Policy Profiler PhoneTree Module

User Guide

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About PhoneTree

PhoneTree is an automated messaging system from Personal Communication Systems, Inc. It is a physical unit that when attached to your computer, will allow you to deliver pre-recorded messages to your clients during non-office hours.

About PhoneBase

PhoneBase is the software that is distributed with the PhoneTree unit from Personal Communication Systems that allows you to create lists and save messages outside of Policy Profiler. (See the User Guide that came with the unit for more details on using PhoneBase.)

Possible Uses of PhoneBase

PhoneBase may be used by church organizations and civic organizations for meeting announcements. You could also use PhoneTree to help organize large social events such as family reunions, weddings and birthday parties.

About the PhoneTree Module in Policy Profiler

The PhoneTree **module** is a Policy Profiler add-on product that is used in conjunction with the PhoneTree **unit**. The PhoneTree module allows the user to create lists and messages from within Policy Profiler. You can download a phone list created in Policy Profiler to the PhoneTree unit. The module also allows you to program the unit (i.e., set calling times and various other calling and messaging options) from within Policy Profiler. (You can also program these options directly from the unit. See the User Guide that came with your PhoneTree unit for details.)

Using the PhoneTree module, you can generate reports from the following locations in Policy Profiler and download the report into the PhoneTree unit to use as a phone list:

- Profile Reports screen
- Policy Transaction Reports screen
- Prime Rate Cancellations Pending screen
- Prime Rate Late List

After you create the list in one of four program areas listed above and download it to the PhoneTree device, PhoneTree will use the list to deliver the messages, track call completion and record the status of each call. Call statuses are retrieved from the unit by the PhoneTree module. You can view the call results from within Policy Profiler and print the results, if desired.

Possible PhoneTree Uses from within Policy Profiler

- Send a message regarding past due payments.
- Send a message regarding accounts about to be canceled.
- Send a new business “Thank You” message.
- Send an additional premium notice.

Note: Because PhoneTree depends on the accuracy of the telephone numbers in the list sent to it, it is very important to verify the accuracy of the data. To correct phone numbers, you can edit phone numbers from an insured’s profile and run the report again to create a new phone list. You can also edit phone numbers from within the PhoneTree module. However, it is recommended that you correct the numbers from the insured’s profile to ensure the accuracy of your records.

PhoneTree Unit Installation

Please refer to the PhoneTree Installation Guide that came with your unit for complete details on how to set up the unit and install the PhoneBase software.

PhoneTree Module Installation

To install the Phone Tree module:

1. From the server or a workstation, insert the PhoneTree module installation CD into your CD-ROM drive (OR if you downloaded the program, locate the ptsetup.exe file and double-click on it to run it).

   Note: The CD-ROM is autoplay, which means that Windows should detect the presence of the CD and automatically start the installation program. If the program does not start, you can go to Windows Explorer to navigate the CD-ROM contents and then double-click on ptsetup.exe.

2. When the PhoneTree module installation program begins, read the end-user license agreement. If you accept the agreement, click **I Accept** to continue the installation.

Important: Network users should pay special attention to the program destination. On the Choose Destination Location screen, make sure the program destination is pointing to the same shared location on the server where Policy Profiler is installed.

3. Follow the screen prompts to complete the installation.

4. When the installation is completed, eject the installation CD-ROM and store it away in a safe place.

PhoneTree Module Setup in Policy Profiler

Perform the following steps in Policy Profiler to set up the PhoneTree module.

To set up the Phone Tree module:

1. Open Policy Profiler.
2. On the Policy Profiler main menu, enter 32 (Agency Reports).
3. On the Agency Reports menu, press H for PhoneTree. The PhoneTree window displays.
4. On the menu bar, click Options and then select Options.
5. Use the table below as a guide to help you set PhoneTree options. When finished setting options, click **OK** to save the changes and exit the PhoneTree Options window.

PhoneTree Options	
Field	**Description**
Dialing Prefix	The **Dialing Prefix** is the access code required to get an outside line. If you must dial 9 (or another prefix) to access an outside line, enter the number in the space provided.
Dial Area Code for local exchanges	Click in the checkbox to select this option if you want PhoneTree to dial the area code for local exchanges. Use this option if your area has multiple area codes for local calls.
Do NOT call before	Enter the time to begin calling. Be certain to specify **AM** or **PM**. No calls will be placed before the time specified.
Do NOT call after	Enter the time to stop calling. Be certain to specify **AM** or **PM**. No calls will be placed after the time specified.
Calling Days	Click in the checkboxes to set the days of the week to call. No calls will be placed on an unmarked day.
Tone	Click this option to set **Tone** as the dialing method. Leave the box unchecked to set **Pulse** as the dialing method.

