



## New to Real Time?

*Get started today!*

**Some experts claim it takes 21 days to form a habit—and break old habits.**

In the spirit of encouraging independent agents to form new habits and gain new efficiencies, the Real Time/Download Campaign is asking you to adopt new workflows to leverage real-time technology tools for sales and customer service. The “21 Day Challenge” will ease anxiety over workflow changes. How? By incrementally changing the way the staff does business—and having some fun in the process!

Real Time is the ability to click on a button from a client file in the agency management system or comparative rater for immediate access to carrier information on that client. This approach provides a single workflow for servicing or quoting. [Tell me more about Real Time.](#)

Are you brand new to Real Time? Not sure you’re ready for the 21 Day Challenge? Don’t worry! Many of your peers have adopted Real Time and are enjoying the benefits. [Hear their stories here.](#)

**Here’s how to get started.**



## Plan & Set Up

1. Review the generic Real Time Implementation Guide available on the getrealtime.org website. (<http://www.getrealtime.org/active/RealTimeGuide.asp>). This will help you to understand all of the benefits and options available by installing the Real Time Tool and how you might be able to most effectively implement the program in your agency.
2. Next, visit your Agency Management System Vendor's Website to find the implementation documentation for its Real Time Tool.

Also, you will want to obtain the vendor's carrier list identifying the transaction types available by carrier. The links for this information are below:

### Applied Systems

- Implementation Document: <http://us.appliedsystems.com/downloads/Installguide.pdf>
- Carrier List:  
Personal Lines: <http://us.appliedsystems.com/downloads/realtimerefguidepl.pdf>  
Commercial Lines: <http://us.appliedsystems.com/downloads/realtimerefguidecl.pdf>

### Ebix

- Implementation Document: (must log in with User ID & Password)
- Carrier List: [http://www.ebixasp.com/ebixaspHelp/RTI\\_Carrier\\_list\\_4-09.pdf](http://www.ebixasp.com/ebixaspHelp/RTI_Carrier_list_4-09.pdf)

### FSC Manager

- Implementation Document: <http://www.mi-assistant.com/resources/servicelinkinstructionanduserguide.pdf>
- Carrier List: <http://www.mi-assistant.com/resources/carrierinterfaces1.pdf>

### SIS (Strategic Insurance Software)

- Implementation Document: Contact Vendor
- Carrier List: <http://www.sisware.com/files/CertsStatusDownload.pdf>

### Vertafore (Formerly AMS Services)

- Implementation Document: <http://www.ams-support.com/transactnow/transactnowmanual.pdf>
- Carrier List: [http://www.amsservices.com/downloads.cfm?files\\_category\\_id=86](http://www.amsservices.com/downloads.cfm?files_category_id=86)

*(For other agency management systems, contact your vendor.)*

3. Install the Real Time tool in your System per the instructions in the Vendor Specific Implementation Instructions you printed in Step # 2 above.

If you need assistance contact your Agency Management System Vendor – be sure you tell them you are getting ready to take the “21 Day Challenge”!

If you run into any problems at all with installing Real Time, please do not hesitate to contact the Real Time Campaign manager at [RealTime@Aartrijk.com](mailto:RealTime@Aartrijk.com) and we will be sure you get the assistance you need! But remember, you should always contact your vendor first.

4. After you install Real Time, generally you will need to enter your carrier(s) Web site user ID and password in the Real Time Program to get started using the program. You might want to activate for one carrier in your agency just to get started. If this is the case, make sure to select a carrier you have a fair amount of business with and have a good relationship with as well.

If you don't already have a user ID and password, contact the carrier agency support center.

5. Congratulations! Your system is set up for Real Time. Maybe first try a billing inquiry?



### ***Next Steps***

Ready to bring Real Time to the rest of the agency?

Click the links below for information on the Real Time 21 Day Challenge:

- [Champions Challenge](#)
- [Agency Challenge](#)

See Real Time Implementation Guide (<http://www.getrealtime.org/active/RealTimeGuide.asp>).

For all the latest information from carriers and vendors on the Real Time Campaign, visit [www.getrealtime.org](http://www.getrealtime.org).