

# Applied Systems Client Network

SEMINAR HANDOUT

***YOUR INBOX IS  
NOT YOUR  
CUSTOMER FILING  
CABINET***

ASCnet™

**Prepared for ASCnet**

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**Updated By:**

N/A

**Target Audience:**

- Accounting
- Non-Insurance Accounting
- Administrative
- Principal
- General
- Human Resources

- Account Executive
- Customer Service Representative
- New Producer
- Experienced Producer
- IT
- Other: (describe)

**Seminar Type:** Microsoft Products

**Seminar Level:** **Intermediate Level:** An Intermediate level class takes the concepts originated from a basic level course, and adds more layers or parallel concepts. For functional courses, these classes will require the participant or attendee to have some basis to work from as they are learning new facets of the agency management system or software program.

# Your Inbox is Not Your Customer Filing Cabinet

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**Class Description:** This class will address the issues with leaving email in individual Email systems. We will discuss how to efficiently and effectively work your Inbox, utilize various features for organization in Outlook and attach email in TAM.

**Learning Outcomes:**

- Understand the importance of keeping client documentation in agency files
- Use the organization features within Outlook
- Automate your Inbox for efficient ways to work it
- Attach emails in TAM through various methods

**Assumptions:** This seminar is based on the following  
TAM Version 10.X  
Microsoft ® Outlook Version 2003 and later

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# Your Inbox is Not Your Customer Filing Cabinet

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## ***Customer Files – A Legal Issue***

### Federal Rule of Evidence 803(6)

“A memorandum, report, record, or data compilation, in any form, of acts, events, conditions, opinions, or diagnoses, made at or near the time by, or from information transmitted by, a person with knowledge, if kept in the course of a regularly conducted business activity, and if it was the regular practice of that business activity to make the memorandum, report, record or data compilation, all as shown by the testimony of the custodian or other qualified witness, or by certification that complies with Rule 902(11), Rule 902(12), or a statute permitting certification, unless the source of information or the method or circumstances of preparation indicate lack of trustworthiness. The term "business" as used in this paragraph includes business, institution, association, profession, occupation, and calling of every kind, whether or not conducted for profit.”

Any data that is recorded in the regular course of business may be subject to evidence. What's in your inbox? What does it say about you and your character?

Prior to email, we filed transactions regarding business in folders in a cabinet. We still have “folders” to “file” the information; however, we need to make sure our business filing gets done. We are now all file clerks.

Where is the data in your organization?

If asked for a client file, where is it?

What about Customer Service? Does everyone have access to the interactions between agency personnel and your clients?

What happens to the documentation when someone leaves your agency?

Are you following the Federal Trade Commission Standards for Safeguarding Customer Information (16 CFR Part 314)? Safeguards Rule effective May 23, 2003 as part of the Gramm-Leach-Bliley Act 501(b)

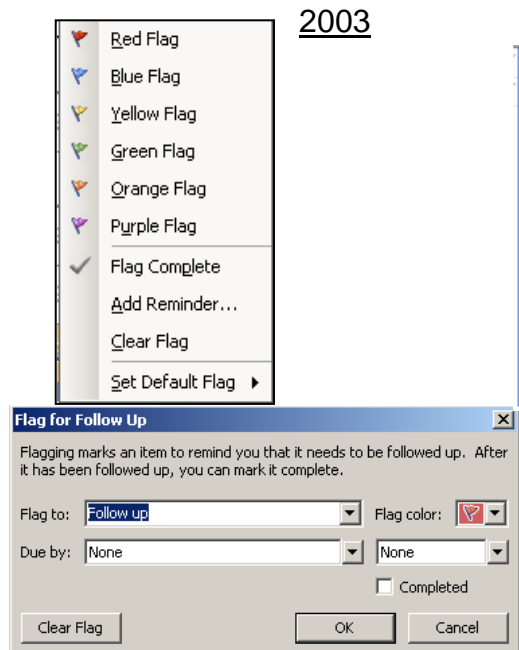
“Ensure the security and confidentiality of customer records and information; protect against any anticipated threats or hazards to the security or integrity of such records; and protect against unauthorized access to or use of such records or information that could result in substantial harm or inconvenience to any customer.”

