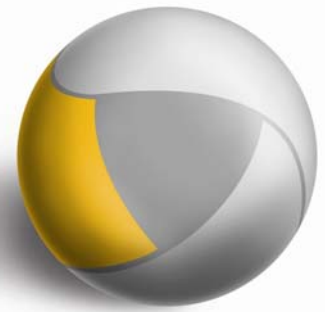


MI Management System Newsletter



January-February-March 2004

Quarterly Newsletter

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Training Center Opens in March for MI Management System

At MI-Assistant, our goal is to help you receive the most from your agency management system investment. For that reason, we've brought together a team of certified trainers with over 20 years of experience prepared to make your MI Management System a success for your agency.

Our Training Center, opening in in March will offer 3 levels of MI Management System Training, all at an economically affordable cost.

Each level allows the instructor to work with individuals to ensure that you receive the most out of your education. Classroom participants are paired to create a flexible opportunity in learning in a friendly, teamed environment to help you become proficient and confident in using MI Management System.

Educational Courses

Basic System Overview-Level 1

Course Length: 1 Day

Course Cost: \$75

Course Description:

Troubleshooting/Answers to user questions, Basic system overview including: Clients, Applications/Forms, Locaters, Memos, Tranlogs, Imaging/Efiling, Integration. Lunch provided.

Marketing and Policy Accounting-Level 2

Course Length: 1 Day

Course Cost: \$75

Course Description:

Marketing, Reports, Tasks, Policy Accounting including: Direct Bill and Agency Bill. Lunch provided.

Accounting Integration-Level 3

Course Length: 1 Day

Course Cost: \$75

Course Description:

Commission Reconciliation, Getting Started with Accounting including: Setting up beginning balances, Setting up QuickBooks Company, and Integration with QuickBooks. QuickBooks Overview including Check Writing, Deposits, Journal Entries and Financial Statements are also covered. Lunch provided.

What Version?

The most current version is 5.2.0.0.

To find out which version of MI Management System you are running, click Help and then About.

Courses held at our Training Center in Eleva, Wisconsin.

Training Center Dates:

March 15 - Level 1 Course

March 16 - Level 2 Course

March 17 - Level 3 Course

September 27 - Level 1

September 28 - Level 2

September 29 - Level 3

Registration Information:

1. Review and select from the offerings appropriate for you.
2. Email: trainings@mi-assistant.com to request a registration form.
3. You will receive an email with the form that must be completed and returned along with payment for your selections to MI-Assistant.

Call 715.287.4262 or visit

www.mi-assistant.com for more information.

Need Technical Support?
<http://support.mi-assistant.com/>

From The Customer Service Technical Support Archives

Where is the best place to view my client's balance due?

Go to the client's screen. Click on Statements & Aging, Client Statement. One of the advantages of looking here is that it's easily accessible. Many times, the client screen is already open. A client statement doesn't show all the items that have been paid off (HIST status), only the items that are currently due. It shows the amount due for all policies and includes whatever falls in the pre-bill days (items that are due in the next 30 days).

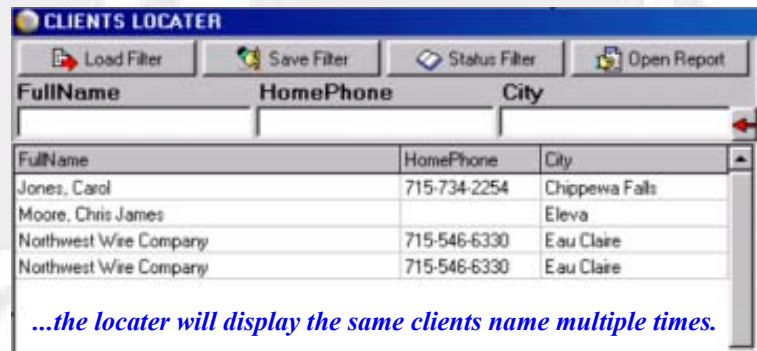
Why do my policies remain inactive after the download has re-instated the policy?

This is a mapping flag setting for the download. Go to Tasks, View Company Download Information, Company Info Setup. On the Mapping Flags tab, highlight a company. If there is a check mark in No Automatic Reinstatement, the agency will have to make reinstated policies active manually. If the check mark is removed, the policy will return to active status when the

company downloads a reinstatement. This is a separate setting for each company.

Can information be exported from MI Management System to Excel?

Yes. Design a custom report and set it up to Print to File. Next, print it as a .txt. Find the file and open it in



...the locator will display the same clients name multiple times.

