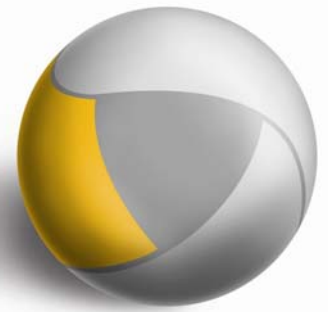


MI Management System Newsletter



April - May - June 2005

Quarterly Newsletter

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What Version?

The most current version of the MI Management System is 5.6.0.1. To find out which version of MI Management System you are running, click Help and then About.

MI Resource Groups receive Paperless Training from MI

The Spring MI Resource Group meetings include training from MI-Assistant on utilizing the imaging and E-filing areas of the Management System. Topics covered include determining the filing method – client or date, basic setup, and day to day tasks. Several MI Management System agencies are currently “paperless”, with many more on the verge of making a move in that direction. A PDF outline of the training session can be found on the Internet at: <http://www.mi-assistant.com/resources/spring2005resourcegroupmeetingtraining.pdf>



NUDGMI President Visits Regional Group Meetings

John Wickhem, President of NUDGMI, is visiting the regional Resource Groups to promote involvement with NUDGMI. John has been receiving information from ACT, AUGIE, and ACORD and is looking for help in providing feedback to these groups to better the workflow for Independent Insurance Agencies. The message John is providing to the groups is that if all MI Users can come together under one organization and speak with one voice to MI and the Carriers, much more can get accomplished. With all the changes in workflow (many for the worse) for the Independent Agent in recent years, the time is now to band together and provide feedback to those that provide the workflow. John Wickhem is an Independent Agent in Janesville, WI, if you would like to speak to John, he can be contacted by Phone: 608-752-6030 Fax: 608-752-6992 or Email: wickhemins1@charter.net.

AN EXPEDITION WITH MI-Assistant

A Division of Fiserv FSC, Inc.

For More information on the
MI Users Conference, please call
715.287.3225 ext. 173

Or Visit our Web Site at www.mi-assistant.com

2005 MI USERS CONFERENCE

July 20 - July 21, 2005

Wisconsin Dells, Wisconsin



What is a Knowledgebase?

By Jennifer Thompson, Customer Service
MI-Assistant

Click on the Support button on the Banner. This directs you to the MI Support Page. Click on the third option down, Knowledgebase. Select the MI Management System as the product and type in a key word(s) such as 'Printing'. Click Search. It will search a database of articles that were entered by Technical Support on a variety of issues: "how do I...." items, error messages, answers to frequently asked questions. Try a few of these key words:

- System is busy
- Mail merge
- Move application
- Download internet

See what article titles come up. Click on the article you would like to read to get step by step instructions or to learn more about your question. Knowledgebase is available 24 hours a day 7 days a week.



What's Next?

- ⇒ **Firebird** – MI is currently contacting all Management System agencies and scheduling a time to run the 5.6 update. This update is a database change from Interbase to Firebird. All agencies should be contacted by the end of April. Firebird is compatible with Windows 2003 Server.
- ⇒ **Real Time** – Real Time Inquiry is currently in Beta with West Bend and SECURA offering Claims, Billing, and Policy Inquiry. Several additional Carriers will be released soon. A rollout of Real Time Inquiry to all Management System agencies should begin in the 2nd quarter.
- ⇒ **Imaging area Improvements** – MI is currently researching enhancements to the Imaging and E-Filing areas of the system. Attaching, retrieving, and viewing images and E-Files will be made easier.

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

From The Customer Service Technical Support Archives

*By Jennifer Thompson, Customer Service
 MI-Assistant*

Download

We frequently receive requests to download with new companies. MI is interested in certifying as many companies for download as possible. If a company is not on our list, please contact the carrier and request that they consider downloading with MI. They should contact Chuck Becker to get the certification process started here. Sometimes carriers are not interested whether it's due to cost or a feeling that not enough agencies will utilize this download. The more they hear from agencies directly, the more likely they will be to consider doing download.



Family Members and Drivers

The personal auto app shares a table with the client screen. This table contains the name of family members/drivers. The download will add names to the list, but it will never remove them. This is being done purposely because the table is a shared table. If a client has children under the age of 16, you probably want them listed on the family member tab even though they aren't drivers. If the download removed drivers, these children would also be removed from the family member tab on the client screen. Consequently, all family members will show up on the auto app as drivers and if a person leaves the household, the download will not remove them. It will have to be done manually at the agency.

Shortcut

Hit the space bar three times in a date field, it fills in the current date.

Clever Idea

Submitted by Mark Cannedy of Prairie State Insurance, Springfield, IL

If you have lots of commercial accounts that have employees, you have a ready made list of prospects. Put the names of the employees under Family Members (this area is usually left blank on commercial accounts). You can print a list of "family members" for the client in the Letters button on the client screen or run a report of all "family members" on commercial accounts to develop a database of prospects.

How to get Emails received in Outlook/Outlook Express documented in the Management System

Copy the entire text of an email simply by clicking and dragging to highlight it. Then either right click and copy or use Ctrl+C.

In the Management System, create a tranlog on the client screen. Place the cursor in the text area of the tranlog and use Ctrl+V to paste the text from the email into the tranlog.

I keep locking up when I try to exit Microsoft Word after setting up a single or marketing letter.

Go into the System button on the banner. Go to the Local Defaults tab. Put a check mark in *Ask if Word is Closed*. This is a local setting which means it is per user. It may not be necessary for all users to have this option selected. Now after closing Word, it will display a box that says "Check if Word is Closed." This box will display twice. Simply click on OK to get past this box and no more lock ups!

Do I need to upgrade my accounting software?

Every year both Peachtree and QuickBooks introduce a new version of their accounting software. There is not necessarily a lot of value for MI users to upgrade every year. However, eventually the companies will discontinue supporting the version of the software you are currently using, usually after 3 years. At that time, it would be appropriate to upgrade to their newest version.

When upgrading to the newest version of the software, contact support to find out if it is necessary to get a new AKY file. It is not always necessary. In the System button on Banner, Accounting Defaults tab, select the accounting program version that is closest to what you have purchased. In the Local defaults, put in the path to the accounting program. You can look at the properties of QuickBooks or Peachtree icon on the desktop to determine the correct path. The first time you post transactions, make sure you have entered the name of your company in QuickBooks or Peachtree. Once entered, it will remember it during future postings.



Commercial Download

By Mike Peterson, VP of Product Management
MI-Assistant

Lately there has been increased discussion about the viability of downloading commercial lines in the MI-Management System. In fact, there has been increased discussion about the downloading of commercial lines throughout the whole industry. Currently, less than 25% of agents that can download commercial lines, do so. There are many instances of agencies giving it a try, only to turn it off after only a few weeks of using it. These statistics spell it out quite well – commercial download doesn't work well in its current state.

Recently a working group from the Agents Council for Technology (ACT) published a paper addressing some of the shortfalls found when downloading commercial lines. This paper addresses the problems in which a carrier sends the data as well as how the vendor processes it. As you may already know, MI doesn't currently support the downloading of commercial lines. This is due primarily to what we've learned from others, it doesn't work yet. The reasons it doesn't work are many. Among them are:

- Limited data is being sent by the carriers
- Data is being truncated and sometimes lost
- Agency data which is correct is being overwritten by incorrect data or blank fields
- Data is handled and managed differently by each carrier



Putting a Face to a Name

Name: Kath Lightfoot
Age: 51

What do you do at MI? Sound familiar-"This is Kath-MI Assistant Software, How can I help you"-I have the pleasure of greeting all that enter or telephone MI. As receptionist, I have the task of not just the phones but also some mail distribution tasks and clerical projects as needed.

How long have you worked at MI? 1 1/2 years

Where do you live? Strum

Who are the significant others in your life? Mike and I have been married for 33 years. We have 2 sons, one of which is married, giving us a wonderful daughter-in-law. And a bonus-Hunter -4 and Sayge-2. Being a grandparent is a wonderful bonus in life.

What do you like to do besides working at MI (that's a given)? Mike and I love the Mississippi River, where we spend as much of the summer as possible. It is a beautiful place for camping and boating. Learning to golf is my newest venture - not good but it is fun.

What do you like about your job? I like the opportunities that MI offers, the challenges each day. And the great people I work with. There is nothing better than being able to say, you love your job.