## Outlook Options for Organization

You can organize your inbox for efficient processing using various features in Outlook. Flags and Follow ups allow you to color-code your items for quick viewing as well as create follow-ups to make sure you don't miss an item. This does not replace TAM activities!

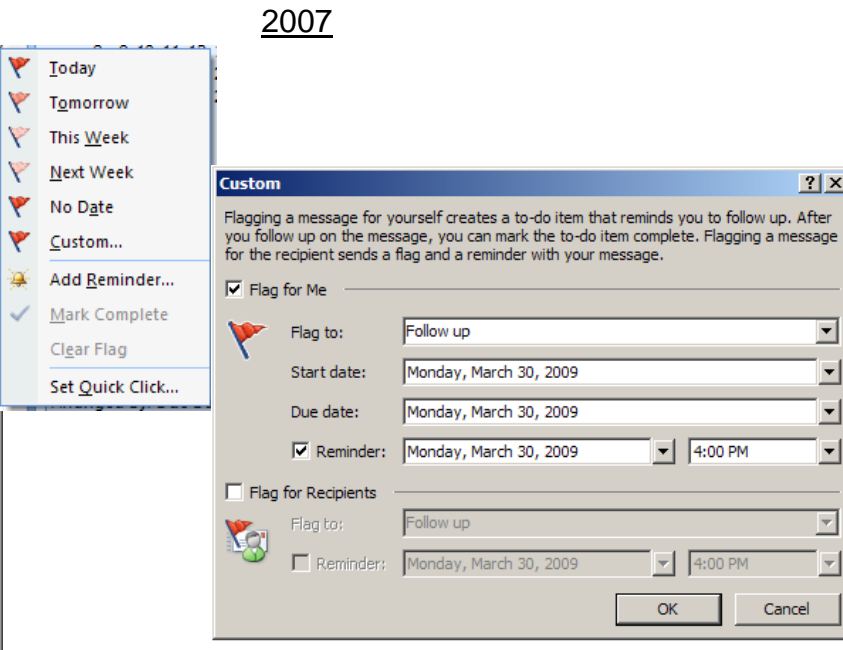
### Flags and Follow ups

**2003**



The 2003 interface shows a list of flag options: Red Flag, Blue Flag, Yellow Flag, Green Flag, Orange Flag, Purple Flag, Flag Complete, Add Reminder..., Clear Flag, and Set Default Flag. Below this is the 'Flag for Follow Up' dialog box with fields for 'Flag to:' (Follow up), 'Flag color:' (Red), 'Due by:' (None), and a 'Completed' checkbox.

**2007**



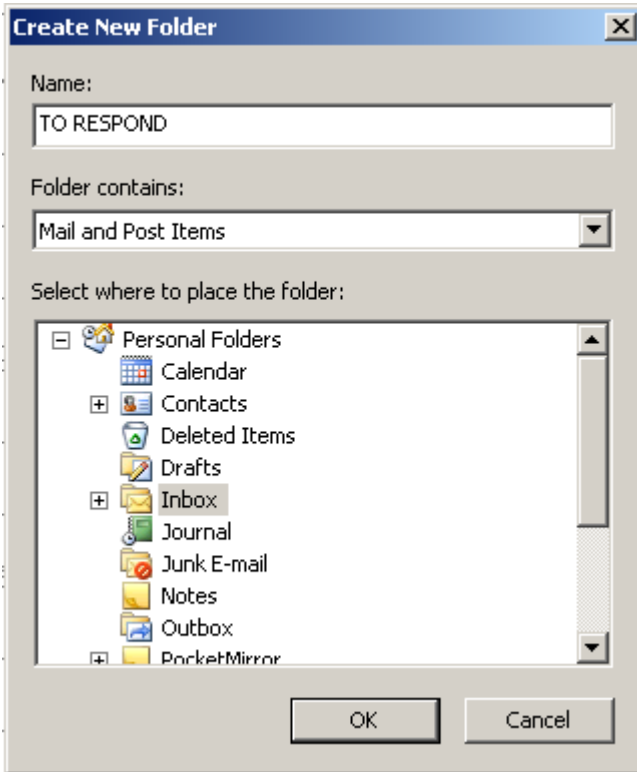
The 2007 interface shows a list of flag options: Today, Tomorrow, This Week, Next Week, No Date, Custom..., Add Reminder..., Mark Complete, Clear Flag, and Set Quick Click... Below this is the 'Custom' dialog box with sections for 'Flag for Me' and 'Flag for Recipients', each with fields for 'Flag to:', 'Start date:', 'Due date:', and 'Reminder:'.

