

Kitty Ambers

From: Darla Berge, NIUG Communications Chair [hq@instarusers.org]
Sent: Wednesday, January 25, 2012 12:26 PM
To: kitty.ambers@instarusers.org
Subject: 3-Minute Update from National InStar Users Group



*promoting the efficient and productive use of the InStar
agency management system*

National InStar Users Group Newsletter

3-Minute Update

In This Issue

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Training Opportunities for InStar Users

Increase Your Bottom Line Now!
Thursday, January 26 - 1:30 p.m. eastern

This session will offer instruction on measurement and sales tracking protocols that will deliver an early warning of success or failure and guidance for course corrections.

[CLICK HERE](#) to Register (FREE from NetVU)

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**NIUG Training Webinar for InStar Users - Tuesday, February 14 - 2 p.m. eastern**  
Every other month, NIUG will host an educational

January 2012

Dear Kitty,

We hope that your new year is starting off right!

Here at NIUG, we've been busy! For starters, we've updated the NIUG website. Please visit at [www.instarusers.org](http://www.instarusers.org). A new user name and password for the **Members Only** area was emailed to all dues paying members. If you need assistance, give headquarters a call - 800-549-2515.



If you haven't renewed your dues for 2012, you can do so conveniently online - just [CLICK HERE](#)! Dues are due by January 31.

We continue to provide a variety of training opportunities for InStar users. Watch the column to the left in this monthly e-newsletter, and visit the [Upcoming Events](#) page of the website regularly.

As always, we invite you to share your ideas for questions or topics you'd like to have addressed during a training session. Please email your thoughts anytime - [hq@instarusers.org](mailto:hq@instarusers.org). We want to make educational program agendas as timely and relevant as possible.

**NIUG is YOUR user group....make the most of it by staying in touch and involved.**

Sincerely,  
Darla Berge, Communications Chair

webinar for NIUG members. In February, we will be addressing TransactNOW and Download related issues.

To register, [CLICK HERE](#). FREE for NIUG Members; \$25 for Non-Members.

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AIMS Society / ACT / AUGIE Meetings - February 15-18 - Tampa, FL

To see the agenda and registration information, [CLICK HERE](#).

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**Save the Date... NIUG Virtual User Group Meeting - Tuesday, March 13 - 3 p.m. eastern**

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NetVU Conference April 26-28, 2012 Anaheim, CA

For the conference agenda and registration details, [CLICK HERE](#).

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**Save Time and Do More with TransactNOW!**

[CLICK HERE](#) for a complete schedule of FREE training opportunities.

**Topics include:**

**Introduction to TransactNOW** covers the benefits of using this real time tool.

**Getting Started with TransactNOW** which covers step-by-step installation and setup.

**TransactNOW for CSRs** which walks thru day-to-day usage.

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Interested in general InStar web-based training from

NIUG
800-549-2515

INSTAR TIP: ENGAGE IN NCOM for INSTAR HELP

InStar Users interact on NetVU Community (NCOM)

Question Posted: Source for the Commercial General Liability field tags are located in:
Main Menu > Setup System > Template Tables > Word/Excel "button" > Field Ref. "button" > Types "General Liability"

The tag for Each Occurrence = [GL_LIM4]
The tag for Aggregate = [GL_LIM1]

Situation: I have inserted these tags AND several other tags into an MSWord doc and saved the doc as TEMP_(Doc Name).doc. I then go into the Word/Excel function and choose, setup and save the doc in InStar. I generate a Certificate of Insuance, go to the Att Form Section and check the box for the form I created. When I go to print, the Cert and Attached Form print out correctly with all "tagged fields" correctly filled in EXCEPT for the General Liabilty limits. Neither the Agg or Ea Occ tags are being filled in.

Can someone explain what I am doing wrong, please?