FullName	HomePhone	City
Jones, Carol	715-734-2254	Chippewa Falls
Moore, Chris James		Eleva
Northwest Wire Company	715-546-6330	Eau Claire
Northwest Wire Company	715-546-6330	Eau Claire

Excel. A wizard will walk you through. Open the file in Excel. More detailed directions are available on our knowledgebase under the key words "excel."

What do I do if an icon disappears from the Banner?

At the Main Screen of the Management System, select Tools then Setup Buttons. Click the Restore button. Click Close. Occasionally, this occurs after a Management System update.

Why does my client locator show each client multiple times?

If any of the fields that contain application specific (i.e. policy number, expiration date) or family member specific (i.e. date of birth, age) information has been moved to the first three fields on the list of the locator. The locator will display the same client's name multiple times. If the customer has 5 policies and policy number is the third column in the locator, the client will be on the list 5 times.

The fields can be moved further down the list of the locator fields by expanding the locator (using red arrow to right), then clicking and dragging the field lower on the list. To permanently remove, expand the locator, click Modify Setup. Under Fields Selected, highlight the field and click on the Remove Fields from Selected button.

How critical are the two new tasks added on the 5.2 update?

Backup Database and Backup and Restore Database are designed



Marketing Tidbits...

Big BLOWOUT sale!

Sound familiar? Successful companies like 3M, Harley-Davidson and Maytag* don't scream out their bargains or deals in ads. Nor do they barrage the public with emails or go banging on the homes of America..

Instead, they let us know what they are doing, why they are doing it and letting the public respond when they are ready. They focus on the customer, not themselves.

Here's some simple tips:

- Interact with customers.
- Engage customers in conversation, get on the same wavelength.
- What customers value should be all that matters to you.
- Never cease efforts to keep your customers believing in you.
- Use your uniqueness to your benefit.

-Shane Vetterkind, Marketing Coordinator, MI-Assistant

*3M, Harley-Davidson and Maytag are property of the respective holders, and have no association with MI-Assistant.

to optimize the InterBase database. This is where your transactional filing is now stored. It also creates a file called mimgmt.gbk. Should your database become corrupted, it's a must to have a current copy of the mimgmt.gbk to restore from. If you do not run this task daily, the gbk file will be old. If we are forced to restore from a tape backup, you will lose all data since the last time this task was completed.

Database corruption is much more unlikely with InterBase databases, but can occur. In the few cases that seen so far, the majority of them occurred at agencies operating a Windows 98

server/workstation instead of the recommendation of a Windows 2000 dedicated server.

Eventually, more of the management system data will be converted to InterBase databases. The next section scheduled to be converted is memos. The tasks are critical now and will only become more so. The next update will include instructions on how to automate these tasks in your Windows task scheduler.

Can I email miscellaneous applications?

Several of the applications in our system are not ACORD forms. They

are what we call Miscellaneous Applications. Examples of these are the Farm, Health, Life, and Bond policies. Because these are not ACORD forms, they are not created in a pdf format and cannot be emailed.

The answers to these questions and more are also available on our web site knowledgebase. Go to www.mi-assistant.com, select Support Center, click Knowledgebase. Select the product and search on a key word. On-line support 24 hours a day, seven days a week.

All the Info, All You Need, All the Time. Resource Group Information at www.mi-assistant.com

Navigate to your hearts content! Check out the web and find out that Resource Groups are users of the MI Management System getting together as a group to discuss, learn, and enhance the MI Management System.

The website is a source for all Resource Group Members to find special information about the MI Management System and to work with other peers in using the program.

Check out these highlights of Resource Group meetings.

- Tips & Tricks
- MI Communications
- Discuss the latest release of the system
- Discuss issues agencies may be experiencing
- General question & answer session
- Learn from other agencies
- Prioritize enhancements made to the system

...And so much more.

Putting a Face to a Name

Name: Bobby Weiss

Age: 32

Residence: Mondovi, WI

Time at MI: 5 years

What do you do at MI?

I am a Customer Service Technician for MI Management System.

Tell us about your family:

Scott, my significant other and I have a 10 year old daughter Carisa and Scott's 14 year old son Ryan.

What do you like to do besides working at MI?

Right now, Scott and I run non-stop with the kids and their activities. So besides that, I just eat and sleep! I do love the outdoors and sports, so any outdoor activity is great. I also enjoy reading when I have a quiet moment and scrap-

booking is a great relaxer. I love to spend time with family and friends which gives me a chance to socialize with people other than kids if you know what I mean!



What do you like about your job position at MI?

MI has many different job positions, but the one I have is the greatest. It fits me the best. The people in my department are all wonderful people

to work with; we have a lot fun each day. We all have very similar characteristics and we "fit" very well together as a Customer Service Technical Support Team.