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## Folders

These are NOT customer folders – use folders to organize your work.

**File, New, Folder**, give your file a name, select the folder it is to be a subfolder of, **OK**.



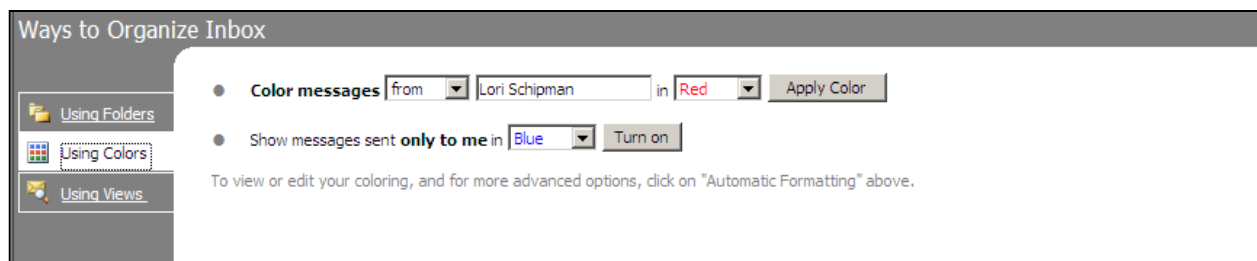
Suggestions:

- TO RESPOND
- WAITING RESPONSE
- TO READ
- PERSONAL (though you really shouldn't use business email for personal).

## Organize

Outlook has a feature to organize emails:

- Using Folders
- Using Colors
- Using Views



Highlight the email(s) you want to organize, **Tools, Organize**

Folders allow you to move the emails to a pre-designated folder.

Colors allow you to automatically change the color of incoming/outgoing emails.

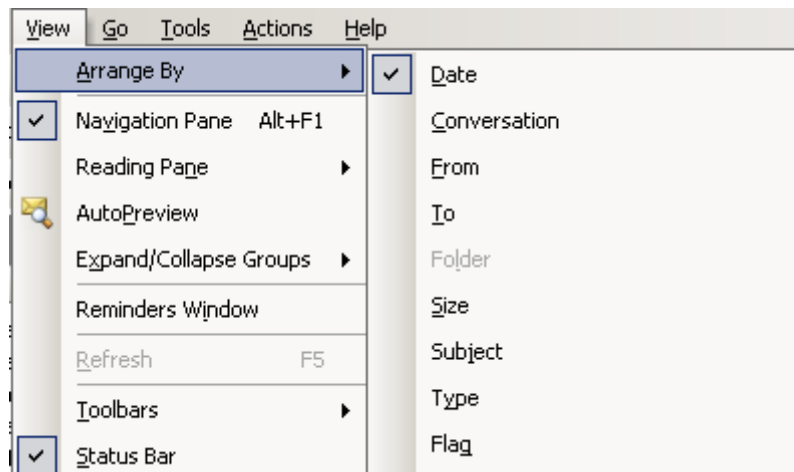
Views change the way you look at your emails on the screen.

