in cmd to get to a dos prompt)
  2. At the dos prompt, type **iisreset** and press the **Enter** key.
  3. At the dos prompt, type **exit** and press the **Enter** key to close the dos window.
  4. Log back into the TransactNOW network server and the IVANS Single Policy Resend option should now display in the carrier list.

# Overview of TransactNOW eDocs & Messages

This section provides an overview of the functionality of TransactNOW and TransactNOW eDocs & Messages (Activity Notes) capability. Vertafore recommends you review this section to become familiar with the related concepts and terminology.

## What is TransactNOW?

TransactNOW is a software solution that enables real-time communication between your agency management system and your carrier's websites. Using this tool, you can access real-time information about policies, claims, and billing as well as submit endorsements, quote new business and remarket existing business, with no duplicate data entry. TransactNOW has also been enhanced to receive eDocs & Messages and Claims transactions from participating carriers. The features available depend on your agency management system and the options offered by your carriers.

The TransactNOW software is a complement to your agency management system and is available at no additional cost. TransactNOW works with the following systems:

- AMS360® (with or without Vertafore® Single Sign-On VSSO) and Vertafore Agency Platform™
- AMS for Windows® (AFW)
- Sagitta®
- Prime®
- InStar®

## TransactNOW eDocs & Messages (Activities and Notes) Software Requirements

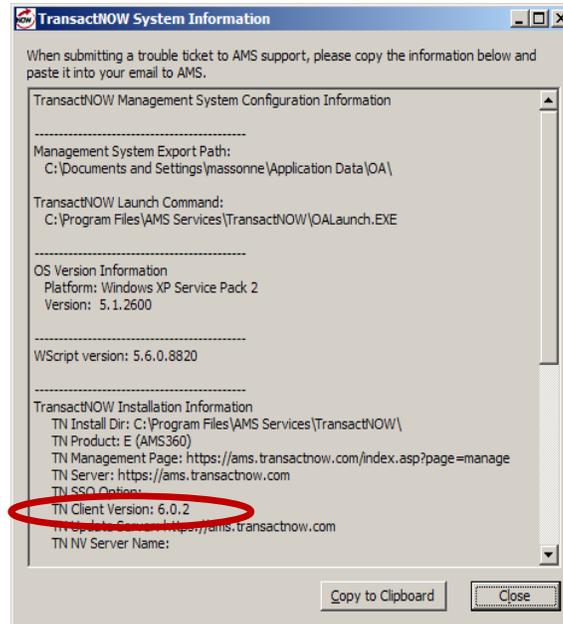
This section describes system requirements and the steps required to install the TransactNOW client software.

### Hardware Requirements

TransactNOW eDocs & Messages does not have any product specific hardware requirements; if your hardware meets the requirements for your agency management system and TransactNOW, it meets the requirements for the TransactNOW eDocs & Messages.

## Software Requirements

The TransactNOW Client (6.0 or later) is a prerequisite for TransactNOW eDocs & Messages functionality. To find out which version of the TransactNOW client you are running, click on Start, Programs, TransactNOW, and select the TransactNOW Configuration and Diagnostic Information link. The following dialog box will display. For more information on TransactNOW, Installation Guides and to download the TransactNOW software, please see [DWN17](#) in [My Vertafore](#), or call Customer Care at 800.444.4813.



**IMPORTANT** You must know your IVANS Y account information (Y User ID, Y Account, and password) before you proceed.

# TransactNOW eDocs & Messages Configuration

This section provides an overview of how to configure TransactNOW to display eDocs & Messages.

