THE ART AGENCY

AMS360 TRAINING · PERSONAL & COMMERCIAL · CSR & PRODUCER

AMS360 CSR & Producer Operating Guide

Personal & Commercial Lines — New Business, Servicing, Forms, Renewals & Reporting

A complete day-to-day reference with ACORD form mapping and trainer best practices

Version 4.1 · June 2026 · Owner: Agency Operations (Tyler Davis)

Navigation, the customer Views rail, New Customer / New Policy entry, eForms, and the carrier-level billing actions (Direct Bill Statement / Entry, Pay Account Current) verified against The Art Agency's live AMS360 instance (build v2526431); the figures inside each accounting window and remaining feature detail confirmed against Vertafore AMS360 documentation, June 2026.

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PART I

Foundations

1. How to Use This Guide

This is the day-to-day operating reference for producers and CSRs working personal and commercial lines in AMS360. It runs from new-business entry through documentation, forms, servicing, renewals, and the reports you use to run your book. Work through Parts I–II first; the rest is reference you will return to.

System of record. AMS360 is the agency's only system of record for policy data. Where a carrier downloads a policy, the download is authoritative and overwrites what you key.

Ticket in AgencyZoom, do the work in AMS360. Your AgencyZoom Service Center ticket is the workflow and the E&O timestamp; AMS360 is where the change actually happens. Section 12 maps the two together.

> **Trainer's note**
> **Tab, don't click.** Move through every form with the Tab key. It forces your eye onto each field in order, surfaces required (red) fields, and stops you skipping a box the carrier will later ask about. This one habit prevents most re-work.

2. Navigating AMS360

AMS360 NextGen is organized into **Centers**, reached from the **Toolbox** menu (bottom-left). Each Center — **Customer, Company, Bank, Broker, Employee, Vendor, Financial, and Admin** — opens with a search box, a left **Views** rail, an **Actions › New** menu, and **Quick Reports**. The Toolbox also launches the agency tools: **eForms, Form Letters, Classic Reports, Scheduled Reports, and the Renewal List Tool**.

The Home page — your work queue

Home opens to your personal queues: **Suspense** (to-dos), **Notes, Suspended Billing, Alerts, My Documents, My Expiring Policies, My Renewal Lists, and Distribution**.

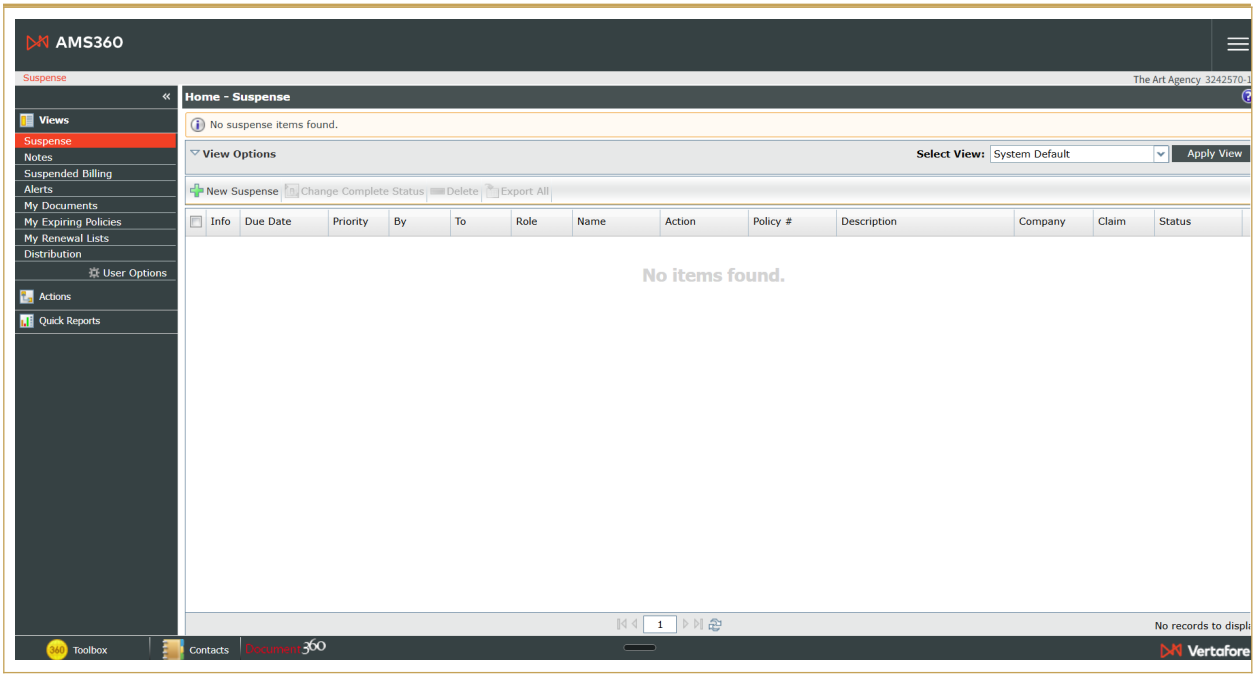


Figure. The Home page work queue — the Views rail (Suspense, My Expiring Policies, My Renewal Lists) and the Suspense to-do grid.

Inside a customer — the Views rail

Open a customer from the Customer Center and the left **Views** rail holds everything for that account:

- **Coverage & servicing** — Customer Overview, Policies, Activity, Claims, Binders, Certificates, Change Requests, Submissions, Suspense, Notes, Documents.
- **Accounting** — Invoices, Receipts, Statements, Register, Aged AR, Company AP.
- **At the bottom of the rail** — the **Actions › New** menu and **eForms**; **Additional Customer Info** sits in the top-right.

> **Trainer's note**
>
> **The Match column.** In customer search, a hit in the Match column can mean a cross-referenced name, not the customer's own — so one search may surface a related household member. That is by design (Section 3).

3. Enter a New Customer (Personal Lines)

From the **Customer Center**, click **New Customer** to open the Customer Setup form. Work down it with the Tab key; the left rail lists its sections (Customer Setup, Additional Customer Info, Service Groups, Contacts, Dependents, Loss History, Agency Defined Fields, Cross References, Expiration Dates, Accounting Options).

Where customers come from — AgencyZoom vs. AMS360

Don't double-key. AgencyZoom and AMS360 are integrated, and each owns a different stage of the account:

- **Sales leads start in AgencyZoom.** Creating a lead in AZ automatically creates a **Prospect** in AMS360 (with a duplicate check) and syncs the name, phone, email, and address; notes, emails, and texts post as Activities and tasks post as Suspense. When the lead is marked **Sold**, AZ flips the Prospect to Customer and creates a policy **shell** in AMS360.
- **AMS360 is the system of record.** A bound customer (Type = Customer) and its policies live here and sync up into AgencyZoom's My Customers / book of business for renewals, retention, and the Service Center.
- **Direction:** leads flow **AgencyZoom → AMS360**; the customer and policy of record flow **AMS360 → AgencyZoom**.

> **Trainer's note**
>
> **Pick the origin — never both.** For a sales prospect, start in AgencyZoom and let it build the AMS360 record, then finish the policy here. Create a customer directly on this page only when it did not come through the AZ pipeline — a carrier **download** (book roll-ins, transfers), a quick bind, or a commercial account worked outside AZ. Hand-creating the same customer in both systems is the fastest way to make duplicates.