# Your Inbox is Not Your Customer Filing Cabinet

## Views

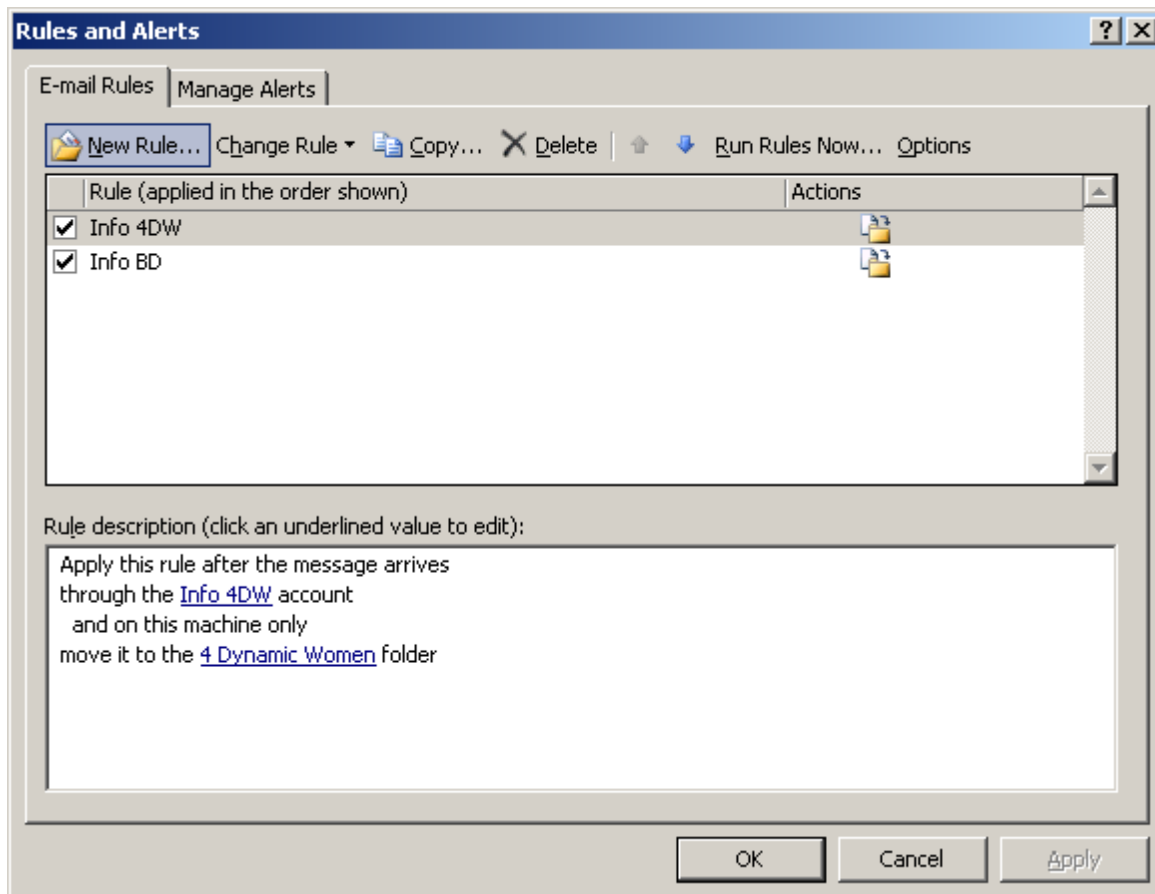
You can change the way you view your emails to handle them more efficiently. The default is by date, but you can view by Conversations, From, To, etc.

To access: **View, Arrange by**, select the way you would like to view your messages.



## Rules Wizards

Set up rules to automatically color, move, forward, etc. emails that meet certain criteria. To access: You must be on a Mail folder, **Tools, Rules and Alerts** Or Right click on an email that you would like to create a rule from and select **Create Rule**.