## AMS360 (not using Vertafore Single Sign-On – VSSO)

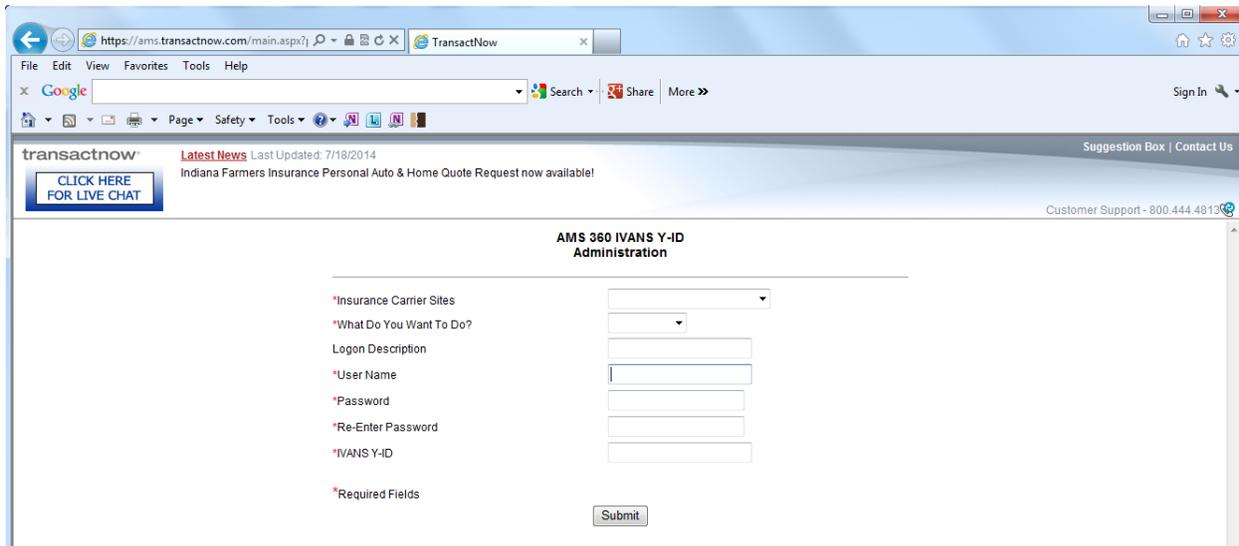
The design of AMS360 and TransactNOW is such that the database of carrier credentials is embedded within AMS360. For an AMS360 agent to be able to receive eDocs & Messages, they must first determine who they would like to designate to be able to view and/or distribute the eDocs & Messages data. Please note that this can be done on multiple desktops.

To enable eDocs & Messages on the AMS360 desktop, the user must click on this link:

<https://ams.transactnow.com/main.aspx?page=anaid>

This will bring up the screen below, into which the agent must enter their IVANS credentials. To start personalization, complete these steps:

1. From the **Insurance Carriers Sites** drop-down list, select **IVANS Activity and Notes**.
1. In the **What do you want to do** field, select **Add Login**.
2. In the **Username** field, enter your IVANS 7-character (length may vary) User ID in all lowercase.
3. In the **Password** and **Re-enter Password** fields, enter the IVANS password your agency uses to pick up download files.
4. In the **IVANS Y-ID** field, enter your IVANS 4-character (length may vary) Y-account in all lower case.
5. Click **Submit** and close the page.
6. When you next go out to TransactNOW, you will see an **Activities** link in the upper-right of the page.

