



Cisco Smart Business Portal

User Guide

AMS 360 Business Adapter

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Cisco Smart Business Portal User Guide

This User Guide will help Cisco Smart Business Portal (CSBP) Users adapt and understand the Cisco Smart Business Portal for daily use and how the portal brings read only views directly from the AMS 360 application. The Cisco Smart Business Portal (CSBP) brings information directly to the Receptionist, Producer, or Accountant and presents information based on the caller ID via the Cisco phone system. Areas that are hyperlinked (underlined) are clickable and provide additional information. Phone numbers are also hyperlinked for “click-to-dial”. The main page (see **Figure 1** below) provides immediate information as customers call in for an appointment or for status on work being done. See below for a complete description of features.

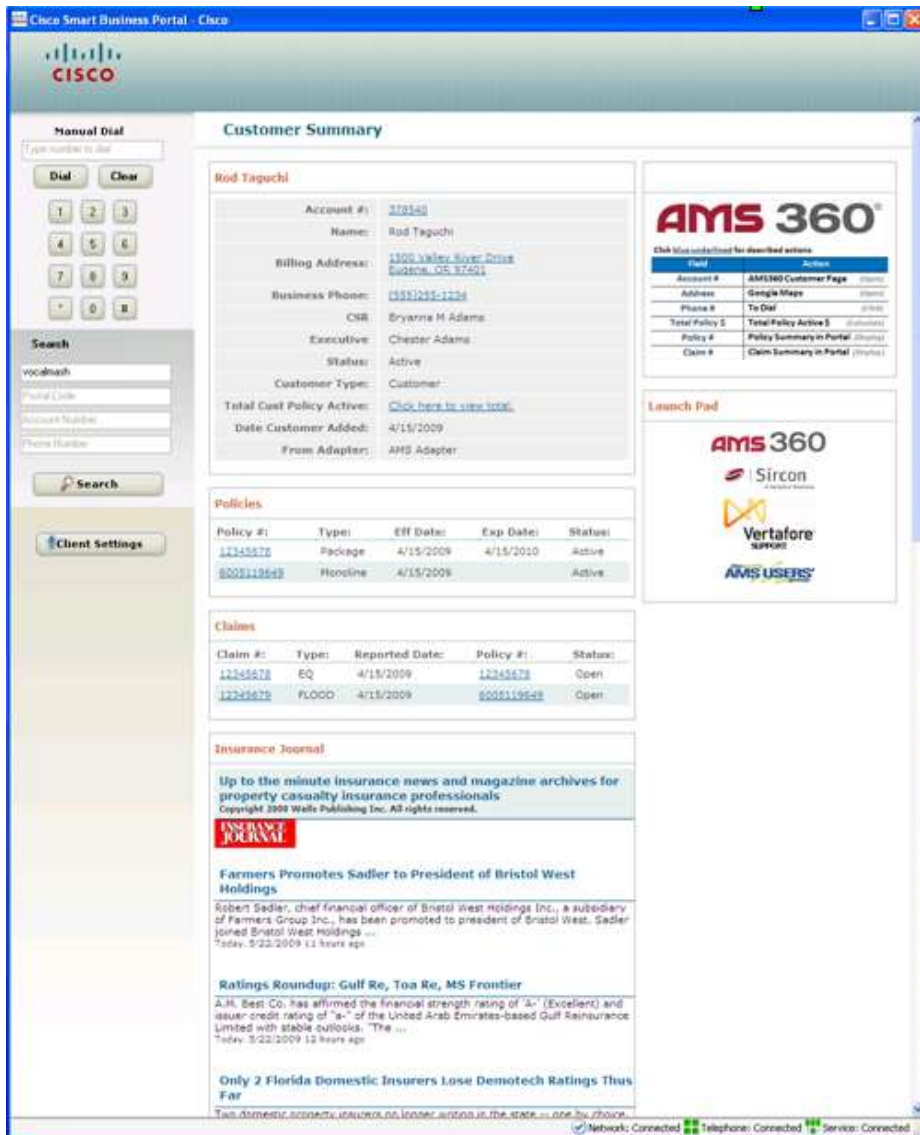


Figure 1 – Vertafore AMS 360/CSBP Main Page



Additional support information can be found below:

Contact your Cisco Unified Communications Partner: _____

For installation or additional support please visit the Cisco Smart Business Portal Website at <http://developer.cisco.com/web/sbp/home> .