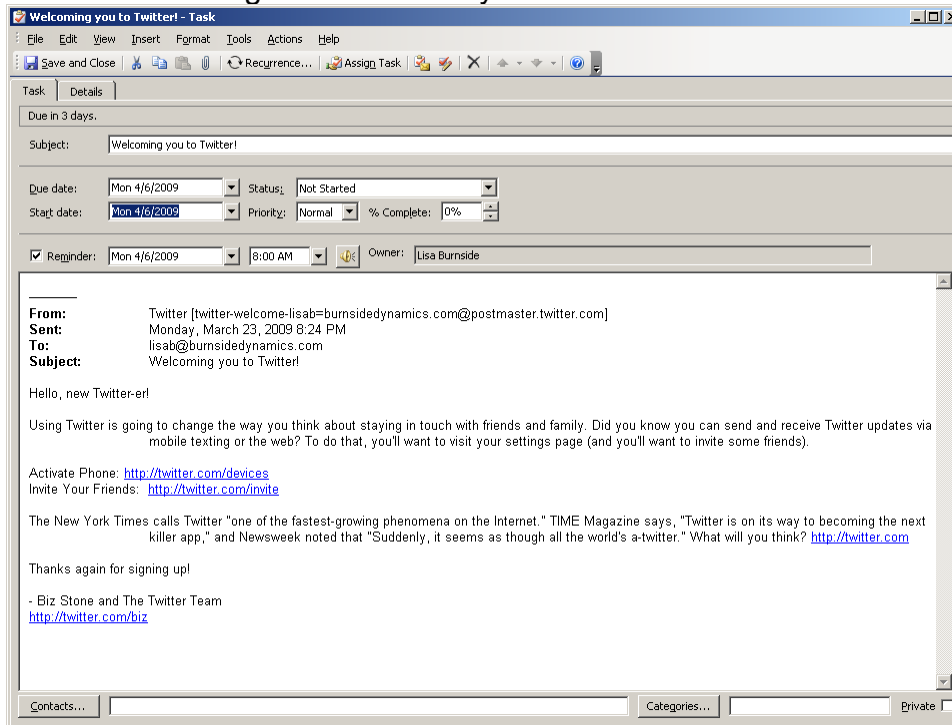


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## Drag and Drop

You can automatically copy an email to a Calendar or Task to schedule it for follow-up or as a reminder of the details.

1. You must have your Folder View open to see the Calendar or Tasks (the To-Do Bar will work here in 2007 version)
2. Drag the email(s) to the Calendar or Task (or the Date in the To-Do Bar)
3. Fill in the date, time and any other details in your item
4. Delete the original email from your inbox.



## Take Action

Set a time to go through your emails and close your Outlook when completed. Decide what needs to be done with the item:

### Schedule it

Drag & Drop to Tasks / Calendar or Flag it with Reminder

### Group it

Move to organization folders

### Act on it

Respond  
File it  
Read it  
Delete it

# Your Inbox is Not Your Customer Filing Cabinet

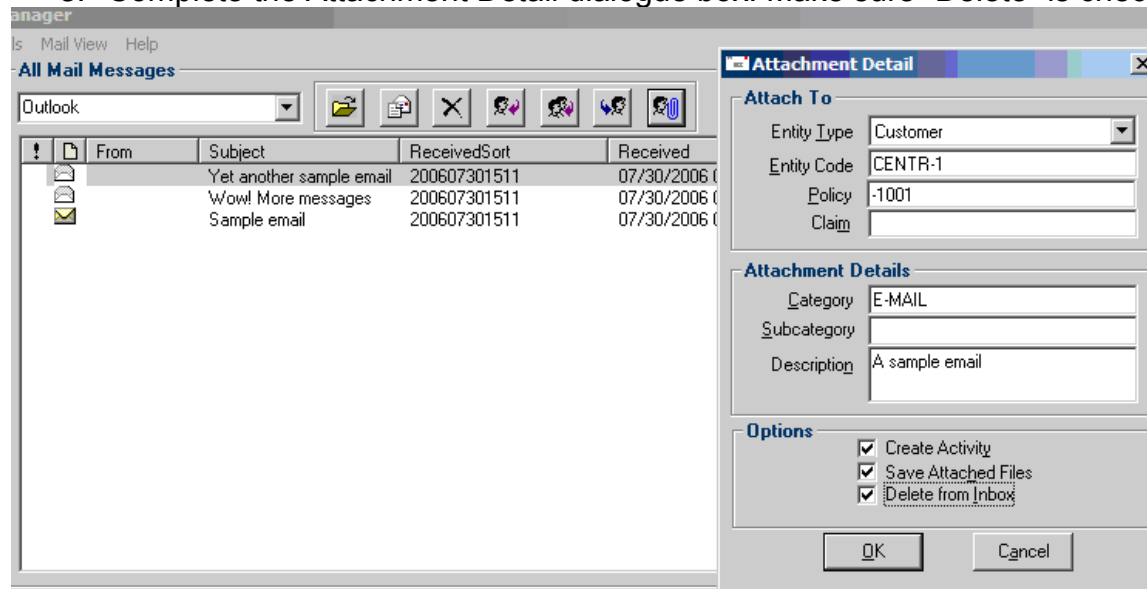
## Attaching Emails in TAM

Version 10 gave us Drag and Drop emails from Outlook to TAM. Earlier versions, you need to select the email and click the Attach icon.