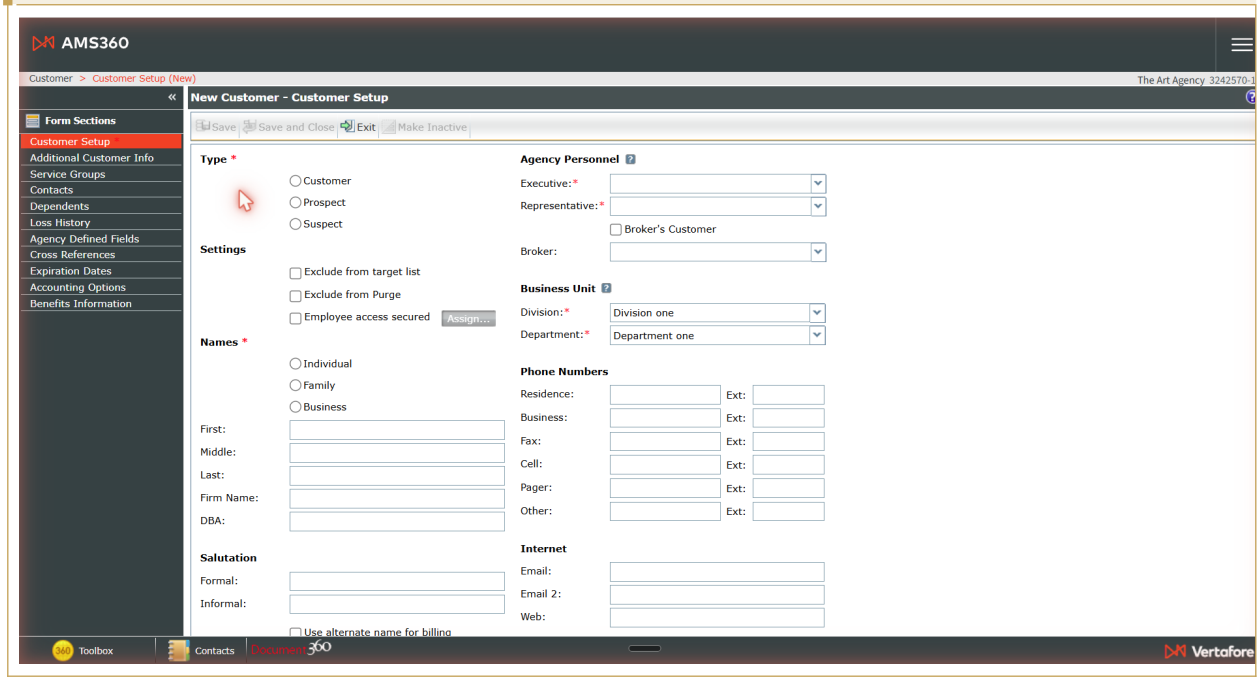


Figure. The New Customer — Customer Setup form (Individual): Type, Settings, Names, Agency Personnel (Executive / Representative required), Business Unit, phones, and Internet, with the Form Sections rail and the Save / Save and Close / Exit bar.

Customer Setup — step by step

1. **Type** — **Customer** (has or is about to have a bound policy; choose this when entering a policy today), **Prospect**, or **Suspect**.
2. **Names** — **Individual** or **Family** for personal lines; enter **First** and **Last** (required). Firm Name and DBA are commercial-only.
3. **Address** — enter Address, City, State, ZIP, and County.
4. **Distribution & contact preferences** — set **Preferred Method of Distribution** (Email / Fax / Printed) and **Contact Preferences** (preferred method, Marketing / Solicitation, and Electronic Delivery consent). If you choose Email, set the electronic-delivery permission to match.
5. **Agency Personnel** — set **Executive** and **Representative** (both required to save; here, **Davis, Tyler**). Check **Broker's Customer** only when an outside broker owns the client.
6. **Business Unit & flags** — set **Division** and **Department** correctly now (they lock once accounting posts); check the **Personal** line flag; set **Business Origin** (Organic / Referral / Transfer).
7. **Save**, then complete as needed: **Additional Customer Info** (store only what underwriting needs), **Cross References** (link related customers), and **Expiration Dates** (a policy you have not written yet). **Save and Close** opens the Customer Overview.

> **Trainer's note**
>
> **Data-minimization.** AMS360 is encrypted, but the safest record stores no more than it needs. Avoid full SSNs and DOBs at the customer level unless required — anyone who can run reports can extract them.

4. Enter a Homeowners Policy (Direct Bill)

From the open customer, choose **Policies** in the left Views rail, then **New Policy** (opens in a separate window). The action bar also holds **Copy, Endorse, Renew, Rewrite, Cancel, Binder Bill, and Compare** for later servicing (Section 12).

4.1 The Policy Header

1. **Policy Number** — key it from the dec page, or enter **TBD** if you only have a quote number (see note).
2. **Effective Date** — defaults the expiration one year out; override for a six-month term. Never use **Continuous**.
3. **Type of Business** Personal Lines · **Transaction Type** New Business · **Bill Method** Direct Bill (or Agency Bill).
4. **Issue State**, **Admitted/Non-admitted** (leave if unsure), **Renewal Term** 0, **Company Type** (Insurance vs Brokerage).
5. **Parent Company** then **Writing Company**, then **OK**.

> **Trainer's note**
>
> **TBD beats a quote number.** Either way a downloaded policy lands in the download hold (Section 13); a quote number looks like a policy number that doesn't match and forces someone to chase you, while **TBD** is recognized as new business and the download loads right onto it.
>
> **Never “Continuous.”** Even auto-renewing policies have a real expiration date; Continuous strips it and breaks expiration reports.

4.2 Policy Detail, line of business & premium

- **Policy Type** — Monoline for one line; **Package** for two or more (home + auto + umbrella).
- **Signature, Full-Term Premium, Mailing, Pay Plan/Installments, carrier account/master codes** — complete as applicable; leave agency-negotiated commission at None on direct bill.
- **Add the line of business** — New › Homeowners › Add. In the application set Type **Special Form 3 (HO-3)**, Coverage A limit, deductible, Personal Liability (Cov E), Medical Payments (Cov F), and the rating fields (year built, construction, protection class, roof, etc.).
- **Premium & Billable status** — Not Billable for a downloading carrier (the download brings the premium); Direct Bill Statement/Entry when not downloading. Bill method must match in all three places.

> **Do not finalize**
>
> **On a demo/training account, stop here.** Do not invoice, run Binder Bill, or finalize. Entering the line of business and premium is the end of the exercise.

PART II
Document Everything

5. Activities & Suspense — the E&O Backbone

Every time you touch a customer or policy, you create two things: an **Activity** (the permanent, time-stamped record of what happened) and, when something must be followed up, a **Suspense** (the reminder/to-do). Activities cannot be edited or deleted once saved — that is exactly what makes them your errors-&-omissions defense.

5.1 Create an Activity (with a Suspense)

1. From the customer (or Quick Actions › New Activity), click **New Activity**.
2. Choose the **Action** code and link the **policy** it relates to.
3. Write the **description** so a stranger could act on it — who, what, deadline.
4. To set a follow-up, add a **Suspense**: assign the CSR (usually the account CSR), a **due date**, and a priority.
5. **Attach** the email, quote, or signed form (Section 6), then save.

Many transactions (issuing an eForm, endorsing, billing) **auto-create** an Activity for you. Add the detail and a Suspense if a follow-up is owed.