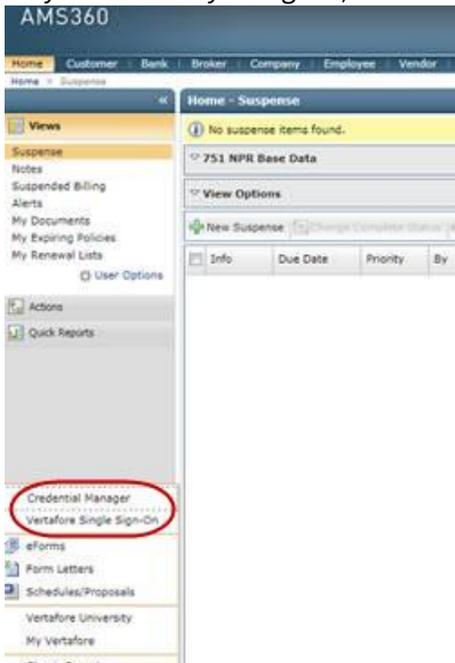


## AMS360 (with VSSO) or Vertafore Agency Platform

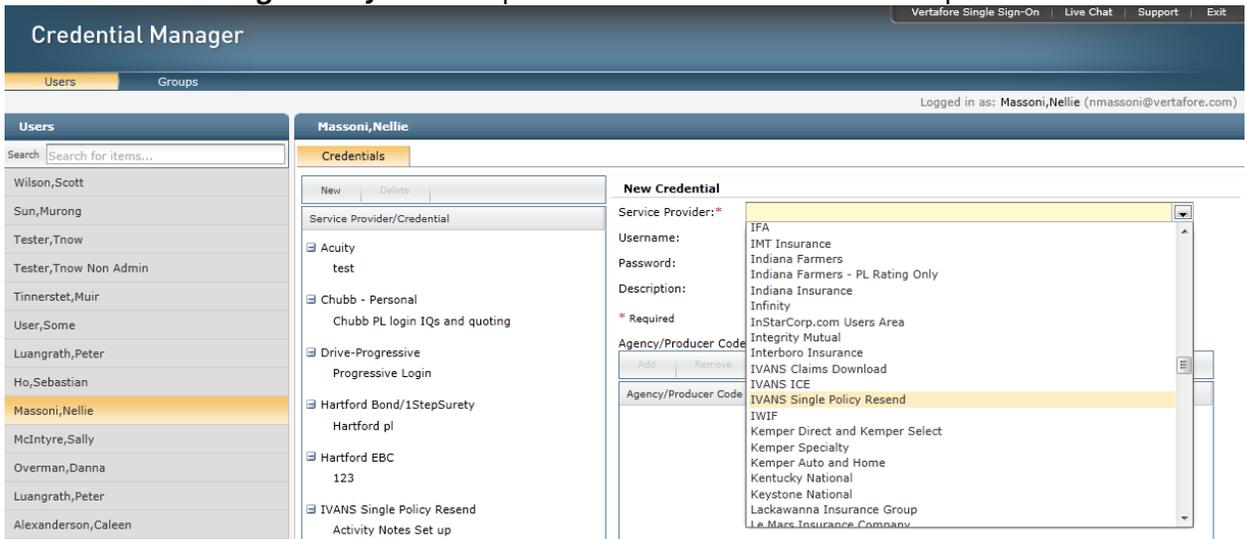
The design of the Vertafore Single Sign-On (VSSO) version of AMS360 allows for centralized carrier credential management via the Vertafore Credential Manager. This is where a VSSO enabled AMS360 agency would set up access to receive eDocs & Messages from participating carriers. Users who have been given permission to manage carrier credentials can access the Credential Manager page.

### To Add eDocs & Messages (Activity Note) Credentials:

1. From the **Toolbox** menu, click **Credential Manager**. The Credential Manager page appears. (It may be necessary to log on.)



2. Select the **IVANS Single Policy Resend** option from the **Service Provider** drop-down list.



3. Enter in your IVANS Y-Account information:
  - a. In the **Username** field, enter in your IVANS 7-character (length may vary) User ID in all lowercase.
  - b. In the **Password** field, enter in the password your agency uses to pick up your download files.
  - c. Enter a **Description** of this credential – in the example below, we used Activity Notes Set up.
  - d. Under **Agency/Producer Codes**, click **Add**. Enter in your IVANS 4 character (length may vary) Y-account and provide a **Description**.
  - e. Click **Save**. You can access eDocs & Messages (Activity Notes) from your AMS360 Dashboard page. If you use Vertafore Agency Platform, you will not have access to the AMS360 Dashboard page. You will access it from the Connectivity menu in Agency Platform. Please see the section for [AMS360 user with Vertafore Single Sign On](#) later in this document.

**Massoni, Nellie**

**Credentials**

New	Delete					
Service Provider/Credential						
<ul style="list-style-type: none"> <li><input type="checkbox"/> Acuity test</li> <li><input type="checkbox"/> Chubb - Personal Chubb PL login IQs and quoting</li> <li><input type="checkbox"/> Drive-Progressive Progressive Login</li> <li><input type="checkbox"/> Hartford Bond/1StepSurety Hartford pl</li> <li><input type="checkbox"/> Hartford EBC 123</li> <li><input checked="" type="checkbox"/> IVANS Single Policy Resend Activity Notes Set up</li> </ul>	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <b>Activity Notes Set up</b> </div> <p>Service Provider: * <input type="text" value="IVANS Single Policy Resend"/></p> <p>Username: * <input type="text" value="My agency's Y account"/></p> <p>Password: * <input type="password" value="*****"/></p> <p>Description: * <input type="text" value="Activity Notes Set up"/></p> <p><small>* Required</small></p> <p>Agency/Producer Codes:</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <span style="float: left; margin-right: 10px;">Add</span> <span style="float: right; margin-left: 10px;">Remove</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Agency/Producer Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Y123</td> <td>my agency's Y account</td> </tr> </tbody> </table>		Agency/Producer Code	Description	Y123	my agency's Y account
Agency/Producer Code	Description					
Y123	my agency's Y account					

