



United Software Developers Inc.

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).

Database Client 14.9 beta [Agency: Default]

Reports Agency Lists Forms Letters Documents Search Web Sites E-mail Options Help 11/07/2002 5:33 PM

Database Last Name Clear

Prefix	First Name	Middle Name	Last Name	Suffix	Address 1	Address 2	City
	John		Doe				

Exit

Add Client

Edit Client

Delete Client

Add Contact

View Contacts

Add Company

Renew Policy

Edit Company

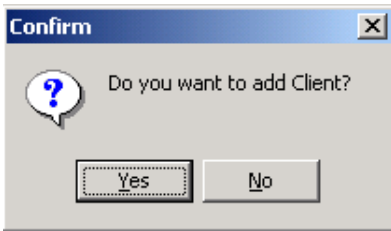
Delete Company

Total Premium: Reference Code:

Payments Cancellations Commissions Claims Vehicles Drivers Checking Coverages

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.

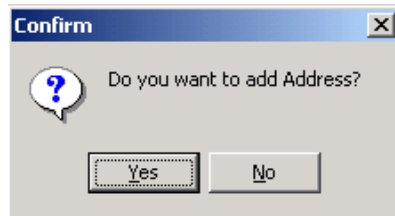


6) Click on “Yes” and you will be taken to the Add Client Screen

A form titled "Add Client" with a close button (X) in the top right corner. It contains two sets of name fields: "Prefix", "First Name", "Middle Name", "Last Name", and "Suffix". Below these is a dropdown menu for "Is there another named insured?" with "No" selected. There are three tabs: "Addresses", "Phones", and "Personal", with "Addresses" selected. Below the tabs is a table with columns: "Type", "Address 1", "Address 2", "City", "State", and "Zip Code". The first row is selected with a checkmark. At the bottom are buttons: "Set as Default", "Add", "Edit", "Delete", "Send an E-mail", "OK", "Add another Client", "Delete", and "Cancel".

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.

A form titled "Add Address" with a close button (X) in the top right corner. It contains a "Client" label. Below are fields for "Type" (with a dropdown arrow and an ellipsis button), "Address1", "Address2", "City", "State" (with a dropdown arrow showing "New York"), and "Zip Code". At the bottom are buttons: "OK", "Add another Address", "Delete", and "Cancel".

- 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.

Type	Phone

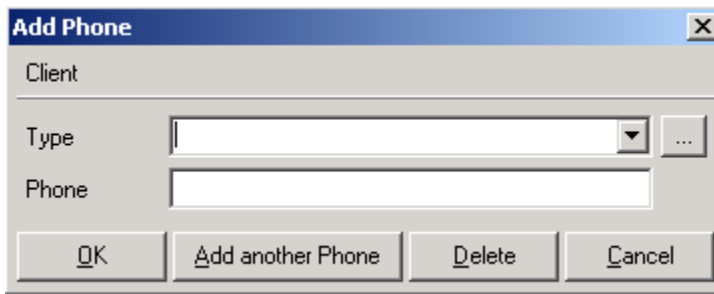
- 13) Click on "Add", a box should pop up asking you to confirm that you would like to add a phone number.

Do you want to add Phone?

