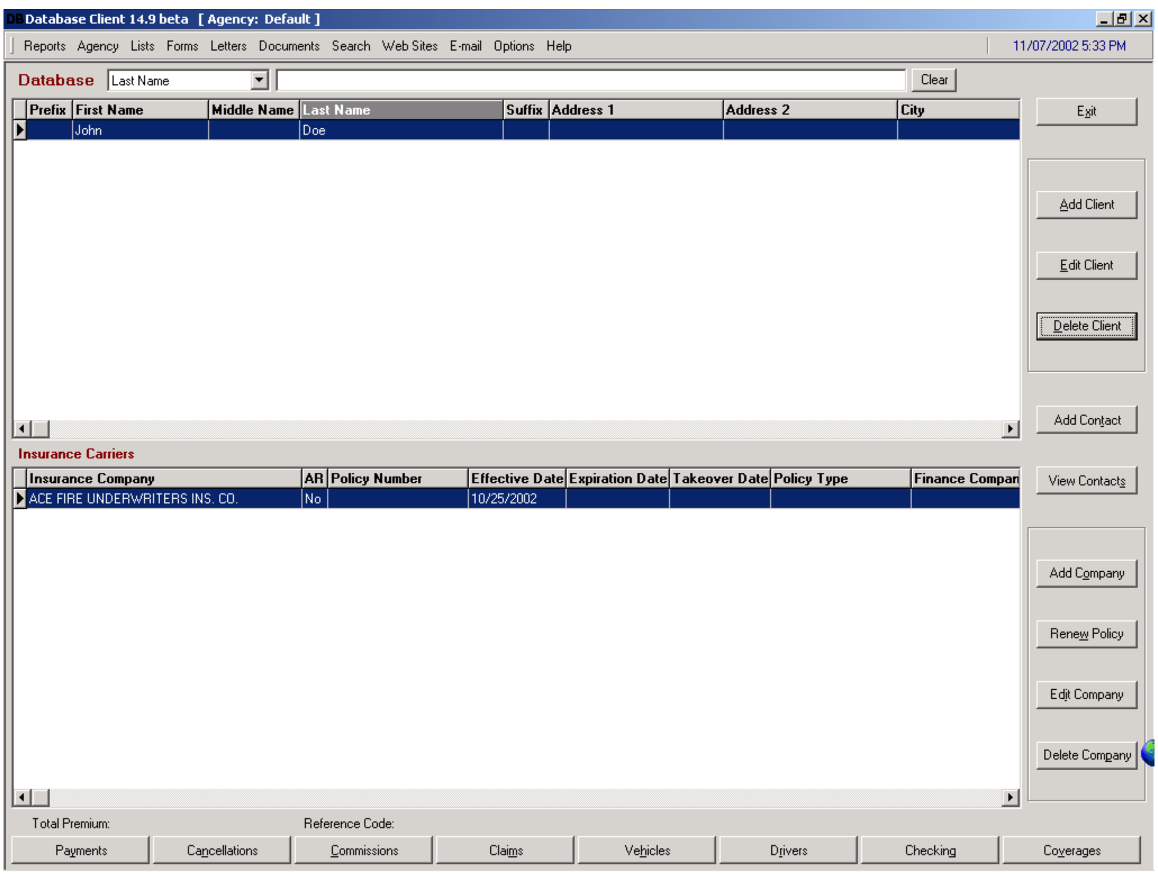
Database Program Instructions

1) Start your Comparative Rating software by double-clicking the icon on your desktop.

2) Click on the **Database** button on the Comparative Rating Software Main Menu.

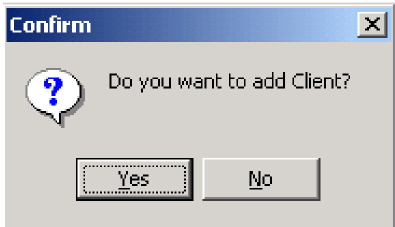
3) A message "Loading Database" should appear and after several seconds you should be taken to a Database Client Screen (similar to the one shown below).



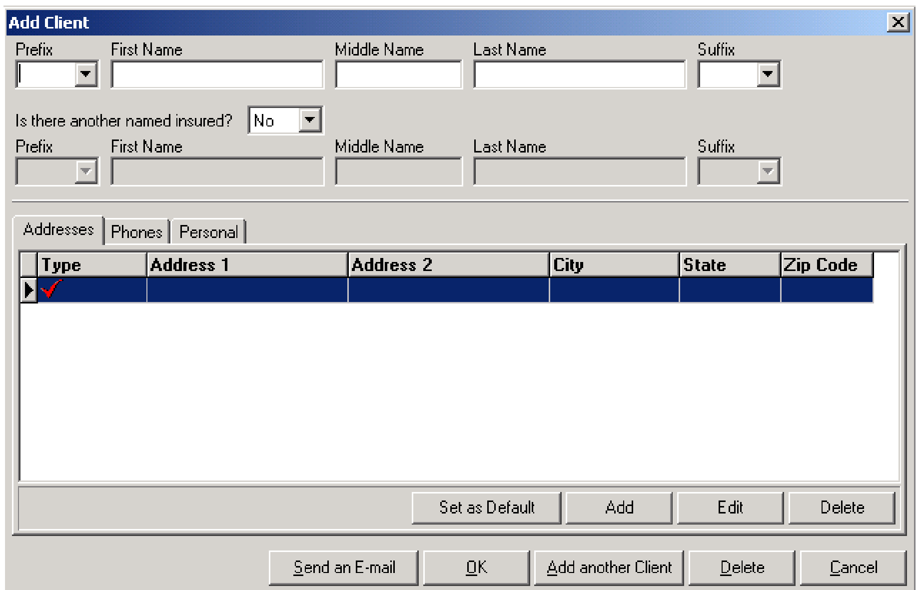
Adding A Client:

4) To add a client click on "Add Client" on the right-hand side of the screen.

5) A message should pop up asking you to confirm that you want to add a new client.