## Local or Standalone Version of TransactNOW

The Local (or Standalone) version of TransactNOW can be used in conjunction with AFW, Sagitta, Prime, or InStar. With this version, the database of carrier credentials is stored in an encrypted file on each individual workstation. To confirm this is the version of TransactNOW you are running, verify that you have these two TransactNOW icons on your desktop:

### Configure TransactNOW



### TransactNOW Carrier Passport

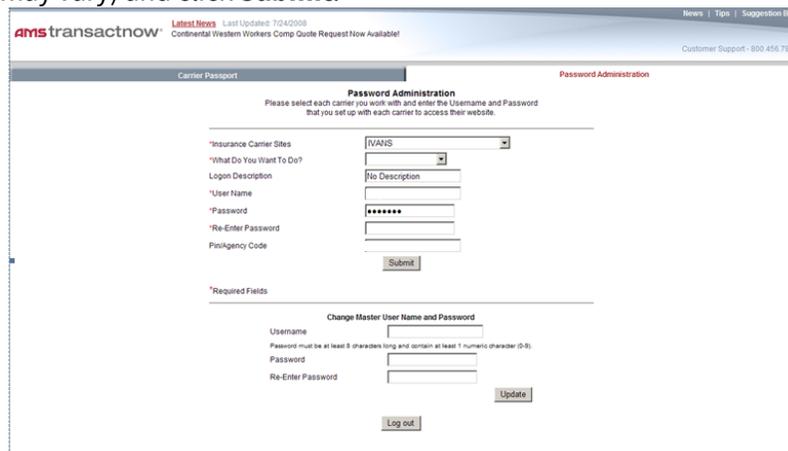


**Note** If you do not have the **Configure TransactNOW** icon on your desktop, you are not running the Local or Standalone Version of TransactNOW. Refer to your network IT personnel.

The first step to set up eDocs & Messages is to determine who will have the responsibility of viewing and maintaining the eDocs & Messages mailbox. Once decided, those users must personalize the IVANS entry in the Password Administration area in TransactNOW. Only the users who have this entry personalized will see the **Activities** tab in TransactNOW.

To personalize, double-click on the **Configure TransactNOW** icon on the desktop and enter your TransactNOW Master Username and Password.

1. From the **Insurance Carrier Sites** drop-down list, select **IVANS**.
2. In the **What do you want to do** field, select **Add Login**.
3. Enter a **Logon Description**. For example, TNOW eDocs & Messages (Activity Notes).
4. In the **User Name** field, enter your IVANS 7-character (length may vary) User ID in all lowercase.
5. In the **Password** and **Re-Enter Password** fields, enter the IVANS password your agency uses to pick up your download.
6. In the **IVANS Y-ID** or **Pin/Agency Code** field, enter your IVANS 4-character Y-account (length may vary) and click **Submit**.



7. Log off TransactNOW and log on again. An **Activities** tab will now appear.

## Network Version of TransactNOW Instructions

The network version of TransactNOW can be used with the following management systems: AFW, Sagitta, Prime, or InStar. In this version, the database of carrier credentials is stored in an encrypted file on your network server. It can be maintained by administrators, as well as individuals in your agency. To confirm you are using the network version of TransactNOW, check to see that you have only one TransactNOW icon on your desktop:

### TransactNOW Carrier Passport



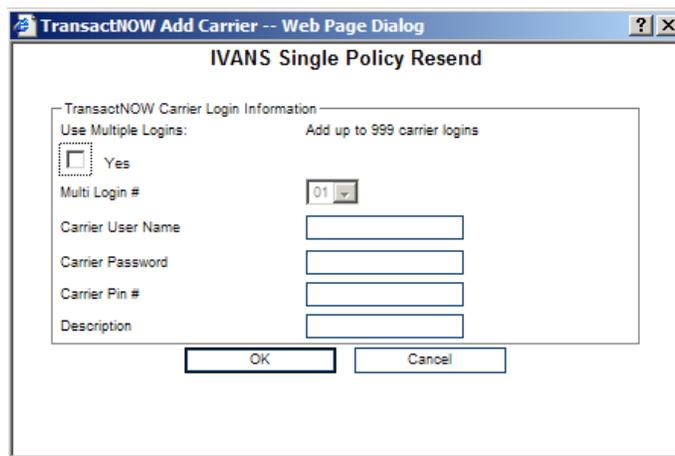
**Note** You may also have a shortcut on your desktop that allows you to connect to the database of carrier User IDs and passwords on the network server.

The first step to personalize your system to set up eDocs & Messages is to determine the person(s) that you would like to have viewing and maintaining the eDocs & Messages mailbox. Once that is decided, those users must personalize the IVANS entry in the Password Administration area. Only the users who have this entry personalized will see the **Activities** tab in their TransactNOW window.

To start personalization, double-click on the icon on your desktop to access/maintain your carrier website User IDs and passwords, and enter in your TransactNOW Master Username and Password.

**Note** If you cannot access the password database from your desktop, please refer to your TransactNOW password administrator for assistance.

1. Select **IVANS Single Policy Resend** from the list of **Available Carriers**, and click **Add Carrier**. The dialog box below will display:


 A screenshot of a web page dialog box titled 'TransactNOW Add Carrier -- Web Page Dialog'. The main heading is 'IVANS Single Policy Resend'. Below the heading is a section titled 'TransactNOW Carrier Login Information'. It contains the following fields:
 

- 'Use Multiple Logins:' with a sub-note 'Add up to 999 carrier logins'. There is a checkbox labeled 'Yes' which is currently unchecked.
- 'Multi Login #' with a dropdown menu showing '01'.
- 'Carrier User Name' with a text input field.
- 'Carrier Password' with a text input field.
- 'Carrier Pin #' with a text input field.
- 'Description' with a text input field.

 At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

2. In the **Carrier Username** field, enter in your IVANS 7-character User ID (length may vary) in all lowercase.
3. In the **Carrier Password** field, enter in the password your agency uses to pick up your download files.
4. Enter in your IVANS 4 character Y-account (length may vary) in the **Pin/Agency Code** field and click **OK**. You are ready to start receiving eDocs & Messages.

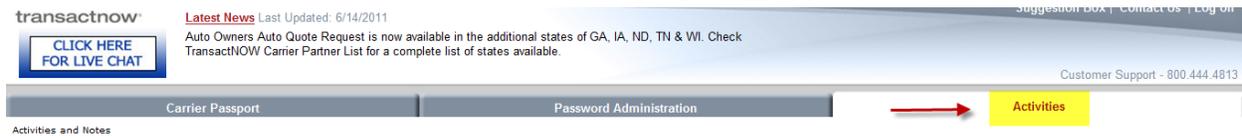
## TransactNOW eDocs & Messages Workflow

This section provides an overview of the functionality of TransactNOW eDocs & Messages.

### Sagitta, AFW, Prime, and InStar Users

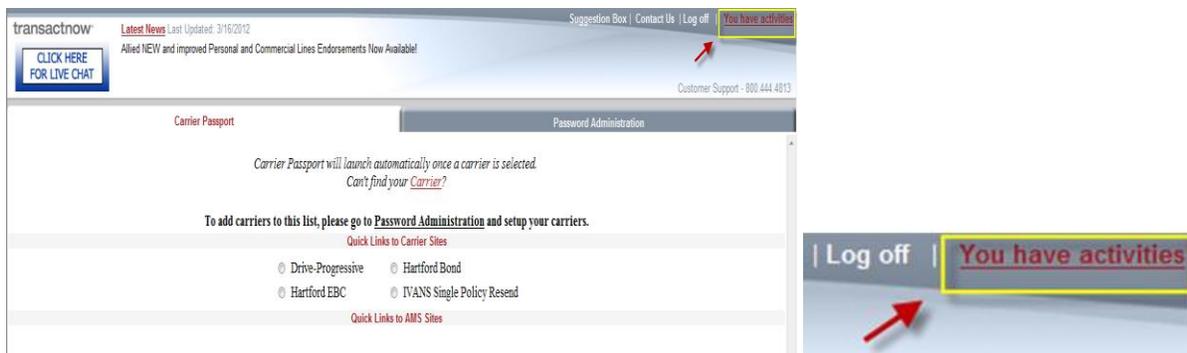
Once you have configured a user (or users) with your IVANS User ID and password in the TransactNOW password maintenance area, that user is identified as an “eDocs & Messages” recipient. At that point, the carrier(s) from whom you would like to receive ‘eDocs & Messages must be informed that you are ready to receive their eDocs & Messages transactions.