Yes No

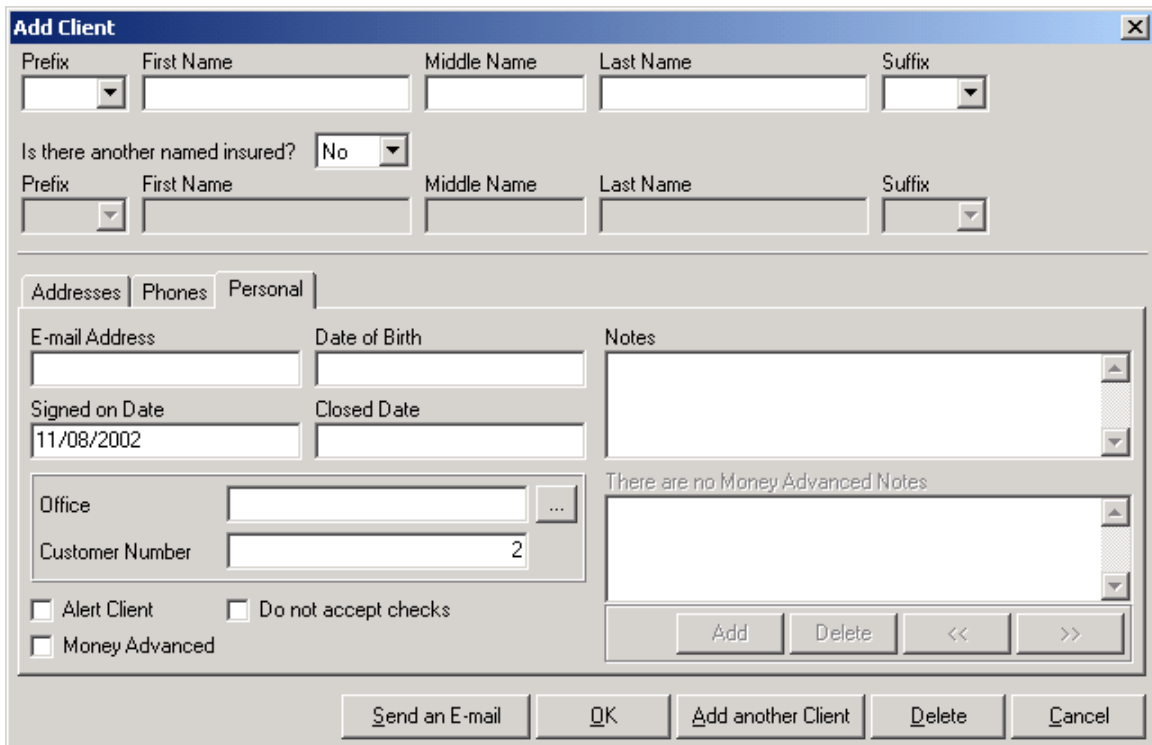
- 14) The Add Phone window should pop up (shown below). Select the type of Phone number by clicking the down arrow to the right of Type. Then enter the phone number next to Phone. When you are finished click "Add another Phone" to add

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.

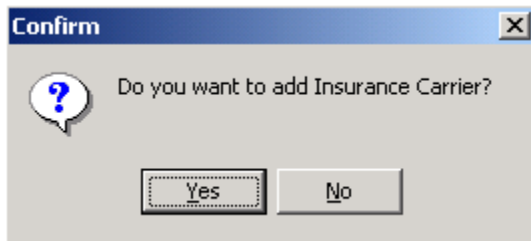
18) If you check the “Do not accept checks” box, the client’s name will be highlighted in red and Do not accept checks message will appear in the upper right-hand corner of the Client screen whenever that client is selected.

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

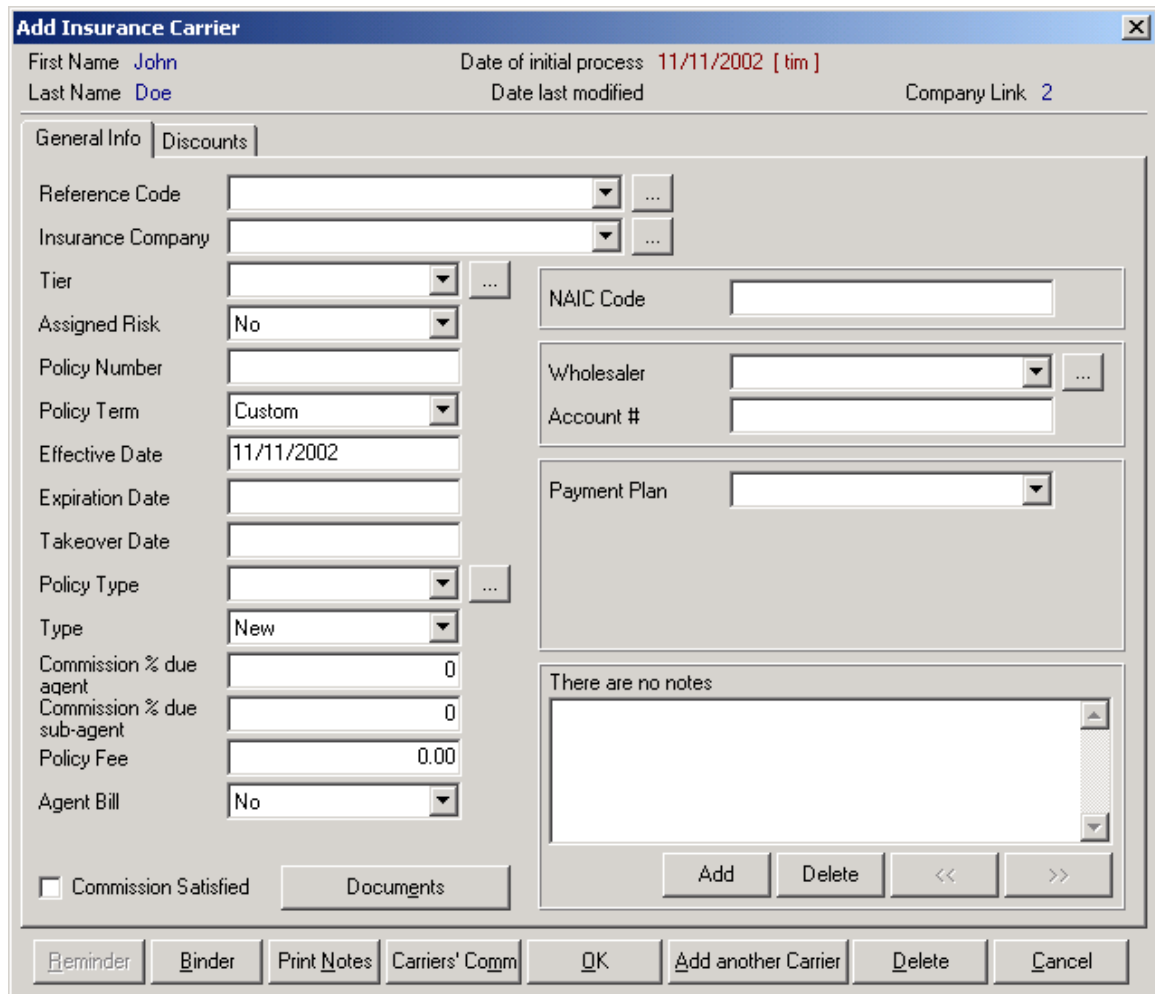
Adding A Company For A Client:

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”.

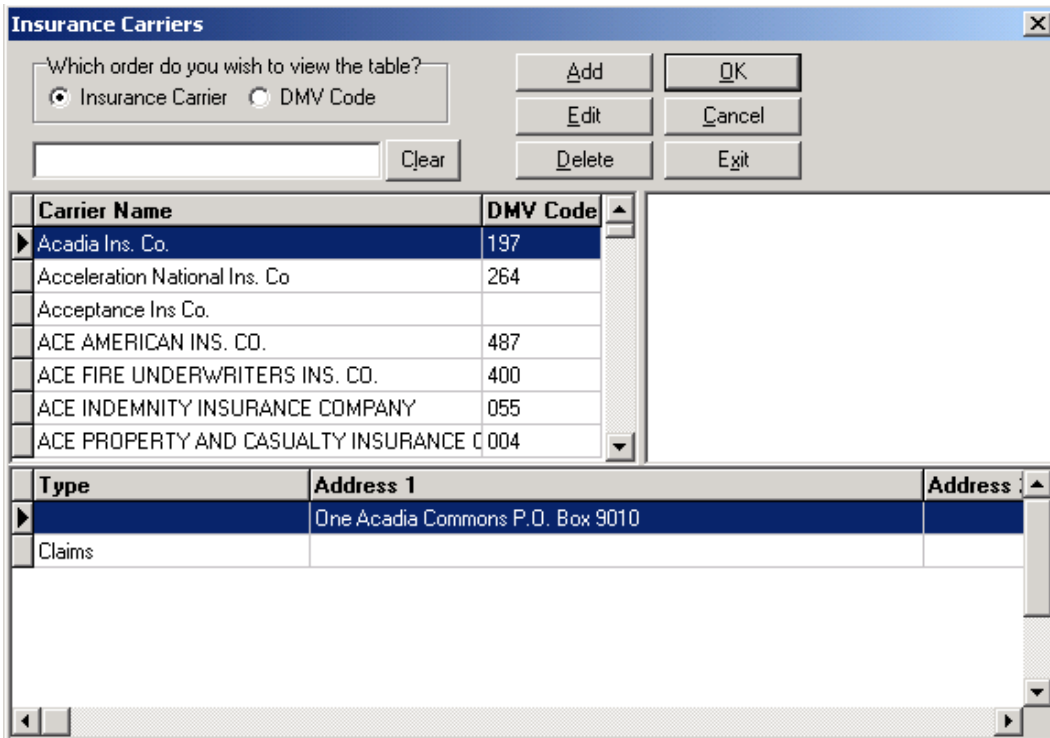


21) You should be taken to the Add Insurance Carrier Screen (shown below).