PhoneTree Options	
Field	**Description**
Short Message	Click this option to set **Short Message** as your default message length. Leave the box unchecked to set **Long Message** as your default message length. The short message is 54 seconds long while the long message is 1 minute and 21 seconds. The short message will give you better audio quality and will communicate your message more quickly.
Star to Repeat	Click this option to allow the call recipient to press the ✳ key on their telephone to have the message repeated.
Hangup Detect	Click this option to have PhoneTree report instances where the call was terminated before the message completed.
Confirm with 9	This option will require you to record both an introduction and a message. After the introduction plays, the call recipient must press **9** on their telephone to confirm that they have heard the message.
Create a note when a call is made by PhoneTree	Click this option to store the call result in the **Notes** section of each insured's Profile. The note contains the date the call was made and the PhoneTree call result. (For example: Call Completed). The note is generated when the call results are retrieved.
Communication Port	Click the drop down arrow to select the correct communication port. If the computer where the PhoneTree device is attached has only one communication port, you will select Com1. If there are multiple ports on the computer, you will need to identify which port is being used and select it.
Export filename	This path should point to the PhoneBase directory. Click the **Browse** button to locate the PhoneBase directory and set the path.
Local exchanges	Enter local exchanges in the space provided. (Look in your phone directory for a complete listing.) Separate each exchange with a space or a comma. Once the list of local exchanges is entered, any number having a local exchange will be dialed as a local number (i.e., without 1 + the area code). **Note:** If you have turned on the **Dial Area Code for local exchanges** option, PhoneTree will dial the area code and then the number without dialing 1 first.

Using PhoneTree with Policy Profiler

Overview

Step One	Generate a phone list from Profile Reports, Policy Transaction Reports, Prime Rate Cancellations, or Prime Rate Late List. (Review the **Appendix** at the end of this guide for detailed instructions on how to generate reports).
Step Two	Record a new message or select an existing, saved message.
Step Three	**Optional:** Save a newly recorded message for future use.
Step Four	Review the phone list and make any necessary changes.
Step Five	**Optional:** Edit Call Options. (Instructions begin on page 3).
Step Six	Send the list to PhoneTree
Step Seven	Retrieve call results.

Recording a Message

Once a message is recorded, it will stay in the PhoneTree unit only until the power is turned off. If you do not want to record a new message each time you generate a new list or risk losing a message due to a power outage, we offer you the ability to store unlimited messages on your computer. This will allow you to record different messages for different types of calls and select the appropriate message when you need it.

To record a message, simply click **Messages** and **Record** on the menu bar <u>OR</u> press the **REC** button on the PhoneTree unit. Speak clearly at a normal volume (not too loudly as the microphone is sensitive enough to detect a normal volume) into to the microphone that is located on the upper left corner of the PhoneTree unit. When finished recording, click **Message** and **Stop** on the menu bar <u>OR</u> press the **STOP** button on the unit. To review the message after recording it, click **Messages** and **Play** on the menu bar <u>OR</u> click **Play** on the unit.

Below is a sample message:
"This is ___________ Insurance Agency calling to remind you that your monthly payment is past due. Cancellation is pending on your policy. Please call our office at (____) ____-______ between 9:00 and 5:00 p.m. to make payment arrangements as soon as possible. Again, our number is (____) ____-______. Thank you and good evening."

Saving a Recorded Message

After recording the message, on the menu bar, click **Messages** and then click **Receive**. On the popup menu, select **Message**. Enter a name for the message and press **Enter**. The message will be stored to a file on your computer. (This process may take a couple of minutes.)

Selecting a Saved Message

To select a saved message, on the menu bar, select **Messages** and then select **Send**. Select the message you want to send to the PhoneTree unit from the list of stored messages. Click **OK**. The message will be sent to PhoneTree. (This process may take a couple of minutes.)

Note: You can verify that the correct message was sent to the unit by pressing the **Play** button on the unit.