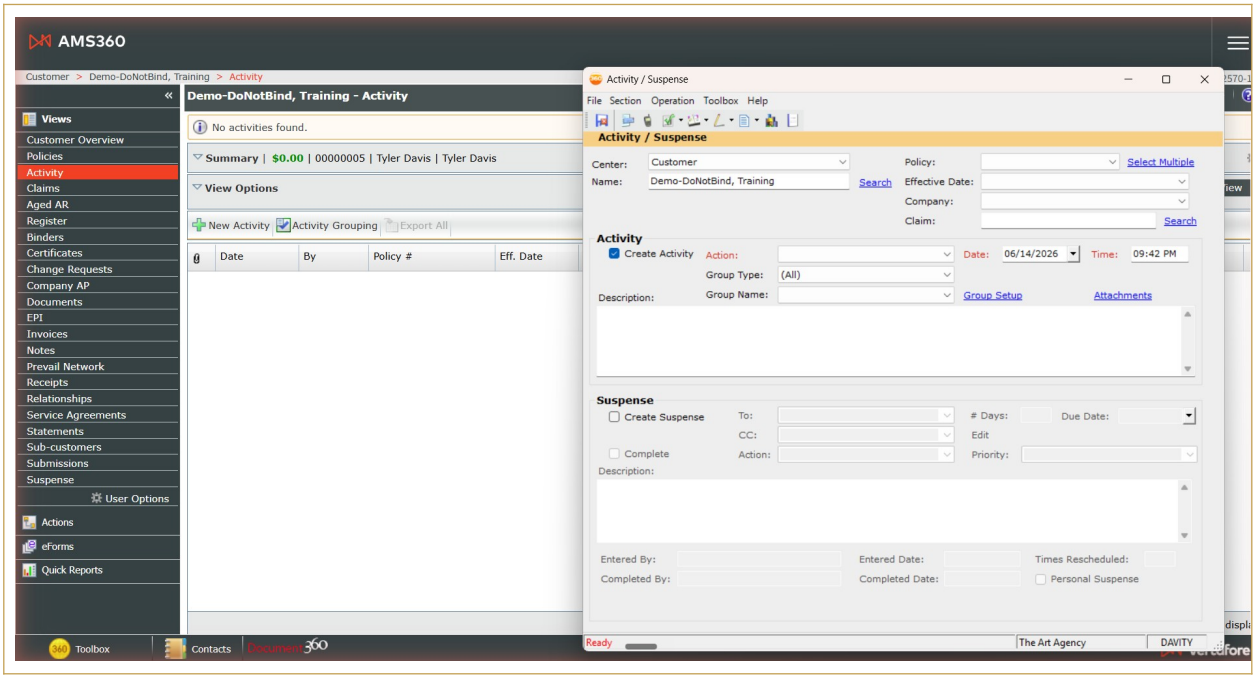


Figure. The New Activity / Suspense window — the Activity section (Action, Date, Description) and the Suspense section (To, Priority, Due Date) are created together on the customer.

5.2 Working your Suspense queue

Your open Suspense items appear on the **Home page**. Work them by due date; keep the status honest (In Progress, waiting on client/carrier). Nothing should sit past due — an overdue Suspense is how things fall through the cracks.

> **Trainer's note**
> **No activity, no proof.** If it is not in an Activity, it did not happen as far as E&O is concerned. Log the call, the email, and the change — every time. This is the AMS360 half of every AgencyZoom ticket.

6. Documents & Email Integration

AMS360 keeps a document trail on every account. The customer's **Documents** view (and Doc360 / WorkSmart, if your agency uses imaging) stores dec pages, applications, signed forms, and correspondence.

6.1 Attach a document to an Activity

1. From the customer, open **New Activity** (or the Activity the document belongs to).
2. Click **Attach** and select the file — dec page, signed application, quote, or saved email.
3. Link the Activity to the right **policy** so the record and the proof live together.
4. Save — the document is now on the account and the policy, not in someone's inbox.

6.2 Bring an email into AMS360

1. In Outlook, select the client email (and its attachments).
2. Use the **AMS360 email integration** to push it in as an **Activity**.
3. Pick the **customer and policy** it belongs to; confirm the attachments came across.
4. Add a **Suspense** if the email asks for a follow-up.

> **Trainer's note**
> **File it to the policy.** Always link a document to the right policy, not just the customer — at renewal or claim time you want everything for that policy in one place.

PART III

Forms & Proof of Insurance

7. The eForms Manager

The **eForms Manager** is the single hub for every ACORD form AMS360 produces from your policy data. Open it from the customer's **eForms** menu (or Quick Actions › eForms). The **eForms › New** menu offers, in this instance: **Applications, Auto ID Card, Binder, Cancellation, Certificate of Liability, Certificate of Property, Change Request, EPI, Loss Notice, and Additional Forms**.

7.1 Generate a form

1. From the customer, open **eForms › Launch eForms Manager** (or **eForms › New** for a specific form).
2. Pick the **form type** from the New menu (e.g., Applications for the HO-3 onto ACORD 80, or Certificate of Liability for ACORD 25).
3. Select the **policy**; AMS360 fills the form from the live policy record.
4. Review every limit and coverage against the policy — never type a value the policy does not carry.
5. **Email, fax, or print** the form in its original format; issuing it drops an **Activity** on the account automatically. Forms can also carry attachments.

> **Trainer's note**
> **Forms read the live policy.** eForms pull limits and coverages straight from the policy record — so the form is only as accurate as your data entry. Verify before you send, and never type a limit onto a form that the policy does not carry.

8. Binders

A **binder** is temporary, legally binding proof of coverage before the dec page issues — for a closing, a new vehicle, or a lienholder. The form is **ACORD 75**. Open the customer's **Binders** view › **New Binder** (it attaches to an existing policy).

1. Select the **policy** the binder applies to.
2. Set **effective date** and **binder expiration** (typically 30–90 days).
3. Confirm named insured, carrier, and limits match what the carrier agreed to bind; add any mortgagee/lienholder.
4. Generate (ACORD 75), deliver, attach a copy.

> **Trainer's note**

A binder is a promise of coverage. Never bind terms the carrier has not agreed to. Set the expiration, and replace it with the dec page the moment it issues. The **Binder Status report** (Section 15) flags binders not yet replaced.

9. Certificates & Evidence of Insurance (COI)

Proof of coverage to a third party. The customer's **Certificates** view offers **New Cert Liab** (Certificate of Liability, ACORD 25) and **New Cert Prop** (Certificate / Evidence of Property, ACORD 24 / 27).

Trainer's note
Personal lines — pick the right document. A true liability COI (ACORD 25) is mostly a commercial tool. On personal lines the document a customer usually needs is **Evidence of Property Insurance (ACORD 27)** for a mortgagee, or an auto ID card (Section 10). Use New Cert Prop for property/evidence; New Cert Liab only when a liability certificate is genuinely required.

1. Open **Certificates** › New Cert Prop (property/evidence) or New Cert Liab.
2. Select the policy; enter the holder / mortgagee name, address, and loan number.
3. Verify limits pull from the live policy; add special wording only if the policy supports it (otherwise endorse first).
4. Generate, deliver to holder and client, attach a copy.

Trainer's note
Treat it as same-day. A COI or evidence request usually blocks a closing, loan, or contract. Issue it the day it is requested and verify limits against the live policy, not memory.

10. Auto ID Cards, Change Requests & Loss Notices

Three more everyday eForms, all issued from **eForms › New** (Section 7):

10.1 Auto ID cards

1. Open **eForms › New › Auto ID Card**; select the auto policy.
2. Produce the **state-correct card** (AMS360 supports all states; many accept the electronic version on a phone).
3. Email or print it and attach a copy.

10.2 Change Requests (Policy Change Request — ACORD 175)

1. Open **eForms › New › Change Request** (or the customer's **Change Requests** view).
2. Describe the change and the **effective date**.

3. Send it to the carrier and open a **Suspense** to confirm the endorsement comes back (Section 12).

10.3 Loss Notices (First Notice of Loss)

1. Open **eForms › New › Loss Notice**; select the policy.
2. Capture **date of loss, description, and parties** — facts only.
3. Generate and send to the carrier, then log the claim in the **Claims** view (Section 12.3).

11. ACORD Forms Reference

These are the personal-lines forms you reach for most; **Part IX** is the complete ACORD reference, organized by section of use, with a full numeric index.

