EasyApps for Windows

Product Manual

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Credits and Copyright

EasyApps® for Windows

Program written by K. Mitchell McInelly

User's Manual & Windows Help Files written by Julia Kelly

Much thanks to Ray Conger and Marla Obray for their advice and wisdom throughout this project

This manual could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein. These changes may be incorporated in new additions of the manual which can be found at www.agencysoftware.com.

History of Agency Software, Inc.

Agency Software, Inc. (ASI), established in 1988, has been the forerunner of property & casualty insurance software since its inception date. Founded by James M. Carpenter and current President and CEO K. Mitch McInelly, ASI has an existing insurance user group that exceeds 20,000 agencies. With 70,000 insurance agents in the United States, ASI is proud to claim an installation base rate of nearly 26% of all agencies, and over 30% of all automated (PC based) agencies in the U.S.A. ASI has helped these agencies' users actuate their PC's for the purpose of increasing overall penetration of personal and commercial lines markets.

ASI has proven to be an invaluable asset to their agency users through the creation and support of an impressive library of insurance software products. These products include such industry standards as, PAR3, EasyApps, EasyApps Professional, EZAgent, EZ Download Manager, EZ Download Plus, and AgencyPro.

1999 sees a landmark in insurance software in the form of Agency Software's latest program, a full-fledged insurance agency management system appropriately titled AgencyPro for Windows. With careful attention to ergonomics and ease of use, AgencyPro provides maximum functionality.

With company focus, development, and marketing strategies aimed and addressed toward Property and Casualty insurance companies for the new millennium and beyond, Agency Software, Inc. is committed to developing customized software systems for those carriers who share the common goal of increasing overall written premiums while decreasing errors and omissions exposure.

About Our Products

Our products create a central database for all your client information; and in some cases, direct access to insurance company web sites.

For years, agents have been populating their companies' databases with their own client information; now it's time to get that information back! Keep your client information in your own database as well as in the company database, and (with EZAgent and AgencyPro) pull existing client information from the company database down into your database.

It is easy to transfer your customer information from Outlook into the Clients window; just drag the customer name from the Outlook window and drop it onto the program icon on your desktop.

Track your clients' policies, claims, personal data (family names, birthdays, etc.), and any notes you wish to permanently record about client interactions.

Run preloaded reports (not available in EasyApps), such as Commission by Rep and Customer by Expiration Date, or create your own custom reports for any specific data you want. Print mailing labels for any or all of the clients in your database.

You can also write letters to specific clients or create form letters for several clients, and attach those letters to specific clients so you can find them easily in the future. There are many pre-built marketing letters that you can either use as is or edit, and they are ready to merge with client data such as names, addresses, and personal and policy information.

The Tickler system allows you to set reminders, and an automatic transactional file that records every transaction anyone made.

In short, our products makes your work as an agent much more efficient and puts you in control of your clients' insurance needs!

Support Maintenance and Updates

To maintain support and product updates you must:

Have internet access – All updates are available by internet only.

Renew support fees – To continue support and updates you must pay an annual maintenance fee, for which you will be billed in advance. In addition, if you experience hardware technical problems, you must have an experienced technical person available to deal with our technical support team.

Contacting Support

If you suspect the problem is with your computer hardware, printer, or software unrelated to Agency Software programs, seek help from a local tech person.

If you feel the problem is related to your Agency Software program you can access technical resources or contact our technical support team through:

Website: www.agencysoftware.com

Email: support@agencysoftware.com

Telephone: 800.342.7327 ext. 30

Our support team will respond as quickly as possible considering the current call load, usually the same day, usually within the hour (during business hours of 7am to 4pm Pacific Time (pst), Monday through Thursday, and 7am to 3pm Friday. If you are hiring outside tech support, make sure to **make an appointment** with one of our tech team members in advance to minimize your costs for outside support. If your tech is on site, be sure to say so if you reach our voice mail during business hours.

Using this Manual

This manual has been designed to take you from initial installation to proficiency. When changes are made to this manual, the newest version will be available on our website at agencysoftware.com.

Table of contents

SECTION 2 - HINTS & TIPS

SECTION 3 - PROGRAM FEATURES

SECTION 1
INSTALLATION

This section will cover the product requirements and direct you through installing EasyApps to either your local machine (as a standalone) or to a shared location to be accessed by the entire office.

Technical Requirements

The following technical requirements are what you must have to install and run EasyApps. These system requirements and recommendations are subject to change as technology evolves.

Server

- Pentium (2+ Ghz)
- 4+ GB RAM
- 100 MB HD space free
- 100 MBPS network (Gigabit highly recommended)
- Wired network*
- Windows Professional versions: XP, Vista/Windows 7, Windows 8, Server 2003, Server 2008, Small Business Server
- Internet connection (high-speed recommended)
- Video settings 256 colors or greater
- Internet Explorer 8.0 or better installed
- CD-ROM (at server/standalone)

**Databases are prone to corruption over wireless networks.*

Workstation

- Pentium (1+ Ghz)

- 1+ GB RAM
- 100 MB HD space free
- 100 MBPS network card (Gigabit recommended)*
- Wired network*
- Windows Professional versions (XP, Vista/Windows 7, Windows 8)
- Internet connection for technical support
- Video settings 256 colors or greater
- Minimum screen resolution of 800x600
- Internet Explorer 8.0 or better installed
- Installed default printer driver

**If workstation accesses the program through the network.*

More Technical Information

For best results please review the following information carefully prior to installation.

User Rights

For best results the user should be granted Administrative rights over the local machine and the network share (if applicable). If the workstation is running Vista or Windows 7 operating systems, the User Accounts Controls can be disabled (followed by restarting the workstation) prior to installation for easiest configuration. Please contact technical support for more information or other options.

Network Attached Storage (NAS) Devices

Network attached storage devices are not recommended. With no controller card, these devices are not a solution for multiple user configurations and may cause significant slowdowns of data retrieval.

Wide Area Networks

EasyApps is not adaptable to wide area solutions, such as Terminal Services or cloud services (please read the copyright notice for more information).

Backing Up

Our programs have an option for Automatic Data Backups. These backups are written to the same location as your program data (in the Backup folder) and are not a valid backup solution for your program data. **You MUST have an offsite backup method available as your primary backup source. We suggest backing up the entire program folder to an external location regularly, but making sure this is done while no one is in the program.**

Qualified Technical Support

Your equipment needs to be properly configured and maintained by a qualified local technician.

Data Storage Information

The initial installation creates an EAPPW folder where all shared program data will be stored. This program folder will be typically located at the c:\ of a standalone or the root of a mapped network drive. All of our databases and executables are located inside of the EAPPW folder.

Updating the Program

We suggest doing monthly updates so you have available the most current Acord forms and product features. Our updates are available online only and must be done with no one in the program or forms.

Obtaining the update password

The update will ask for a password. The Get Current Password option in the Start Menu program group will check your support status at our servers (your support must be current to access the updates) and give you the current update password.

1. From the Windows Start menu select Programs, then the EasyApps program folder
2. Select Get Current Password.

Alternatively, you can call to obtain the password. Call 800.342.7327 from your main line and select option 2.

Accessing the update

Make sure the program and all forms are closed on all workstations before starting the update.

1. Go to www.agencysoftware.com
2. Click the Updates heading
3. Choose **EasyApps Updates** from the Select Update drop down list
4. Click the link reading: "CLICK HERE TO START THE UPDATE INSTALLATION"
5. Run the downloaded file and click Next on the Welcome screen
6. In the Choose Destination Location check the location for accuracy and click Next
7. Click Next on the Start Installation screen
8. After the backup enter the password obtained

During the update process the program will:

- Download the most current features
- Run utilities
- End by opening up your start menu folder.

PROGRAM INSTALLATION

Installation procedures must be followed precisely. A faulty installation will produce negative results and possible loss of data. Qualified technical personnel should install the software.

NOTE: Due to an unlimited number of possible computer configurations, Agency Software, Inc. cannot be held responsible for loss of data under any circumstances. Data can be lost or become corrupted by means beyond our control.

The installation will attempt to connect to our server to verify your current support status, therefore, you may have to disable your firewall to allow this connection.

Standalone Installation

Use these directions to install a new copy of EasyApps to a single computer. Use the Moving Program instructions when moving an existing installation from one standalone to another.

NOTE: Multiple datasets can only be combined (accounting cannot be combined) by Agency Software for a fee. If you intend to share the program over a network in the future, you may consider this when loading the program to multiple standalones.

1. Place the EasyApps for Windows CD (from the front cover of this manual) into the CD-ROM drive. The installation screen will appear
2. Click *EasyApps for Windows*
3. In the Welcome screen, click *Next*
4. In the Choose Destination Location screen, examine where the program will be installed (this

defaults to C: drive). Change the drive if necessary, but do not change the folder name.

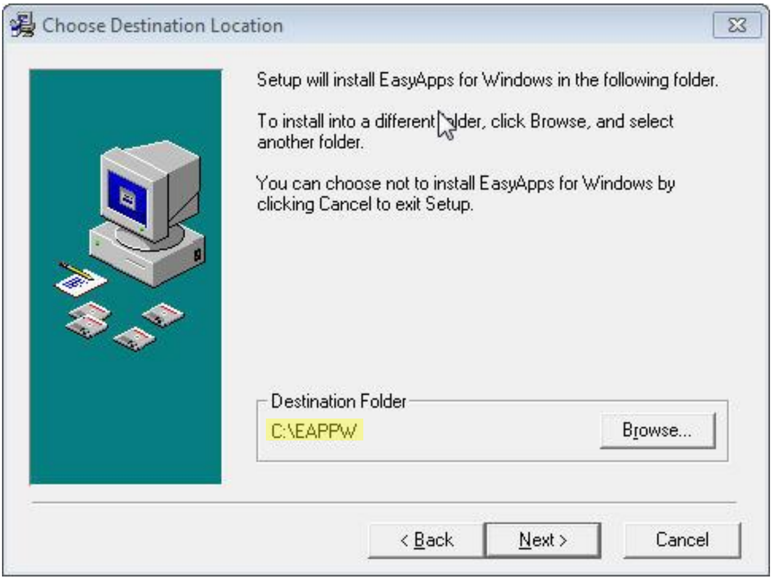


FIGURE 1 - CHOOSE DESTINATION LOCATION

5. In the Start Installation screen click *Next*.
6. You will be asked to validate your agency information. Click OK and enter your agency's 10 digit telephone number, click *OK*. (If you are unable to connect turn off your firewall and try again.) Your agency information will appear, if any of this information is incorrect please contact customer support for correction.

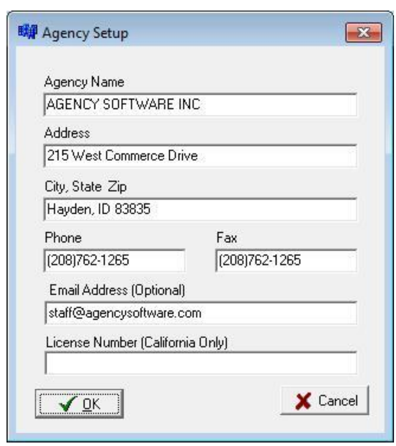


FIGURE 2 - AGENCY INFORMATION

7. The installation will

begin and, when complete, the Start Menu program group will be displayed and the program shortcut(s) will appear on your desktop. You can now Exit the initial installation window and remove the CD.