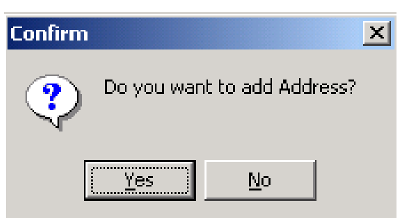


6) Click on “Yes” and you will be taken to the Add Client Screen

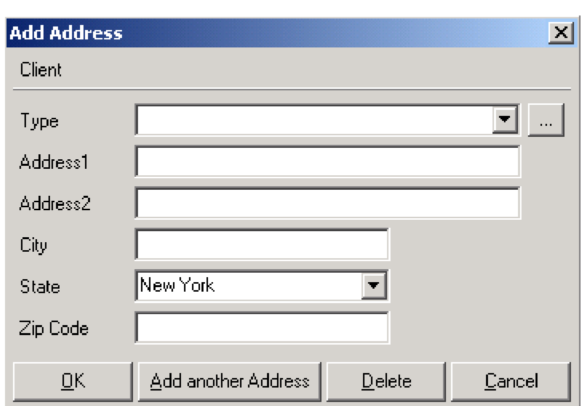


7) Notice there are three tabs “Addresses”, “Phones”, and “Personal”. To add an address for your client make sure that the “Addresses” tab is selected then click on “Add”.

8) You will be asked to confirm that you want to add an address.



9) Click on “Yes” and you should be taken to the Add Address screen.

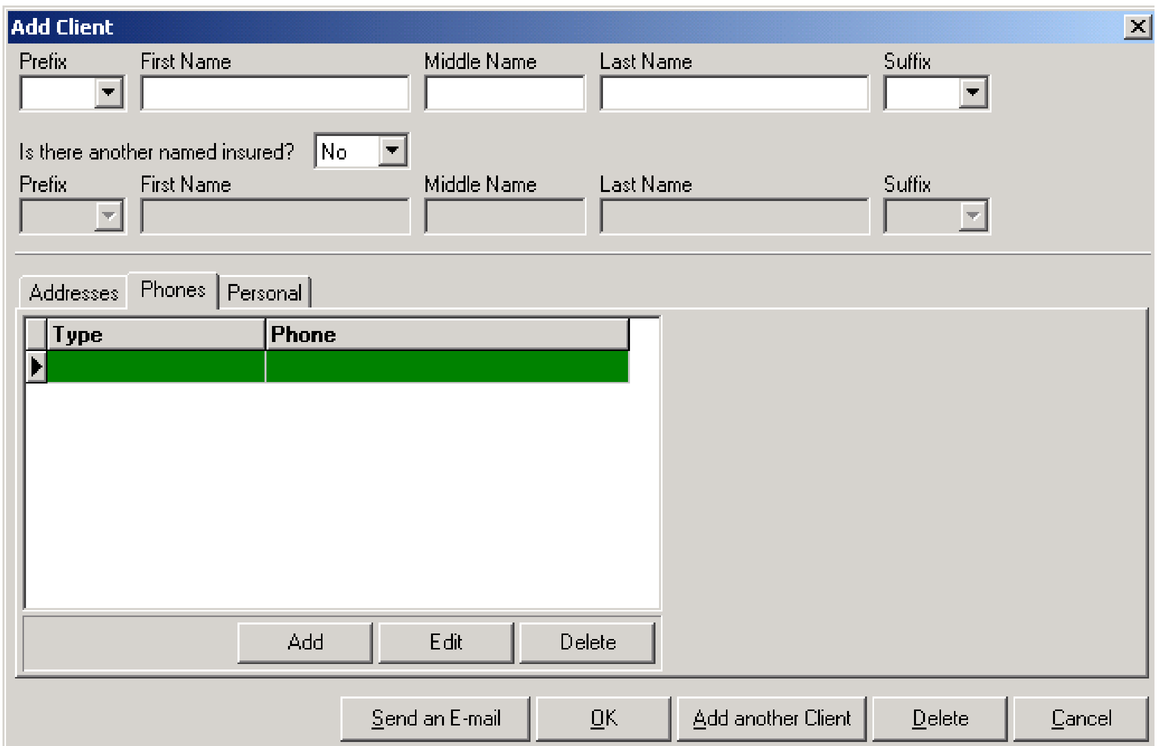


10) Be sure to choose the Type of address by clicking on the down arrow to the right of Type. Choose "Insured" if the address you are entering is the address that the insured resides at. Choose "Location" if the vehicle being insured is at a different location than the residence of the insured and you are entering that address. Choose "Mailing" if you are entering an alternative mailing address for the client.

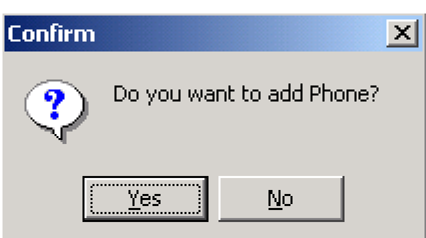
11) Enter the rest of the address information in Address1, Address2, City, State and Zip Code then click "Add another Address" to add other addresses, or click "OK" to return to the Add Client screen.

Adding A Client Phone Number:

12) On the Add Client Screen click on the tab marked "Phones". Your screen should look similar to the one shown below.

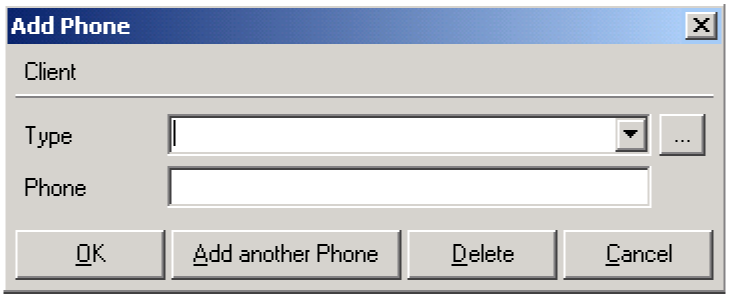


13) Click on "Add", a box should pop up asking you to confirm that you would like to add a phone number.