Reviewing the Phone List and Making Changes

Once you generate a report from the Profile Reports, Policy Transaction Report, Cancellations Pending Report or Late List Report and enter **T** for PhoneTree, the PhoneTree window displays with your phone list shown. At the same time, the PhoneTree unit is initialized and the current system date and time along with your calling options are automatically downloaded to the unit. The next step is to review the phone list and make any necessary changes before downloading the list to the unit.

To review the phone list and make changes:

1. Use the up and down arrow keys on your keyboard **or** the vertical and horizontal scroll bars on the PhoneTree window to review the list.
2. Note any missing phone numbers. These are automatically marked **Do Not Call**. To supply a missing phone number or edit a phone number:
    a. Click on the desired record.
    b. Then, on the PhoneTree window toolbar, click the **Edit Call Log**  button.
    c. On the Edit Entry window, click in the **Phone** field and type or edit the phone number.
    d. When finished, click **OK** to save the changes and close the Edit Entry window.
3. To remove a **Do Not Call** status from a record or add a **Do Not Call** status to a record:
    a. Click on the desired record.
    b. Click the **Toggle Call Status**  button.

Sending the Phone List to the PhoneTree Unit and Initiate Calling

After reviewing the phone list, the next step is to send it to the unit. To do this, simply click the **Send List**  button on the toolbar. (Alternately, you can select **List** and then **Send** from the menu bar.) To start calling, on the menu bar, click **PhoneTree** and then click **Start Calling**.

Note: Calling will begin when the time you indicated for calling to begin in **Call Options** has arrived.

Retrieving the Call Results from PhoneTree Unit

Once the range of time you indicated in **Call Options** for calls to be made has passed, you can retrieve your call results from the PhoneTree unit into the Policy Profiler PhoneTree module.

To retrieve the call results:

1. On the Policy Profiler main menu, enter **32** (Agency Reports).
2. Enter **H** for **PhoneTree**. The call results for the last list you sent to PhoneTree will be displayed
   Note: Alternately, you can go to the report screen where you generated the phone list (Profile Reports, Policy Transaction Reports, Prime Rate Cancellations Pending Report, Prime Rate Late List Report), and enter **T** for **PhoneTree**. On the PhoneTree window, click the **Receive List**  button. (You can also select **List** and then **Receive** from the menu bar.)

APPENDIX – Generating Reports in Policy Profiler

Generating a Profile Report

One possible use of Profile Reports with PhoneTree is to generate a report by policy expiration date to determine which policies will be soon up for renewal and send a message to notify the insureds.

To generate a Profile Report:

1. On the **Policy Profiler** main menu, enter **32** (Agency Reports).
2. Select **Profile Reports**.
3. Select **Update**.
4. Set report criteria. Use the table below as a guide.

Field	Description/Steps
Last Name/thru	Enter an alphabetical range of insureds' last names to include only those profiles on the report.
Created on/thru	To only include profiles created during a specific period, enter the date range.
Update on/thru	To only include profiles that were modified during a specific period, enter the date range.
Eff-Date/thru	To only include policies with effective dates within a specific range, enter the date range.
Exp-Dates/thru	To only include policies with expiration dates within a specific range, enter the date range.
Term	Enter **6** to include only 6-month policies. Enter **12** to include only 12-month polices. Leave this field blank to include 6-month and 12-month policies.
Status	To only include policies with a specific policy status, press **F1** on the first available line of the **Status** field, use your mouse or your **Down** arrow key to select a policy status and then press **Enter** to apply the selection. Repeat this process to select up to five policy statuses.
Type	To only include policies of a specified policy type, press **F1** on the first available line of the **Type** field, use your mouse or your **Down** arrow key to select a policy type and then press **Enter** to apply the selection. Repeat this process to select up to five policy types.

Field	Description/Steps
Carrier	To only include policies written with a specific company, press **F1** on the first available line of the **Carrier** field, use your mouse or your **Down** arrow key to select a company and then press **Enter** to apply the selection. Repeat this process to select up to five companies.
Report to Generate	Click the down arrow or use the **Up** and **Down** arrow keys on your keyboard to select a report.
Order by	Click the down arrow or use the **Up** and **Down** arrow keys on your keyboard to select a report order.
Group by	To group the report by **Company**, **Status**, **Type** or **CSR**, enter the **Group By** categories in the desired order. You can group by one level or by multiple levels and in any order.