8. Run an update following the *Updating the Program* instructions in the *More Technical Information* section.
9. After the update run Techtools (TechtoolsV8 for Windows 8 computers) for supplemental install adjustments. The common adjustments depend on which version of Windows you are running.

   If you are running Windows:

   Vista & Windows 7 - click the tab to:

   - Run as Admin – click the blue button to fix Vista and Windows 7

   Windows 8 – Click the blue button on the first tab which will give further instruction if additional action is necessary.

Network Installation

Use these directions for the initial installation of EasyApps to a network (or peer to peer) server. (Use the *Moving Program* instructions when moving an existing installation from one server to another.) The preferred setup is to a dedicated server (server is not used as a workstation), however, the program can be installed to a peer to peer server (a system someone also uses as a workstation).

NOTE: For best results in Vista and Windows 7, first disable User Account Controls and reboot prior to the installation.

Setting up the Network

Your network should be set up by a qualified network technician. Our program is loaded to a shared folder on a ***physical drive*** *(see information on NAS devices in the Technical Requirements section) of the server computer (we would typically call the share* ***ASI****). Full control should be granted over the shared folder and all subdirectories to all users (Everyone).*

Mapping Letter Drives

Drive letters should be mapped identically on the server and all workstations. These common network drives are mapped to the shared folder, not the EAPPW folder.

First, get the Full Computer Name of the server machine.

To find the Full Computer Name right-click the Computer (or My Computer) icon on the server machine and click Properties. On XP click the Computer Name tab. You want the Computer Name (not the Computer Description) without the period that follows it. On Windows 7 it will be listed under Computer Name.

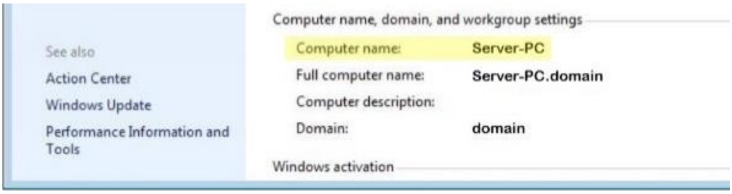


FIGURE 3 - FIND COMPUTER NAME

Next you will map a network drive:

1. Click with the right mouse button on the Computer (or My Computer) icon.
2. Select Map Network Drive.

3. Open the list in the Drive box and select the network drive letter you want to use (for example, Q:).
4. In the Folder box, type the path to the drive where you will install the program (e.g., if you are going to install the database to the C:\ drive on the computer named Server-PC, you would enter **\\Server-PC\C**).

   Note: It is recommended to install to a shared folder (e.g., a folder named ASI) instead of the C: drive, in that case you would type \\Server-PC\ASI in the Folder box.

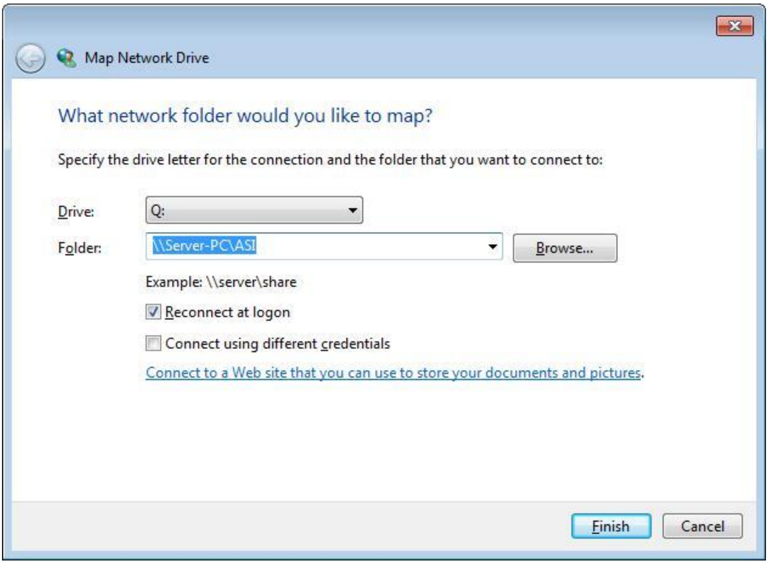


FIGURE 4 - MAPPING NETWORK DRIVE

*****Do not map to the product's program folder*****

5. Click Finish. A window to the new mapped drive opens, and it reads Q:\ in the window's title bar.

You are now ready to install the software to the drive that you just mapped.

Initial Installation

1. Place the program CD (from the front cover of this manual) into the CD-ROM drive. The installation screen will appear with options for your product.
2. Click the name of the product you are installing.
3. In the Welcome screen, click *Next*.
4. In the Choose Destination Location screen, examine where the program will be installed (this defaults to C: drive). Change the drive if necessary, but do not change the folder name.

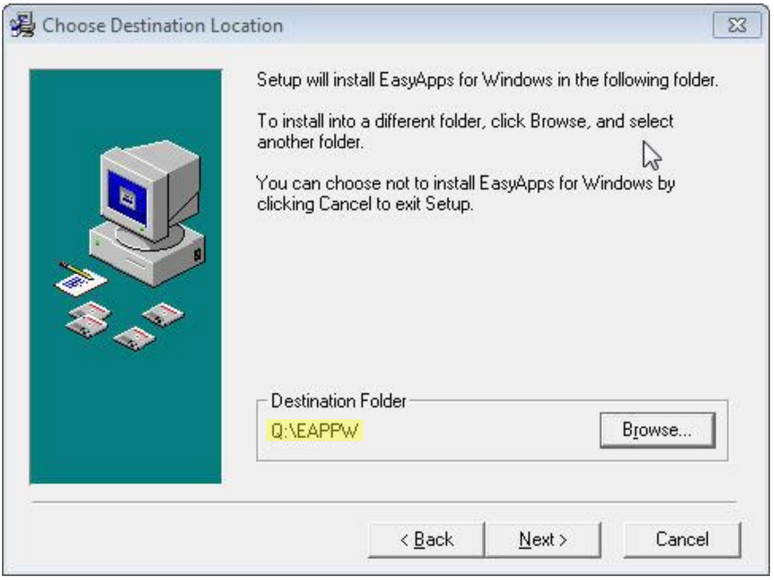


FIGURE 5 - CHOOSE DESTINATION LOCATION

5. In the Start Installation screen click *Next*.
6. You will be asked to validate your agency information. Click OK and enter your agency's 10 digit telephone number, click *OK*. (If you are unable to connect turn off your firewall and try again.) Your agency information will appear, if any of this information is incorrect please contact customer support for correction.

7. The installation will begin and when complete the Start Menu program group will be displayed and the program shortcut(s) will appear on your desktop. You can now Exit the initial installation window and remove the CD.

FIGURE 6 - AGENCY INFORMATION

8. Run an update following the *Updating the Program* instructions in the *More Technical Information* section.

If this is a peer to peer server you will also run as a workstation, follow the *Workstation Setup* instructions below.

Workstation Setup

The network drives should already be (identically) mapped as part of the *Setting up the Network* process in the *Network Installation* section of this manual.

Follow this procedure at each one of the workstations:

1. Double-click the Computer (or My Computer) icon to open the Computer window. (In Windows XP, you may need to click the Start button and then click the My Computer icon on the Start menu)
2. In the Computer Window, double-click the mapped drive where you installed the program (in this example the Q: drive)

3. Double-click to open the EAPPW folder
4. Double-click the file named **setupws.exe** (that is setupws.exe *not* setupw.exe) *Windows 8 workstations skip this step and continue to step 7*
5. Click Next in all the dialog boxes
6. When the workstation setup is complete, a window of program icons appears on your desktop (your Start Menu program group). You can close this window at any time
7. Run Techtools (TechtoolsV8 for Windows 8 computers) for supplemental installation adjustments. The common adjustments depend on which version of Windows you are running. If you are running Windows:

   XP - click the tab to:

   - Disable IE Security Warning - click the blue button

   Vista & Windows 7 - click the tab to:

   - Run as Admin – click the blue button to fix Vista and Windows 7
   - Disable IE Security Warning - click the blue button

   Windows 8 – Click the blue button on the first tab which will give further instruction if additional action is necessary.

You are now ready to run the program from the workstation by double-clicking on the icon on your desktop.

When you open EasyApps on a workstation you are opening the database that you installed on the server. If the workstations were set up correctly, multiple users can open the database at multiple workstations at the same time, and all will see the same data.

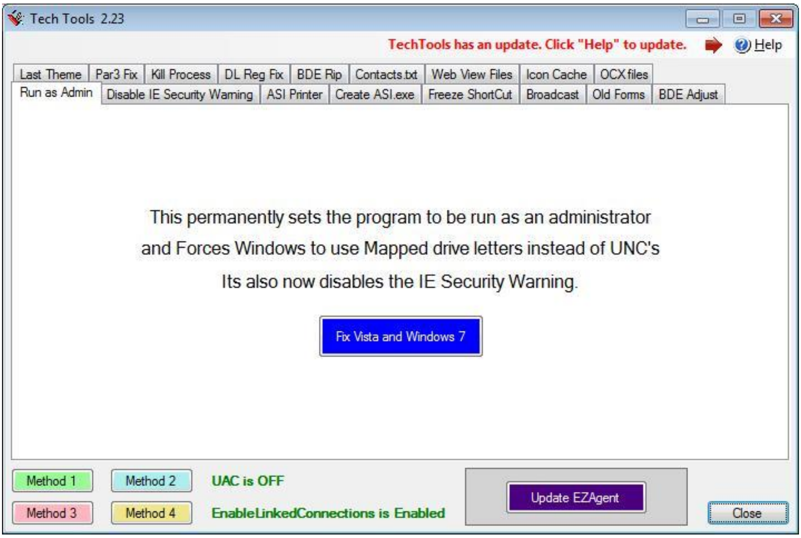


FIGURE 7 - TECHTOOLS

Moving the Program

The EasyApps files are contained in the EAPPW folder. To transition to a new server (or standalone workstation) you must first copy the entire EAPPW folder from the old location to the new location.

If this is a network installation be sure to follow instructions in the *Setting up the Network* section to set up the new shared folder and map the network drives. The program folder then can be copied to the new shared folder on the new server.

Existing Workstation:

1. Remap the common drive (let's call it Q:) at the workstation to the new server's shared folder (should be the same drive letter as the previous setup)

2. Run Techtools.exe (or Techtoolsv8.exe if you run Windows 8) from the program folder and disable the IE warning if you get the "Publisher could not be verified" message opening the program.

If this is a new workstation follow the previous *Workstation Setup* instructions.

SECTION 2
HINTS & TIPS

Check out these techniques to quickly master navigation of EasyApps for Windows, and for the most efficient ways to do things. We also recommend reviewing the online tutorials available at www.agencysoftware.com/Tutorials.

Navigation

EasyApps uses common Windows navigation techniques and keystrokes, which allow you to move around within EasyApps with great ease. Understanding and using these features will make your job much easier, speed up your work, and make using this program a pleasure.