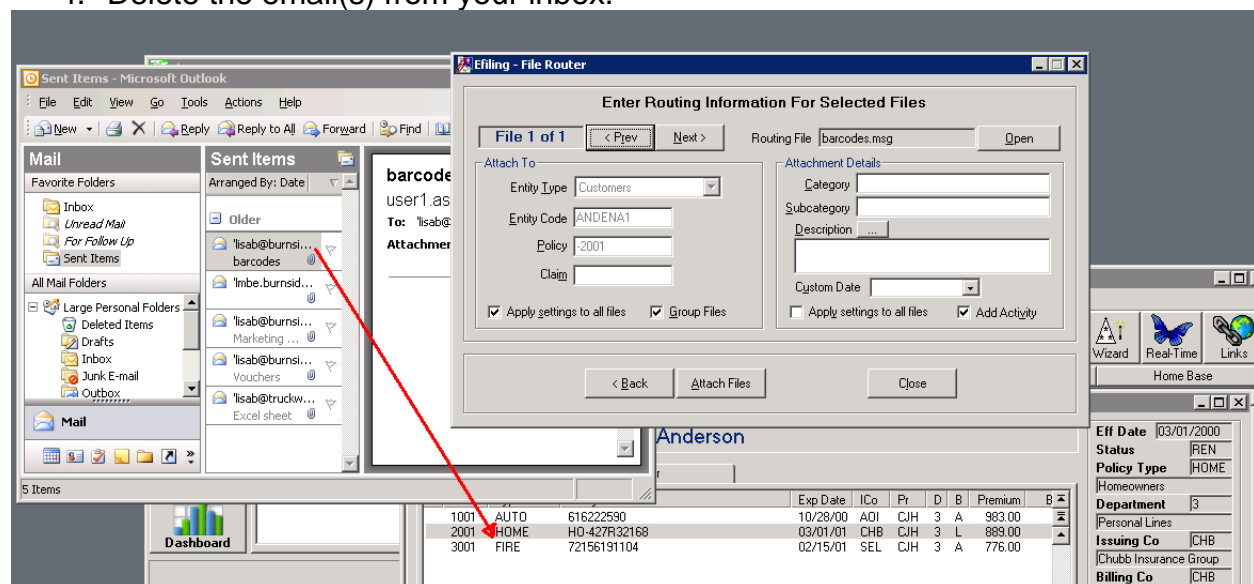
Prior to 10:

1. Select the email to attach
2. Click the Attach icon
3. Complete the Attachment Detail dialogue box. Make sure "Delete" is checked.



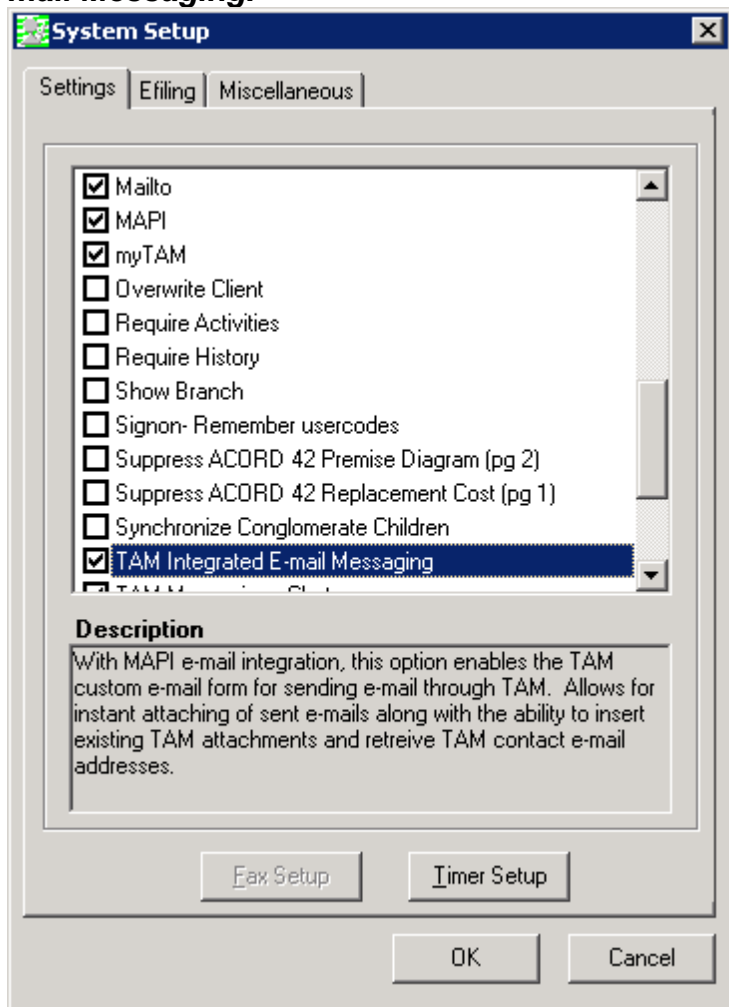
Version 10:

1. Highlight the Customer, Policy or Claim to attach the email(s) to in TAM.
2. Select the email(s) in Outlook and drag them onto the highlighted item.
3. Complete the Efilng dialogue box.
4. Delete the email(s) from your inbox.



## Attach Sent Items from TAM

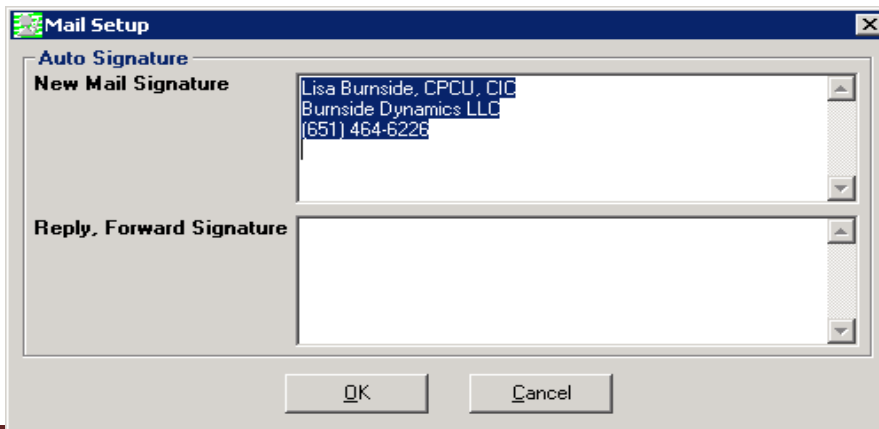
You must have the MAPI integration set up in TAM prior to using this feature. From Home Base, **Tools, System Options, Settings, MAPI** and **TAM Integrated E-mail Messaging**.



Anywhere you see the New Mail icon in TAM, it will begin an email message that can be Sent and Attached in one step.