The personal-lines forms you will generate from AMS360, and where each comes from:

ACORD #	Form	Where in AMS360
ACORD 80	Homeowner Application	eForms › Applications (from the HO-3 data).
ACORD 90	Personal Auto Application	eForms › Applications (auto).
ACORD 84	Dwelling Fire Application	eForms › Applications (rental dwellings).
ACORD 75	Insurance Binder	Binders view (Section 8).
ACORD 27	Evidence of Property Insurance	Certificates › New Cert Prop (Section 9).
ACORD 25	Certificate of Liability	Certificates › New Cert Liab (Section 9).
ACORD 175	Policy Change Request	eForms / Change Requests view (Section 10).
—	Auto ID Card	eForms › Auto ID Cards (state-specific, Section 10).

> **Trainer's note**
> **Garbage in, garbage on the ACORD.** Every form is only as good as the policy data behind it. Complete the rating fields even when they aren't red-required.

PART IV

Servicing the Book

12. Service-Center Corrections in AMS360

Every AgencyZoom Service Center ticket ends with the change being made in AMS360. This maps each category to the AMS360 action that processes it.

Service ticket (AgencyZoom)	AMS360 action	Where in AMS360
General · Question · Carrier Request	Activity + Suspense	Customer › New Activity; set a Suspense follow-up.
+/- Driver · +/- Insured · Coverage Change	Endorsement	Customer › Policies › policy › Endorse (12.1).
COI / Evidence	Certificate	Customer › Certificates (Section 9).
Auto ID card	eForm	eForms › Auto ID Cards (Section 10).
Pending Cancellation · Client Cancelling	Cancel / Reinstate	Customer › Policies › policy › Cancel (12.2).
Remarket	Rewrite / new quote	Customer › Policies › Rewrite, or new submission (Section 17).
Claim Services · Claims Filed Directly	Claim + Loss Notice	Customer › Claims › New Claim (12.3); eForms Loss Notice.
Renewal	Renew	Customer › Policies › policy › Renew (Section 14).

12.1 Endorsing a policy

1. **Customer › Policies** — select the policy, click **Endorse** (separate window).
2. Set the **endorsement effective date** and description.
3. Open the line of business and make the change (driver, insured, limit, deductible, vehicle, coverage).
4. Record the **premium change**; communicate any increase before binding and note the OK.
5. Save and document; if not downloading, set the billable status.

12.2 Cancelling or reinstating

1. Customer › Policies › policy › **Cancel**; choose the cancellation type and effective date.
2. Client-requested: record the reason and confirm replacement coverage (E&O); get the signed request where required.
3. Pending cancellation: work it to reinstatement (payment or the carrier's requirement) and confirm terms with the carrier.

12.3 Logging a claim

1. Customer › Claims › **New Claim** (whether the agency or the insured filed).
2. Record claim number, date of loss, carrier, adjuster. Capture facts only — never editorialize fault or promise an outcome.
3. Generate a **Loss Notice** from eForms if you are reporting it; track to resolution.

> **Trainer's note**
> **AMS360 holds the record; AgencyZoom holds the workflow.** Process the change in AMS360 and complete the matching Service Center ticket — one without the other leaves a gap.

13. Carrier Download & the Download Hold

Most carriers **download** policy data (and increasingly eDocs & Messages via IVANS) straight into AMS360 — new business, renewals, endorsements, and cancellations load automatically, usually within 24 hours. When a downloaded item can't be matched to a policy, it lands in the **download hold** for someone to work.

- **Why TBD matters** — a new-business download with a real policy number won't match your TBD shell unless effective date, expiration, line of business, and parent company line up. Matching it assigns the download onto your policy and overwrites the manual entry (Section 4.1).
- **eDocs & Messages** — dec pages and carrier messages download alongside the data and route to the customer's Documents (and to WorkSmart/email if configured).
- **Don't double-key** — for a downloading carrier, you only need to add the line of business; the download fills the rest. Key a full application only when the policy will not download.

13.1 Work the download hold

1. Open your agency's **Download / Download Hold** queue — every day.
2. For each unmatched item, find the AMS360 policy it belongs to — match on **effective / expiration dates, line of business, and parent company**.
3. If you keyed it as a **TBD shell** (new business), match the download to it; the download fills the policy number and premium and **overwrites the manual entry**.
4. If no policy exists yet, **add the line of business** so the download has a home.
5. Route true exceptions (wrong customer, unknown policy) per agency procedure — never force a mismatch.

> **Trainer's note**
> **Work the hold daily.** Unmatched downloads sitting in hold mean premiums and documents aren't on the policy. Clearing hold is a daily CSR habit, not a monthly cleanup.

14. Renewals

AMS360 surfaces renewals so nothing expires unworked. Three tools:

- **My Expiring Policies** (Home page) — your personal list of upcoming expirations to review.
- **Renewal List Tool** — build and assign renewal lists so a book of expirations is worked systematically.
- **Expiration / Renewal report** (Section 15) — a date-range list of expiring, not-yet-renewed policies.

Processing a renewal

1. Open the policy and click **Renew** (or let the download renew it, then review).
2. Confirm the new term dates, premium, and any coverage changes; re-shop if the increase warrants it (Section 17).
3. Issue renewal proof (ID cards, evidence) and document the review with an Activity.

> **Trainer's note**
> **Never rely on “Continuous.”** Renewals only show up on expiration tools when the policy carries a real expiration date — another reason the term is always annual or six-month (Section 4.1).

PART V

Reporting & Production

15. Reports Every CSR & Producer Should Know

AMS360 ships dozens of reports; these are the ones you will actually run. Find them under **Reports**, or as a **Quick Report** (a single-customer version) from a center.

15.1 Run a report

1. Open **Toolbox › Classic Reports** (agency-wide) or **Quick Reports** from inside a Center (the single-customer / company version).
2. Pick the report; set the **date range** and filters (producer, company, line of business).
3. For same-day work, set the range to **All Time** so nothing created today is missed.
4. Run it; preview, print, or **export to Excel / PDF**. Use **Scheduled Reports** to have it run and email on a cadence.

Report	Use it to…	Who
Activity	Your E&O record — every action by your team; run it when a change is questioned.	CSR
Expiration / Renewal	Work renewals — expiring, not-yet-renewed policies by date range.	Both
Policy Book of Business	See in-force book by producer, company, or line of business.	Producer
Summary of Insurance	One-page recap of a client's policies (reviews, cross-sell).	Both
Suspense	See open follow-ups by employee or customer.	CSR
Submission Status	Track submissions out to carriers (Section 17).	Producer
X-Date	Expiration dates of policies you don't yet write — marketing.	Producer
Binder Status / Binder Billed Not Replaced	Find binders not yet replaced by a policy.	CSR
Producer/Broker	Commission and production by producer.	Producer

> **Trainer's note**
> **Run same-day reports on "All Time."** Year-to-Date can miss items created today due to time-zone offsets — a habit worth keeping for any same-day reconciliation.

16. Summary of Insurance & Cross-Sell

The **Summary of Insurance** produces a clean, client-ready recap of all of an insured's policies and limits. Generate it from the customer (or as a Quick Report).

16.1 Generate the Summary of Insurance

1. From the customer, run **Quick Reports › Summary of Insurance** (or Toolbox › Classic Reports).
2. Select the policies to include; generate the client-ready recap.
3. Send it at renewal / review for the client to confirm coverages and flag changes.
4. If it reveals a gap (a monoline home with no umbrella or auto), open a lead in **AgencyZoom** — don't bury it in a note.

- **At renewal or review** — send it so the client can confirm coverages and flag changes.
- **To spot gaps** — a monoline home client with no umbrella or auto on the summary is a cross-sell/round-out conversation.
- **Route the opening** — when a review reveals a need, open a lead in AgencyZoom rather than burying it in a note.

> **Trainer's note**
> **Round-out is retention.** Multi-line households renew and refer at far higher rates. The Summary of Insurance is your fastest way to see what a client is missing.

17. Prospects, X-Dates & Submissions (Producer)

17.1 Enter a prospect & X-date

1. Enter the not-yet-written account as a **Prospect** (Type = Prospect; Section 3).
2. Record the competitor's expiration as an **X-Date** in Customer Information / Expiration Dates.
3. Run the **X-Date report** as your marketing calendar; reach out ahead of each expiration.

17.2 Build a submission

1. When marketing an account to several carriers, build a **Submission** from the customer's **Submissions** view.
2. Track each carrier's response with **Activities and Suspense**.
3. Watch the whole pipeline on the **Submission Status report**.
4. When a carrier wins, bind and bring the account in as new business (Part I).

17.3 Compare options

Use **Compare** on the Policies action bar to line up policy terms when re-shopping a renewal or presenting options.

> **Trainer's note**
> **The pipeline lives upstream.** AgencyZoom owns the sales pipeline and PL Rater owns the price comparison; AMS360 records the prospect, the X-date, and the submission. The forthcoming end-to-end workflow guide ties these together.

PART VI

Tools & Integrations

18. Integrations: eSignature, InsurLink, TransactNOW & Mobile

- **eSignature** — send applications and forms for legally binding electronic signature instead of chasing wet signatures; the signed document returns to the account.
- **InsurLink** — the client self-service portal. Insureds pull their own ID cards, evidence/COIs, and documents and submit requests, which cuts routine CSR volume.
- **TransactNOW** — real-time carrier transactions from inside AMS360: billing inquiry, claims status, and quoting without logging into each carrier site. eDocs & Messages route in via IVANS.
- **AMS360 Mobile** — look up customers, policies, and activities from a phone when you're out of the office.

> **Trainer's note**
> **Push routine work to the client.** Every ID card or COI a client self-serves through InsurLink, and every form signed electronically, is time your team gets back for real servicing.

19. Billing & Accounting for CSRs

Full accounting belongs to your accounting team, but producers and CSRs touch billing on almost every account. This section gets specific so you key it right the first time — and know exactly when to hand a transaction off. The screens here live under the customer's **Invoices, Receipts, Statements, Register, and Aged AR** views and the **Financial** center.

> **Do not finalize**
> **Posted entries are hard to unwind.** Invoices, receipts, and statement postings hit the general ledger. If a bill method, commission, or amount looks wrong, fix it before posting or route it to accounting — never re-bill to patch a mistake.

19.1 The two bill methods — the fork everything hangs on

Every policy is either **Direct Bill** or **Agency Bill**. It drives who invoices, who collects, and what the agency does:

	Direct Bill	Agency Bill
Who invoices the insured	The carrier	The agency (you)
Who collects payment	The carrier	The agency, into the trust/operating account
The agency is owed / owes	Owed commission by the carrier	Owes the carrier net premium (gross less commission)
What the CSR does	Enter the policy; reconcile commission (19.4)	Invoice in the Customer Center (19.3); accounting pays the carrier (19.5)
General-ledger effect	Income posts when the direct-bill statement posts	Income at invoice; a company payable is created

> **Trainer's note**
> **Match the bill method in all three places.** The header, the policy detail, and the premium section must agree (Sections 4.1-4.4). A mismatch is the single most common reason a policy will not invoice or will not reconcile.

19.2 Billable status — how a premium actually gets billed

On the policy's **Transaction Premiums** section, the **How Billed** (billable status) tells AMS360 what to do with the premium:

- **Not Billable** — the default for a downloading direct-bill carrier; the download brings the premium and there is nothing to invoice (Section 13).
- **Customer Center** — you bill the premium from the policy's Invoicing section; it creates a customer receivable you can track (used for agency bill, and for direct bill when you want a receivable on record).
- **Direct Bill Statement** — the premium is reconciled on a Direct Bill Commission Statement (19.4); the common direct-bill default.
- **Direct Bill Entry** — commission is recorded through the Direct Bill Entry form; used by larger agencies.

19.3 Agency-bill invoicing (Customer Center billing)

1. Open the policy and go to **Transaction Premiums / Invoicing**.
2. Enter the **full-term premium** plus any **fees and taxes**, and set **How Billed = Customer Center**.
3. Confirm the **commission** (agency and producer) — leave the agency-negotiated rate at the default unless you are certain (Section 4.2).
4. **Post the invoice**. This posts income and, for agency bill, creates the **company payable** owed to the carrier.
5. **Print or email it** from the customer's **Invoices** view (or the Invoice report).

> **Trainer's note**

Invoice once. If the premium changes, endorse and **bill the difference** — do not void and re-key unless accounting tells you to. Voided invoices still leave a general-ledger trail.

19.4 Direct bill — reconciling carrier commission

When the carrier pays the agency its commission, you reconcile what they paid against what AMS360 expected. Both forms live on the carrier record.

1. From the **Company Center**, open the carrier (e.g., Travelers), then choose **Actions › Direct Bill Statement** — the statement opens in its own window.
2. Enter the **statement date** and the **total commission** the carrier paid, so AMS360 reconciles to a target.
3. Match each carrier line to the AMS360 policy / transaction and mark it **Included**. Leave anything that doesn't match unmatched (see the note).
4. Confirm the statement total ties to the carrier's deposit, then **post** — posting recognizes the commission income and writes the entries to the carrier **Register**.

For lower volume, **Actions › Direct Bill Entry** records commission entries directly; corrections must be made outside the Direct Bill Entry form (reverse and re-enter).

Trainer's note

Do not force a match. If a carrier line is missing, short, or doubled, leave it unmatched and chase the carrier — a forced match buries a real commission discrepancy.

19.5 Paying the carrier on agency bill (Pay Account Current)

Agency-bill business creates a **company payable**. Accounting pays the carrier the **net premium** (gross less commission); the CSR's job is to make sure the policy was invoiced correctly so the payable — and the carrier check — are right.

1. From the **Company Center**, open the carrier, then choose **Actions › Pay Account Current** — it opens in its own window.
2. Set the **through / cut-off date** so AMS360 lists the agency-bill invoices due to that carrier as of that date.
3. Select the **invoices being paid** (the net amounts); the form totals the carrier check.
4. Choose the **bank account** the check / EFT draws on, confirm the **net total**, and process the payment.

Trainer's note

Invoice first, pay second. Pay Account Current can only pay what was invoiced. If a policy isn't showing, it wasn't invoiced (19.3) or the bill method doesn't match (19.1) — fix that before the carrier payment, never around it.

19.6 Taking a customer payment (Cash Receipts)

1. Open **Cash Receipts** (Financial, or the customer's Receipts view) and search the customer.

2. Apply the payment to one or more open invoices in **Insured Accounts Receivable** — **Auto Fill** applies it to the matching invoices.
3. If there is no invoice yet, use **On Account** (at the customer level, or customer/policy level).
4. Post the receipt into a **bank deposit**; print a payment receipt for the insured if asked.

- **Payment Import** — import a bank .csv; receipts auto-match by invoice number and amount (**M** = matched, **U** = unmatched).
- **ePayPolicy / card & ACH** — electronic payments flow in through the integration; reconcile them the same way.
- **Bank Deposit report** — print it to accompany the physical deposit; it shows the general-ledger detail for every receipt in the deposit.

19.7 Premium finance

When the insured finances the premium, the finance company pays the carrier up front and the insured repays the finance company over time.

1. Identify the **premium finance company** (set it up as a vendor / company record if it doesn't exist), and confirm the **amount financed** and **down payment** from the finance agreement.
2. Flag the policy as **premium financed** and record the finance company and contract reference so the policy shows how it is being paid.
3. Track the **finance company's disbursement** against the premium so the policy balances.
4. If a **cancellation-for-non-payment** notice arrives **from the finance company** (not the carrier), work it like any pending cancellation — Section 12.2.

> **Trainer's note**
> **Premium-finance cancellations move fast.** The finance company can request cancellation on a short fuse when the insured misses a payment. Treat that notice as urgent, confirm with the insured, and document every step.

