

AMS Prevail Network Integration for AfW version 5.4

Now you can directly finance your premiums without having to re-key your policy information into various finance companies' web sites to get quotes! The AMS Prevail Network is your premium finance solution and is a core feature in AfW 5.4. With version 5.4, there is no longer a workstation installation.

After reviewing this document, you will be able to:

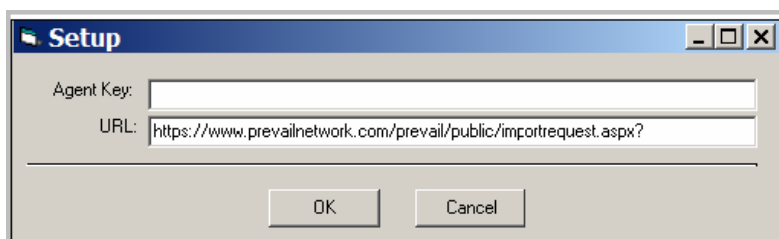
- Set up the premium finance integration
- Process a quote

Agency Setup

Becoming an AMS Prevail Network member is free (no monthly fee) and an AfW 5.4 feature.

When you sign up for Prevail, an email is sent with a link to your Agent Key. If you need to access your Agent Key, refer to the additional information below. Once the Agency Key has been copied and saved into the Prevail Network setup, the integration is activated for anyone who has access.

Launch the AMS Prevail Network and click the Setup button



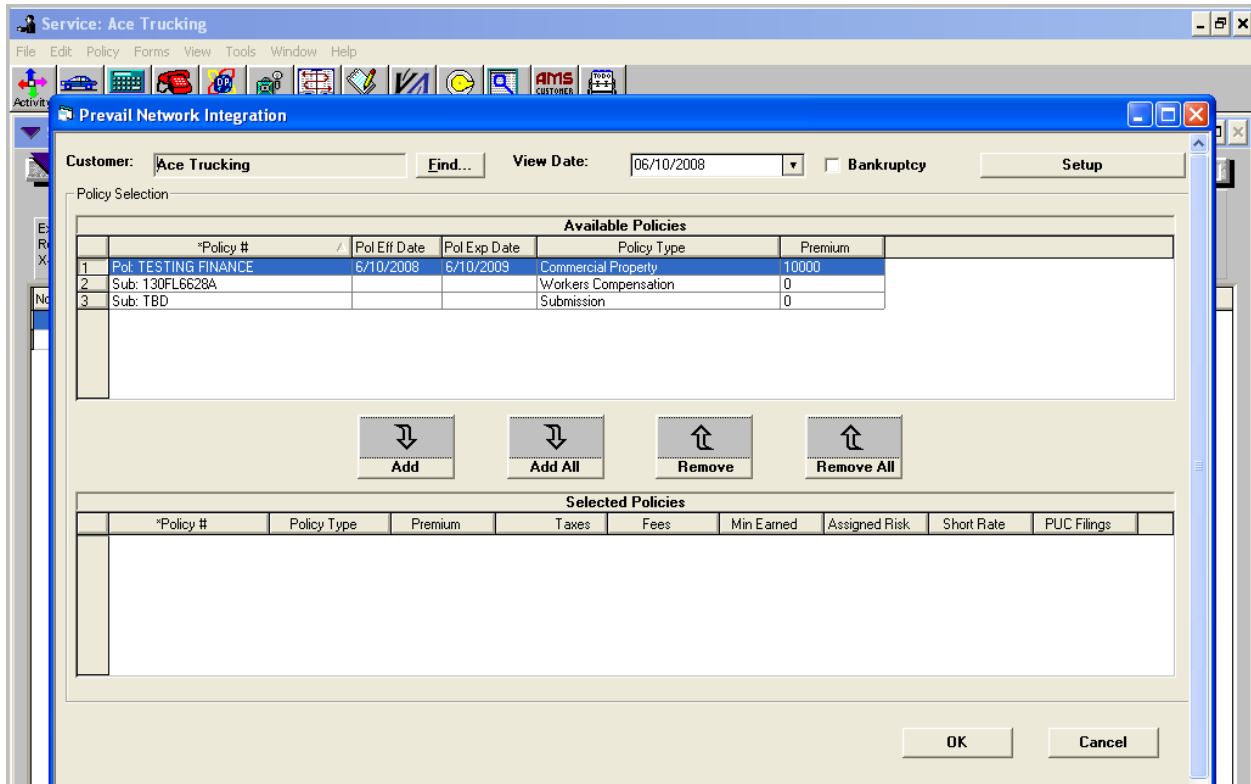
Copy (Ctrl+C) and paste (Ctrl+V) the Key into the Agent Key field. Click the OK button.