For the AMS 360 business adapter for the Cisco Smart Business Portal specific information please visit [http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/AMS 360+1](http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/AMS+360+1)

CSBP Home Page

Figure 1 above illustrates the portal when initially opened and properly configured. There are 4 areas to be aware of on the CSBP home page. See **Figure 2** below.

Area 1, if you do not see green lights contact your administrator. These CSBP icons will turn green if properly configured. More information can be found in the [AMS 360 Business Adapter for CSBP – Install and Config Guide v2.0.0.2 Rev A](#).

Area 2, allows the CSBP user to search by name, zip code, and phone number. Information on the [Client Settings](#) button can be found in the above mentioned Install Guide and should be configured by your administrator.

Area 3 will contain various web parts for the CSBP Home Page. More information on each web part can be found in the [CSBP Home Page Web Part Overview](#) section below.

Area 4 is the [Dial Pad](#) that interacts with your Cisco Phones. *Answer, Transfer, Hold, and End Call* are all available features in the CSBP Dial Pad or the Cisco phone itself. The clear button will remove an entry in the [Dial Pad](#). A *right click* with the mouse near the dial pad will allow you to add/remove the tool, menu and status bar. It is recommended to only have the status bar showing.

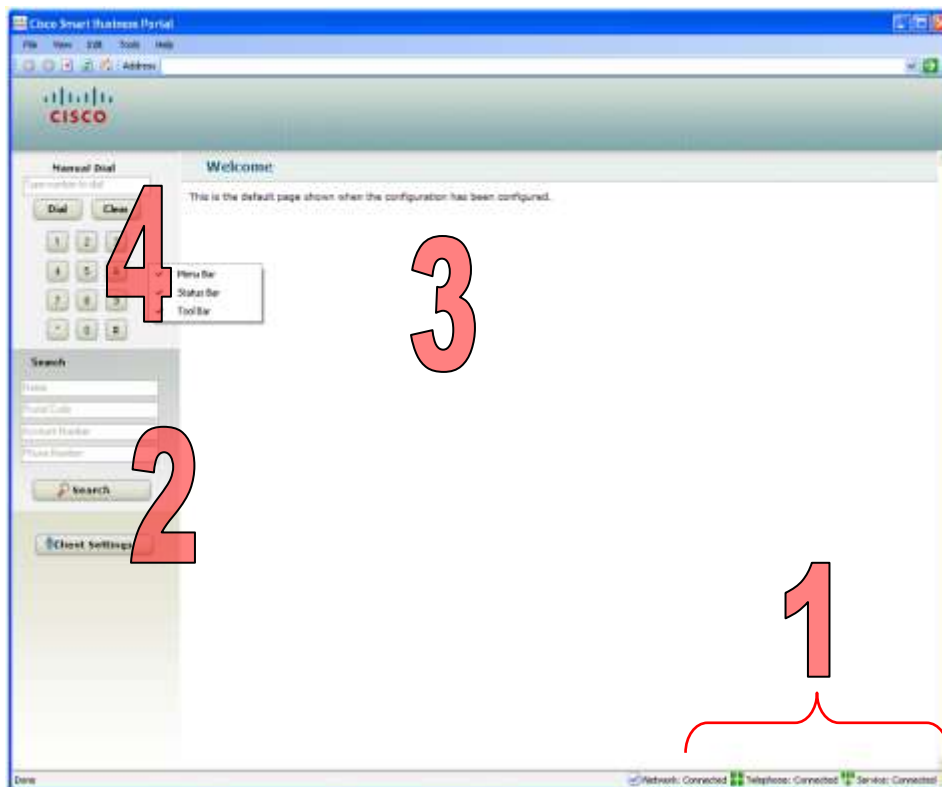


Figure 2 - Main CSBP Page Zones



CSBP Home Page Web Parts Overview

Accounts Web Part (Figure 3): The Account web part reflects the information from the **Customer** Tab in AMS 360. Features of this web part include:

- Click in the [Account #](#) to go to Customer tab in AMS 360
- Click the address to launch Google maps. This allows ease of access for directions and distance information. When launched the customers address is already filled in and by using Google Maps Auto Complete capabilities your office locations can also be saved and selected. This allows for simple and efficient display of directions from the customer’s location to the office. For information on Internet Explorer Auto Complete used by Google Maps, visit the following link: <http://support.microsoft.com/kb/217148>.
- *Click-to-Dial* for any underlined phone numbers. Clicking your mouse on the highlighted phone number will initiate an outbound call to that number.
- Click on the underlined portion for the **Total Cust Policy Active** section to calculate and display the total premium for all active policies for the customer.

| Rod Taguchi | |
|---------------------------|--|
| Account #: | 378540 |
| Name: | Rod Taguchi |
| Billing Address: | 1500 Valley River Drive Eugene, OR 97401 |
| Business Phone: | (555)255-1234 |
| CSR | Bryanna M Adams |
| Executive | Chester Adams |
| Status: | Active |
| Customer Type: | Customer |
| Total Cust Policy Active: | Click here to view total. |
| Date Customer Added: | 4/15/2009 |
| From Adapter: | AMS Adapter |

Figure 3 - Accounts Web Part



Policies (Figure 4): This web part displays information about the policies for a particular customer.

- For each policy owned by this customer the following information is displayed:
 - Policy #
 - Type
 - Effective date
 - Expiration date
 - Status
- Click on a [policy #](#) to go to the [Policy Summary](#) page in the Cisco Smart Business Portal for that policy.

| Policies | | | | |
|----------------------------|----------|-----------|-----------|---------|
| Policy #: | Type: | Eff Date: | Exp Date: | Status: |
| 12345678 | Package | 4/15/2009 | 4/15/2010 | Active |
| 6005119649 | Monoline | 4/15/2009 | | Active |

Figure 4 – Policies Web Part

Claims (Figure 5) – This web part displays information about the claims for a particular customer.

- For each claim the following information is displayed:
 - Claim #
 - Type
 - Reported date
 - Policy #
 - Status
- Click on a [claim #](#) to go to the [Claim Summary](#) page in the Cisco Smart Business Portal for that claim.
- Click on a [policy #](#) to go to the [Policy Summary](#) page in the Cisco Smart Business Portal for that policy.

| Claims | | | | |
|--------------------------|-------|----------------|----------------------------|---------|
| Claim #: | Type: | Reported Date: | Policy #: | Status: |
| 12345678 | EQ | 4/15/2009 | 12345678 | Open |
| 12345679 | FLOOD | 4/15/2009 | 6005119649 | Open |

Figure 5 Claims Web Part

News RSS Feed (Insurance Journal) Web Part (Figure 6): This web part displays news stories via an RSS feed. It is set by default to the Insurance Journal, but may be modified upon installation. The articles are refreshed each time the main portal page is refreshed.

- Select the blue title of any article to launch that item in Internet Explorer, or your default browser.

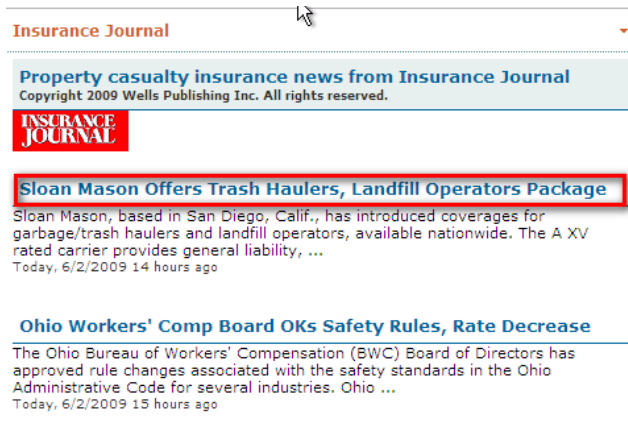


Figure 6 RSS Web Part (Insurance Journal)

Legend (Figure 7): This is not actually a web part, but rather a static display that can be used as a reminder about what actions happen when hypOerlinked (blue underlined) information is selected.

