**AMS/AMS2**

<https://www.wfgsecure.com/AMS/Login.aspx> is WFG’s primary Agent Management System page. It includes the ability to search by agent name and to run various reports. TRICK: Date format is 201608 – for August, 2016.

<https://www.wfgsecure.com/AMS2> is the agent facing management system used by agents to generate policy and CPL forms. It also is our Over Limit management system in which an agent can enter OTL requests and for the underwriting team to enter or manage OTL requests.

**BillTrack 50**

<https://www.billtrack50.com/Login> is the subscription legislative and regulatory tracking service for keeping the Keeping the underwriting, claims, regulatory, compliance, and Info Security team current with law changes. More detail is in your handout package.

**DeedPlotter**

Deedplotter is a third party software that will map legal descriptions. We have a group subscription coordinated through Pat Neu pneu@wfgnationaltitle.com.

**E-mail encryption**

Any e-mail through the WFG systems should be automatically encrypted if system detects certain things in the contents like an SSN. You can also force Email encryption by including “#encrypt#” (without the quotation marks) anywhere in email body or subject line

**GlobalProtect VPN**

WFG has a virtual private network that is required for secure access to some of WFG’s platforms and generally helps with info security. If you don’t have the VPN (some limits on non-WFG computers) put in an IT request.

**Google Earth**

For those using Google Earth, this will add Section-Township-Range Overlay to Google Earth. <http://www.earthpoint.us/Townships.aspx>

**GoTo Meeting/GoTo Webinar**

We have GoTo Meeting and GoTo Webinar available for offering training and education or just collaboration. Joey Elizabeth Grampa JGrampa@wfgnationaltitle.com and Haleigh Smith HaleighSmith@wfgnationaltitle.com can set you up to present using the 500 seat platform for your training class or for smaller groups.

**Ignition Learning Center**

<http://wfgignition.technicallyre.com/> is the Agent facing learning management platform that will eventually host the courses Walter is developing for agent access. It’s currently hosting materials from the Spark Events.

**IT Helpdesk**

helpdesk@willistonfinancial.com is the email address to send all IT support requests.

**Legal Support Requests**

<http://home.williston.local/> Under the “Legal Tab” is where to go when we need a corporate lawyer assigned to a project or for contract review.

**1.** SharePoint Legal is located on the WFG home page (intranet portal) for easy access.

**2.** Submit a new request by hovering over Legal and Click on New Legal Request

**3.** Complete the new task form, making sure to give a clear and concise description/details of request.

**4.** Attach and upload any pertinent documents for legal to review.

**5.** When the form is submitted:

a. An email notice is sent to Joe McCabe and Vera Van Bergh requesting assignment.

b. An email is sent to the requestor acknowledging receipt of their request and advising requestor who has been assigned the task.

**Long Term Filing of Contracts/Agreements**

HCue. This is the electronic file cabinet where all legal documents, contracts, and agreements are stored and indexed. If you have something that falls into this category, it goes should be sent to Vera Van Bergh VVanBergh@willistonfinancial.com. In the cover email, please note any expiration or renewal dates and dates on which follow-up review should be made.

As the person originating, you should also document those same dates on your Outlook Calendar and invite the manager for whom you did the work, simply so that we have backups on any reminders.

If there are original documents that must be maintained in physical form, such as a promissory note, letter of credit, certificate of deposit, WFG has a document safe in Portland. Original documents should be scanned and preserved in HCue. The originals should be sent to Jennifer Maki, our corporate paralegal.

**Lync**

This is Microsoft’s instant messaging system, which also allows screen sharing and video conferencing. If you would like to try it, please put in a helpdesk ticket.

**PACER**

<https://pacer.login.uscourts.gov/csologin/login.jsf?court_id=00idx> is the public access to federal court and bankruptcy court filings. It is very useful for evaluating bankruptcies.

For ease of billing, we share the same login: WFG18881 and password: Rocky10\*.

**Paylocity**

<http://www.paylocity.com/> Paylocity is our Human Resources Platform. For salaried employees its primary relevance is to post your time off requests. This uses a different login than your email.

**Policy Search**

<http://poa_planetforms.williston.local/square9web/index.html#/direct?op=2&db=1> Provides access to WFG Policy images. Click [Renew License] new menu appears. Select [Policies] [Searches] [All Fields]

**Sharepoint**

 Legal <http://sharepoint.williston.local/legal/SitePages/Home.aspx> See Legal Support Requests

**Sugar CRM**

This is WFG’s new Customer Relationship Management platform. It will contain all of the key contacts at each agency, as well as a ready place to check the status of an agent. Because of limitations in email retention, we need to move future email responses to this platform.

**WFG Agent**

<https://wfgagent.com/> is the agent facing website. Login will be your standard email login if asked. WFGagent provides access to AMS2 for Policy jackets, CPL and overlimit approvals. A rate calculator and recorded training sessions.

This site includes our agent compliance management system that allows the agent to create Best Practice and other compliance templates. [CMS]

It also includes links to “TitleNet” a proprietary Electronic Partner Network (EPN), that allow our clients to electronically order and receive title information and products in the top 100 SMSA’s These are outsourced to select agents.

**WFG Cloud**

This creates a sharable directory or file in a secure “cloud” location similar to Dropbox. The resulting files may be shared with persons inside and outside of the company. Individual files and directors may be individually password protected, may allow recipients to read, download, edit and/or upload or erase – all depending on the permissions given.

To access from a browser: <https://wfgcloud.com/secureStore/index.php?redirectUrl=%2FsecureStore%2Findex.php%2Fapps%2Ffiles>

Instructions for Installation and use: <https://wfgcloud.com/guide.pdf>

**WFG Global Address List**

<http://sharepoint.williston.local/gal>. This is the master list of all company employees. WARNING it is not always current or complete. Please check your information and send update requests to Kim Kaufman KKaufman@willistonfinancial.com

**WFG-kipedia – the UnderWriting Wiki**

<http://uww.wfgnationaltitle.com/> is the **NEW LOCATION** underwriting and escrow resource being developed to eventually evolve into a full blown underwriting reference. It is currently being used by NTS and Lender Services. All WFG employees have access to add and correct information. The State underwriters are expected to periodically review and correct any errors.

Login should be your email login & password. Some of the loaded documents will ask for a separate login and password (we haven’t figured this out yet) which is “wfg” and “wfg”

A separate guide on formatting and use is included in your package

**WFG Labs**

<https://WFGlabs.com> is the training platform for our agency reps and others who are in contact with our agents.

**WFG Underwriting**

<http://wfgunderwriting.com/> This site includes all of our rate manuals and filed forms for each state, as well as underwriting bulletins. It includes a link to our underwriter directory. The page has categories for uploading underwriting manuals and cases of interest – but neither is currently used.

**Williston Main**

<http://home.williston.local/> includes links to many company resources. Among them:

Under the “Compliance” Tab

Policies & Procedures

Complaint Log <http://sharepoint.williston.local/sites/consumercomplaints/default.aspx#InplviewHash6dfd5f63-81a1-4172-a3d7-27f9ee6d34df>=

Fourth C

Compliance Hotline

Under the “Legal” Tab

A link to load a New Legal Department request for assistance or contract review

A “Licensing” dropdown that takes you to an index of every state license for each WFG entity.

Under the “Escrow” Tab

 TRID and Closing information

 Guides from Lenders

 Under the “HR Portal”

 Employee handbooks

 Official Company Holidays

 Job Openings

 Under the Three Dash Menu at the far right

 “Get Familiar with WFG” information about different departments and what they do
 <http://home.williston.local/category/get-familiar/>

 Company news including Pat Chat