
Company Code Utility Import

Use the **AMS 360 Code Utility** to import a list of company-specific codes into your AMS 360 database for use in download.

Instructions for downloading codes

1. From the **Carrier Download Code Utility** page on the AMS Customer Support website, locate the company whose codes you want to import.
2. From the list of companies, right-click the name of the company and choose **Save Target As**. A download dialog box will appear briefly and then the **Save As** dialog box appears.
3. Save the xml file to your C:\My Documents directory, which is the default directory that appears. Click **Save**.
4. When the file finishes downloading, the **Download Complete** dialog box appears. Click **Close**.

Instructions for importing codes

1. Log into **AMS 360**.
2. From the menu, click **Toolbox > System Administration > Utilities > Company Code Import Utility....** The import form appears.
3. Click **Browse** at the end of the File to Import field. Locate the .xml file in the C:\My Documents directory. (Where you saved it in step 3 of *Instructions for downloading codes*.)
4. Highlight the file and click **Open**. (**Note:** Only one file can be imported at a time.) From the **AMS 360** Company list on the import form, select the company for which you are importing codes. The company must already be set up in AMS 360 before running the import.
5. When you have finished making your selections, click **Import**.

6. The import occurs quickly. When complete, a message appears telling you the name and location of the Company Code Import Utility report. Record the location of the report and then click Ok.

The Company code .xml file remains in the C:\My Documents directory so that you can import it into another agency. After you are finished importing the codes you can delete the file.

Printing and reviewing the Company Code Import Utility report

From the import form in **AMS 360**, click **View Report**. The report opens in Notepad. Print and review the report carefully looking for the results of the import in the following categories:

- **Coverages**
 - > All coverage codes import into **AMS 360** with a default type of *Property*. While it does not matter to download whether a code is set as *Property* or *Liability*, it does determine what prints on certificates. If you know specific codes listed on the report under **Rows copied** are *Liability*, you can change them manually. See **Coverage and Endorsement Setup** in AMS 360 Help for more information.
- **Plan Types**
- **Credits**
- **SOIs** (Subjects of Insurance)
- **Surcharges**

Within each type of code imported, the report lists information about the how the data was handled. You may have additional tasks based on how the information was imported.

- **Rows copied** – these codes were successfully added to your agency database.
- **Rows rejected with duplicate codes** – these codes were not added to your agency database because a code already existed that matched the one being imported. However, the code description did not match. Check your **AMS 360** set up for these codes to make sure the description is similar to the

company's description. Download will load these codes when found on a downloaded policy.

- **Rows rejected with duplicate descriptions** - these codes were not added to your agency database because a code already existed where the description matched the description of a code being imported. However, the code itself did not match. Check your **AMS 360** set up for these codes. You may want to change the existing description slightly and then enter the code and description from the report so it is available for download. Download will **not** load these codes when found on a downloaded policy so it is important that you correct these.
- **Rows already present** – these codes were not added to your agency database because a code and description already exists that matched the one being imported. These items do not require any further attention. Download will load these codes when found on a downloaded policy.

You can only use the **View Report** button after you import the file and have the import form open. To view the report after you close the import form, use Windows Explorer to navigate to the file and open it in Notepad. The default location for the report is C:\mydocuments. The name of the report file is XXX.txt, where XXX=Company name.

The report is overwritten each time you import the same company codes into a different agency (database). It is critical to print the report before importing the same codes to another agency.