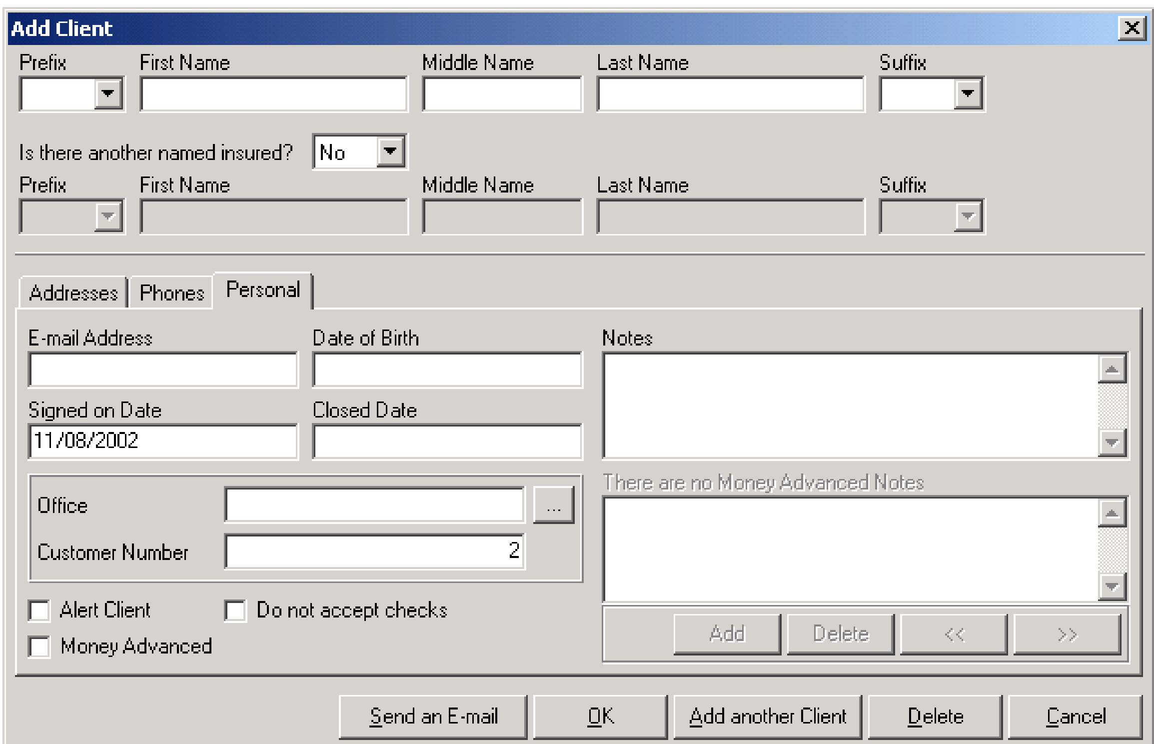
14) The Add Phone window should pop up (shown below). Select the type of Phone number by clicking the down arrow to the right of Type. Then enter the phone number next to Phone. When you are finished click "Add another Phone" to add

another phone number for this client, otherwise click “OK” to return to the Add Client screen.



Adding Personal Client Information:

15) On the Add Client Screen click on the tab marked “Personal”. Your screen should look similar to the one shown below. This screen is primarily used by Insurance Companies but has some features a brokerage may find useful.



16) If you check the “Alert Client” box, the client’s name will be highlighted in red and an Alert! message will appear in the upper right-hand corner of the Client screen whenever that client is selected.

17) If you check the “Money Advanced” box, you will be able to enter notes about money advanced to in the field to the right. The client’s name will be highlighted in red and a Money Advanced message will appear in the upper right-hand corner of the Client screen whenever that client is selected.

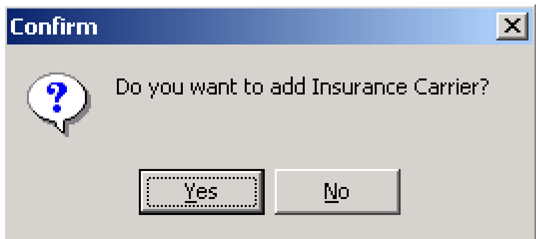
18) If you check the “Do not accept checks” box, the client’s name will be highlighted in red and Do not accept checks message will appear in the upper right-hand corner of the Client screen whenever that client is selected.

19) Once you have entered all desired information into the Personal tab, click "OK" you should be returned to the Client Screen.