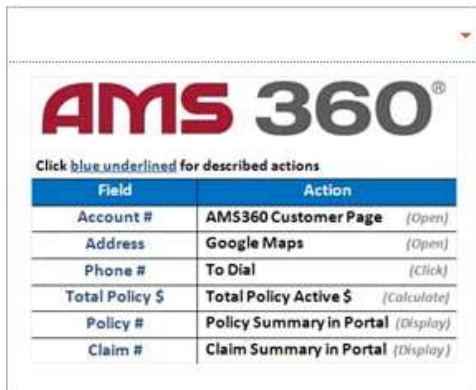


Figure 7 - Legend

Map Web Part (Figure 8): This web part shows the customer address in a map view.

- Roll the mouse wheel allows for zooming.
- Click and Drag features are available in this web part for panning.

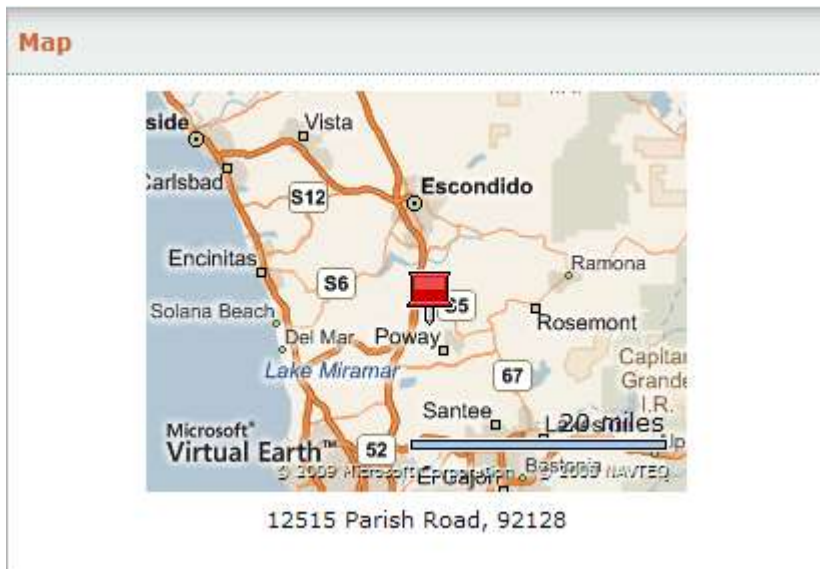


Figure 8 - Map Web Part

One-Click Launch Pad Web Part (Figure 9): You can access commonly used Internet links that you wish to have readily accessible for your daily activities. By default [AMS 360](#), [Sircon](#), [Vertafore Support](#), and [AMS Users](#) can be accessed via this web part. The launch pad can be customized upon installation. Please contact your Cisco Smart Business Portal Administrator or Cisco Support Partner to request these changes. Customization Instructions for the Launch Pad web part can be found in the *AMS 360 Business Adapter for CSBP – Install and Config Guide v2.0.0.2 Rev A*.



Figure 9 Launch Pad Web Part



Policy Summary Page

The Policy Summary page includes information about a customer's selected policy. You reach this page from either the Policy or Claims web parts on the main portal page. This summary page includes the following information:

- Policy #
- Account Name
- Type
- Carrier
- Begin Term
- End Term
- Billing Type
- Billing Method
- CSR
- Executive
- Status
- Premium Amount (from the total premium field in AMS 360)
- From Adapter (the name of the adapter from the Cisco Smart Business Portal)

The following fields are hyperlinked to provide additional functionality:

- Click on a [Policy #](#) to go to the Customer tab in AMS 360.
- Click on a [Account Name](#) to return to the main portal page
- Click on a [Carrier](#) to go to the Company tab in AMS 360.
- Additionally there is a legend at the top of the page to remind what these fields do when selected.