A screenshot of the "Add Insurance Carrier" screen. The window title is "Add Insurance Carrier" with a close button (X) in the top right. The screen is divided into several sections. At the top, there are fields for "First Name" (John), "Last Name" (Doe), "Date of initial process" (11/11/2002 [tim]), "Date last modified", and "Company Link" (2). Below this, there are two tabs: "General Info" (selected) and "Discounts". The "General Info" section contains various fields: "Reference Code" (dropdown), "Insurance Company" (dropdown), "Tier" (dropdown), "Assigned Risk" (No), "Policy Number" (text), "Policy Term" (Custom), "Effective Date" (11/11/2002), "Expiration Date" (text), "Takeover Date" (text), "Policy Type" (dropdown), "Type" (New), "Commission % due agent" (0), "Commission % due sub-agent" (0), "Policy Fee" (0.00), and "Agent Bill" (No). There are also fields for "NAIC Code", "Wholesaler" (dropdown), "Account #", and "Payment Plan" (dropdown). At the bottom of the "General Info" section, there is a checkbox for "Commission Satisfied" and a "Documents" button. A notes section at the bottom right contains the text "There are no notes" and a scrollable area. At the very bottom of the window, there are several buttons: "Reminder", "Binder", "Print Notes", "Carriers' Comm", "OK", "Add another Carrier", "Delete", and "Cancel".

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).



Which order do you wish to view the table?
 Insurance Carrier DMV Code

Buttons: Add, OK, Edit, Cancel, Delete, Exit, Clear

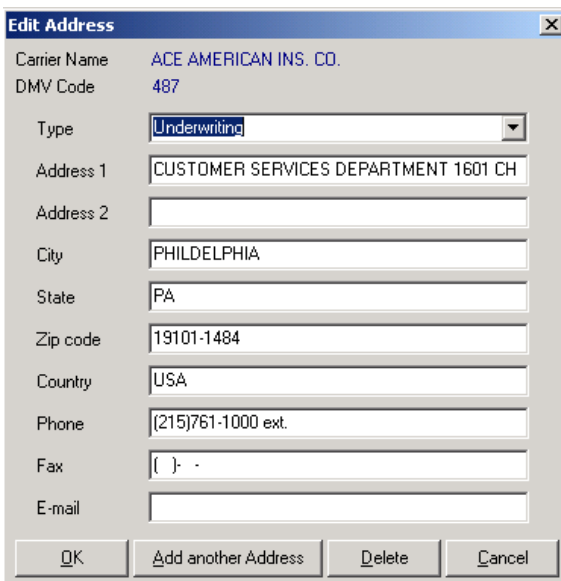
Carrier Name	DMV Code
▶ Acadia Ins. Co.	197
Acceleration National Ins. Co	264
Acceptance Ins Co.	
ACE AMERICAN INS. CO.	487
ACE FIRE UNDERWRITERS INS. CO.	400
ACE INDEMNITY INSURANCE COMPANY	055
ACE PROPERTY AND CASUALTY INSURANCE CO	004

Type	Address 1	Address
▶	One Acadia Commons P.O. Box 9010	
Claims		

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).



Edit Address

Carrier Name: ACE AMERICAN INS. CO.
 DMV Code: 487

Type: Underwriting

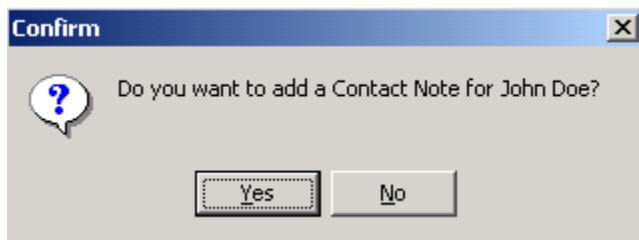
Address 1: CUSTOMER SERVICES DEPARTMENT 1601 CH
 Address 2:
 City: PHILDELPHIA
 State: PA
 Zip code: 19101-1484
 Country: USA
 Phone: (215)761-1000 ext.
 Fax: () -
 E-mail:

Buttons: OK, Add another Address, Delete, Cancel

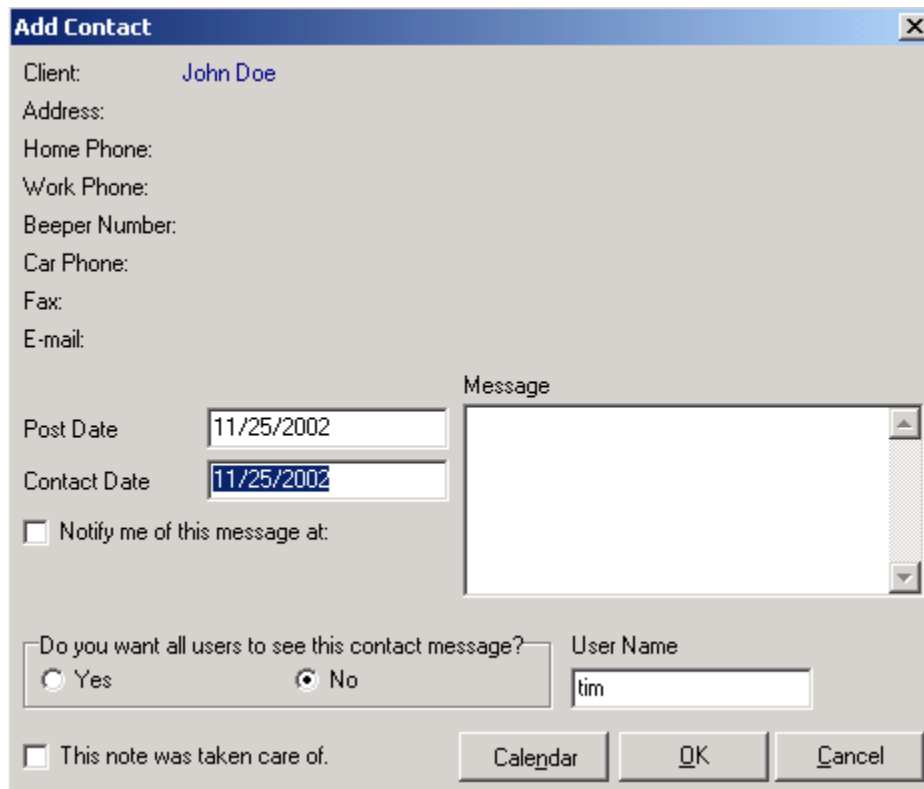
- 26) Click “OK” to return to the Insurance Carriers Screen. Click “OK” again to return to the Add Insurance Carrier Screen.
- 27) Once you are done entering all desired information click on “OK” to return to the Client Screen.

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.



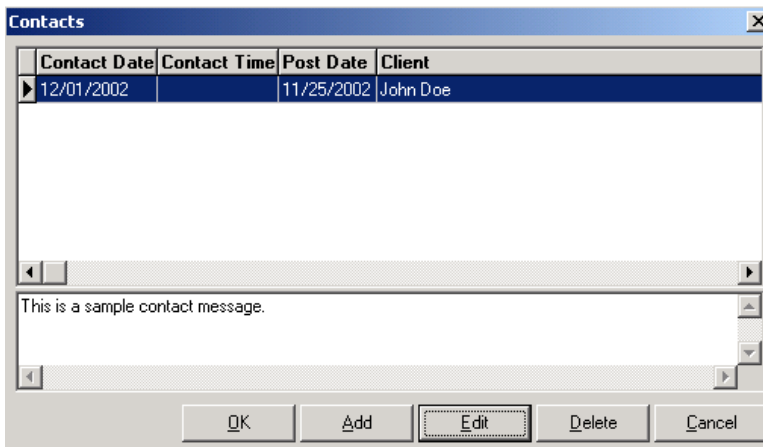
- 30) Click on “Yes”. The Add Contact screen should now come up:

A screenshot of a Windows-style dialog box titled "Add Contact". The "Client" field is populated with "John Doe". Below this are several empty text input fields for "Address:", "Home Phone:", "Work Phone:", "Beeper Number:", "Car Phone:", "Fax:", and "E-mail:". There are two date input fields: "Post Date" with the value "11/25/2002" and "Contact Date" with the value "11/25/2002". A checkbox labeled "Notify me of this message at:" is unchecked. A large text area labeled "Message" is empty. Below the message area are radio buttons for "Do you want all users to see this contact message?", with "Yes" selected and "No" unselected. To the right of these radio buttons is a "User Name" input field containing the text "tim". At the bottom left, there is a checkbox labeled "This note was taken care of." which is unchecked. At the bottom right, there are three buttons: "Calendar", "OK", and "Cancel".

- 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.)