Help Files

Help Files for many subjects are available. When you're working in EasyApps, no matter what tab (window) you have open, you can always press F1 to get help on that subject. The Help Files contain Hints & Tips, a comprehensive Index, and Help files for all main topics, although a few are limited in their scope. Improved Help Files will be made available with most updates. In the Help File click on the green underlined text to go straight to that main or sub-topic.

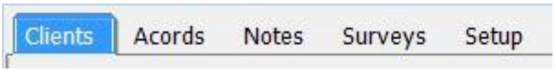
List Boxes

You'll find many list boxes with dropdown arrows that allow you to open a list and select an entry. Some of these lists

are codes in the system while others are comprised of entries that have been keyed into the field.

Tabs

Click on a tab to open that window. If you can't see all the tabs, either make the EasyApps window wider, or click the arrow buttons at the right end of the tabs to scroll and display the hidden tabs



at each end. You may not have all the tabs available if your User Account has limited access.

Toolbars

Most windows, and all ACORD forms, have Toolbars for your convenience. Learn what each button does and use them to save time.

When you point your mouse at a specific button, a screen tip with the button's name appears – this will help you figure out which button does what.

Scroll Bars

Scroll Bars appear at the right side and/or bottom of lists that exceed the current view. Scrolling up, down, right, or left will bring more information into view.

Moving Around in EasyApps

EasyApps will open to the Clients tab by default. The entire client list will be in view and the left side of the screen will display the information for the current client selected. You can select a new client by:

Typing in the first few letters

In many lists within EasyApps, you can start typing the item you wish to look up. For instance, if you are on the Clients tab and you want to look up Anna Ogden you can type in A-N… and you will be taken to that area of the list while the typed letters will appear in the top left corner of the EasyApps window. If all you have is an address, first put the list in Address order (see *Sort by heading* section on the next page) and then type in the first few numbers of the address. This is the easiest way to select a single client.

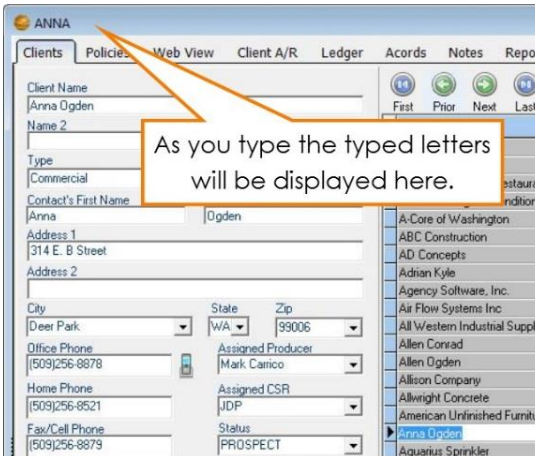


FIGURE 8 - TYPING IN YOUR DESIRED SELECTION

Using the navigation icons

Throughout EasyApps are variations of these icons that move you through the database either record by record, or jump from the current selection to the first or last records in the database.

Program search and filter utilities

You can locate a certain value by using the search or filter utilities. The client filter, for instance, will clear the client detail window (the left side of the Clients tab that normally displays the

current client information) and allow you to enter your filter criteria. Once your desired criteria has been entered, simply click the Filter icon again and the filter will apply to the client list, showing only the returned values. Click the Restore icon to release the filter and view all clients.

The filter is a great way to display a group of clients. For instance, if you would like to view all clients in a certain city, click the Search icon, choose the city from the City drop-down, and click Search again. The client list will now show only clients in that city and the filter will display on the header bar.

This filter will carry into many client selection screens in the other marketing areas (and reports), allowing you to first place the desired filter, then run letters and reports based first on that filter. Be sure to remove this filter before attempting to run letters or reports on the entire database.

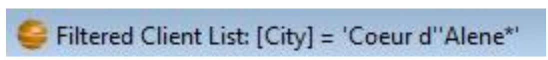
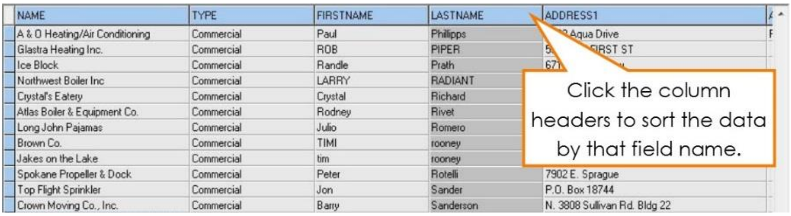


FIGURE 9 - HEADER BAR DISPLAYING CURRENT FILTER

Sort by heading

In most tables and lists, if you click on a column heading (such as Address in the Clients tab), the list or table will be sorted by the entries in that column.

Also, when you click a column heading to sort, the sorted column will be shaded so that you can tell at a glance which column the table is sorted by.



NAME	TYPE	FIRSTNAME	LASTNAME	ADDRESS1
A & O Heating/Air Conditioning	Commercial	Paul	Phillipps	[illegible] Aqua Drive
Glastra Heating Inc.	Commercial	ROB	PIPER	[illegible] FIRST ST
Ice Block	Commercial	Randle	Prath	[illegible]
Northwest Boiler Inc	Commercial	LARRY	RADIANT	[illegible]
Crystal's Eatery	Commercial	Crystal	Richard	[illegible]
Atlas Boiler & Equipment Co.	Commercial	Rodney	Rivet	[illegible]
Long John Pajamas	Commercial	Julio	Romero	[illegible]
Brown Co.	Commercial	TIMI	rooney	[illegible]
Jakes on the Lake	Commercial	tim	rooney	[illegible]
Spokane Propeller & Dock	Commercial	Peter	Rotelli	7902 E. Sprague
Top Flight Sprinkler	Commercial	Jon	Sander	P.O. Box 18744
Crown Moving Co., Inc.	Commercial	Barry	Sanderson	N. 3808 Sullivan Rd. Bldg 22

FIGURE 10 - CLIENTS TAB ORDERED BY LAST NAME FIELD

Using the keyboard

In most tables and lists, you can navigate through the data by using the arrows and navigation keys (Home, End, Page Up, and Page Down) keys on the keyboard.

SECTION 3
PROGRAM FEATURES

The Clients Tab

The Clients window is where you enter client information, such as client name, address, and phone numbers. EasyApps always opens with the Clients window displayed. The client names are listed on the right side of the window, in the list, and the data for the selected client is displayed on the left side of the window. To open the Clients window from any other window in EasyApps, click on the **Clients** tab at the top of the program window.

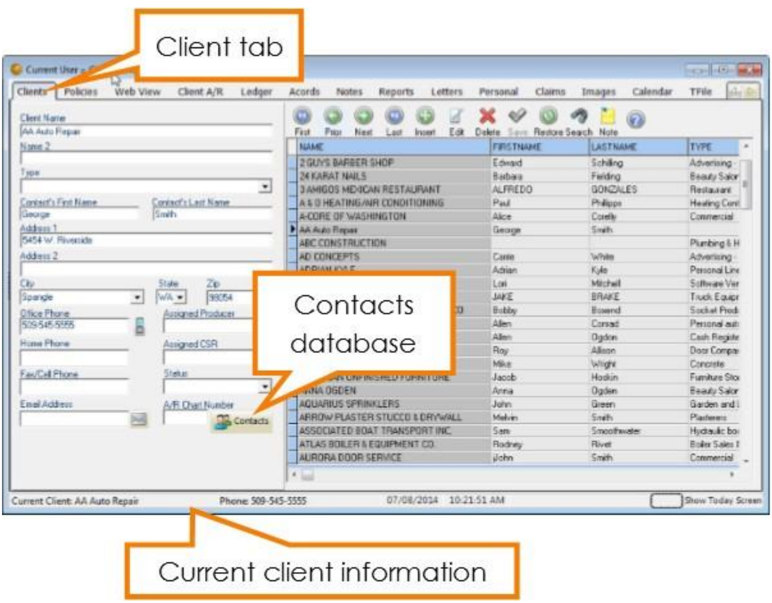


FIGURE 11 - CLIENT TAB

The status bar at the bottom of the EasyApps program window always indicates the selected client name, their phone number, and the current date and time.

In the name list, columns other than the name column can be displayed by scrolling to the right in the horizontal scroll bar below the list.

You can reorder these columns by clicking on the column header and dragging to the left or right while holding down the mouse button. You may also sort by any of the columns by clicking the column header for that column.

Adding a Client

To add a client, click the + button above the client list. The client information fields on the left side of the

window are emptied so that a new client's information can be typed into the appropriate fields. You can use your Tab key to move between fields while entering client information or you can click in the field where you want to enter data.

Click on the Contacts button. Whichever contact you mark as Primary will automatically fill in the First Name, Last Name and phone number fields in the main client information screen.

You may list multiple contacts for this client by clicking the plus sign on the top toolbar to add an additional contact name or the plus on the bottom toolbar to add additional email addresses.

After all of the client's information has been entered, click on the save button to save the information.

Editing Client Information

To edit client data, select the client's name in the list on the right (click the client name to select it), and then click on the edit button to open that client's record for editing. The selected client's information appears on the left side of the window. Edit the data, and save your changes by clicking on the save  button.

Deleting a Client

To delete a client, click the client's name in the list on  the right then click the delete button. Click Yes in the *Delete This Client?* message. That client's data and forms are permanently removed from the database.

The Clients Toolbar

When you position the mouse over a specific button on the toolbar, the name of that button will appear in a "hint" screen.

The buttons, left to right, are:

First Record Selects the client name at the top of the list.

Prior Record Selects the next client above the selected client.

Next Record Selects the next client below the selected client.

Last Record Selects the client at the bottom of the client list.

Insert Record Creates a new client record, ready for data entry. Click the Post Edit button to finish and save the new client record.

Edit Record Select the client that you want to edit in the list, then click this button to edit the fields on the left. When done, click the Post Edit button to save the changes.

Delete Client Select the client you want to delete from the list on the right, and then click this button to delete the client. All entries in all modules for that client will be deleted from your system. A confirmation box will appear before the client can actually be deleted.

Post Edit Permanently posts the change to the database while adding or editing a client's record.

Restore Client List Restore the full client list after filtering.

Filter Client Database Click on the magnifying glass button to clear all fields on the left. Type in your search criteria in any fields, and then click the Filter Client Database button again. The client list will be filtered to show only those clients who match your search criteria and most reports will show results only for this filtered list of clients.

Add a Sticky Note to Client Click on the yellow sticky note to add a note that will appear whenever this client record is brought up.

Print labels Click the printer to print a sheet of labels for clients in the current view.

Start Tutorial This button will start the tutorial for the current window if you have the EasyApps CD in your CD-ROM drive, or if you have loaded the tutorials to your hard drive. If the tutorials are not available, Windows Help Files will appear instead.

Tip: Instead of scrolling down to find a client in a long list, you can jump to a specific area in the clients list by pressing a key (or two or three) on your keyboard. For example, suppose you want to find a client whose name is listed as Longhorn Barbecue. To jump to the first name that begins with the letters LON, click in the clients list, and then type 'LON' on your keyboard.

The ACORDs Tab

Click on the Acords tab to open the Acords window. The Acords window contains all the ACORD forms for the selected client, and allows you to add, edit, or delete forms for that client. The forms list is blank until you add forms for that client.

The data in the Create Date column is automatic – you cannot change it. You can type short notes  about specific forms by clicking the Add Note icon and typing your note in the Acord Note window. When done your note will display in the note field and can be edited by clicking the Add Note icon again.

ACORD Options

This section explains the various options in the lower pane of the Acord window.

Add New Form

When you select the Add New Form option and click the "Do It" button, the Add New ACORD Forms window appears. This window displays all available ACORD forms in alphabetical order.

This list is first-key sensitive – to jump quickly to a specific point in the alphabetical list, you only need to press a letter key on your keyboard. For instance, if you need to add a Workers Comp form, press “WOR” on your keyboard. The first form starting with ‘WOR’ is selected. You may then scroll down, page down, or arrow down to the Workers Comp form. Select the form you want, and click OK to open the form.

You also can click the Number header on this screen and type in the ACORD form number you are looking for.

Use the options below the list to filter the more than 600+ ACORD forms to a more manageable list.

- The Country Wide option filters the list to display all the forms that are NOT state-specific.
- The State Specific option filters the list to show just the forms that are specific to a particular state (after you select the State Specific option, select the state you want in the list box that appears to the right).
- The All Current ACORDs option removes the filters and displays the entire list of current ACORD forms.
- The Prior Versions will show prior versions of select accord forms, such as the Certificate of Liability and Evidence of Property.

Edit Client’s Form
Edit an existing ACORD form for the current client. Select a form from the list of existing forms, select Edit

Client's Form, and then click "Do It." The selected form will appear and you may edit as needed. *(You can also double click the form you wish to edit.)*

Delete Client's Form

Delete an existing ACORD form for the current client. Select a form from the list of existing forms, select Delete Client's Form, and then click "Do It." You will be prompted if this is what you really want to do. The selected form will be deleted from the current client.

Duplicate Client's Form

If you wish to create an exact duplicate of a different client's ACORD form for the client you have selected, click on the Acords tab and then select "Duplicate Client's Form." The DupAcordForm dialog box opens with a list of all the clients in the database and all their forms.

1. Scroll down to select the client and the form you wish to duplicate for the open client. You can often find the form you want more easily if you sort the list by Name or Form Name or Create Date (by clicking on the appropriate column heading).
2. After you select the form you want to duplicate, click OK.

Note: When you duplicate an existing form year after year, you run the risk of using outdated, non-current forms. A better approach is to add a new form of the type you are renewing, and then use the Prefill Form From Another button (at the top of the new form) to fill the new, current form with the data in the old, expiring form and then make the changes for the renewal term.

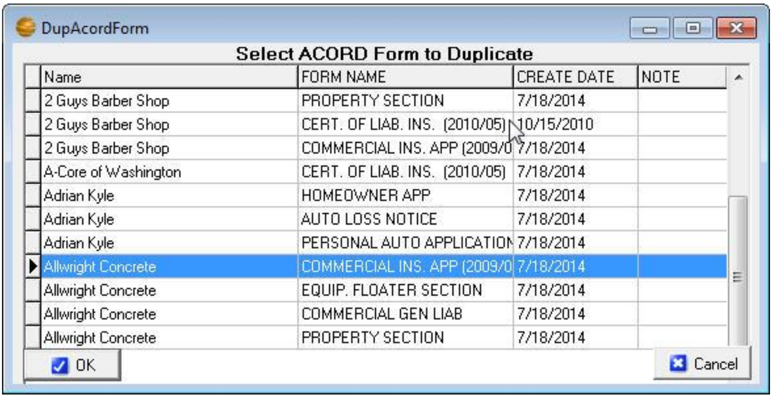


FIGURE 12 - DUPLICATE AN ACORD FROM A DIFFERENT CLIENT

Mark Forms for Mass Print

You can send several forms from several different clients to the printer, pdf, or email all at once with the Mark Forms For Mass Print option.

1. Choose a client, then click the Acords tab and click the Mark Forms For Mass Print option. Click the Do It button, click to mark the forms you want to print, and click OK.
2. Then choose another client, click the Acords tab, click the Mark Forms For Mass Print option, click the Do It button, click to mark the forms you want to print, and click OK.
3. When you've selected all the clients' forms you want to mass print, you're ready to use the Print Mass Marked Forms option.

Print Mass Marked Forms

1. Select any client and click the Acords tab. Click the Print Mass Marked Forms option, and click Do It.
2. A Print Preview of all the marked forms opens. Click the Print button in the toolbar and send the

forms to your printer or if you have email setup, click on File and Email and it will email all those forms at once.

3. After the forms are sent to the printer or emailed, you'll be asked if you want to unmark the forms for mass printing – click Yes.

Move Forms to Disk

If you want to move a specific client's data and forms to an EasyApps database on another computer (perhaps a computer at home, or a different standalone database in your office) you can use the Move Forms To Disk and Read Forms From Disk options to do this.

The procedure is to move clients and their forms, one client at a time. To use the Move Forms To Disk option:

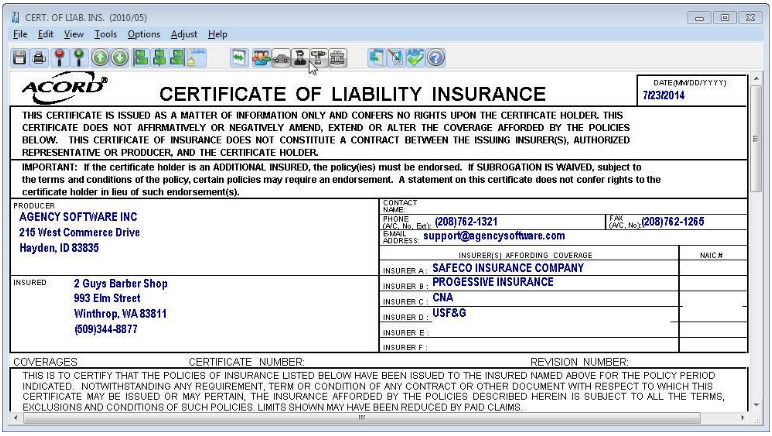
1. On the Clients window, select a client whose data and forms you want to move.
2. Click the Acords tab. In the Acord Form Options section, click the Move Forms to Disk option and click the Do It button. A window listing the client's forms will appear.
3. Select each form you want to move by clicking the form name (if you want to de-select a form, click that form name again) or you can click the Mark All button to move all their forms. When you've selected all the forms you want to move, click the OK button.
4. In the Save As dialog box, choose your desired location and click Save. A file that contains the client's data and forms will be saved with the client's name.

Read Forms from Disk

After you have transferred the files to the other computer and are ready to move the clients and their forms into the other database, follow these steps to use the Read Forms from Disk option:

1. Open EasyApps and click on the Acords tab for any client.
2. In the Acord Form Options section, click the Read Forms from Disk option. An Open Account dialog box opens so you can located the transferred files..
3. In the Open Account dialog box, click a client filename, then click Open. The client data and forms are imported, and a message tells you "ACORD forms successfully imported from Disk!".
4. Repeat steps 3 through 4 for each client file on the CD or Flash Drive.

The ACORD Formview Window


CERT. OF LIAB. INS. (2010/05)

File Edit View Tools Options Adjust Help

ACORD® CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 7/23/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
AGENCY SOFTWARE INC
215 West Commerce Drive
Hayden, ID 83835

CONTACT NAME:
PHONE (A/C, No, Ext): (208)762-1321 FAX (A/C, No): (208)762-1265
E-MAIL ADDRESS: support@agencysoftware.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : SAFECO INSURANCE COMPANY	
INSURER B : PROGESSIVE INSURANCE	
INSURER C : CNA	
INSURER D : USF&G	
INSURER E :	
INSURER F :	

INSURED
2 Guys Barber Shop
993 Elm Street
Winthrop, WA 83811
(509)344-8877

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

The Formview Toolbar

The Formview toolbar appears at the top of the open form. When you place your mouse over a Formview toolbar button, the name of the button appears. The buttons, left to right, are as follows:

Save Form saves your current work while you work in the open form. When you finish working in a form and close it, all your work is automatically saved.

Print prints the open form.

Increase Form View makes the form bigger on the screen

Decrease Form View makes the form smaller on the screen.

Go To Previous Page goes forward one page in a multi-page form..

Go To Next Page goes back one page in a multi-page form.

Left Justify left-aligns text in the selected field.

Center Justify center-aligns text in the selected field.

Right Justify right-aligns text in the selected field.

Font Selection lets you select a different font for the selected field.

Toggle Expanded Fields allows you to type more in a field than would normally fit. If you have a lot of data, this process can take several minutes

Cert Holder's Menu accesses certificate holders database; lets you add, edit, delete, and print certificate holders.

Vehicle Menu accesses vehicles database; lets you add, edit, delete, and prefill vehicle information for vehicle forms.

Drivers Menu accesses drivers database; lets you add, edit and delete drivers to prefill to ACORD forms that contain driver information.

Equipment Menu accesses equipment database; lets you add, edit and delete equipment to prefill to ACORD forms that contain equipment information.

Property Menu accesses property database; lets you add, edit, delete, and prefill property information for property forms

Additional Interest Menu accesses additional interests database; lets you add, edit, delete, and prefill interests to specific forms

Pre-Fill Form From Another will fill a new form with data from existing forms, including prior forms certificate holders.

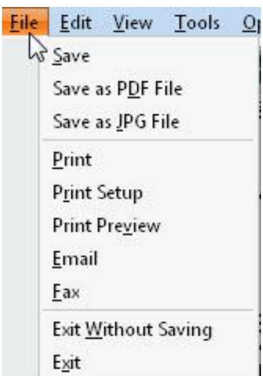
Electronic Signature lets you put your electronic signature on a form before you print, e-mail, or fax the form.

Spell Checker will correct spelling errors.

Help has general instructions for filling out forms.

The ACORD Formview Dropdown Menus

File . . .



Save - saves the changes in the open form without closing it.

Save As PDF File - saves the form as a PDF image file.

Save As JPG File - saves the form as a JPG image file.

Print - opens the Print dialog box so you can print the ACORD form.

Print Setup - opens the Print dialog box to change print settings.

Print Preview - shows how the document will look when printed.

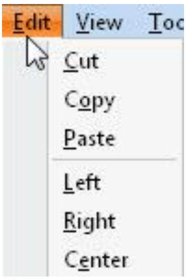
E-mail - allows you to send a form in an e-mail message directly from EasyApps.

Note: Email must be setup first (see Emailing Forms section).

Fax - allows you to send the form to your fax software.

Exit Without Saving - closes the form without saving your changes.

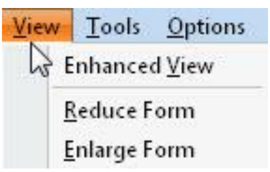
Exit - closes the form and saves all changes you've made.



Edit . . .

Cut/Copy/Paste - are standard windows commands to cut, copy, and paste text.

Left/Right/Center - are used to justify text within the selected field.



View. . .

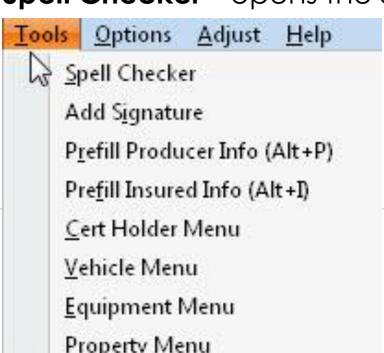
Enhanced View - toggles the form display between the Draft view and the Camera view. Enhanced View (Camera View) provides the most accurate view of what the form will look like when printed.

Reduce Form and **Enlarge Form** - allow you to adjust the magnification of the form on your screen.

Toggle Floating Menu - Will show or hide a small menu allowing you next page and print utilities (made for PDF forms).

Tools. . .

Spell Checker - opens the Spell Check dialog to check your text for errors.



Add Signature will place an electronic graphic representation of your signature (in your own handwriting), if you have taken steps to create your electronic signature.

Note – Signatures must be created as 300x60 dpi Bitmap (.bmp) images. These can be ordered from Agency Software using the Electronic Signature Order Form available from the support page at agencysoftware.com.

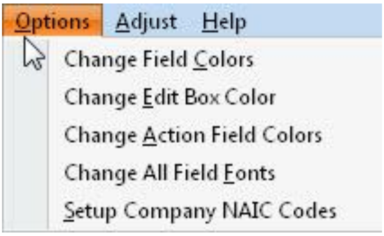
PreFill Producer Info - automatically pre-fills your current agency information onto the form. This is handy if you have changed your agency information and are opening old forms that have your old info on them.

PreFill Insured Info - pre-fills the insured's current information if you're opening an old form and their information has changed.

Cert Holder Menu - opens the certificate holder options dialog (see the Certificate Holder section below).

Vehicle Menu - opens that client's vehicle list (see the Vehicle Database section below).

Options . . .



Change Field Colors - changes the color of all data entry fields.

Change Edit Box Color - changes the color of the active field (the field in which you're typing).

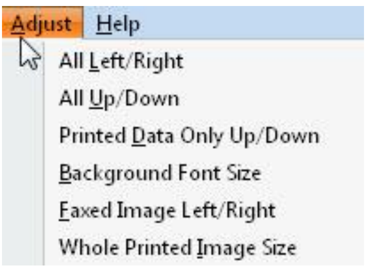
Change Action Field Colors - changes the color of action fields. When you right-click in an action field, something pertinent to that field happens (such as an appropriate dialog box opening up).

Change All Field Fonts - allows you to change the font of the data you type on the form. The changed font only lasts until you close the form.

Reset to Default Font and Color – Resets to original settings.

Setup Company NAIC Codes – Click to enter NAIC code for company, which saves to the Company Setup.

Adjust . . .



All Left/Right - moves the printed form image to the left or right on the page.

All Up/Down - moves the printed form image up or down on the page.

Printed Data Only Up/Down - moves the data you entered up or down in the printed form.

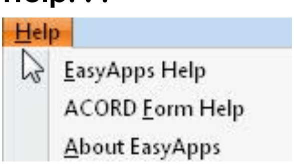
Background Font Size – Adjusts background fonts.

Faxed Image Left/Right moves the faxed form image to the left or right on the page.

Whole Printed Image Size prints the entire form larger or smaller to better fit the page.

All Left Right Printer Only – Adjust printing alignment

Help. . .



EasyApps Help - provides program help for creating forms. EasyApps is the ACORD form module of EasyApps and is available as a stand-alone program.

ACORD Form Help - provides systematic instructions for filling out specific forms. Not all forms have a help file.

About EasyApps - displays the software version number and the Agency Software, Inc. address and telephone information.

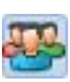
Entering Client Information in ACORD Forms

Data entry in an ACORD form is much like data entry in the Clients window. You can move from field to field using your arrow keys, tab key, or mouse, and edit data using the Insert, Backspace, and Delete keys. You can use your mouse to move the scroll bar (right side of screen) to move up and down the form.

The first thing you will notice when you open an ACORD form is that some of your work has already been done for you. Fields for your agency name and address have been filled in with the data you entered during installation and the client name and address information has been filled in with the information from the Clients window.

Certificate Holders

The ACORD certificate forms allow you to have multiple certificate holders for a single certificate (so you can type in a **single** certificate and print separate certificates for each certificate holder all in one operation).



If the Certificate Holders Menu button is displayed in color, it means that the form can support multiple certificate holders. If the button appears grayed out, it means that the form doesn't support multiple certificate holders.

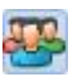
Certificate Holders Menu

Here are some things you need to know about working with certificate holders and entering cert holder information in certificates.

You can type certificate holder and description of operations information in the boxes in the lower-left corner of the certificate, but if you type the information directly in the form on-screen, you won't be able to use the Cert Holders Menu to set up and print the certificate for multiple cert holders. You'll only be able to print that certificate for a single cert holder.

If you have more than one cert holder for a certificate, use the Cert Holders Menu instead.

Adding Certificate Holders



To add a certificate holder, click the Cert Holders Menu icon.

In the Certificate Holder Menu select the *Add New Holder* option and click the *Do It* button.

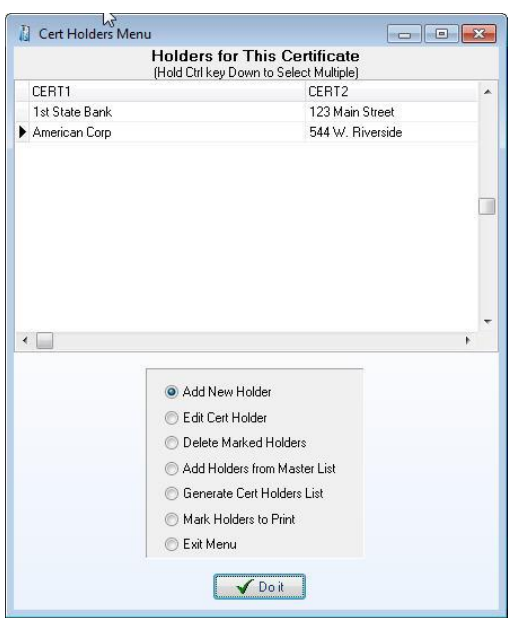


FIGURE 13 - CERT HOLDER MENU

The Certificate Holder Detail dialog box appears. Type the certificate holder's name and address information in the dialog box.

Note: You cannot have two cert holders in the same *certificate with identical names and addresses. If you need to issue multiple certificates to the same cert holder for different jobs, see the sidebar "Same Cert Holder, Multiple Jobs" (below) to learn how.*

Enter the "Description of Operations" information in the Override Description of Operations box (if different than the master form), and click the Done button. The cert holder name, address, and operations information will not appear on the form on-screen, but it will be printed when that certificate holder is marked for printing.

The Description of Operations database can hold commonly used descriptions of operations. Access

this database from anywhere the displayed icon appears.

This button sends saved information to the cert holder description field.

This button saves the information in the current cert holder description field for use later.

This button will add a blank record if you want to type the description in manually to pre-load the descriptions.

This button will delete the text in the description. All of the description is deleted, not just what is highlighted.

The Order field is used to place the descriptions into the order you want them in so the most used descriptions can be at the top. This is in ascending order and is entered by the User.

The font adjustment is used for changing the font size in the description field to allow for more data. The minimum font size is 7.

When you click *Done*, a new certificate holder is added to the certificate.

Tip: If you need to enter a nearly identical name and address block for a different cert holder, you don't need to retype it. Instead, select the text you need to duplicate, then right-click the selected text and click Copy on the shortcut menu. Then close the Certificate Holder Detail window, add a new cert holder (or edit a cert holder), right-click in the box where the copied text should go, and click Paste on the shortcut menu.

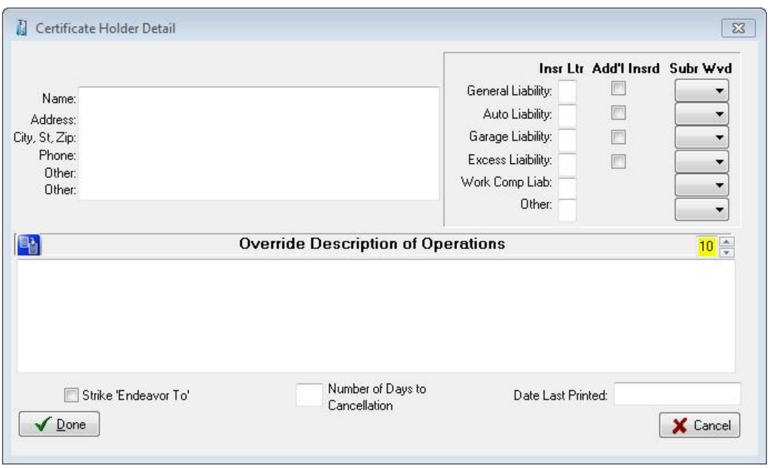


FIGURE 14 – ADDING A NEW CERTIFICATE HOLDER

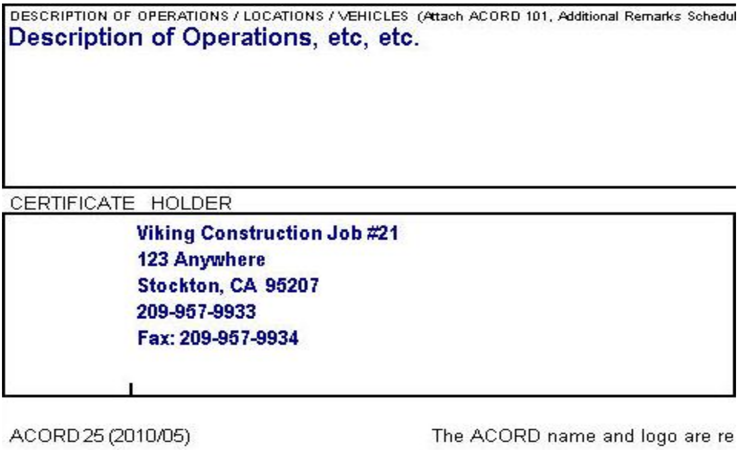
Same Cert Holder, Multiple Jobs

Suppose you have a client, perhaps a construction company, who needs to issue several certificates (for different jobs) to the same cert holder. But you can't enter cert holders with identical names and addresses in the same cert… so what do you do?

Try this: Add a new cert holder, but enter a job number at the end of the Name line (as shown below).

FIGURE 15 - MODIFY CERTIFICATE HOLDER NAME TO ALLOW FOR DUPLICATE HOLDERS

This keeps the Name and Address field combination (really the Cert1 and Cert2 fields) from being duplicated, and you can print all the certificates you need for the same cert holder's different jobs. The resulting printed certificate entry looks like this:


DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedul
Description of Operations, etc, etc.

CERTIFICATE HOLDER

Viking Construction Job #21
123 Anywhere
Stockton, CA 95207
209-957-9933
Fax: 209-957-9934

ACORD 25 (2010/05) The ACORD name and logo are re

FIGURE 16 - CERTIFICATE HOLDER INFORMATION WILL PREFILL WITH INFORMATION ENTERED IN THE CERT HOLDERS MENU

Description of Operations

The latest version of the Certificate of Liability holds six lines of text in the Description of Operations field. If you have more text than fits in this field you can reduce the font size as low as 7 and use the Additional Remarks (ACORD 101) for overflow.

Editing Certificate Holders

To edit or modify existing certificate holders, do the following:

1. Click the Cert Holders Menu button (the button that shows a person walking out of an envelope).
2. Click the name of the cert holder you want to edit.
3. Select the Edit Cert Holder option on the Cert Holders Menu, and click Do It.
4. Make your edits, then click the Done button.

Adding Certificate Holders from the Master List

The EasyApps database has a Master List that holds all the certificate holders for all the certificates in the database. If a certificate holder has already been added for one certificate or client, you can add that same cert holder to another certificate (for the same client or for another client) by choosing it from the Master List.

To add an existing cert holder from the Master List to the open certificate, select the *Add Holders from Master List* option on the Certificate Holder menu, and then click *Do It*. The Master Cert Holder List appears, showing all of the certificate holders for all of your clients.

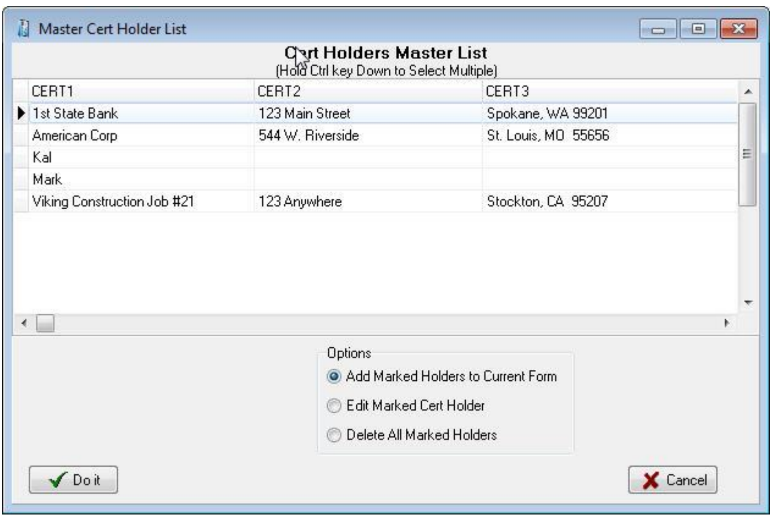


FIGURE 17 - MASTER CERT HOLDER DATABASE

In this dialog box, click cert holder name with your mouse to mark them, you can hold your CTRL key down to select multiple holders, click the Add Marked Holders to Current Form option, and then click Do It. The marked cert holders will be added to the cert holder list for the open certificate.

Note: There cannot be any blank certificate holders in the Cert Holders Menu list. If you see a blank certificate holder name at the top of the list, you'll get a Key Violation error the next time you try to add a new cert holder. You MUST delete the blank cert holder (click in the blank cert holder name, then click the Delete Marked Holders option and click Do It). If you delete cert holders from the Master List, they'll be deleted from all certificates. To delete a cert holder from just one certificate, open that certificate and delete the cert holder using the Certificate Holders Menu.

Deleting Certificate Holders

1. Open the Cert Holders Menu.
2. Select the Delete Marked Holders option.
3. Select the names of the cert holder(s) you wish to delete. (You can mark multiple holders by holding the Ctrl key down as you click the names.)
4. Click the Do It button. EasyApps will ask if you really want to delete the certificate holder – click *Yes*. The cert holder is deleted from the open certificate.

Printing Certificates for Selected Cert Holders

You can print a certificate for a single cert holder or for multiple cert holders (but don't try to send more than 10 at a time to your printer). To print certificates for cert holders:

In the open certificate, click the Cert Holders Menu button. In the Cert Holders Menu, select the *Mark Holders to Print* option and then click the Do It button.

The Mark Holders to Print dialog box appears (shown below). Double click the selected box for each cert holder you want to print to highlight it. If you want to mark all the certificate holders with one click, click the Mark/Unmark All check box (click the check box again to unmark all the cert holders).

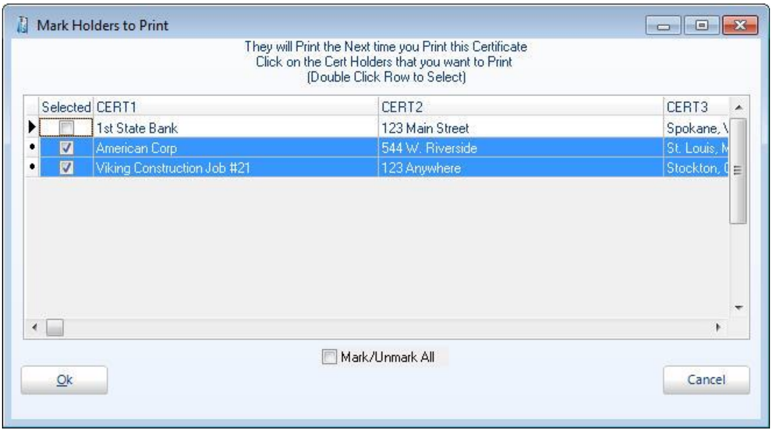


FIGURE 18 - MARK HOLDERS TO PREFILL TO CERTIFICATE FOR PRINTING

Click OK. You will be asked if you want to start printing marked certificate holders now.

If you wish to print select Yes and the Print dialog box for your printer appears – you can print multiple copies of each certificate by entering the number of copies in the Numbers of Copies box. Then click OK to print.

Click No to print to utilize other options, such as email or save to PDF. You will be viewing the form (unfilled with selected holders) and can select Save as PDF File or Email from the File menu.

After you close the form, you will be asked if you want to unmark all the holders you have marked for printing. Click Yes.

Generate Cert Holder List

To generate a printable list of certificate holders for the open certificate, select the Generate Cert Holder List option on the Certificate Holders Menu, and click Do It.

Close the Certificate Holders Menu

To close the Certificate Holders Menu, select the Exit Menu option, and click Do It.

Vehicle Database

The Vehicle Database stores vehicle information by client and allows entered information to be pre-filled on ACORD forms such as ID cards, Vehicle Schedules, and other auto applications. If the Vehicle Menu  button (the car button) is fully colored (not grayed out), it means the open form has access to the vehicle database.

Enter Vehicles in the Vehicle Database

To open the vehicle database, click on the Vehicle Menu button (the red car button). The Vehicle Database dialog box opens.

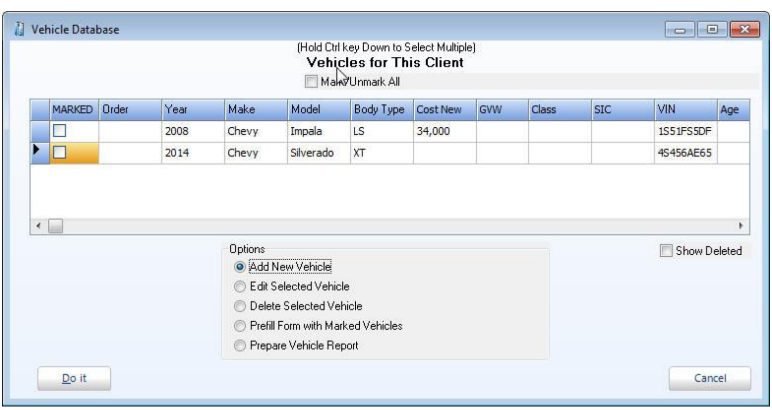


FIGURE 19 - VEHICLE MENU

To add a vehicle, click the Add New Vehicle option and then click the Do It button. The Vehicle Detail dialog box appears.

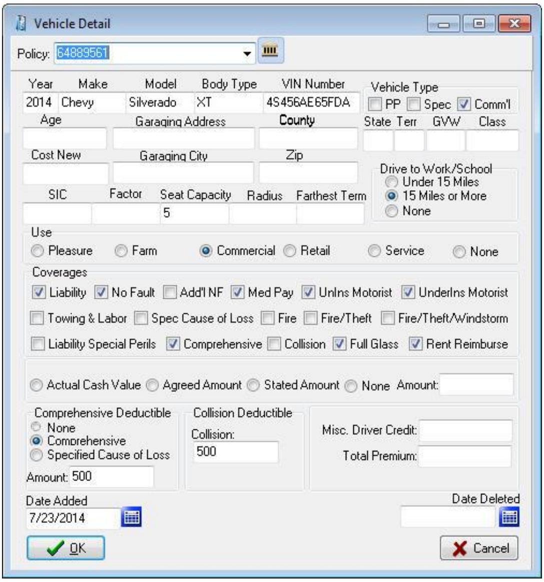


FIGURE 20 - ADDING A VEHICLE

Fill in all vehicle information, and then click OK. The Vehicle Database reappears.

Once you have entered all of your vehicles for your client, you can manipulate the order in which they print by updating the 'Order' column on the Vehicle Database.

Fill a Form with Vehicle Information

To prefill the open form with information for a specific vehicle, click the vehicle to highlight it. To select more than one vehicle, hold down the Ctrl key while clicking on the vehicles.

Then click the Prefill Form with Marked Vehicles option and click Do It. The vehicle data is filled into the open form.

Note: You can only prefill the number of vehicles that the specific open form has spaces for, with the exception of Auto ID cards. In Auto ID cards, you can prefill up to 10 vehicles at a time, and EasyApps will create the number of ID cards required for those vehicles as long as you use the Order number.

Note: If the Auto ID Card form is more than one page, when you prefill vehicles it will only create one form with one vehicle at a time.

Attach Vehicles to Specific Policies

You can also attach vehicles to specific polices when adding new vehicles on the Vehicle Detail screen. When you click the car icon on the toolbar of an Auto form, or you click the Vehicle button on the Personal tab, click on Add New Vehicle and Do It to get the Vehicle Detail screen. At the top of this screen is a policy drop down list so you can attach this vehicle to a specific policy.

Print a Vehicle List Report for a Client

A vehicle list report is a printable list of all vehicles associated with the current client. To create it, open the Vehicle Database, then click the Prepare Vehicle

Vehicle List Report
For:
2 Guys Barber Shop

Year	Make	Model	VIN	Cost New
2008	Chevy	Impala	1S51FS5DF1SD1	34,000
2014	Chevy	Silverado	4S456AE65FDA	

FIGURE 21 - VEHICLE REPORT LISTS ALL VEHICLES

Report option and click the Do It button.

Equipment Database

The Equipment Database stores equipment information and allows entered information to be pre-filled on ACORD forms. If the Equipment Menu button  (gears button) is fully colored (not grayed out), it means the open form has access to the equipment database.

Add Equipment to the Equipment Database

Click the 'Add New Equipment' option and the following screen appears

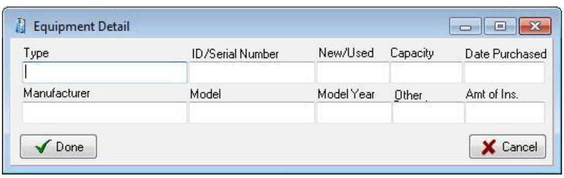


FIGURE 22 - ADD EQUIPMENT

Click 'Done' when finished. From the equipment menu you can Add/Edit/Delete/Prefill forms and print an Equipment Report.

Drivers Database

The Drivers Database stores driver information by client and allows entered information to be pre-filled on ACORD forms such as Business Auto Section, and other driver applications. If the Drivers Database button (the steering wheel button) is fully colored (not grayed out), it means

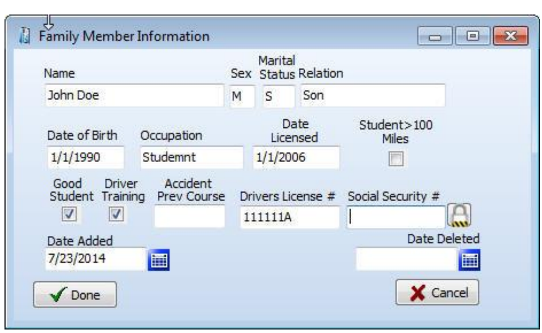


FIGURE 23 - ADD NEW DRIVER

the open form has access to the drivers database.

Add Drivers to the Drivers Database

Click the 'Add New Driver' option and the Driver Detail screen appears.

From the drivers menu Add, Edit, Delete, Prefill, and Prepare a Drivers Report are available, similar to the Vehicles Menu.

Property Database

The Property Database stores property information by client and allows entered information to be pre-filled on ACORD forms such as Homeowners Application, Commercial Insurance Application and the Dwelling Fire Application. If the Property Menu button (the

house button) is fully colored (not grayed out), it means the open form has access to the property database.

Either the Personal Property or the Commercial Property dialog box opens depending on the Acord application being used.

Enter Property in the Property Database

To open the Property Database, click on the Property Menu button (the house button). The Property dialog box opens.

The Personal Property and Commercial Property dialog box looks and works the same except for the title.

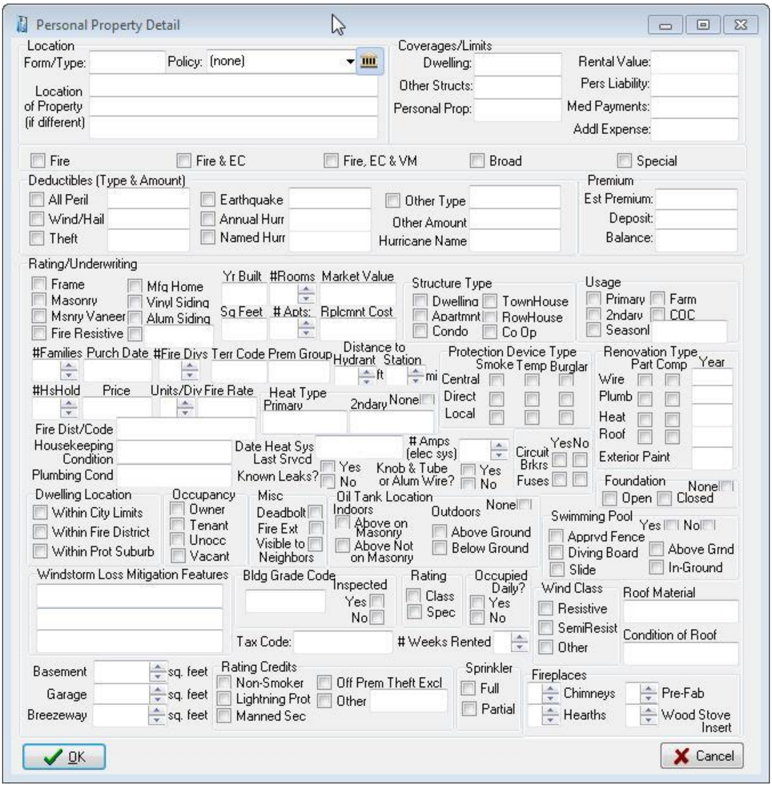


FIGURE 24 - ADD NEW PERSONAL PROPERTY

To add property, click the Add New Property option and then click the Do It button. The Property Detail dialog box appears.

Fill in all property information, and then click OK. The Property Dialog reappears.

Once you have entered all of your properties for your client, you can manipulate the order in which they print by updating in the 'Order' column on the Property Dialog window.

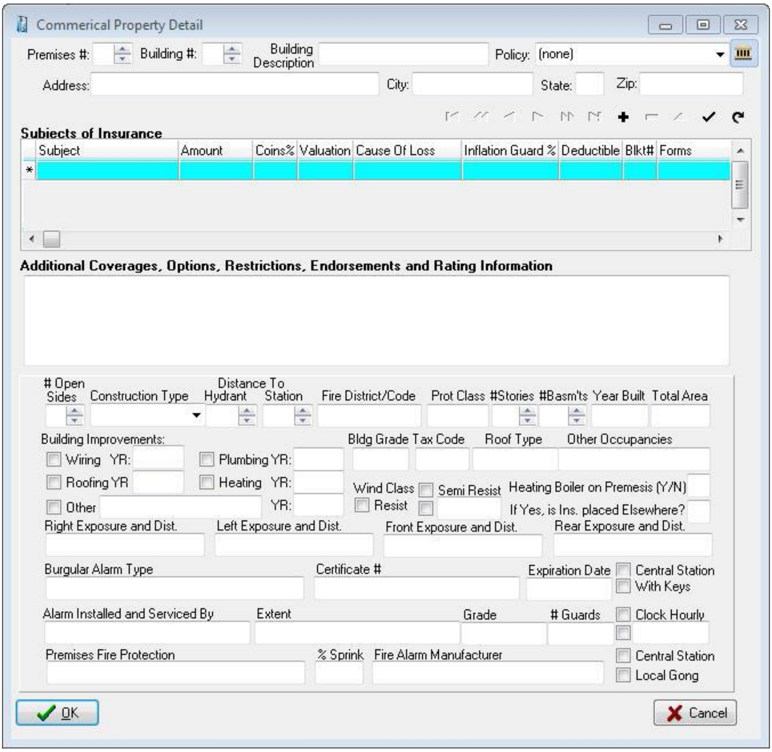


FIGURE 25 - ADD NEW COMMERCIAL PROPERTY

Fill a Form with Property Information

To prefill the open form with information for a specific property, click the property to highlight it. To select more than one property, hold down the Ctrl key while clicking on the properties.

Then click the Prefill Form with Marked Properties option and click 'Do It'. The property data is filled into the open form.

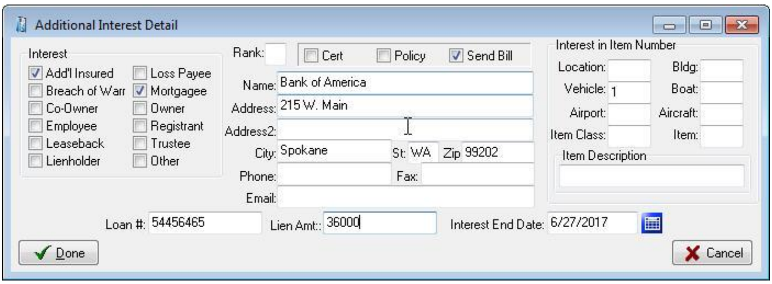
Note: You can only prefill the number of properties or buildings that the specific open form has spaces for.

Print a Property List Report for a Client

A property report is a printable list of all properties associated with the current client. To create it, open the Property Database, then click the Prepare Property Report option and click the Do It button.

Additional Interest Database

The Additional Interest Database stores information on the additional interest on the assets of the policy holder. This information can be pre-filled to ACORD forms such as the Additional Interest schedule, as well as drawn into the invoice as the billed party.



Click the 'Add New Interest' option and the Additional Interest Detail screen appears. Click *Done* when finished. From the Additional Interests menu you can Add, Edit, Delete, and Prefill similar to the Vehicles or Drivers menus.

Emailing Forms

The Email feature sends forms, saved as PDF or JPG files, directly from EasyApps through your e-mail provider. This must be properly configured using your email provider settings.

Setting Up Email

To set up to email from EasyApps you need to collect your email service information. The required information is:

- Outgoing SMTP server name

- User name
- Port number
- Password (if one is required for outgoing mail).

You can get all this information from your Internet Service Provider (ISP).

Note: Outlook users can simply check the Send through Outlook box and enter their signature information (optional).

To set up email:

1. Open any ACORD form, and click File – Email.
2. The Email Form dialog box opens with the saved file name in the Attachments box.
3. Click the Email Setup button (the button with the gears).
4. In the Email Setup dialog box, fill in your ISP information and click OK.
    - If your email provider requires a secure connection, you can select SMTPS and enter the specific port given to you by your email provider.

      Common gmail settings:
      - *Server is smtp.gmail.com*
      - *Select SMTPS (select this before setting the port)*
      - *Enter Port 587*

      These settings may change as your ISP makes configuration changes.
    - In the Signature area you can add a Default Signature. There is room for 6 lines of information that will appear at the bottom of each email.
    - The Password box is for the password your ISP requires for sending outgoing mail. Not all ISPs

require outgoing mail passwords – if yours does not require a password, leave this box blank and uncheck My Outbound Server Requires a Password box.

- Click OK

Sending an Email

From the Acord form select File – Email (after adding signatures and prefilling any pertinent information):

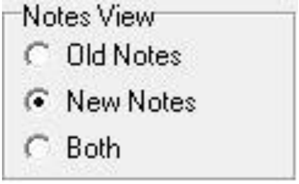
1. Enter the recipient address in the To: box.
2. In the large box, enter any message text you want to send the recipient.
3. Click the Send Email button.

Note: You can attach more files to your message by clicking the ellipsis button (at the right end of the Attachments box), and selecting the files you want to attach.

If EasyApps email doesn't work for you, you can save your forms as JPG or PDF files by clicking File – Save As PDF (or File – Save As JPG), and then attach the saved files to a message in your outside email program.

The Notes Tab

EasyApps now offers two modes for the notes window. The first is the original notes that were written to a single page listing the notes by date. These are referred to now as the Old Notes. To print these you either had to print ALL the notes or highlight what you want and copy / paste to a word document to print a section.



In the Agency Setup tab you can select a global preference to have Old Notes, New Notes or Both.

The "Both" option allows you to view Old Notes without the ability to Add and New Notes with adding ability. So you can add notes in the New Note format, but be able to view all the notes previously entered in the Old Note format.

Operation of Old Notes
Click the Notes tab to view the Notes window.

To start a new note, click the New Notes icon . The New Notes window opens.

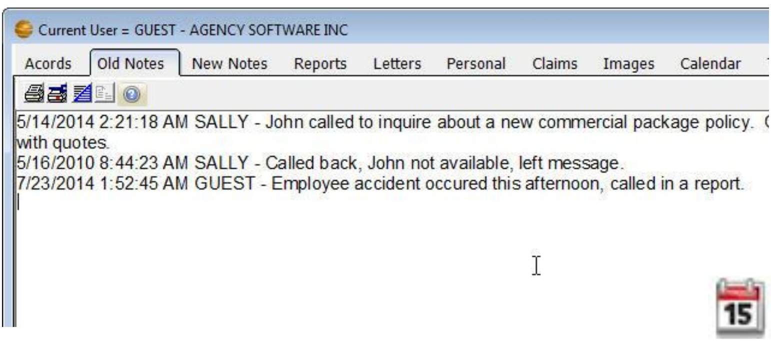


FIGURE 26 - OLD NOTES TAB DISPLAYING NOTES ENTERED

Notes are automatically time-and-date stamped, and your login user name is entered. You'll find buttons for formatting your note text, as well as print, cut, copy, and paste buttons, on the toolbar. Type your note in this window, then click the Commit button.

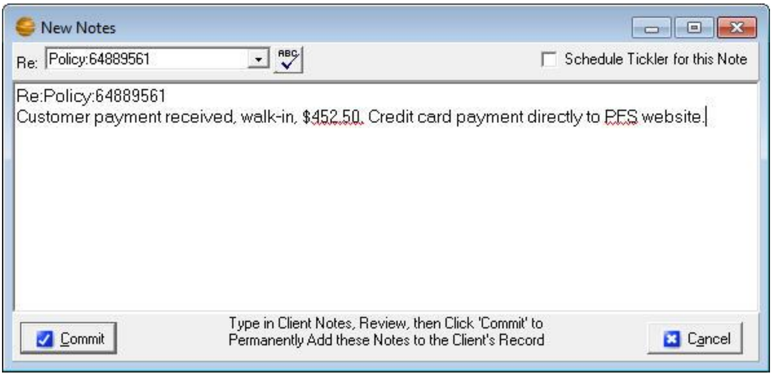


FIGURE 28 - NEW NOTE ENTRY FROM OLD NOTES TAB

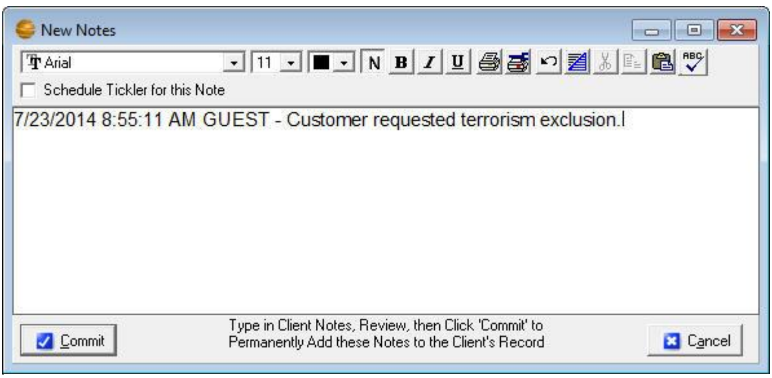


FIGURE 27 - NEW NOTE ENTRY FROM THE NEW NOTES TAB

Operation of the New Notes

The new notes are stored in a database as one (1) note per record. This allows the ability to categorize and print the notes per User and per date range.

Click on the Notes tab to view the New Notes window

To add a note, click on the  button from the Notes (or New Notes) tab. The New Notes entry window opens.

If the note applies to a policy you can select it in the Re: field

Notes are automatically time-and-date stamped, and your login user name is entered.

- Click the Spell Checker button to correct spelling
- Check the Tickler checkbox to add a tickler for this note
- Type your note in the body of the note record.
- Click the Commit button to permanently accept the record after reviewing your entries.

You can run reports on New Notes by clicking the Print Notes icon. The Print Notes window allows you to print by date, user, and client, or combinations of these filters.

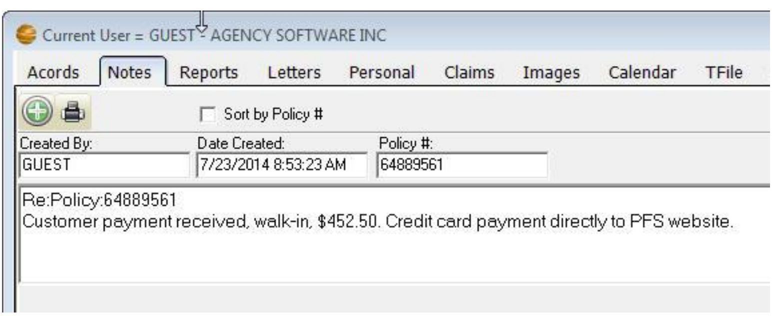


FIGURE 29 - NEW NOTES TAB

Note: On either of the mode of notes, clicking the Commit button posts the note and makes it read-only (meaning it cannot be edited or deleted). This is for E&O protection. Do not click the Commit button until the note is complete and correct. If you DO make a mistake entering a client's notes, you will have to add another entry below it stating your correction.

The Surveys Tab

Click the Surveys tab to open the Surveys window. There are more than 200 Business Specific Survey Questionnaires in EasyApps. Most Survey Questionnaires are 7 – 10 pages long and contain a checklist of items that will certainly help reduce your E&O risk – and possibly uncover underwriting credits. Use the scroll bar on the right side of the list of survey titles to locate the survey you want. *Double-click* on the survey title to display it in the window. When you have the survey you want open, click the print button to print it. You can take the survey with you when you go to an insured site, and enter information right on the pages.

You can edit surveys to better suit your agency. Click in the survey text and edit it as you would in a word processor. Use the scroll bar on the right of the open survey window to scroll through the entire survey.

The three buttons in the upper-left corner are Print Survey, Open Saved Survey (which opens surveys you've saved under a new name), and *Save as New Survey* (which saves a survey under a new name).

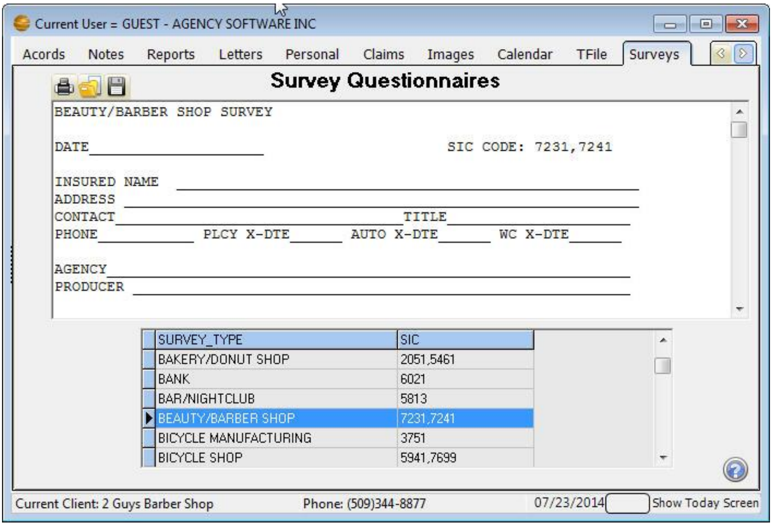


FIGURE 30 - NEW SURVEY ADDED TO THE SURVEY TAB

The Setup Tab

Click the Setup tab to review and adjust your settings and code tables.

Agency Information

The Agency Information is also the producer information that appears on your ACORD forms. This information comes from the information submitted during purchase to Agency Software. You can change the Agency Information by submitting the Change of Address form (found on the support page at agencysoftware.com) to Agency Software.

Encrypt Client SSN's

The Encrypt Client SSN's option is designed to secure the client social security number on the Personal tab. **Once checked it cannot be reversed** and the social security numbers are only available one at a time by clicking the Decoded SSN button next to the SSN field.

Automatic Data Backups Configuration

In the # of Days Between Backups box you can set a schedule for automatic data backups. If, for example, you select 7, then every 7 days the first thing that happens when EasyApps is opened is a data backup. EasyApps creates a compressed backup file of all your EasyApps data and saves it in the EAPPW\Backup folder. Since these backups are stored directly on your computer's hard drive, they do not protect against hardware failure, fires or viruses. **You MUST have an offsite backup method (i.e. tape backup, CD Burner or memory stick that you can take with you) available as your primary backup source.**

You can include the EasyApps backup in your Microsoft Scheduled Tasks so you can back up EasyApps at a time that's convenient for you. For instructions go to the Support page at agencysoftware.com.

Companies Information Database

Click the Companies button (on the right side of the window) to open the Company Information window. The toolbar buttons will allow you to Add, Edit, Delete and scroll through companies.

Click the + (Insert Record) button to add a new company to your Companies database. Fill in the fields, and then click the check mark button to save your entries.

Employees Information Database

On the Agency Setup tab, click the Employees button to open the Employees window.

The toolbar at the top is like the rest of the toolbars in EasyApps – with the buttons, you can Add, Edit and Delete usernames and producers in EasyApps.

Once your employees have been entered you can choose the appropriate employee from the Logged In As drop down on the Setup tab. This will automatically enter the user's name as they add notes in the program.

Appearance Settings

The Skins button allows you to choose a theme. The listed themes change the colors of the program background.

SECTION 4
TROUBLESHOOTING

EasyApps Slow to Open

Try disabling the anti-virus program on the local machine. If the program opens more quickly, the anti-virus is the problem. You need to set exclusions in your anti-virus program so that the anti-virus can run without interfering with your EasyApps database files. Go to the web site www.agencysoftware.com. On the Support page, click the link that reads "Program Running Slow or Locking Up" for more information on exclusions and details on other things to look for.

EasyApps will not open, no error

Often this means that there are multiple processes in the task manager. Open the Windows Task Manager (CTRL+ALT+DEL), click the Processes tab, and end any instance of **eappw.exe** you find. Try the program again, being sure to give it plenty of time (this happens due to system/network slowness).

Cannot Perform Operation on Open Dataset

This error occurs in the ACORD window. It is preceded by an error showing characters and stating that those characters are not a valid integer. Trying to add an ACORD form after that message will generate this error. This means that some data in the ACORD forms has corrupted. Call Technical Support immediately and prepare to transfer the data to Agency Software for examination and correction of the corruption.

Index Out of Date

This error usually occurs when someone has used Ctrl-Alt-Delete to get out of the software or has shut down their computer while EZApps was running

1. Close EasyApps on ***all machines***
2. Click Start, Programs, EasyApps for Windows, Keyfix.
3. Allow Keyfix to run until you see the message "Rebuild Complete".

Forms will not open, giving error

If no forms are opening on a single workstation, the memory setting might need to be adjusted. Close EasyApps, browse to the EAPPW folder, and open Techtools (Techtoolsv8 for Windows 8 users). Click the BDE Adjust tab, note the current setting on the left side, then click the 2000 button (if it was currently 2000 try a different setting). Close techtools, return to EasyApps, and try opening a form again.

Printer Doesn't Print from EasyApps

This problem is most likely to occur when an agency is trying to print to a multifunction printer from EasyApps. There are some multifunction printers EasyApps will not print to. These include some Xerox WorkCenter XE series printers. There is no fix for this. The agency must print to a different printer.

Text Won't Fit into Lines on Forms

This problem is usually caused by having Large fonts set on the particular computer that has the problem. The ACORD forms are not designed to run in a Large-fonts environment.

To change the font settings back to Normal:

1. Right-click in an empty space on your computer desktop.
2. On the shortcut menu, click Properties.
3. In the Display Properties dialog box, click the Settings tab.
4. On the Settings tab, click the Advanced button.
5. On the General tab, you'll see a box labeled Font Size or DPI Settings (depending on your version of Windows). The box probably has "Large" or "125%" or some similar setting (again, depending on your version of Windows).
6. Click the arrow in the box to open a list of choices.
7. Choose Normal, or choose Other and set 100%.
8. Click OK to close every open dialog box. You may need to restart your computer (depending on your version of Windows).

External Exception/Unknown Internal Operating System Errors

These messages indicate a network interrupt. The reason for these interrupts can vary network to network. Anything from aggressive antivirus, to a bad network card can cause these errors. See more about the potential issues by referring to the "Program Running Slow or Locking Up" document in the Support section at our website.

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