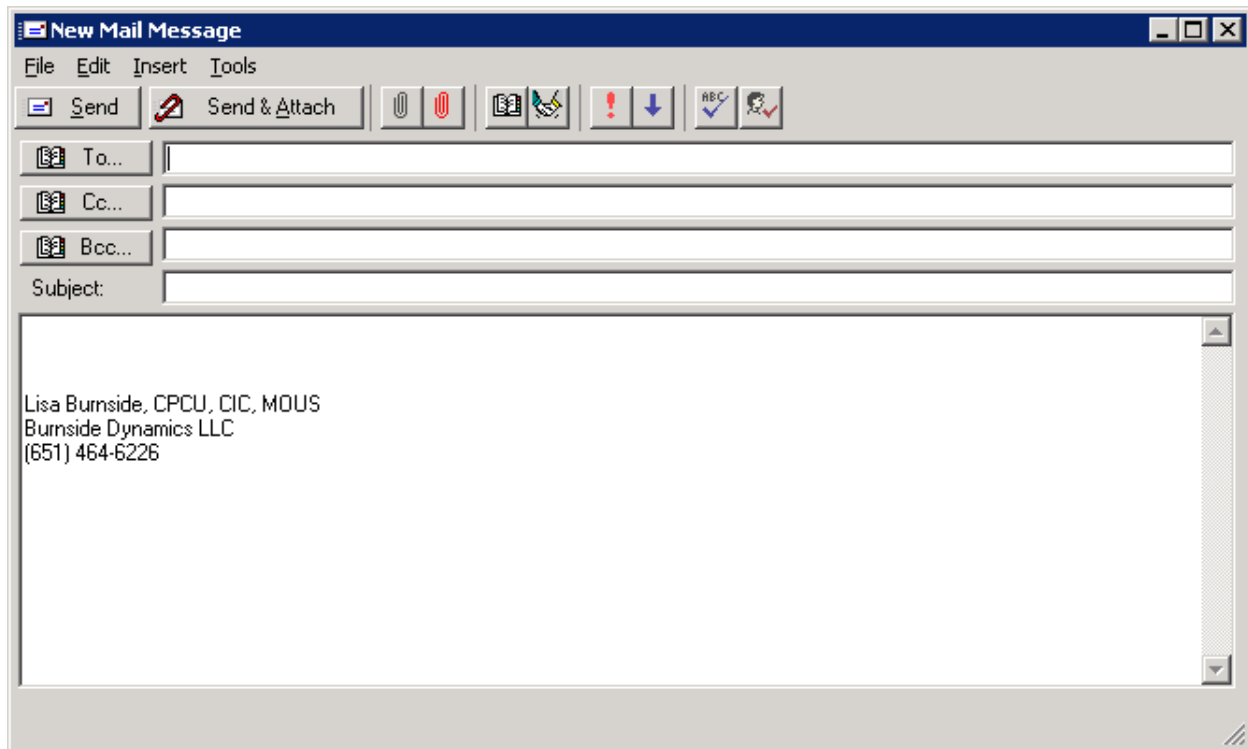


Set up your Email signature in **Tools, User Setup, Settings, Mail Setup.**



## Your Inbox is Not Your Customer Filing Cabinet

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**Send** will only send the email and not attach it in TAM

**Send & Attach** will send the email and bring up the attachment dialogue box.

The paperclips allow you to attach from your system and from Attachments in TAM.

The Address book accesses your Outlook address book(s).

The Handshake accesses Contacts in TAM.

ABC is the spell checker.

The face with check mark checks names in your email addresses.

### **Summary**

You need to take time every day to do your filing. Just like you used to do with paper and put your “filing” items in a designated place for someone to put into folders, you now need to put your “filing” items in a designated place and do your own filing. If you are not comfortable attaching your items as you work on them, create a folder in Outlook to organize your filing and schedule a time each day to attach and clean out.

For the best in customer service, all of your correspondence items should be attached to the customers, prospects or carriers in TAM. This will allow others in the agency to assist a customer, prospect or carrier when you are not available. It will also help to keep the E&O attorneys out of your email system.

# 2009 TENCon Evaluation – Kansas City, MO

Thank you for attending this ASCnet session. By completing this evaluation, you will help us to identify what we did well and what we can do to improve the quality of our future sessions.

Session Number:

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Presenter:

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<b>Strongly Agree</b>	<b>Somewhat Agree</b>	<b>Neutral</b>	<b>Somewhat Disagree</b>	<b>Strongly Disagree</b>
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1. The learning objectives were met.
2. The session description was accurate.
3. The slides and/or audio-visual aids were of high quality.
4. The class materials/handouts were easy to understand and use.
5. The session was conducted in a professional manner.
6. The information was communicated effectively.
7. The presenter was knowledgeable about the subject.
8. The presenter created an enjoyable learning environment.
9. The presenter encouraged all to actively participate in the session.
10. The presenter effectively used examples to explain concepts.
11. The presenter effectively presented the material.
12. The presenter kept discussion on track.
13. The presenter allowed all participants to express their opinions.
14. The overall session was of value to me.
15. The time allotted to this session was appropriate.

<input type="radio"/> 5	<input type="radio"/> 4	<input type="radio"/> 3	<input type="radio"/> 2	<input type="radio"/> 1
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<input type="radio"/> 5	<input type="radio"/> 4	<input type="radio"/> 3	<input type="radio"/> 2	<input type="radio"/> 1

16. How was the pace of the class?
- 1 Too Fast
  - 2 Just Right
  - 3 Too Slow

17. What would you consider to be the presenter's strong points?

18. Help me to help you—what can we do to make this a better class?

19. What would you consider to be the STRONG points of this educational session?

20. What other topics would you like us to consider developing for future sessions?