- **Agent Key** - The key is unique to each agency. Copy your Agent Key from the Email link. To locate your agent key – refer to the additional information section below.
- **URL** – The URL is created for you. You do not need to change this field.

Using the AMS Prevail Network Premium Finance Integration

*Before you use Prevail for the first time you will need to setup the Agent Key. Please refer to the Agency Setup section for more instructions.

- From AfW, select a customer or a prospect
- Click the **AMS Prevail Network** button, the integration dialog box appears.



- Select the policies and/or submissions that you would like to finance using the Add buttons.
- If needed, double click on the policy/submission to changes where appropriate. Click OK to continue.
- Once you have made the changes, click the OK button to export the data for a premium finance quote.

Additional Information

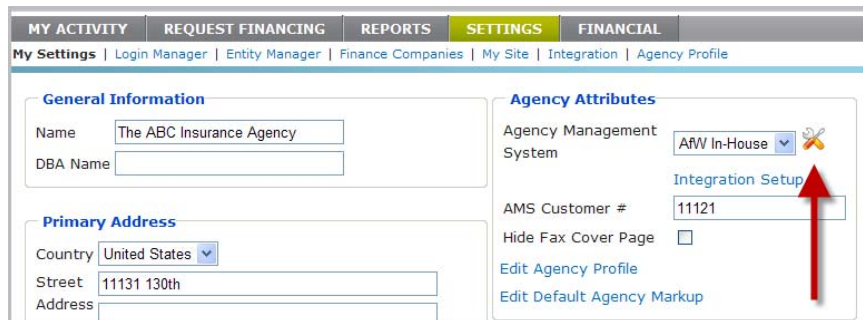
Business Units: If you have multiple Business Units (Division/Department) setup in AfW, log a Focus support case on how to setup a business unit in the AMS Prevail Network

Fee legal State: If your agency is located in one of the 37 “Fee legal” States, log a Focus support case on how to setup your Agency Fee markup in the AMS Prevail Network.

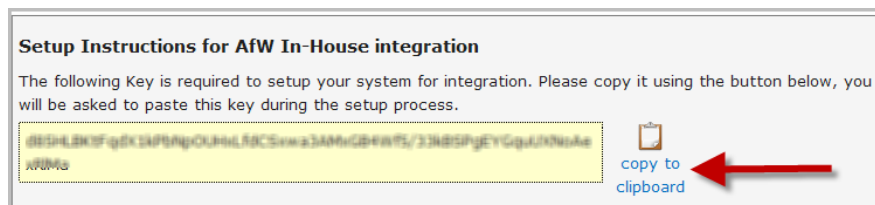
Locating the Prevail Network Agency Code:

Log into the AMS Prevail Network: www.prevailnetwork.com. Settings > My Settings

Select the tools icon next to your Agency Management system.



Select the 'Copy to clipboard' to copy the key.



Additional Questions?

For questions regarding the installation and workflow of the AMS Prevail Network software, please log a FOCUS support case. If you have questions relating to the premium finance quote, please contact the finance company.

Thank you for choosing to be a part of the AMS Prevail Network –

Your Premium Finance Solution