The most important/largest part of my job, and the one I love the most, is dealing directly with our customers... More specifically, being able to help them. I can guarantee that at some

point, you have experienced a time when something breaks, something does not work correctly, just doesn't go the way intended, or you just plain don't understand why we've done something the way we did. I love to be able to take those situations and find a solution. It's a wonderful feeling to know I've helped someone with a problem. It's very motivating to hear "Thank you so much, you've just made my day!" I am very much a people person and really enjoy getting to know our customers, not only on a business level, but a personal level. Some of you, I have talked to for 5 years. I know your family, your business, and the things going on in your life. The funny thing is that many of you, I've never even met! I'm really looking forward to meeting you in person, and putting a face with voice.

Thank you for the past 5 years, and I look forward to being here to help you in the future.

MI-Assistant. Why Eleva, Wisconsin ?

By James (Jim) Deetz
Former COB, MI-Assistant

I have been asked this question many times. Eleva, pronounced \e-'le-va\, with a population of 635, is a small farming community approximately 15 miles south of Eau Claire, Wisconsin. I love the small town atmosphere, the great people, and the memories. I grew up on a farm just one mile south of Eleva.



Jim Deetz
MI-Assistant

I started running the business in the basement of my home nearly 20 years ago. I was selling insurance for Deetz Insurance, my brother's agency in town. He asked me if a

computer could calculate insurance rates for quoting auto and home. I found out that it could! As the company grew, it moved to a modest building in downtown Eleva. Eventually, MI outgrew that building, moved to another, and outgrew that building too.

I had to make a decision to keep MI-Assistant in Eleva or move the company to Eau Claire.

I wanted to stay in Eleva, besides, many of the employees were from the local area communities. When I presented the issue of office space to the Eleva Village Board, the Board had some concerns. The Village Board wanted to know what exactly MI-Assistant was, and how long it planned on staying in the community. The Village of Eleva understood the importance of keeping business close to its roots by stepping up to the plate. The Village of Eleva applied for a grant

from the State of Wisconsin, placing the Village credit on the line. With the approval of the grant, the Village generously constructed a building for MI to lease from the village.

The employees are proud of who MI is and what it does. They go the extra mile in support, software design, and everything else that makes this a great company. I believe small town pride and small town values have a lot to do with that.

A very special thing happened October 31st, 2003. Fiserv, FSC, Inc. purchased MI-Assistant. Fiserv is a S&P 500 organization owning over 120 top-notch companies like MI. I am excited to say that MI is staying in Eleva and will continue to grow and offer great products. Thanks to our customers, our employees, our community, and to God.

Resource Group Contacts and Meeting Locations

<http://www.mi-assistant.com/miassistant/resource+groups/default.asp>

Western Wisconsin

President: Mike Field
mikefield@fieldins.com
Super 8
Rice Lake, Wisconsin

Eastern Wisconsin

President: Brian Jilot
brian@jilotinsurance.com
SECURA
Appleton, Wisconsin

Northern Minnesota

President: Dan Lancette
Eddy's Resort
Onamia, Minnesota

Eastern Iowa

President: Lori Welch
lwelchs@iowatelecom.net
Guesthouse International Inn & Suites
Cedar Rapids, IA

Southern Wisconsin

President: John Wickhem
wickhemins1@charter.net
General Casualty
Sun Prairie, Wisconsin

Southern Minnesota

President: Dan Butler
Cabela's
Owatonna, Minnesota

Illinois

President: Tim Hurt
youwillgethurt@aol.com
Holiday Inn
Normal, Illinois

Western Iowa

President: Mike Worthington
worthings@goldfieldaccess.net
Carrollton Inn Hotel
Carroll, Iowa

Vendor Spotlight

Getting more out of your MI Management System

By Mary Hauri, President, Insurance Concepts in Motion

The most profitable and efficient agencies are those that use technology to the utmost advantage. Many agencies invest in technology, but a year later are still using less than 50% of the software capabilities. So, how do we get more out of it? Answer: Begin using your tranlog.

Seem like more work? Sound too simple? It works! The Tranlog is at the heart of efficiency in using your MI Management System. Your goal is to be able to view the client screen, click the Transactional filing tab, and instantly see what each entry is about. Set up clear categories with definitions instead of using general terms such as "conversation". Remember to put these in your procedures manual. Over time, you will naturally begin to use your system more and depend less on paper files. And when it comes to E & O, you are increasingly protected. Plus, you can answer your customer's questions immediately.



Mary Hauri, President
Insurance Concepts In Motion
www.icmotion.net
608.755.4603