Once there are eDocs & Messages from the carrier(s) that have been sent to your agency, users set up with the ability to access eDocs & Messages will see a new **Activities** tab:



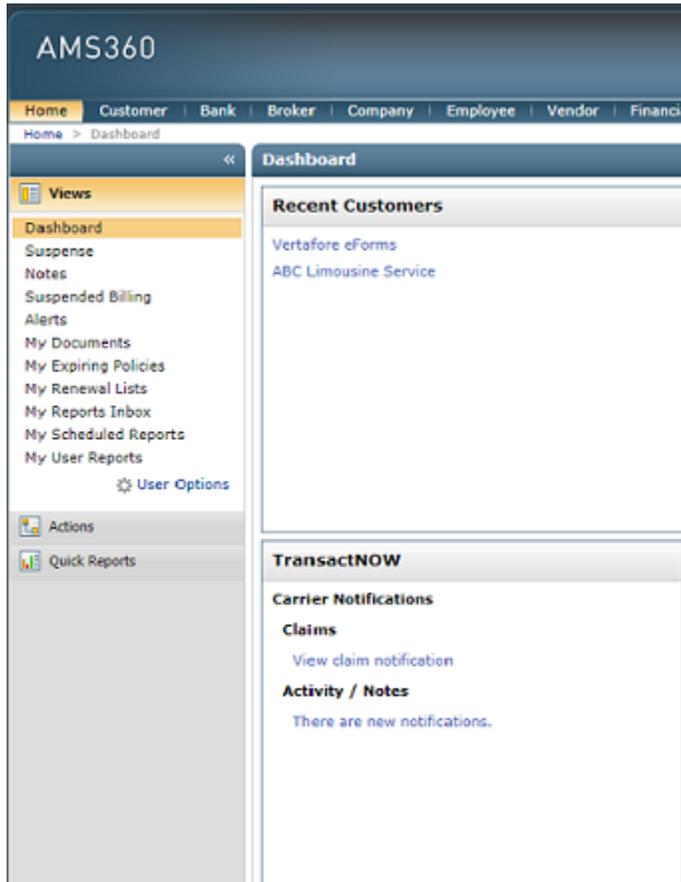
### AMS360 users (not using Vertafore Single Sign-On)

Once there are eDocs & Messages (Activity Notes) from the carrier(s) that have been sent to your agency, users set up with the ability to access eDocs & Messages will see the **You have activities** link in the upper right of any TransactNOW window.



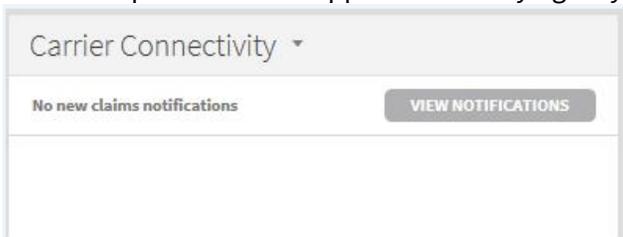
### AMS360 users (with VSSO) or Vertafore Agency Platform

Once there are eDocs & Messages from the carrier(s) that have been sent to your agency, users set up with the ability to access eDocs & Messages (Activity Notes) will receive the notification that there are new **Activity/Notes** to view in their AMS360 Dashboard view:



If you are using **Vertafore Agency Platform**, you will not see the Dashboard view in AMS360. Instead you need to select to view the Carrier Connectivity panel in Vertafore Agency Platform.

1. From your user menu in Agency Platform, click Platform Settings.
2. Select to view either the **Carrier Connectivity** panel or tile or both. Click **Apply**.
3. The tile or panel will now appear on the My Agency Home page in Vertafore Agency Platform.

