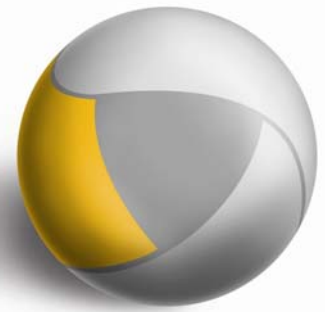


# MI Management System Newsletter



July-August-September 2004

Quarterly Newsletter

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## MI Users Conference July 28-29, 2004

### Holiday Inn - Campus Area in Eau Claire, Wisconsin.

The 2004 Users Conference hosts fun, education, and the opportunity to network with your peers, industry professionals, and company representatives. The conference will stage a variety of speakers to educate even the most versed individual.

Special guest Carolyn "Cal" Durland from ACORD presents ACORD Standards, Real-time and the Benefits to your agency.



Carolyn "Cal" Durland, ACORD



Mark Parrish, Ajasent

Mark Parrish, founder and CEO of Ajasent, Inc., comes to us from Louisiana to discuss remote computing and how it affects your productivity and work environment.

The afternoon rating and management system conferences host speaker and industry consultant Mary Hauri, ICM, presenting "Personal Lines Workflow" and "Paperless, getting started."



Mary Hauri, ICM



Scott Johnson, PC Solutions

Technology Advisor and Consultant, Scott Johnson of PC Solutions brings us the newest in technology gizmos, gadgets and advice. Come see samples of the newest products in bleeding edge technology.

### What Version?

The most current version of the MI Management System is 5.3.0.0. Please do not attempt the 5.3.0.0 update if version 5.2.0.0 has not been completed. If your version is 5.1.0.2 or lower, contact support to schedule an appointment for an update at support@mi-assistant.com.

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

**Register today! [www.mi-assistant.com](http://www.mi-assistant.com)**

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

## MI Management Training Center

MI Management System training sessions will be held at our Training Center on September 27, 28, & 29, 2004. Registration is open to all agencies from Illinois, Indiana, Iowa, Minnesota and Wisconsin. Participate in this cost-effective, small classroom setting to ensure you're getting the most out of your MI Management System.

### Level 1

1

#### Basic System Overview

**Course Length:** 1 Day

**Course Cost:** \$75/Person

**Course Description:**

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

### Level 2

2

#### Marketing and Policy Accounting

**Course Length:** 1 Day

**Course Cost:** \$75/Person

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

**Email [trainings@mi-assistant.com](mailto:trainings@mi-assistant.com) for more information.**

### Level 3

3

#### Accounting Integration

**Course Length:** 1 Day

**Course Cost:** \$75/Person

**Course Description:** Commission Reconciliation, Getting Started with Accounting including: Setting 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.

## From The Customer Service Technical Support Archives

*By Jennifer Thompson, Customer Service MI-Assistant*

### Do we still need a modem to do the company downloads?

It might be possible to do downloads without a modem. There is a new version of Transfer Manager (v. 2.2) available which supports download via high speed internet connections. However, this is only available if your carriers use the EC Server. To see if your carriers are using the EC Server, visit this web site:

<http://www.ivans.com/main.asp?secname=ABOUT%20US&subname=E-Commerce&offername=E-Commerce%20Server%20Customers>

If any of your companies do NOT use the EC Server, you will still need a modem. There are a handful of companies that don't download via IVANS at all and may also require a modem. Check with each carrier to make sure. If your carrier was not on the list, please contact them to request that they send downloads to the EC Server.

### Why do all Progressive policies come in as Personal Auto, and can I change this?

Progressive uses the personal auto format for all policies- auto, motorcycle, snowmobile, recreational vehicle, mobile home etc. This is how they send it.

However, did you know that you can change something that was entered as a Personal Auto to a Personal Motorcycle, Personal Snowmobile, or Personal Recreational Vehicle and vice versa? To do this, open up the application. At the top of the Application, click on Utilities, Switch to.... select the type of policy. All four policy types use the same ACORD form, so you are able to simply switch the policy type if you desire. The download will not change it back.

You can do the same between Personal Home and Personal Mobile Home since they use the same ACORD form.

### What should I do when I can't get into my Management System because it says, "maximum number of users already logged in?"

Double click on Management System icon. Change to a user with level 1 security, type in the password, and go into Admin Utilities button.

In the column called Logged in, look to see who is set to True, but is not actually in the system. Right click on True and left click on Log out.

This problem usually occurs when people lock up in the system, `ctrl+alt+del` and end task on the Management System or shut down their computer while the Management System is still open.

Agencies pay maintenance based on the number of concurrent users they want to have access to the system. Each time a person logs in, we count them. When they log out, we count that. If a user exits the system improperly (and sometimes it is necessary), it thinks that they are still in the system. You will have to manually log them off with the directions above.

### Can I insert a signature on the Certificate of Liability Insurance?

At this time, it is not possible to insert signatures into the pdf file that is created when emailing it. This is an enhancement that we will look into for a future update. Also, when emailing a certificate, if you have ten

Continued from page 2

certificate holders, it will email ten certificates. There is no way to email the certificate for just the one certificate holder unless you do a new certificate each time. This too will be looked at for future enhancement.

### How do I change my agency information in the Management System?

If you need to change the name, address, phone number, fax number, or email address of the agency, go to the System button on the Banner. On the Sub agency tab, simply type over the current information. This will change it everywhere in your system unless you have it typed on any word processing documents.

### When reconciling commissions, I can't find an invoice but I can see it in Billing Setup.

Some of the most common reasons you can't find an invoice in commission reconciliation are as follows:

1. The invoice has not been OK'd.
2. The invoice already has a paid date on it.
3. It was billed under the wrong company.
4. If you just created the invoice, you will have to exit commission reconciliation, then go back in for the new invoices to pull in.

### I know there is an Age/Birthday Report, but how do I send a letter to all people within a certain age range?

You need to set up a Marketing Letter. If you are not sure how to do this, search on "mail merge" in the Knowledgebase. The key to this is that you will need the table called Family. This contains a list of all family members and their date of birth and age. Make sure before you run the marketing piece, you have run the task called Update Family Member Ages. If you don't, the age field may not be accurate. Usually, you can simply search off of the age field by using the greater than and less than signs (i.e. > 64<66). As long as you don't put any of the fields from the Family table onto the Word document itself, you will get one letter for each household, not one letter for each family member.

## Putting a Face to a Name



**Name:** Jennifer Thompson

### What do you do at MI?

I am responsible for telephone support and trainings via WebEx and in person on the MI Management System.

### How long have you worked at MI?

6.5 years.

### Where do you live?

I live in Mondovi, WI.

### Who are the significant others in your life?

My husband is Geoff Brisbane, a.k.a. "George." He is the network administrator at MI and previously supported the DOS Management System. Also, my son, Zeke (short for Ezekiel). He is 9 years old and will be going into 4th grade next fall. He is the sun of my universe.

### Did You Know?

#### Don't steal my car!

**Did you know the Saturn SL was the most often stolen vehicle in '03? Particularly a '95 Saturn SL. The Saturn is followed by Acura's '98 Integra and Saturn's '94 SL.**

Source: CCC Information Services, Inc. - Chicago, IL.

**What do you like to do besides working at MI?** I love to read. You can usually find 1-2 books that I am currently reading lying around the house.

I am my son's Cub Scout leader. I appreciate working with the boys, getting to know them and their parents.

Lastly, I have become a gardening addict. I'm constantly looking for new places to put flowers and cannot go into a gardening center without buying something.

### What do you like about your job?

I am a puzzle freak. I find working on a 1000 piece jigsaw puzzle to be very relaxing and therapeutic-just like my job. I like to find solution. I have to look at lots of different questions: does it happen to just one client or all clients, does it happen at one computer or all computers, what is the exact error message, what exactly were you trying to do, etc. So, there's a lot of problem solving and it's very challenging. When you can solve another person's problem for them, it's very rewarding.◇

### What's Next?

#### Version 5.4.0.0

New Memos! Move to client/server database for stability and speed, spell check, font formatting, and template designer.

## Resource Group Contacts and Meeting Locations

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

Resource Group Meetings for Quarter Three of 2004 are being replaced by this year's 2004 MI Users Conference in Eau Claire, Wisconsin. For information on upcoming Resource Group Meetings and locations, check out the web for all the details.

## More About the 2004 Users Conference

By William R. Sterry, Product Manager  
MI-Assistant

MI Users Conference to hold MI Management System session.

This year's MI Users Conference will include a three hour session that will focus solely on the MI Management System. The first forty-five minutes will be an introduction to the new memos area of the system and a question and answer session about the new release. Be prepared to focus in on the new areas of the MI

Management System that you are not that familiar with. Mary Hauri, President and founder of ICM will follow with an hour presentation entitled "Paperless, Getting Started. The Why's and How To's." Next will be a presentation of training tools to learn about the Management System, including an introduction of our new Training CD's. Finally, Scott Johnson will talk about technology gizmos and gadgets – which can benefit your agency the most. We look forward to seeing you there on July 28 from 1:00-4:00 p.m!

**2004 Annual MI Users Conference**  
July 28 - 29, 2004  
Holiday Inn - Campus Area and Hillcrest Golf & Country Club

This year MI-Assistant captures a variety of topics for two days of learning, fun, and excitement. Join Resource Group members, agents, MI Carrier Partners, MarketLink partners and Industry Professionals at this year's conference.

Conference Highlights Conference Highlights Conference Highlights

**Exhibitor Showcase**  
One of the most exciting events will take place at our exhibitor showcase the afternoon of July 28, 2004 from 4:00 to 5:45 p.m. Come talk with industry professionals, agents, carriers, and industry vendors. Social hour begins in the exhibit hall at 4:30 p.m. with the Partners Pizza Party to follow.  
Come see what's in store!

## Vendor Spotlight

### What's In My Computing Future

By Mark Parrish, President  
Ajacent, Inc.

The hottest topic in agency automation the last couple years has been ASP – Application Service Providers. First, an explanation. An ASP is a company that hosts applications on centralized servers. ASPs remotely host, manage and deliver software from an off-site location. Instead of running your own server at your office, the ASP installs your software on a server at their data center and you access that software via the Internet. The goal here, is to take you out of the computer business and put you back into the insurance business full-time.

An ASP will provide several valuable services for you. The more prevalent ones include:

- Provide remote access to your application from any location where there is Internet access
- Backup your information for you (no need to run backups in your office anymore)
- Eliminate the capital costs associated with upgrading the computers in your office every 3 years
- Eliminate the dependence on a computer technician to manage your network
- Apply updates to software

The feature that our users seem to get the most excited about is the ability to access their information

from anywhere. This means that you can work from the office or from home. It means you can open up an office at any location and immediately be able to run the software needed for that office. You can have a producer working at home in another town. I've even accessed our servers riding down the road from my laptop connected with my cell phone. True anywhere, anytime access to your information.

Disaster recovery is a topic that is generating a lot of discussion. Using an ASP gives you ultimate disaster recovery – since the ASP will probably be located somewhere other than your geographic area, catastrophes should not affect the availability of your information. You simply get to an area that still has infrastructure in place and keep working.

Another hard to see benefit is the cost savings of using an ASP over running and maintaining your own network. There are obvious savings in such areas as removing the need to upgrade the hardware in your office and lower technical support costs. Then there are less obvious savings with such things as less downtime with your system, which improves your productivity; enhanced support capability for your vendor (they can just shadow right into your screen and fix the problem); and less of the "aggravation" factor of having to work on computers when you should be selling insurance.

One other way that I see an ASP helping the agent is that it gives the agent

someone to help make automation decisions for them. Agents seem to be constantly bombarded by new and different ways of handling their business with carriers and with customers. It can get very confusing, at times. By having an ASP be your technology provider, they should be involved in those decisions and handle the setting up of whatever technology is required. For example, many carriers are starting to require that policy downloads be handled from the carrier website instead of the traditional IVANS method. Your ASP will intercede for you with the carrier and walk through the necessary setups to enable the download to occur.

Some vendors are reporting that up to 80% of their new sales are going into the ASP environment. This is fast becoming the standard for automation in the insurance industry.

Watching the trends of automation over the last couple of years, there is a pretty good chance an ASP may be in your future. ◇



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