Response from another InStar User:

I would have to do some exploring, but I think this is one of the fields that isn't working properly and is a BUG that needs to be fixed. I don't know if this "thread" is monitored, but it may be best if you report it directly to InStar. Sorry I don't have better news but in trying to look at the positive those merge fields that do work save time and make us more productive.

Further Response from original poster:

I felt that you might be right about this particular thread not being monitored, so I took this direct to Client Services. Sure enough, we were able to demonstrate that these two tags were not working with the Certificate of Ins module, but did work with the Letter (Merge) module. They're supposedly putting this as a Medium or High priority for the next update. Sure glad to know it wasn't just me goin' nuts over here...lol.

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**Question Posted:**

How do you roll your general ledger over from last year?

**Response:**

Go to Main Menu, Acctg, Chart of Accts. You will see a button that says Roll. You will receive a confirmation message and

**Vertafore?**  
**[CLICK FOR MORE INFO](#)**

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Vertafore offers Free Training Fridays - [CLICK HERE](#) for a schedule and details about offerings.

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**Interested in learning more about PLRating and the Consumer Rate Quote online rating tool? [CLICK HERE](#) for a schedule of informational webinars hosted by Vertafore.**

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PeopleInsure is a major supporter of NIUG. [CLICK HERE](#) to learn more about their training and consulting services, offered to NIUG members at substantial discounts.

"A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty."

~Winston Churchill

InStar User Quick Links

Click the links below to learn more!

[Visit the NIUG Website](#)

[Visit NIUG Partners](#) and learn of their benefits & services for InStar Users

[Join the NetVU InStar Community](#)

that it could take a while and should not be interrupted. This should be done at the end of the day when no one is posting to accounting to make sure that everything goes smoothly.

POLISH YOUR PRESENTATION SKILLS and BECOME INVOLVED WITH THE NETVU EDUCATORS GUILD



Consider taking part in the upcoming Guild training series being offered by NetVU. Sessions are web-based and begin on February 1. To register, visit <http://www.netvu.org/pv/core/Events/Events.aspx>

Topics include:

1. Effective Content Organization - 1 hours
2. Effective Speaking Skills - 2 hours
3. Effective Facilitation Skills - 2 hours
4. Effective messaging: The NetVU & Vertafore Relationship 1 hour
5. Running Effective Meetings *Recommended, not required

These webinars are recorded and available at your convenience.

Visit <http://www.netvu.org/Education.aspx?id=1650&terms=guild> for all the details!

AGENCY OPPORTUNITIES IN A TIME OF PROFOUND CHANGE by Jeff Yates

This article discusses some of the future oriented issues that ACT is addressing and the types of opportunities and challenges they create for independent agents. We are living through a period where several major transitions are occurring simultaneously involving consumers, agencies, agent-carrier interfaces, agency management and other areas. These changes are giving agencies more choices regarding how they organize, the technologies they decide to utilize, and whether they outsource or not. The attributes of the agency managers of the future will have to evolve as well to succeed in this changed world.

[Visit InStar Support from Vertafore](#)

[Visit Vertafore University for Basic InStar Training Opportunities](#)

[TransactNOW Setup & Training](#)

[Carrier Capabilities Listing for InStar](#)

[CLICK HERE](#) to read the complete article, compliments of the Agents Council for Technology (ACT).

NIUG is SEEKING VOLUNTEERS! We have several openings on the Board of Directors, and the Membership and Education committees. To learn more, please call or email NIUG Headquarters - 800-549-2515 or HQ@instarusers.org.

Visit www.instarusers.org and see all that NIUG offers it's members! The goal of the organization is to promote the efficient and productive use of InStar. Let us know how we can help you and your agency better understand and utilize your InStar system!

Email your ideas and suggestions for articles, seminar sessions, or Virtual User Group discussion topics to hq@instarusers.org.

Have an idea for an InStar Enhancement? As a member, you can submit an Enhancement Request for review and prioritization by the NIUG Research & Development Committee. Visit the [RESOURCES](#) page of the NIUG website and click on Enhancement Request.

[Forward email](#)

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