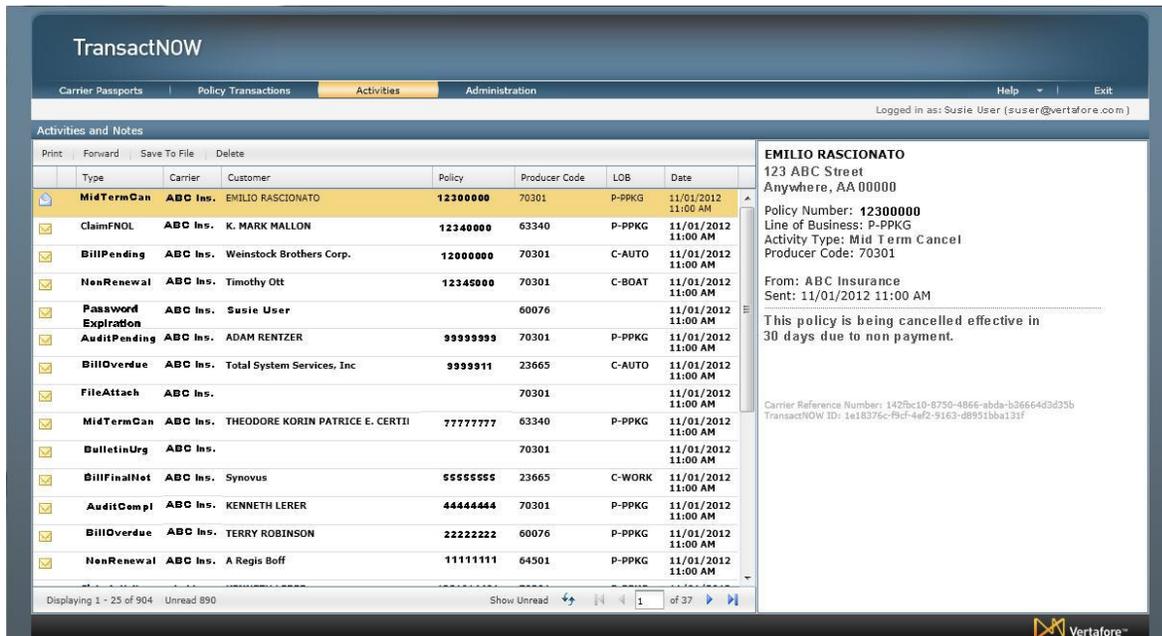


## Vertafore Single Sign-On (VSSO) View

There are two different looks to TransactNOW, Classic which the previous screens were showing and the Vertafore Single Sign-On (VSSO) view. The VSSO view is below. The information detailed below applies to both the Classic and VSSO view.

As with the Classic view, all columns can be sorted - click any header to sort the entire database of received eDocs & Messages by that field. Please note that the information in these fields is populated by the data the carrier(s) send to your agency regarding that particular transaction.

To view the Activity Notes, simply click on the link and the information will show up in the preview pane to the right:



The screenshot shows the TransactNOW interface with the 'Activities' tab selected. The main table lists activities with columns for Type, Carrier, Customer, Policy, Producer Code, LOB, and Date. A preview pane on the right displays details for the selected activity, including the carrier name, policy number, and a cancellation notice.

Type	Carrier	Customer	Policy	Producer Code	LOB	Date
MidTermCan	ABC Ins.	EMILIO RASCIONATO	12300000	70301	P-PPKG	11/01/2012 11:00 AM
ClaimFNOL	ABC Ins.	K. MARK MALLON	12340000	63340	P-PPKG	11/03/2012 11:00 AM
BillPending	ABC Ins.	Weinstock Brothers Corp.	12000000	70301	C-AUTO	11/01/2012 11:00 AM
NonRenewal	ABC Ins.	Timothy Ott	12345000	70301	C-BOAT	11/01/2012 11:00 AM
Password Expiration	ABC Ins.	Susie User		60076		11/01/2012 11:00 AM
AuditPending	ABC Ins.	ADAM RENTZER	99999999	70301	P-PPKG	11/03/2012 11:00 AM
BillOverdue	ABC Ins.	Total System Services, Inc	99999911	23665	C-AUTO	11/01/2012 11:00 AM
FileAttach	ABC Ins.			70301		11/01/2012 11:00 AM
MidTermCan	ABC Ins.	THEODORE KORIN PATRICE E. CERTII	77777777	63340	P-PPKG	11/01/2012 11:00 AM
BulletinUrg	ABC Ins.			70301		11/03/2012 11:00 AM
BillFinalNot	ABC Ins.	Synovus	55555555	23665	C-WORK	11/03/2012 11:00 AM
AuditCompl	ABC Ins.	KENNETH LERER	44444444	70301	P-PPKG	11/01/2012 11:00 AM
BillOverdue	ABC Ins.	TERRY ROBINSON	22222222	60076	P-PPKG	11/01/2012 11:00 AM
NonRenewal	ABC Ins.	A Regis Boff	11111111	64501	P-PPKG	11/03/2012 11:00 AM