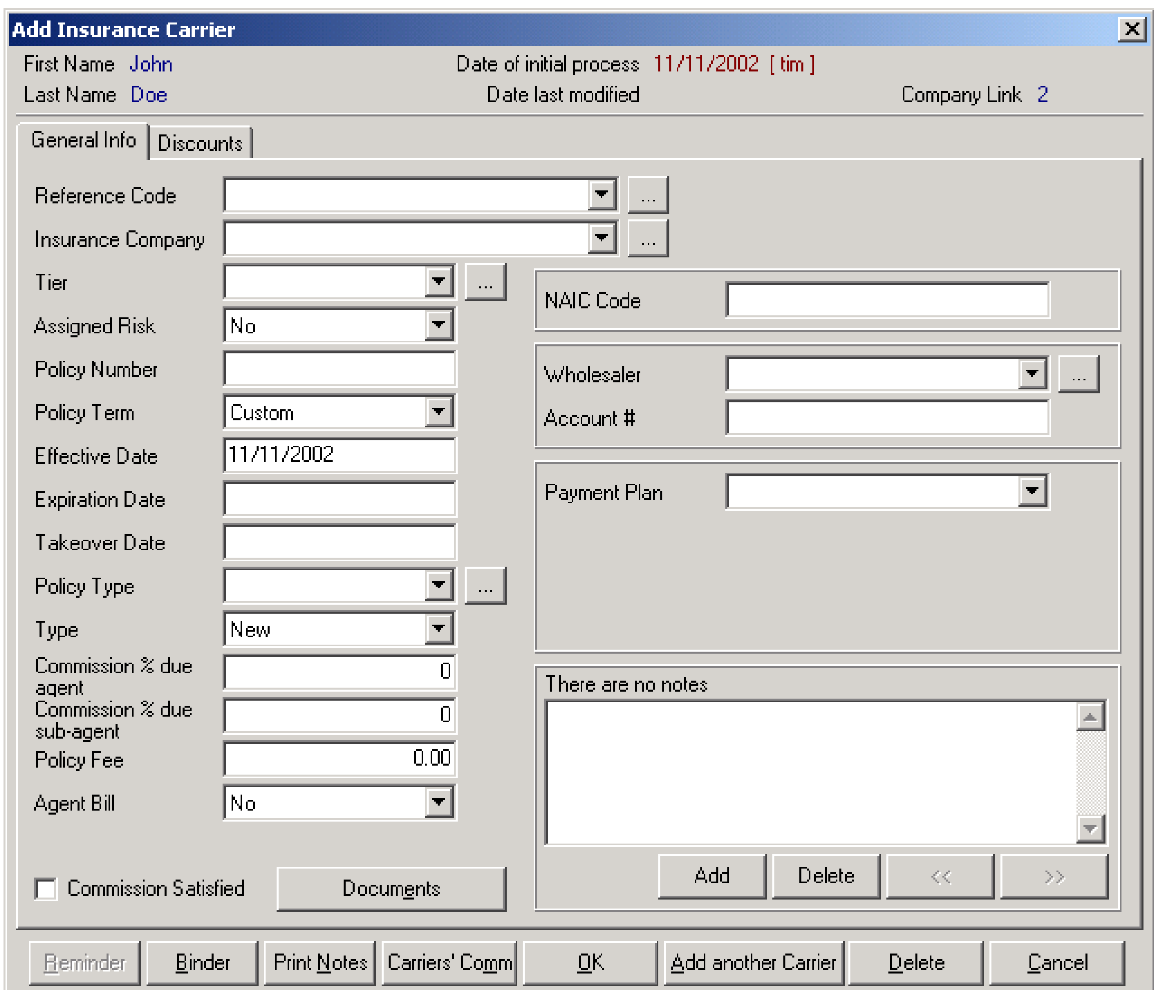
Adding A Company For A Client:

20) On the Client Screen, click on the client that you wish to add a company to, then click on "Add Company".

21) You will be asked to confirm that you wish to add a new carrier to the selected client. Click "Yes".

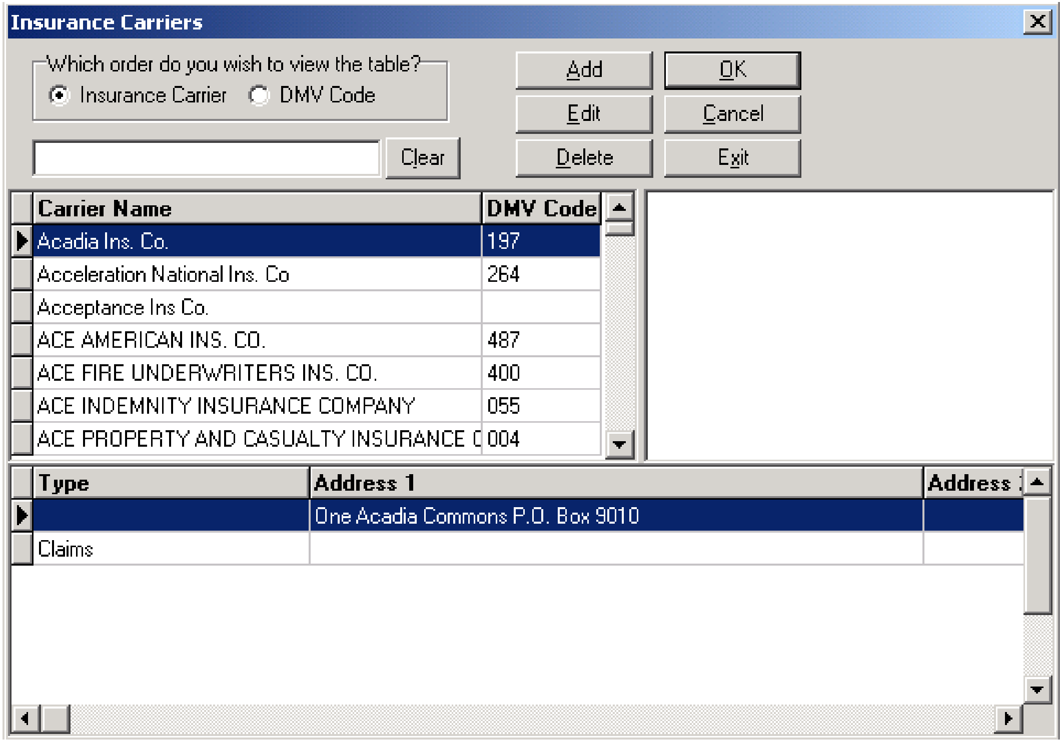


21) You should be taken to the Add Insurance Carrier Screen (shown below).



22) Reference Code is used to give credit to Brokers or In House Agents for policies they have written.

