



Proposal Installation - Introduction

The following installation instructions assume a basic knowledge of directory structure (on your hard drive) and the ability to copy files from one location to another. **If you are not comfortable with this process, we can assist you either over the phone or by remotely accessing your system at a rate of \$150 per hour.** It is important to proceed cautiously. Nothing in our installation procedure will cause any problems with the operation of TAM. It has been performed at many agencies. Misuse or inaccurate use of copy commands can cause damage. Do not proceed if you are not comfortable with these procedures.

These proposal documents are in a "zipped" (compressed) format. They must be Unzipped. If you are not using the Windows XP operating system on your workstation, then the product we recommend for this is WinZip. It is available at the following web site:
<http://www.winzip.com/download.cgi>.

This set of proposal documents uses boxing & shading.

Instructions

1. Copy all of the provided files to "X:\DOC\PROPDOC\" (Where "X" is your TAM drive).
2. From the TAM Home Base screen, on the Menu Bar select "Utilities" then "Document Setup".
3. Set your Document Type Radio Button to "Proposal".
4. Set your Options Ratio Button to "Documents".
5. Click on the New Button in the lower left of the screen. Answer "Yes" to the question 'Do you want to add a new proposal document?'
6. Fill in the 3 fields according to the table below.
7. Click on "OK". Microsoft Word will open.
8. In Microsoft Word, from the Menu Bar at the top of the screen select "Applied" then "Save and Exit".
9. Answer "Yes" to the question 'Do you wish to save the changes made to the current document?'
10. Repeat steps 5 through 9 one time for each row in the table before proceeding to step 11.

(Note: Don't forget the asterisks (*) in the descriptions)

Name	Description	Associated Form
AB1-COVP	*Cover Page	None
AB1-AGCY	*Agency Introduction	None
AB1-AP	*Location Schedule	Commercial Application
AB1-PRP1	*Property	Property
AB1-GL-S	*General Liability	General Liability (1/97)
AB1-CA-S	*Commercial Auto	Commercial Auto (or Business Auto – Depending on TAM version)
AB1-DRVR	*Drivers List	Commercial Auto (or Business Auto – Depending on TAM version)
AB1-CASN	*Hired Non-owned Auto	Commercial Auto (or Business Auto – Depending on TAM version)
AB1-FLTR	*Equipment Floater	Equipment Floater
AB1-EDP	*EDP	Electronic Data Processing
AB1-ARVP	*Accts Rec / Val Papers	Accts Rec/Val Papers

AB1-CRIM	*Crime	Crime
AB1-CUMB	*Commercial Umbrella	Umbrella Simplified
AB1-WC	*Workers Compensation	Workers Compensation
AB1-PREM	*Premium Summary	None

11. Set your Options Ratio Button to "Setups".
12. Click on the New Button. Answer "Yes" to the question 'Do you want to add a new proposal setup'.
13. Double click in the white area labeled Activity Category. Select the activity that you wish to associate with this proposal setup (PROP is the non agency specific code).
14. Under Setup Name enter "AB1". Under Description enter "*Commercial Proposals" (do not enter the quotation marks).
15. **Read this entire step before proceeding:**
 - Move the individual documents listed under Documents Available over to Documents in Proposal.
 - Move only the documents that have a single asterisk (*) in front of their name.
 - The order that you move them in is the order in which they will merge together at the client level. So be sure to start off by selecting "**Cover Page", then do "**Agency Introduction", etc.
 - Progress through the entire available selection of single asterisk documents in the order that you would like to have them appear on a finished proposal.
16. When you are done adding documents to the Documents in Proposal list, click on OK.

That's it. Go to the client level and test your new proposals.

Please note: The property section of just about any proposal page integrated into TAM will take a considerable amount of time to merge. If you are doing a proposal for a client with more than just a few locations on the property schedule, be sure to give the system a lot of time to finish merging the data. (And we do mean a long time – as much as 10 to 20 minutes if there are a lot of locations) Many users interrupt the merge process thinking that the system has "hung" when in fact it was simply trying to work through the property section.

There is another version of the property page included in this set of documents. It is considerably more complex than the standard property page listed above. It will replace the standard subject of insurance codes (those that can be accessed by double clicking in the subject of insurance field on the property application) with their full text descriptions. So "B" will translate through as "Building", etc.

We don't know of any agency that is actually using these codes, but this document was created and included as a 'proof of concept' for anyone who has been thinking of doing something like this. If your agency has one of these people, we hope they find this document useful.

To install this extra document, simply add the following line to the table of documents to be installed above:

AB1-PRP2	*Property w/SOI Replace	Property
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Be warned, our testing has revealed that on large accounts, using this more complex version of the property document can considerably increase the amount of time it takes to merge a proposal. If it wasn't for this, we would have included it as the standard and not an extra.