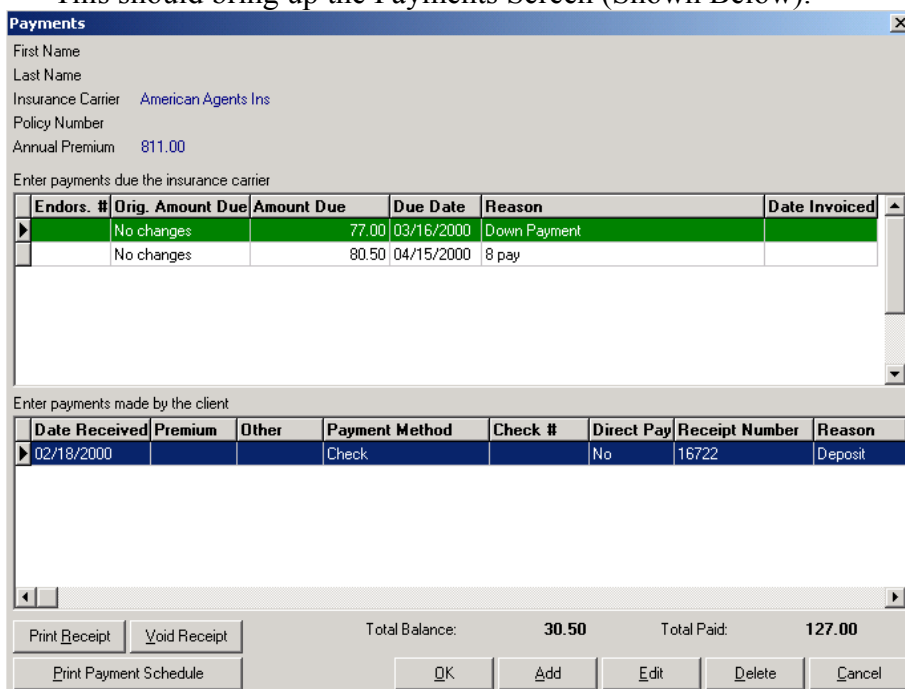


34) To add a contact note for this client, click on “Add”. To edit an existing contact note, click on the note and then click “Edit”. To delete a contact note, click on the note and click “Delete”.

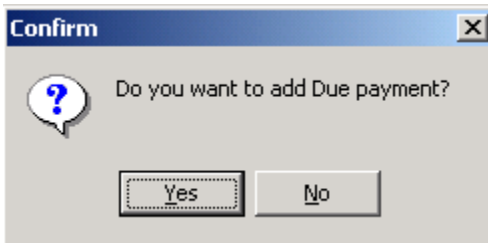
35) Once you are done managing contact notes, click on “OK” to return to the Database Client screen.

Adding A Payment Due:

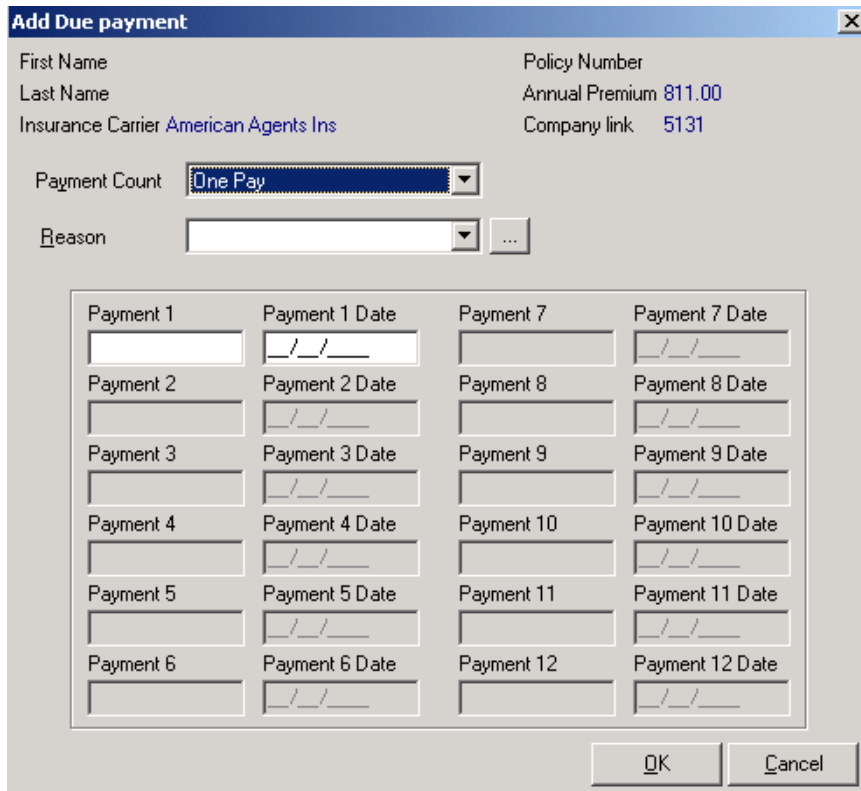
1) In the Database Client screen click on “Payments” in the lower left hand corner. This should bring up the Payments Screen (Shown Below).