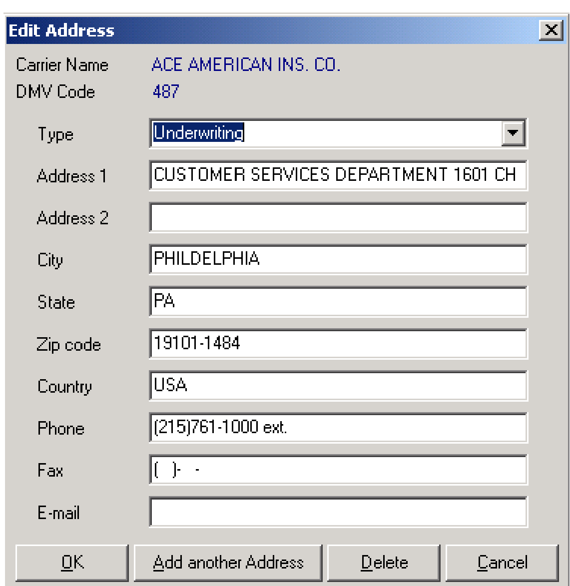
23) Insurance Company is a list of all Insurance Carriers in New York. If you click on the ... to the right of Insurance Company it will bring up the Insurance Carriers Screen (shown below).



23) To look up a carrier by name, type the name in the search box below Insurance Carrier.

24) To look up a carrier by DMV Code, click on the white circle to the left of DMV Code, then enter the code in the search box below it.

25) When you have selected a carrier, information on its various departments will appear at the bottom of the screen. If you double-click on a department an information screen will come up containing information about that department such as address and contact number (shown below).



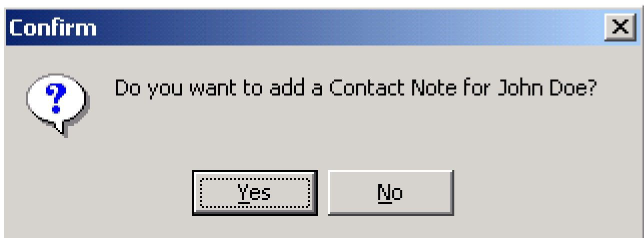
26) Click "OK" to return to the Insurance Carriers Screen. Click "OK" again to return to the Add Insurance Carrier Screen.

27) Once you are done entering all desired information click on "OK" to return to the Client Screen.

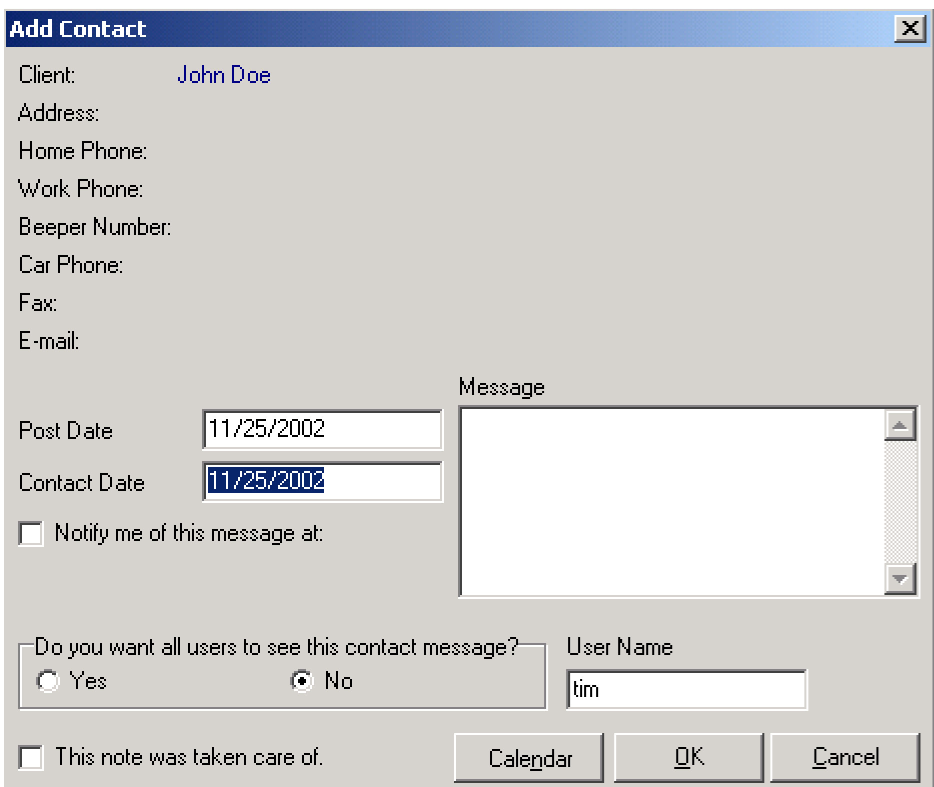
Using The Contact Manager:

28) To add a note to the Contact Manager, select a client in the Client Screen then click on "Add Contact".

29) A box should pop up asking you to confirm that you want to add a contact note for this client.



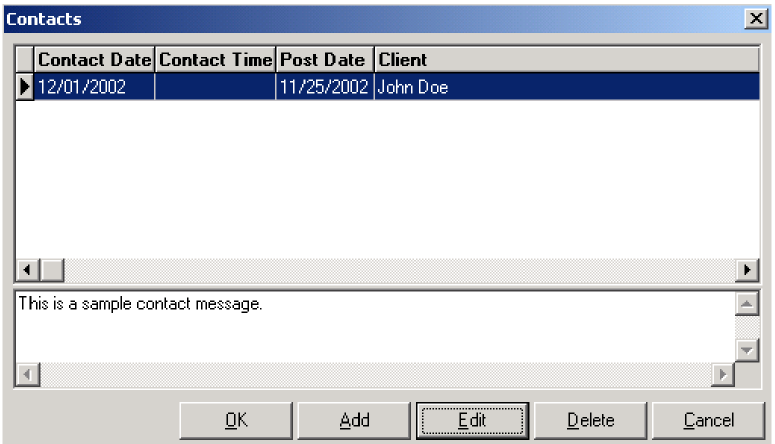
30) Click on "Yes". The Add Contact screen should now come up:



31) Post Date is the date that the contact note was added. Contact Date is the date that you wish the note to be displayed. If you select "Yes" under Do you want all users to see this contact message, then all users will see the message on the contact date. If instead you want only a certain user to see the message, type their database login name under "User Name".

32) Enter the message you want displayed under “Message” then click on OK to return to the Clients Screen. The writing on the “View Contacts” button should now be red. This indicates that you have contact messages.