Policy Summary

| Field | Action |
|--------------|---|
| Policy # | AMS 360 Customer Page <i>(Open)</i> |
| Account Name | Main Cisco Smart Business Portal Page <i>(Return)</i> |
| Carrier | Carrier/Company in AMS360 <i>(Open)</i> |

AMS 360®
Click [blue underlined](#) for described actions

Policy Detail

| | |
|-----------------|--|
| Policy #: | 12345678 |
| Account Name: | Rod Taguchi |
| Type: | Benefits |
| Carrier: | Peerless Insurance Company |
| Begin Term: | 4/15/2009 |
| End Term: | 4/15/2010 |
| Billing Type | Package |
| Billing Method | Direct bill |
| CSR | Bryanna M Adams |
| Executive | Chester Adams |
| Status: | Active |
| Premium Amount: | \$28,000.00 |
| From Adapter: | AMS Adapter |

Figure 10 - Policy Summary Page

Claims Summary Page

The Claims Summary page includes information about a customer's selected claim. You reach this page from either the Policy or Claims web parts on the main portal page. This summary page includes the following information:

- Claim #
- Policy #
- Account Name
- Carrier
- Loss Date
- Reported Date
- Type
- Cause of Loss
- Status
- Description
- From Adapter (the name of the adapter from the Cisco Smart Business Portal)




The following fields are hyperlinked to provide additional functionality:

- Click on a [Policy #](#) to go to the Customer tab in AMS 360.
- Click on a [Account Name](#) to return to the main portal page
- Click on a [Carrier](#) to go to the Company tab in AMS 360.
- Additionally there is a legend at the top of the page to remind what these fields do when selected.

Claim Summary

| Field | Action |
|--------------|---|
| Policy # | AMS 360 Customer Page <small>(Open)</small> |
| Account Name | Main Cisco Smart Business Portal Page <small>(Return)</small> |
| Carrier | Carrier/Company in AMS360 <small>(Open)</small> |



Click [blue underlined](#) for described actions

Claim Detail


| | |
|----------------|--|
| Claim #: | 12345678 |
| Policy #: | 12345678 |
| Account Name: | Rod Taquchi |
| Carrier: | Peerless Insurance Company |
| Loss Date: | 4/15/2009 |
| Reported Date: | 4/15/2009 |
| Type: | EQ |
| Cause of Loss: | |
| Status: | Open |
| Description: | earthquake damages trees and cars |
| From Adapter: | AMS Adapter |

Figure 11 - Claims Summary Page

Personalization

Personalization is a Cisco Smart Business Portal customization feature that allows users to change the appearance of their portal view. Different Cisco Smart Business Portal users may want web parts in different places to help prioritize the task. To enable personalization please refer to the *AMS 360 Business Adapter for CSBP – Install and Config Guide v2.0.0.2 Rev A*. **Figure 12** illustrates a web part after personalization has been turned on.

- When turned on, in the top right corner of every web part, *clicking* a down arrow (see red circle) allows users to minimize that web part, effectively hiding it. To return each web part to the original size, *click* the arrow again.
- The Cisco Smart Business Portal Home Page also allows users to move each web part to custom locations. To do this, simply *click and drag* the web part header (see red rectangle) to the desired location.



| Rod Taguchi | |
|---------------------------|--|
| Account #: | 378540 |
| Name: | Rod Taguchi |
| Billing Address: | 1500 Valley River Drive Eugene, OR 97401 |
| Business Phone: | (555)255-1234 |
| CSR | Bryanna M Adams |
| Executive | Chester Adams |
| Status: | Active |
| Customer Type: | Customer |
| Total Cust Policy Active: | Click here to view total. |
| Date Customer Added: | 4/15/2009 |
| From Adapter: | AMS Adapter |

Figure 12 - Personalization of a Web Part