- 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:



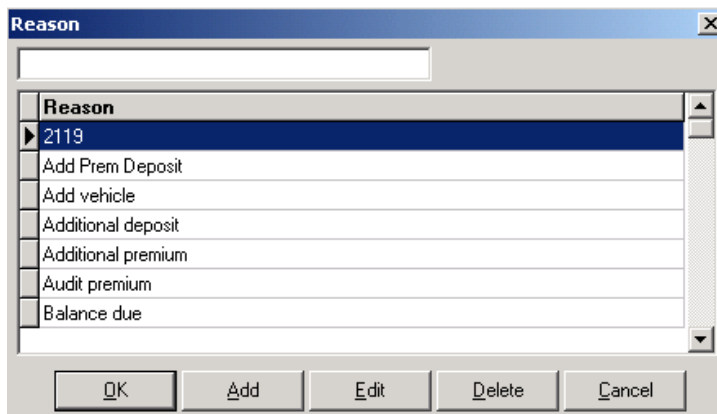
- 3) Click “Yes” and the Add Due Payment screen will come up:



A dialog box titled "Add Due payment" with a close button (X) in the top right corner. It contains the following fields and controls:

- First Name: [Text Field]
- Last Name: [Text Field]
- Insurance Carrier: American Agents Ins
- Policy Number: [Text Field]
- Annual Premium: 811.00
- Company link: 5131
- Payment Count: [Dropdown Menu] (Currently set to "One Pay")
- Reason: [Dropdown Menu] with a "..." button next to it.
- A table with 12 columns for payments (Payment 1 to Payment 12) and 2 columns for dates (Payment 1 Date to Payment 12 Date). Each cell contains a date input field with a calendar icon.
- Buttons: OK and Cancel.

- 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:



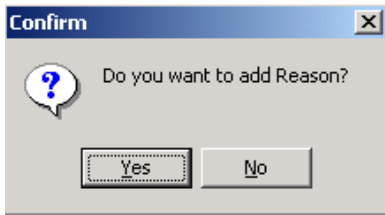
A dialog box titled "Reason" with a close button (X) in the top right corner. It contains a search field at the top and a list of reasons below. The list is currently expanded to show the following items:

- Reason
- 2119
- Add Prem Deposit
- Add vehicle
- Additional deposit
- Additional premium
- Audit premium
- Balance due

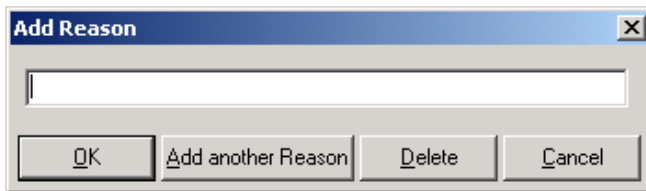
Buttons: OK, Add, Edit, Delete, Cancel.

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).

The "Payments" screen displays the following information:

First Name
Last Name
Insurance Carrier: American Agents Ins
Policy Number
Annual Premium: 811.00

Enter payments due the insurance carrier

Endors. #	Orig. Amount Due	Amount Due	Due Date	Reason	Date Invoiced
	No changes	77.00	03/16/2000	Down Payment	
	No changes	80.50	04/15/2000	8 pay	

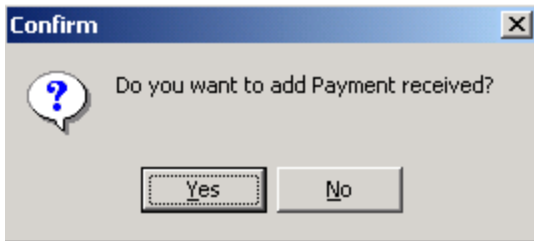
Enter payments made by the client

Date Received	Premium	Other	Payment Method	Check #	Direct Pay	Receipt Number	Reason
02/18/2000			Check		No	16722	Deposit