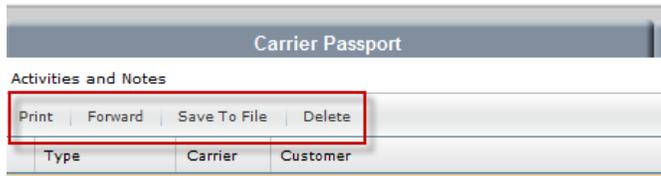
**EMILIO RASCIONATO**  
 123 ABC Street  
 Anywhere, AA 00000  
 Policy Number: **12300000**  
 Line of Business: P-PPKG  
 Activity Type: Mid Term Cancel  
 Producer Code: 70301  
 From: ABC Insurance  
 Sent: 11/01/2012 11:00 AM  
 This policy is being cancelled effective in 30 days due to non payment.  
 Carrier Reference Number: 142fbc10-8730-4866-abda-b36664d3d35b  
 TransactNOW ID: 1e18376c-f9cf-4ef2-9163-d8951bba131f

Columns from left to right are as follows:

- Read/Unread indicator
- Attachment indicator
- Activity Type
- Carrier
- Customer Name
- Policy Number
- Producer Code
- Line of Business
- Date

Because the data in eDocs & Messages comes from the carrier, any data issues you find will need to be worked out with the carriers.

There are a few function buttons to note. Select an Activity Note and then click on one of the following functions to:



- **Print** – prints the information sent in the activity note.
- **Forward** – generates an email for the information in the activity note. It does not yet forward the attached document if one is in the activity.
- **Save To File** – lets you navigate to where you want to save the file to attach it to a client or policy on your system.
- **Delete** – lets you delete the a transactions. You can delete multiple transactions by selecting them using your mouse and Shift key then click Delete.

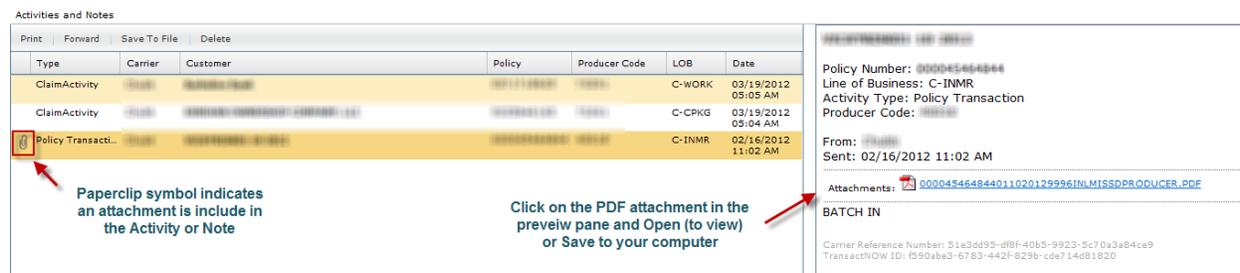
## TransactNOW Document Attachment Capability as part of eDocs & Messages

If your carrier offers the PDF delivery capability via TransactNOW, there is no additional personalization involved.

## TransactNOW Document Attachment Workflow

Once there are eDocs & Messages with attachments from the carrier(s) that have been sent to your agency, the users that have been identified as eDocs & Messages recipients will see the **“You have activities”** link in the upper right hand side (AMS360 clients) of any TransactNOW window or by clicking on the **Activities** tab (all other management systems).

Attachments are indicated via a paperclip in the column to the left of the Type column. Click on the Activity Note and the details can be viewed in the preview pane on the right. Click on the PDF attachment and either Save or Open.



Activities and Notes

Print Forward Save To File Delete

Type	Carrier	Customer	Policy	Producer Code	LOB	Date
ClaimActivity					C-WORK	03/19/2012 05:05 AM
ClaimActivity					C-CPKG	03/19/2012 05:04 AM
 Policy Transact...					C-INMR	02/16/2012 11:02 AM

Paperclip symbol indicates an attachment is include in the Activity or Note

Click on the PDF attachment in the preview pane and Open (to view) or Save to your computer

Policy Number: 000045464844  
 Line of Business: C-INMR  
 Activity Type: Policy Transaction  
 Producer Code: 000000

From: [redacted]  
 Sent: 02/16/2012 11:02 AM

Attachments:  000045464844011020129996INLMISSDPRODUCER.PDF

BATCH IN

Carrier Reference Number: 51e3dd95-d9f-40b5-9923-5c70a3a84ce9  
 TransactNOW ID: f590ba3-6783-442f-829b-cde714d81820