5. When finished setting report criteria, press **F10**.
6. Select **Query Records**.
7. Enter **T** for **PhoneTree**.
8. On the PhoneTree window, record a message, review the phone list, make any necessary changes, download the list to the PhoneTree unit and initiate calling. (Instructions begin on Page 9).

Generating a Policy Transaction Report

Some possible uses of Policy Transaction Reports with PhoneTree include generating a list of new business and using PhoneTree to thank them for their business or generating a list of insureds with an additional premium and using PhoneTree to notify them to come by your agency to pay the additional premium.

To generate a Profile Report:

1. On the **Policy Profiler** main menu, enter **32** (Agency Reports).
2. Select **Policy Transactions**.
3. Select one of the following options:

    - Enter a policy **Effective Date** range to include policy transactions on policies with an effective date in the specified range.
    - Enter a **Transaction Date** range to include policy transactions entered in that range (regardless of policy effective date).

- Enter an **Effective Date** range and a **Transaction Date** range to include policy transactions entered in the specified transaction date range where the policy transactions are associated with policies with a policy Effective Date within the specified range.

4. Under **Select Transaction Type(s)**, using your **Up** and **Down** arrow keys to navigate the list, press the spacebar on the transaction types you want to include on the report to select them. (You can also use your mouse to click the check box next to each selection.)
5. **Optional:** Under **Other Selection Criteria**, enter additional report criteria.

Field	Action
CSR	Press **F1** in this field to generate a report containing the selected user's transactions only.
Term	Enter **6** to include transactions entered on 6-month policies only. Enter **12** to include transactions entered on 12-month policies only.
Company	To print policy transactions for the selected company only, press **F1** in this field, highlight the company and press **Enter** to apply the selection.
List suspended transactions only?	By default, this field is set to **N** so that both suspended and regular transactions will be included. Enter **Y** in this field to include only suspended transactions.
Active or Inactive?	By default, this field is set to **A** so that only transactions on active profiles will be included. To include policy transactions on Inactive profiles only, enter **I** in this field.

6. When finished setting report criteria, press **F10**.
7. Select **Query Records**.
8. Enter **T** for **PhoneTree**
9. On the PhoneTree window, record a message, review the phone list, make any necessary changes, download the list to the PhoneTree unit and initiate calling. (Instructions begin on Page 9).

Generating a Cancellations Pending Report

You can send your Prime Rate Cancellations Pending list to PhoneTree and notify insureds whose accounts are about to cancel.

To generate a Cancellations Pending Report:

1. On the **Policy Profiler** main menu, enter **32** (Agency Reports).
2. Select **Premium Finance Reports** and then select **Cancellation Processing**.
3. A message displays indicating the last date you generated a Cancellations Pending list. To generate a new list, click **Yes**. To view or make changes to an existing list, click **No**.

Caution

If you have already created a cancellations pending list for the current cycle and have been editing it, be careful not to accidentally click **Yes** to create a new list. Doing so will cause you to lose any changes you may have previously made such as putting accounts in **Hold** or **Paid Agent** status.

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4. **Optional:** Select **Scan Receipts** to have **Profiler 32** check for any recently made payments.
5. Enter **T** for **PhoneTree**.
6. To notify clients with an account in **Send** status, select **Accounts with a SEND Status**. To notify clients with an account due to cancel by a specified date, select **Accounts cancelling By** and enter the scheduled payment date.
7. On the PhoneTree window, record a message, review the phone list, make any necessary changes, download the list to the PhoneTree unit and initiate calling. (Instructions begin on Page 9).

Generating a Late List

You can send your Prime Rate Late List to PhoneTree to notify insureds of their past due account status.

To generate a Late List:

1. On the **Policy Profiler** main menu, enter **32** (Agency Reports).
2. Select **Premium Finance Reports**.
3. Select **Prime Rate Late List**.
4. The following message displays: Create new LATE list? Select **Yes** to create a new list or select **No** to retrieve the previously created list.
5. If you selected **Yes** in step four, a confirmation message displays. Select **Yes** to continue.
6. When the list has finished generating, enter **T** for **PhoneTree**.
7. On the PhoneTree window, record a message, review the phone list, make any necessary changes, download the list to the PhoneTree unit and initiate calling. (Instructions begin below).