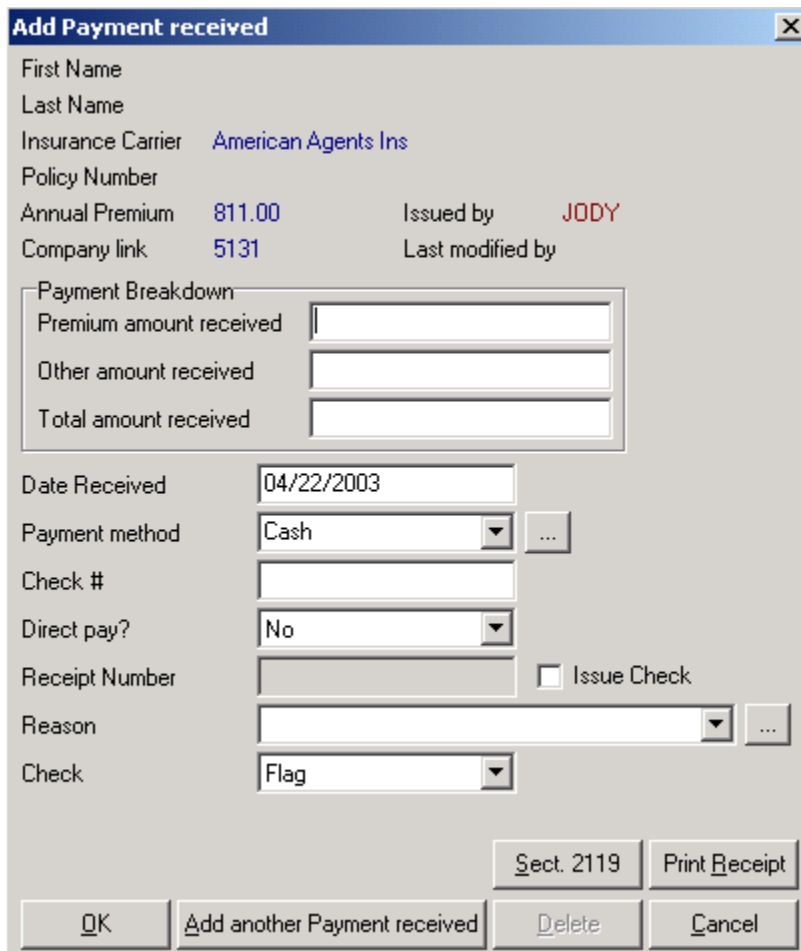
Total Balance: 30.50 Total Paid: 127.00

Buttons: Print Receipt, Void Receipt, Print Payment Schedule, OK, Add, Edit, Delete, Cancel

- 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:

A screenshot of the 'Add Payment received' window. The title bar says 'Add Payment received' with a close button. The form contains the following fields:

- First Name
- Last Name
- Insurance Carrier: American Agents Ins
- Policy Number
- Annual Premium: 811.00
- Issued by: JODY
- Company link: 5131
- Last modified by
- Payment Breakdown section with three input fields:
 - Premium amount received
 - Other amount received
 - Total amount received
- Date Received: 04/22/2003
- Payment method: Cash (dropdown menu)
- Check #: (input field)
- Direct pay?: No (dropdown menu)
- Receipt Number: (input field) with an 'Issue Check' checkbox
- Reason: (dropdown menu)
- Check: Flag (dropdown menu)

At the bottom, there are several buttons: 'OK', 'Add another Payment received', 'Sect. 2119', 'Print Receipt', 'Delete', and 'Cancel'.

- 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:

Today's date 04/22/2003


Customer Receipt

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

<u>First Name:</u> John <u>Last Name:</u> Doe <u>Address:</u>	<u>Insurance Company:</u> American Manufacturers Mutual Ins. Co. <u>Policy Number:</u> A123456 <u>Effective Date:</u> 06/25/1999 <u>Expiration Date:</u> 06/25/2000 <u>Finance Company:</u> <u>Account#:</u>
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<u>Date of Payment:</u>	03/02/2000
<u>Premium Amount:</u>	
<u>Other Amount:</u>	
<u>Total Amount:</u>	405.00
<u>Method of Payment:</u>	Check
<u>Check #</u>	
<u>Direct Pay:</u>	No
<u>Receipt Number:</u>	41277
<u>Reason:</u>	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:

