
ADMIN GUIDE - EPIC



TARMIKA

Welcome to Tarmika!

We are thrilled to have you.



1

Get your users excited!

We see the most success with agencies who drive Tarmika from the top down. We need your help pushing this new and exciting product to your users! See page 3 for more information.

NOW WHAT?

2

Set up your integration

Your Epic admin user will need to set a few security rights on your end. Review pages 4 - 6 for Epic integration configuration instructions.

3

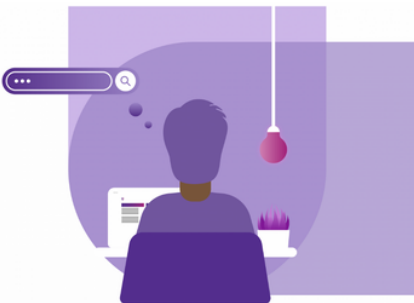
Schedule your onboarding

A member from our team will be in touch once your account is created. You will schedule a call for all of your users - here, you will learn all about Tarmika and get answers to your questions. We can't wait to meet you!

4

Stay in the loop!

Be on the lookout from emails from the Customer Success Team! We share exciting enhancements to the platform, updates, and announcements. We are constantly adding to our **Knowledge Base** - stay in the loop! As always, share your success stories with your team, colleagues, and us!



Let's get your users excited.

We can't wait to connect with all your users and show them the ropes of Tarmika, but we need your help!

We see the most success with agencies when they take the top down approach! **To start, we recommend sending the email template below to your users to share what Tarmika is and that is now available for use. Just copy & paste!**

Hi team,

I am excited to share that our team has invested in Tarmika for our small commercial quoting needs. Tarmika is a tool where you enter your client or prospect's information in one system and receive quotes from several of our carriers.

Why Tarmika?

We want to ensure that we are getting the best rates for our clients in a timely and efficient manner for our small commercial business. Quoting in one place will help us save time and streamline our process instead of having to jump between all of our carrier partners portals.

Benefits of Tarmika:

- Quote with multiple carriers at once
- Simple integration with Epic
- Ability to bridge information into carrier portals with the click of a button
- Acord form download
- SAVE TIME!

Next Steps:

- Join our onboarding call with Tarmika
- Ensure your profile is completed
- Start quoting

Questions/Feedback:

The Tarmika team encourages everyone to attend our onboarding session to get familiar with the system and then to begin inputting your business into Tarmika. If you have questions they have a great Knowledge Base and 24/7 Support team should anything come up.

Best,





TO UTILIZE THE EPIC INTEGRATION, YOUR EPIC ADMIN USER WILL NEED TO FOLLOW SOME CONFIGURATIONS.

Agency must be on Epic RIC Fall 2022 MU1+ or Epic Browser
2022.11.22 to access the Epic/Tarmika integration



EPIC TO TARMIKA INSTRUCTIONS

REQUIRED

1. Employees must have an Employee Code associated with their account under Configure > Security > Users
2. The email address used for the Tarmika login must match what is listed in the Email 1 section of the Epic employee file

SECURITY RIGHTS

1. Configure > Security > Users/Security Groups
2. Highlight the User/Security Group, click the Pencil to access edit mode
3. On the Program Access tab, select Area: Insured Clients, Sub-Area: Tarmika, and Grant permission
4. Also on Program Access, select Area: Prospective Clients, Sub-Area: Tarmika, and Grant Permission
5. Click Finish
6. Affected users should exit/re-enter Epic to see the change
7. Users can now access Tarmika from the Navigation panel at the Account or Policy level, and can select Remarket with Tarmika in Renewals Manager!

ACTIVITY SETTINGS

1. A new system event for Tarmika Quote Started has been added to Configure > Activity > Events and will automatically generate the @TQS activity code in the background each time a user initiates the Tarmika option from within Epic
2. We recommend leaving this as an automatic background Activity in the system in order to generate usage reports related to Tarmika quoting



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3. The Agency must be configured within Epic under Configure>User Options>Field Defaults and set up default under “Client Add Workflow”

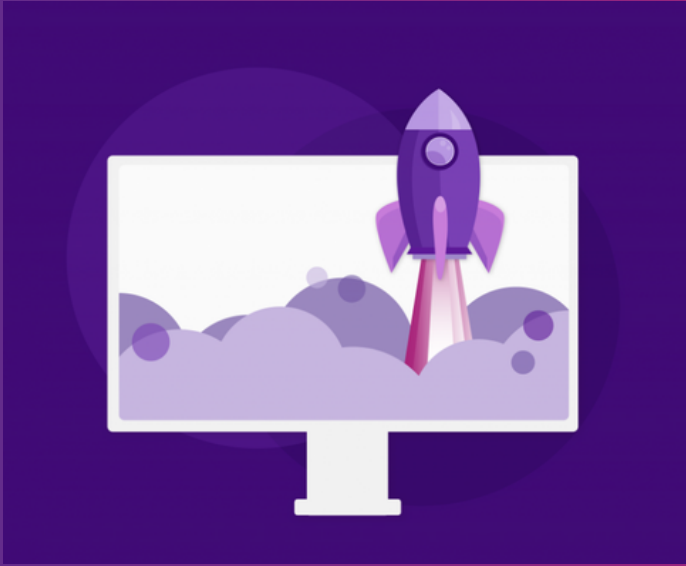
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ACTIVITY SETTINGS

1. Agency must add in a new Activity Code T_AA into Epic Activity configurations
2. Configure > Activity > Codes to add the Activity Code – setup the “Basic Settings” for this new code
3. If this Activity code is not added into Epic, the Account will still be able to transfer, an associated Activity will just not be created.





Congrats, you have entered your Tarmika era.

We are so lucky to have you and cannot wait
to see your workflow efficiencies take off!



QUESTIONS?



Contact our Support Team!

support@appliedsystems.com

617 - 380 - 4377