33) To view contacts notes that have already been added, click on a client then click on “View Contacts” in the Database Client Screen. (The screen that comes up should be similar to the one shown below.)

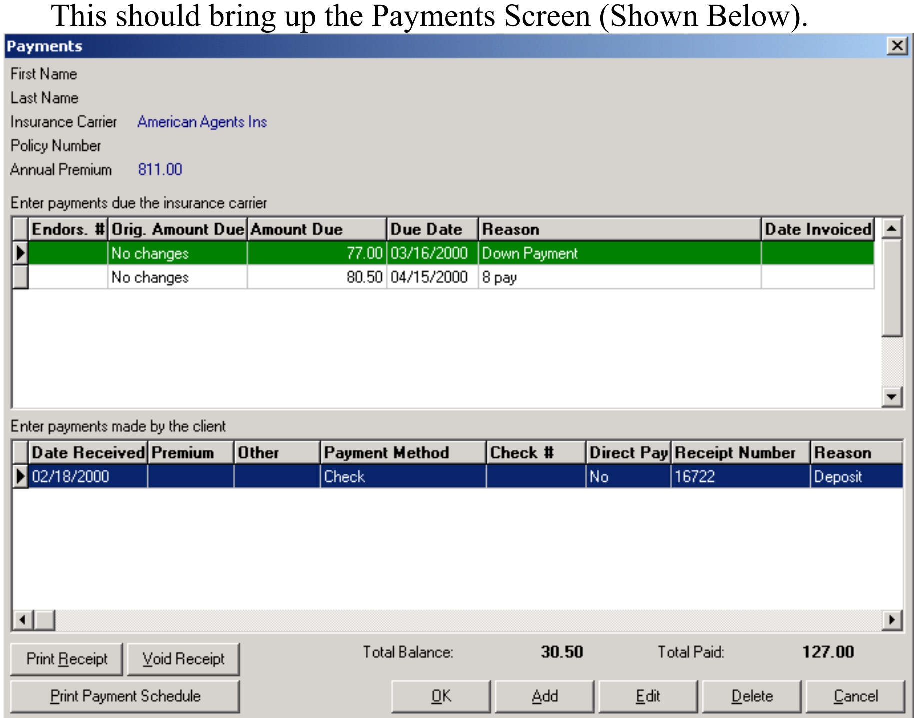


34) To add a contact note for this client, click on “Add”. To edit an existing contact note, click on the note and then click “Edit”. To delete a contact note, click on the note and click “Delete”.

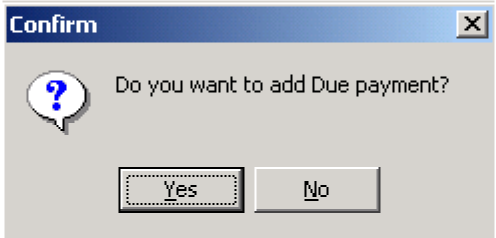
35) Once you are done managing contact notes, click on “OK” to return to the Database Client screen.

Adding A Payment Due:

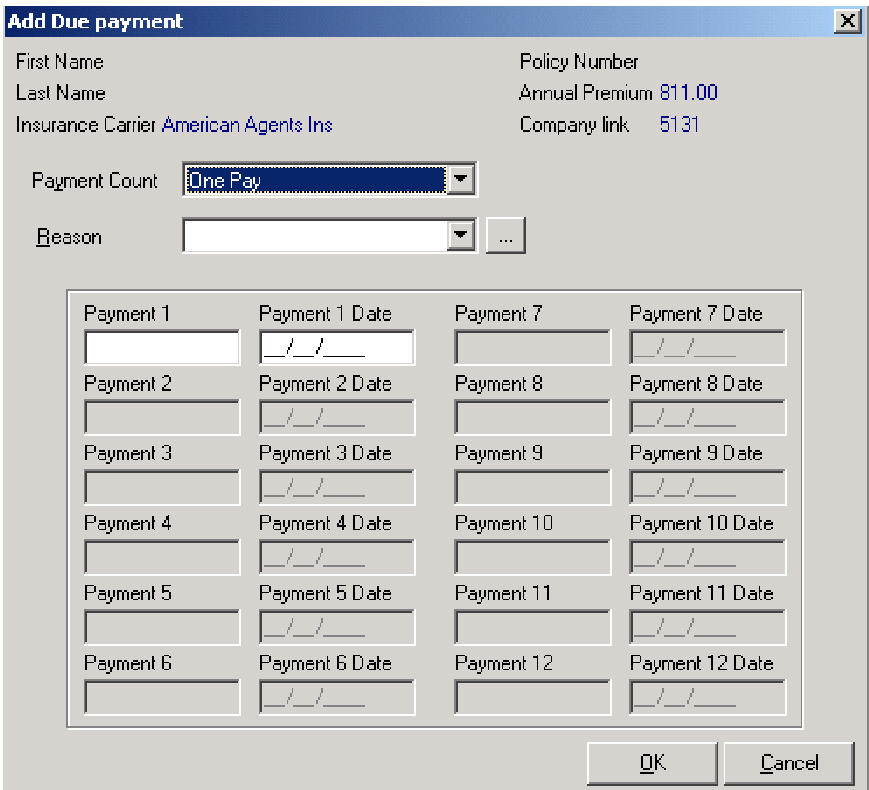
1) In the Database Client screen click on “Payments” in the lower left hand corner. This should bring up the Payments Screen (Shown Below).



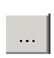
2) To add due payment(s) for a customer, click on “Add” at the bottom of the screen. You will be prompted to confirm that you want to add a payment due:



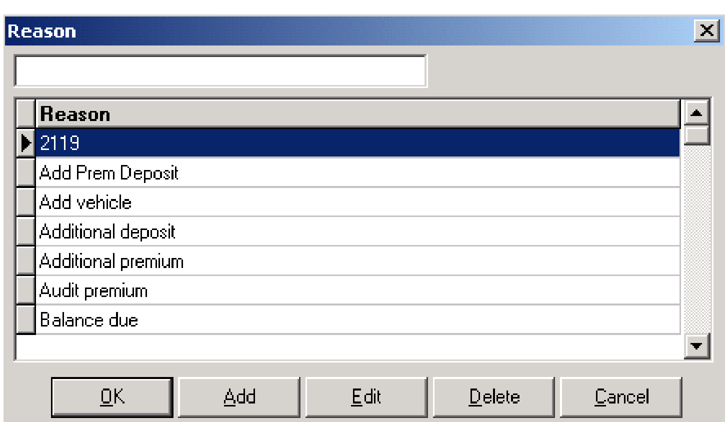
3) Click “Yes” and the Add Due Payment screen will come up:



4) Click on the down arrow next to Payment Count and choose the number of payments.

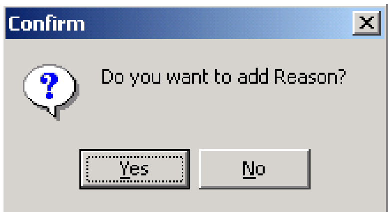
5) Click on the 

next to Reason, this will bring up the Reason screen:

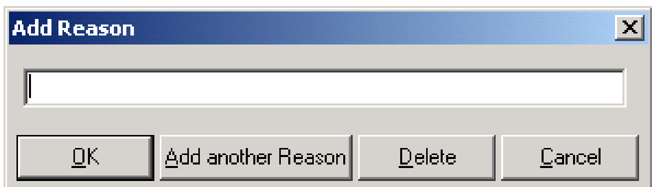


6) If the payment reason is listed, click on it and then click on "OK" to return to the Add Due Payment screen. If the payment reason is not listed, click on "Add" to add a new reason. (If adding a new reason see steps 7 – 9, if not proceed to step 10).

7) You will be asked to confirm that you want to add a new reason:



8) Click on "Yes" and the Add Reason screen should come up:

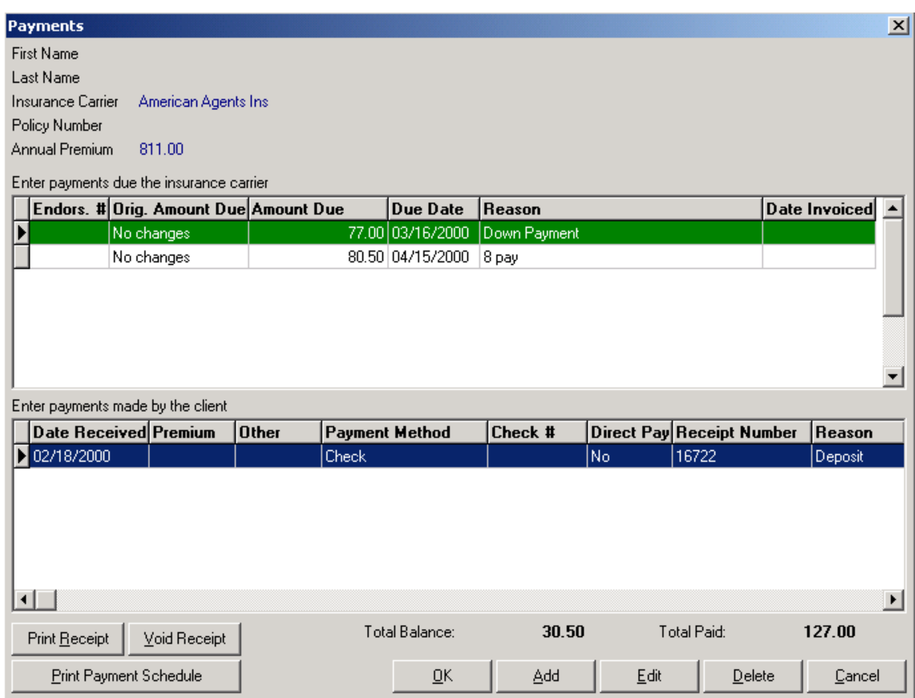


9) Enter the payment reason, then click on "OK" to return to the Reason screen. Click on "OK" again to return to the Add Due Payment screen.

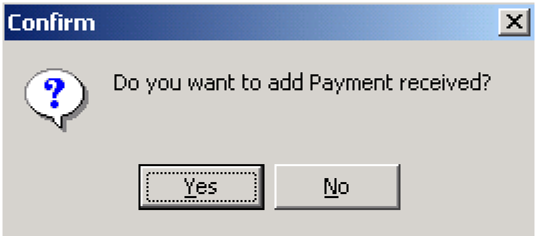
10) Enter the amount and date of the payment(s) then click on "OK" to return to the Payments screen.

Adding A Payment Received:

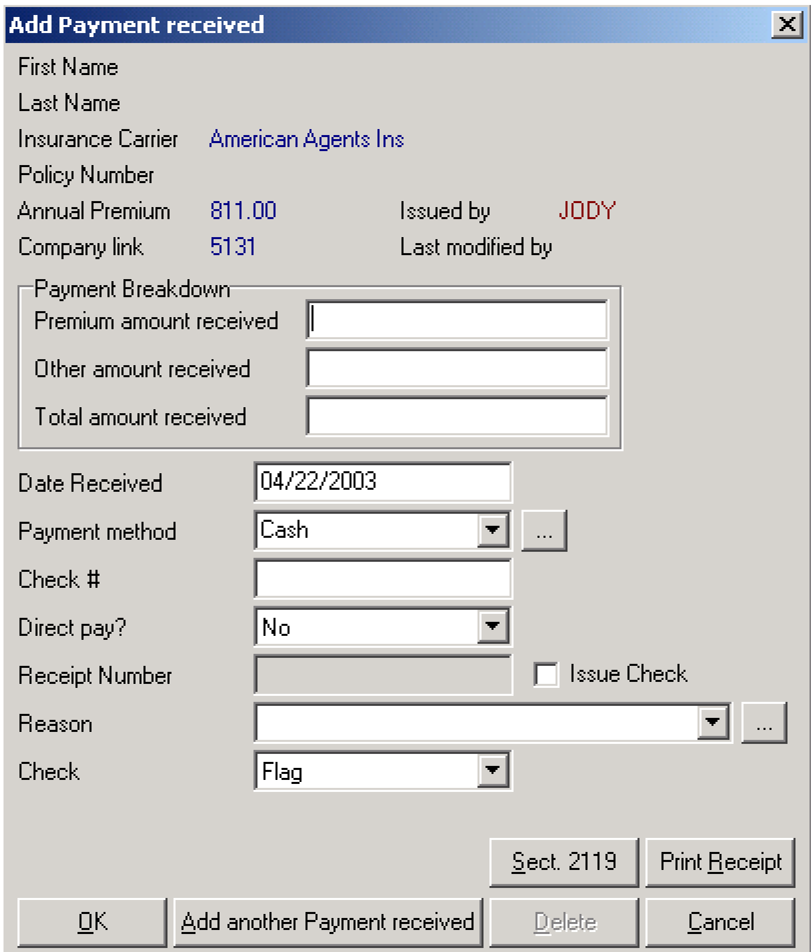
1) In the Database Client screen click on "Payments" in the lower left hand corner. This should bring up the Payments Screen (Shown Below).



2) To add a received payment for a customer, click under Date Received (near the middle of the screen) then click on “Add” at the bottom of the screen. You will be prompted to confirm that you want to add a payment received:



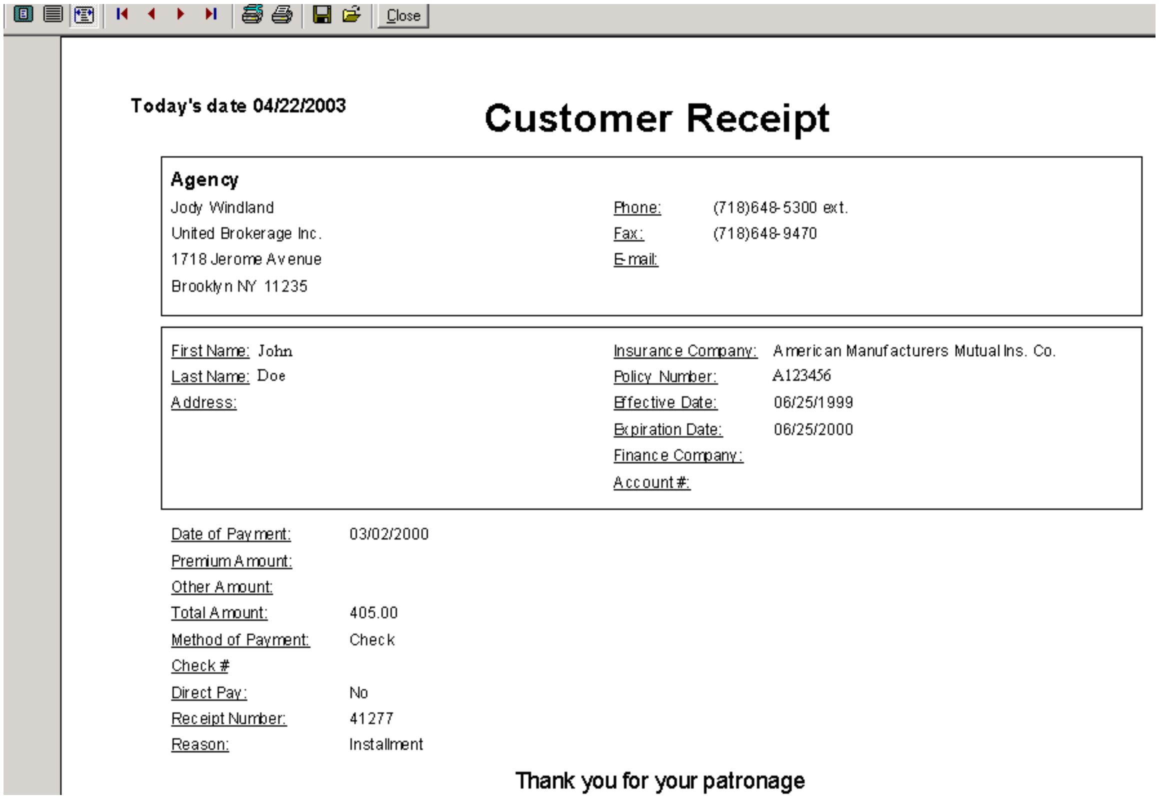
3) Click on “Yes” and the Add Payment Received window should appear:



4) Enter all of the required information, then click on “OK” to return to the Payments screen. The payment that you entered should now appear in the lower part of the screen.

Printing A Receipt:

1) In the Payments screen, click on the payment you want to print a receipt for (on the lower half of the screen), then click on “Print Receipt”. A screen showing a receipt should come up:



Close

Today's date 04/22/2003

Customer Receipt

Agency

Jody Windland		Phone:	(718)648-5300 ext.
United Brokerage Inc.		Fax:	(718)648-9470
1718 Jerome Avenue		E-mail:	
Brooklyn NY 11235			

First Name:	John	Insurance Company:	American Manufacturers Mutual Ins. Co.
Last Name:	Doe	Policy Number:	A123456
Address:		Effective Date:	06/25/1999
		Expiration Date:	06/25/2000
		Finance Company:	
		Account #:	

Date of Payment:	03/02/2000
Premium Amount:	
Other Amount:	
Total Amount:	405.00
Method of Payment:	Check
Check #	
Direct Pay:	No
Receipt Number:	41277
Reason:	Installment

Thank you for your patronage

2) To print the receipt, click on the picture of a printer  at the top of the screen. To close the receipt without printing, click on "Close" at the top of the screen.

Printing A Payment Schedule: