



April 3, 2019 Agenda

Portsmouth NH – Courtyard Marriott – 1000 Market Street

Okay folks, let's all play in "The Sandbox" and not get cranky...

(unlike others we hear about every day...)

We are centering/inviting both Accounting folks and Service folks to "The Sandbox" .. *The idea is to have front office and back office folks know each others needs, why it is or isn't important (both sides here) and what each needs to "play together". BTW: we **know** that this will get way out of hand, a great thing, as we all learn different jobs, workflows, procedures and more!*

CSR and Accounting - How they are really playing together

- Reporting functions will be a primary focus discussed
- Classic Reports
 - vs
- My Agency Reports
 - Why they are different and why ???
 - Where does the data pull from for each
- Do you use???
- "My User Reports" *located on your Home Center*
- "My Scheduled Reports" *located on your Home Center*
- How do you run Renewal Reports vs Renewal List Tool
 - Platform
 - Vs not Platform *(you do know Platform has Renewals easily listed, right?)*

Special Guest is no stranger to our group... Caleen Alexanderson

Understanding not just how agency CSR/AM's want to work with their carriers but the subtle nuances of what makes that process easier is critical. Caleen Alexanderson, UX Researcher at Duck Creek Technologies studies how the CSR/AM want to work within the quoting and servicing process with their carriers. Learn what this includes and how you can be part of the process in improving CSR to carrier workflows

Do you know about all the AMS360 Updates???

Recent and soon to come....

2018 R1

- What's changed or added...
- FYI 18.1.56.4
- Accounting Changes
- Business Origin

2018 R2 *(should be on your desktop in April)*

- Append to Activity
- Security within Business Unit
- Merge Customer – *Security Settings - no people in system, short and sweet*
- Multiple IVANS accounts – *agency merger and acquisition issue*

"Sandbox" discussions

Audience: CSR's/Account Managers/Accounting/more the merrier

Dates and info to note

NetVU New England Fall Conference (October 27, 28, 29)

- Red Jacket Resort – North Conway NH

National Conference

- Please use the "suggested hotels" / NOTE: quality is of the essence in this location/area

Cost: \$50.00 member \$75.00 non-members

See website www.netvune.org for Registration Form and payment details – or write us at Board@NetVUNewEngland.org