19.8 Binder billing, installments & the Daily Process

1. **Binder Bill** (Policies action bar) — bill a binder when coverage is bound before the dec page issues.
2. Replace the binder bill with the **policy invoice** when the policy arrives; the **Binder Billed Not Replaced** report (Section 15) flags any never replaced.
3. **Pay plans & installments** — set the pay plan and installment dates on the policy.
4. The **Daily Process** posts future invoices and installments as they come due, per the agency's days-to-bill-in-advance setting.

19.9 Collections & receivables

- **Customer Receivable Aging** — the collections report; work overdue balances by age bucket (Section 15).
- **Aged AR view** — on the customer, shows what that insured currently owes.
- **Suspended Billing** — invoices parked in hold awaiting action; clear them so they post.

Do not finalize

Never write off or move a balance yourself. Write-offs, refunds, NSF reversals, and moving money between accounts are accounting's job — document the situation and hand it off.

19.10 References (AMS360 Help)

Open these from the AMS360 **Help** menu (or the ? icon) for Vertafore's full workflow on each topic:

Topic	AMS360 Help reference
Direct bill invoicing methods	Choosing a Direct Bill Invoicing Method — An Overview
Agency bill invoicing methods	Choosing an Agency Bill Invoicing Method — An Overview
Reconciling direct bill commission	Direct Bill Commission Statement (Reconciling)
Direct Bill Entry	Direct Bill Entry
Receiving payments	Receipts
Importing bank payments	Payment Import
Premium finance	Understanding and Entering Premium Finance in AMS360
Deposit reporting	Report: Bank Deposit

PART VII

Commercial Lines

20. Enter a Commercial Customer (Business)

A commercial account is entered through the same Customer Setup form as a personal one (Section 3); what changes is the Names type, the department, and the business detail underwriters need. Work down the form with the Tab key.

1. From the **Customer Center**, click **New Customer** to open the Customer Setup form.
2. **Customer Type** — set **Customer** once you are writing the account (leave it **Prospect** while it is still a pre-sale opportunity — Section 3).
3. **Names** — choose the **Business** radio (not Individual or Family). The form swaps First / Last Name for **Firm Name**; enter the legal Firm Name, plus the **DBA** if it trades under another name. Pick this radio **first** — switching it after typing can clear the name fields.
4. Enter the business **mailing address, primary phone, and email**. If you will email documents, set the **Preferred Method of Distribution** and the **Electronic Delivery** consent (two separate settings).
5. **Executive** and **Representative** — select both; the customer will not save without them. In this instance that is **Davis, Tyler**.
6. **Division / Department** — set the **Commercial** department, not Personal. This locks once accounting posts, so get it right now.
7. Open the **Additional Customer Info** section and complete the business detail: **Agency Business Classification**, **Business Entity** (LLC, corporation, partnership, sole proprietor), **In Business Since**, **Federal ID #** (the FEIN), **NAICS #**, **SIC #**, and **DUNS #**. These feed the ACORD 125.
8. Tab to the end, confirm the red required fields are filled — **NAICS #** is required on a Business customer and will block the save — then **Save**. Do not bind anything on a demo account.

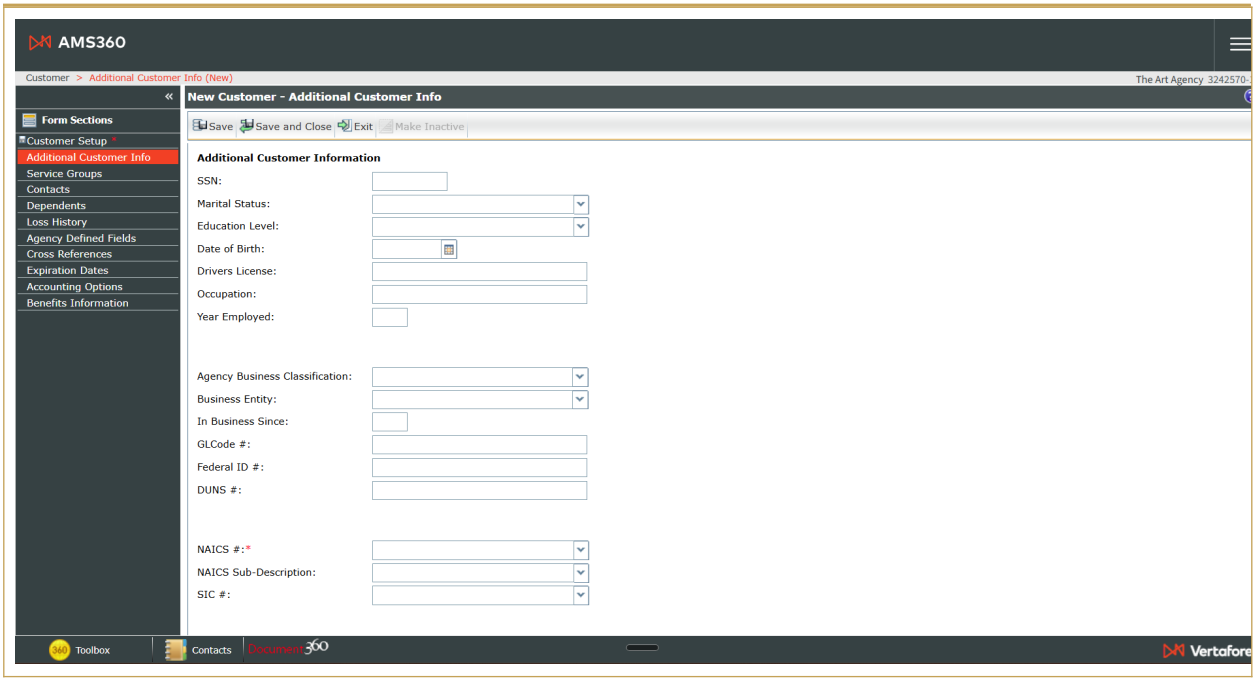


Figure. A Business customer's Additional Customer Info — Agency Business Classification, Business Entity, In Business Since, Federal ID # (FEIN), DUNS #, NAICS #, and SIC #.

> **Trainer's note**
> **Class code drives everything.** NAICS / SIC determine carrier appetite, the class rate, and which supplemental applications a carrier will ask for. Get the code right — a wrong class can undercut the basis the policy was quoted on.

21. Enter a Commercial Policy

New Policy uses the same form as Part B (Section 4); the steps below are the commercial-specific choices. Tab through every field.

1. Open the commercial customer, go to the **Policies** view, and click **New Policy**.
2. **Type of Business** — choose **Commercial Lines**; this drives the commercial line list and the ACORD forms.
3. **Company** — select the **writing company** (pick the entry labeled "(writing company)," not the parent group). Set **Company Type** — Insurance vs Brokerage; choose **Brokerage** for an MGA, wholesaler, or surplus-lines placement.
4. **Policy #** — enter the carrier number, or **TBD** if it has not issued yet. Never leave it blank.
5. **Effective Date** — enter it; AMS360 auto-fills **Expiration** one year later. Override for a six-month or odd term. Never choose a **Continuous** term.
6. **Policy Type** — **Monoline** (one line), **Package** (several lines on one policy, e.g., CGL + Property + Auto), or **BOP** (the businessowners package — commercial only). Pick this before adding lines.

7. **Auditable** — set **Yes** for general liability, workers compensation, and most commercial lines; the carrier audits actual payroll / sales at term end and adjusts premium.
8. **Bill Method** — confirm Direct or Agency bill (agency bill is more common in commercial) and **match it in three places**: the policy header, the line detail, and the premium entry.
9. **Add the line(s) of business** — Commercial General Liability, Commercial Property, Businessowners (BOP), Commercial Auto, Workers Compensation, Commercial Umbrella / Excess, Inland Marine. A package carries several lines on one policy.
10. **Enter each line's rating / exposure basis** — payroll by class for WC, sales / receipts and class for GL, building values and protection class for property, vehicles / drivers / covered-auto symbols for auto.
11. Log an **Activity** and open a **Suspense** for the term-end audit. On a demo / training account, do not finalize or bind.

> **Do not finalize**
> **Auditable means the premium isn't final.** Tell the insured the policy is subject to audit, document the estimated exposures accurately, and open a Suspense for the audit at expiration — a surprise audit bill is a top commercial complaint. And on a demo / training account, never finalize or bind.

22. Certificates, Additional Insureds & Audits

Commercial servicing is certificate-heavy — proof of coverage is constantly demanded by the insured's vendors, landlords, lenders, and customers.

22.1 Issue a commercial certificate

1. From the customer, open **Certificates › New Cert Liab** (Certificate of Liability, ACORD 25) — or **eForms › New › Certificate of Liability**.
2. Select the policy; enter the **certificate holder's** name and address.
3. If the holder must be an **additional insured** or needs specific wording, **endorse the policy first** (Section 12.1) — never show AI status or wording the policy does not grant.
4. Verify the limits pull from the live policy; generate, deliver **same-day**, and attach a copy.
5. For property evidence to a lender, use **Certificates › New Cert Prop / EPI** (Evidence of Commercial Property, ACORD 28).

22.2 Premium audits

1. At term end the carrier audits actual exposures (payroll, sales). Help the insured assemble the records.
2. Process the **audit endorsement** and any additional or return premium.
3. Close the term-end **Suspense** you opened at binding (Section 21).

> **Trainer's note**
> **A certificate is a legal statement of coverage.** Commercial COIs usually block a job, a lease,

or a contract, so issue them same-day — but a certificate that overstates coverage is a direct E&O exposure. The policy governs; the certificate only reports it.

23. Commercial ACORD Forms Reference

The everyday commercial submission forms are below; **Part IX** gives the full ACORD set by section of use, with a numeric index.

Commercial submissions are built from one common application plus a section per line. A line section is **never valid alone** — it always accompanies a completed ACORD 125. Generate them together from eForms (Section 7).

ACORD #	Form	Use it for
ACORD 125	Commercial Insurance Application (Applicant Info)	The common section on every commercial submission — applicant, locations, prior coverage.
ACORD 126	Commercial General Liability Section	CGL exposures, limits, and class codes.
ACORD 140	Commercial Property Section	Building / contents values, construction, and protection.
ACORD 160	Businessowners (BOP) Section	Property + liability detail for a businessowners policy.
ACORD 130	Workers Compensation Application	Payroll by class, ownership, prior coverage, experience mod.
ACORD 137	Commercial Auto Section	Coverages, limits, and covered-auto symbols.
ACORD 127	Business Auto Section	Vehicles, drivers, and use (rides with 125 + 137).
ACORD 131	Umbrella / Excess Liability Section	Underlying coverage and excess limits.
ACORD 25	Certificate of Liability Insurance	Proof of liability to a third party (Section 22).
ACORD 28	Evidence of Commercial Property	Proof of commercial property coverage for a lender.
ACORD 101	Additional Remarks Schedule	Overflow / remarks attached to any ACORD form.

Trainer's note

One 125, many sections. A supplement (126, 140, 160, 130, 137 / 127, or 131) is not a complete submission on its own — it always rides with a completed ACORD 125. Send the package, not the part.

PART VIII
Reference

24. Trainer's Best-Practice Checklist

A pre-flight for every account and every change:

- **Tab through every field** — never mouse-skip.
- **Log an Activity for every touch**; add a Suspense for every follow-up.
- **Executive & Representative set**; Division/Department correct before accounting.
- **Policy number real or TBD**; term annual/six-month, never Continuous.
- **Don't double-key downloads**; work the download hold daily.
- **Forms read the live policy** — verify limits before sending any eForm.
- **Replace binders with the dec page**; issue COIs same-day.
- **Work renewals from My Expiring Policies** and the Expiration/Renewal report.
- **Use the Summary of Insurance** to spot cross-sell and round-out.
- **Every correction: process in AMS360 and ticket in AgencyZoom.**
- **Commercial: Business Entity, Federal ID # (FEIN), and NAICS / SIC # captured**; auditable set where the line requires it.
- **Commercial submissions: every line section rides with a completed ACORD 125.**
- **On a demo/training account, never finalize or bind.**

25. Field Watch-Outs & Tricky Dropdowns

A one-page reference to the fields, radios, and dropdowns that quietly block a save, change the form, or get mis-keyed across personal and commercial entry. Skim it before you finalize an account.

Field / control	Watch out for
Names radio (Individual / Family / Business)	Pick it first — it changes which fields show. Business swaps First / Last for Firm Name + DBA. Switching after typing can clear the name fields.
Executive & Representative	Both are required — the customer will not save without them.
NAICS # (Business customer)	Required (red). A missing class code blocks the save and drives carrier appetite, rate, and supplements.
Division / Department	Locks once accounting posts. Set Personal vs Commercial correctly before the first invoice.
Distribution / Electronic Delivery	Emailing documents needs the Preferred Method of Distribution AND the Electronic Delivery consent — two separate settings.
“Use alternate name / address for billing”	Checking it opens hidden billing-name / address fields. Leave unchecked unless the bill truly goes elsewhere.

Field / control	Watch out for
Customer Type (Customer vs Prospect)	A Prospect will not sync as a customer to AgencyZoom. Flip to Customer when you write the account (Section 3).
Policy #	A real number or TBD — never blank.
Effective Date	Auto-sets Expiration one year later. Override for six-month or odd terms; never choose a Continuous term.
Company (writing vs parent)	Choose the entry labeled “(writing company),” not the parent group — the wrong pick misroutes download and accounting.
Company Type (Insurance / Brokerage)	Brokerage for an MGA, wholesaler, or surplus-lines placement; Insurance for a direct admitted carrier.
Policy Type (Monoline / Package / BOP)	Package and BOP carry several lines on one policy — choose before adding lines. BOP is commercial only.
Auditable	Yes for GL, WC, and most commercial — premium isn’t final until the audit. Open a Suspense for term-end.
Bill Method	Must match in three places: header, line detail, and premium. On direct bill, agency-negotiated commission = None (Section 19).
How Billed / billable status	Downloaded carriers default to “Not Billable.” Switch to edit mode to change it before you invoice.
eForms / New Policy / New Activity	These open as separate pop-up windows. A pop-up blocker silently stops them — allow pop-ups for ams360.com.
Carrier download	Overwrites manual entry. Don’t double-key a policy a carrier downloads; work the download hold daily (Section 13).
Notation / code dropdowns	Pre-configured lists — you can’t free-type a value that isn’t set up in Admin.

Trainer's note

Tab, don’t click. Almost every item above is caught by the same habit: move through the form with the Tab key so your eye lands on each field in order, the red required boxes surface, and nothing gets mouse-skipped.

PART IX

ACORD Forms Reference

26. How AMS360 Produces ACORD Forms

ACORD forms are the insurance industry's standardized applications, certificates, and notices — a common language every carrier accepts. AMS360 generates them from your **live policy data** through **eForms › New** (Section 7), so a form is only as accurate as the policy behind it. This part is the complete reference: what each form is and when you use it, organized by section of use.

How they work

- **One hub.** Open **eForms › Launch eForms Manager**, or **eForms › New** for a specific form (Section 7).
- **Forms read the live policy.** Limits and coverages pull straight from the policy record; issuing a form drops an **Activity** on the account automatically.
- **One common section + supplements.** Both personal and commercial submissions pair a common applicant section with one line application per coverage — a supplement is never valid alone.

AMS360 eForms section → ACORD form(s)

eForms › New	ACORD form(s)
Applications	Personal: 89 + 80 / 90 / 84 / 83 / 81 / 82 / 85 / 86. Commercial: 125 + 126 / 140 / 160 / 130 / 137 / 127 / 131.
Binder	ACORD 75.
Certificate of Liability	ACORD 25.
Certificate of Property	ACORD 24 (certificate) / 27 (evidence).
EPI (Evidence of Property)	ACORD 27 (personal) / 28 (commercial).
Auto ID Card	State auto ID card.
Change Request	ACORD 175.
Cancellation	ACORD 35.
Loss Notice	ACORD 1 / 2 / 3.
Additional Forms	ACORD 101, 139, and others.

> **Trainer's note**
> **Verify before you send.** Because every form reads the live policy, the data entry is the form. Check each limit and coverage against the policy, and never type a value the policy does not carry (Section 7).

27. Application Forms (Personal & Commercial)

27.1 Personal lines applications

A personal-lines submission pairs the **Applicant Information Section (ACORD 89)** with the line application(s) for the risk.

ACORD #	Form	What it is / when you use it
89	Personal Insurance Application — Applicant Information	The common front section: named insured, address, prior carrier. Pairs with the line app(s) below.
80	Homeowner Application	Owner-occupied home (HO-3, etc.) — Coverage A, deductible, liability, and the rating fields (year built, construction, protection class, roof).
90	Personal Auto Application	Private-passenger auto — drivers, vehicles, coverages, and garaging address.
84	Dwelling Fire Application	Rental, seasonal, or secondary dwellings (DP-1 / DP-3) that are not owner-occupied.
85	Mobile Home Application	Manufactured / mobile homes.
83	Personal Umbrella Application	Excess liability over the home and auto; lists the required underlying limits.
81	Personal Inland Marine Application	Scheduled valuables — jewelry, fine art, firearms, collectibles.
82	Watercraft Application	Boats and personal watercraft.
86	Personal Lines Package Application	Several personal lines submitted together as one package.

27.2 Commercial lines applications & supplements

Every commercial submission is built from the common **ACORD 125** plus one section per line of business. A line section is **never valid alone** — it always rides with a completed 125 (Section 23).

ACORD #	Form	What it is / when you use it
125	Commercial Insurance Application — Applicant Information	The common section on every commercial submission: applicant, locations, prior coverage.
126	Commercial General Liability Section	CGL exposures, limits, and class codes.
140	Commercial Property Section	Building / contents values, construction, and protection.
160	Businessowners (BOP) Section	Property + liability detail for a businessowners policy.
130	Workers Compensation Application	Payroll by class, ownership, prior coverage, experience mod.
137	Commercial Auto Section	Coverages, limits, and covered-auto symbols (state-specific).

ACORD #	Form	What it is / when you use it
127	Business Auto Section	Vehicles, drivers, and use (rides with 125 + 137).
131	Commercial Umbrella / Excess Liability Section	Underlying coverage and excess limits.
139	Statement of Values	Schedule of building / property values across multiple locations.
101	Additional Remarks Schedule	Overflow / remarks attached to any ACORD form.

> **Trainer's note**
> **One 125, many sections.** A supplement (126, 140, 160, 130, 137 / 127, or 131) is not a complete submission on its own — send the package, not the part (Section 23).

28. Proof-of-Insurance Forms

28.1 Binders & certificates of liability

ACORD #	Form	What it is / when you use it
75	Insurance Binder	Temporary, legally binding proof of coverage before the dec page issues — a closing, a new vehicle, a lienholder. Set an expiration and replace it with the policy (Section 8).
25	Certificate of Liability Insurance	Proof of liability coverage to a third party (vendor, landlord, client). Mostly a commercial tool; it reports coverage but does not amend the policy (Section 22).

28.2 Property certificates, evidence & auto ID cards

ACORD #	Form	What it is / when you use it
24	Certificate of Property Insurance	Proof of property coverage to a party with no interest in the policy; carries the “does not amend” disclaimer.
27	Evidence of Property Insurance	Personal property proof for a party with a financial interest — typically a mortgagee / lender on a home.
28	Evidence of Commercial Property Insurance	Commercial property proof for a lender / loss payee; includes additional-insured status and detailed limits.
—	Auto ID Card	Proof of auto insurance for the insured to carry. State-specific; many states accept the electronic version on a phone (Section 10).

> **Trainer's note**
> **Pick the right document.** On personal lines the request is usually an **ACORD 27** for a mortgagee or an **auto ID card** — not a liability certificate. Issue it same-day; it usually blocks a

closing or a loan.

29. Servicing & Claims Forms

29.1 Policy changes & cancellation

ACORD #	Form	What it is / when you use it
175	Policy Change Request	Request a mid-term change from the carrier in writing — add / remove a vehicle, driver, coverage, or address. Most common in commercial; open a Suspense for the endorsement to return (Sections 10, 12.1).
35	Cancellation Request / Policy Release	Formally request cancellation of a policy (personal or commercial). Also serves as a policy release when the original policy cannot be returned (Section 12.2).

29.2 Claims — loss notices (First Notice of Loss)

ACORD #	Form	What it is / when you use it
1	Property Loss Notice	Report a property loss — home, building, or contents — to the carrier.
2	Automobile Loss Notice	Report an auto loss or accident to the carrier.
3	Liability Notice of Occurrence / Claim	Report a general-liability occurrence or claim.

Trainer's note

Facts only. Capture date of loss, description, and parties — never editorialize fault or promise an outcome. Then log the claim in the Claims view (Section 12.3).

30. Supplements & Full ACORD Index

Two forms attach to others rather than standing alone:

ACORD #	Form	What it is / when you use it
101	Additional Remarks Schedule	Overflow and remarks for any ACORD form — unusual operations, loss-history context, or anything that doesn't fit the standard fields.
139	Statement of Values	A schedule of building / property values across multiple locations; rides with the commercial property submission (ACORD 140).

Every ACORD form in this guide, by number, for fast lookup.

ACORD #	Form	Section of use
1	Property Loss Notice	Claims (29.2)
2	Automobile Loss Notice	Claims (29.2)
3	Liability Notice of Occurrence / Claim	Claims (29.2)
24	Certificate of Property Insurance	Proof of insurance (28.2)
25	Certificate of Liability Insurance	Proof of insurance (28.1)
27	Evidence of Property Insurance	Proof of insurance (28.2)
28	Evidence of Commercial Property Insurance	Proof of insurance (28.2)
35	Cancellation Request / Policy Release	Servicing (29.1)
75	Insurance Binder	Proof of insurance (28.1)
80	Homeowner Application	Personal apps (27.1)
81	Personal Inland Marine Application	Personal apps (27.1)
82	Watercraft Application	Personal apps (27.1)
83	Personal Umbrella Application	Personal apps (27.1)
84	Dwelling Fire Application	Personal apps (27.1)
85	Mobile Home Application	Personal apps (27.1)
86	Personal Lines Package Application	Personal apps (27.1)
89	Personal Insurance Application — Applicant Info	Personal apps (27.1)
90	Personal Auto Application	Personal apps (27.1)
101	Additional Remarks Schedule	Supplements (30)
125	Commercial Insurance Application — Applicant Info	Commercial apps (27.2)
126	Commercial General Liability Section	Commercial apps (27.2)
127	Business Auto Section	Commercial apps (27.2)
130	Workers Compensation Application	Commercial apps (27.2)
131	Commercial Umbrella / Excess Liability Section	Commercial apps (27.2)
137	Commercial Auto Section	Commercial apps (27.2)
139	Statement of Values	Supplements (30)
140	Commercial Property Section	Commercial apps (27.2)
160	Businessowners (BOP) Section	Commercial apps (27.2)
175	Policy Change Request	Servicing (29.1)

Trainer's note

The how-to for generating each form is earlier in the guide. See Section 7 (eForms), Section 8 (Binders), Section 9 (Certificates), and Section 10 (ID cards, change requests, loss

notices).