



# United Software Developers Inc.

## ID Card Program

### Starting The Program:

- 1) You can start the ID Card Program from the main menu of your rating software by clicking on the **Print ID Cards** button.
- 2) This should bring up the ID Card Login Screen (shown below).

The screenshot shows a dialog box titled "ID Card Logon Information" with a close button (X) in the top right corner. On the left is a key icon. The text reads: "Enter an Issuer License Number and PIN that is valid for this application". Below this are three input fields: "Issuer Name" (a dropdown menu showing "United Brokerage Inc"), "Issuer License Number" (text box with "BR-673657"), and "PIN Number" (empty text box). There is a checkbox labeled "This ID card for an assigned risk policy" which is currently unchecked. At the bottom are three buttons: "Ok", "Cancel", and "Setup".

### Setting up the Program:

- 1) Click on the button marked "Setup" on the ID Card Logon Information Screen. This should bring up a window similar to the one shown below:

The screenshot shows a dialog box titled "Options" with standard window controls (minimize, maximize, close) in the top right. It has several tabs: "Key Maintenance", "Defaults", "ICC Entry", "FH Options", "NYPASS Access", and "Mail Server". The "ICC Entry" tab is selected. Under the heading "Issuer License Number & Key", there are five input fields: "Agency / Issuer", "Address Line 1", "Address Line 2", "License Number" (containing "BR-673657"), and "Issuer Key". At the bottom are two buttons: "Add this account" and "Add another Issuer". A "Close" button is located at the bottom right of the dialog box.

- 2) Enter the name of your brokerage next to "Agency/Issuer".

- 3) Enter your street address next to “Address Line 1”.
- 4) Enter your City, State and Zip Code next to “Address Line 2”.
- 5) Enter your broker’s license number next to “License Number”.
- 6) Enter your bar-coded ID Card Issuer’s Key next to “Issuer Key”.
- 7) Click on “Add this account”. You should receive a message telling you that the account was added successfully. Click on OK, then click on “Close”.

**Creating An ID Card:**

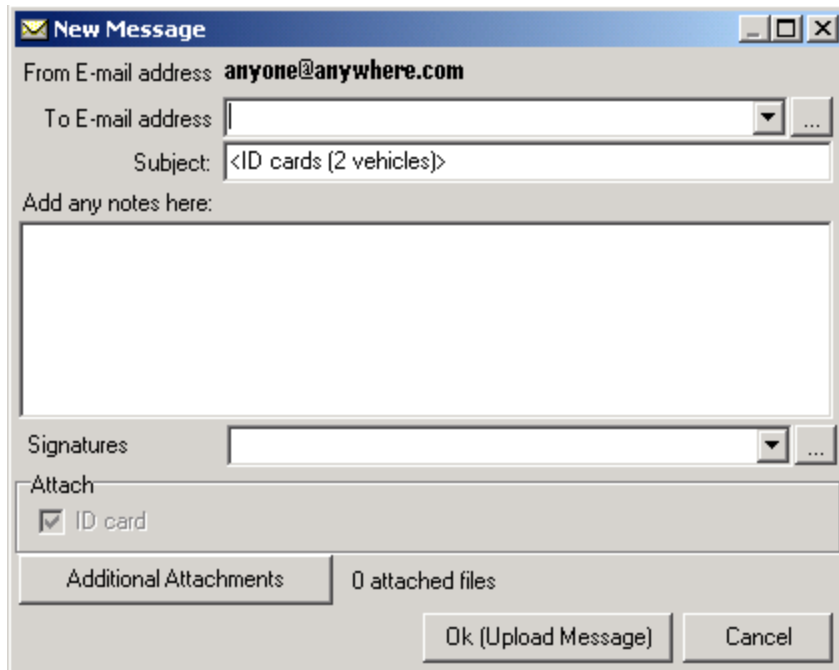
- 1) On the ID Card Logon Information Screen click on the down arrow to the right of “Issuer Name” and choose the name of your brokerage from the list.
- 2) Enter your PIN Number next to “PIN Number.
- 3) If this ID Card is for an assigned risk policy put a check in the checkbox at the bottom of the screen then click “OK”. Otherwise, just click “OK”. This should bring you to the ID Card Screen (shown below).

The screenshot shows a software window titled "ID Card" with several sections for data entry:

- Policy Info:** Includes "Sort by:" with radio buttons for "Insurance Carrier" (selected) and "DMV code". A dropdown menu for "IC Code" is set to "TRAVELERS PROPERTY CASUALTY INSURANCE CO. (001)". There are input fields for "Policy Number", "Effective Date" (01/30/2003), and "Expiration Date" (format: \_\_/\_\_/\_\_). On the right, there are dropdowns for "Paper Selection" (BS (Blank Stock)), "Document Type" (FS-20), and "Type Of Registrant" (1 Individual).
- Individuals:** Two rows of fields for "First Name", "Middle Name", "Last Name", "Suffix" (dropdown), and "NYS Driver's Lic/ID#" (input field).
- Address:** Input fields for "Street", "City", "State" (dropdown set to NY - NEW YORK), and "Zip Code".
- Vehicle # 1:** Fields for "Year", "Make", "VIN", and "Seats" (input field). There are checkboxes for "Replacement", "Historical", and "Tow Truck", each with a "NO" label to its right. Navigation buttons include "<< Previous vehicle", "Next vehicle >>", and "Remove vehicle".
- Footer:** A license number "BR-673657" and a row of buttons: "Preview/Print ID Card", "Send", "Save", "Retrieve", "Options >>", "Help", and "Exit".

- 4) Enter the required information into the various fields on the screen, be sure to select the correct document type and the correct type of registrant on the upper right side of the screen.
- 5) To save the ID Card, click on “Save” on the bottom of the screen.
- 6) To Print the ID Card, click on “Preview/Print ID Card” on the bottom of the screen.

- 7) To email the ID Card, click on “Send” on the bottom of the screen. This should bring up a window similar to the one shown below:



**New Message**

From E-mail address: **anyone@anywhere.com**

To E-mail address: [ ] [v] [...]

Subject: <ID cards (2 vehicles)>

Add any notes here:

Signatures: [ ] [v] [...]

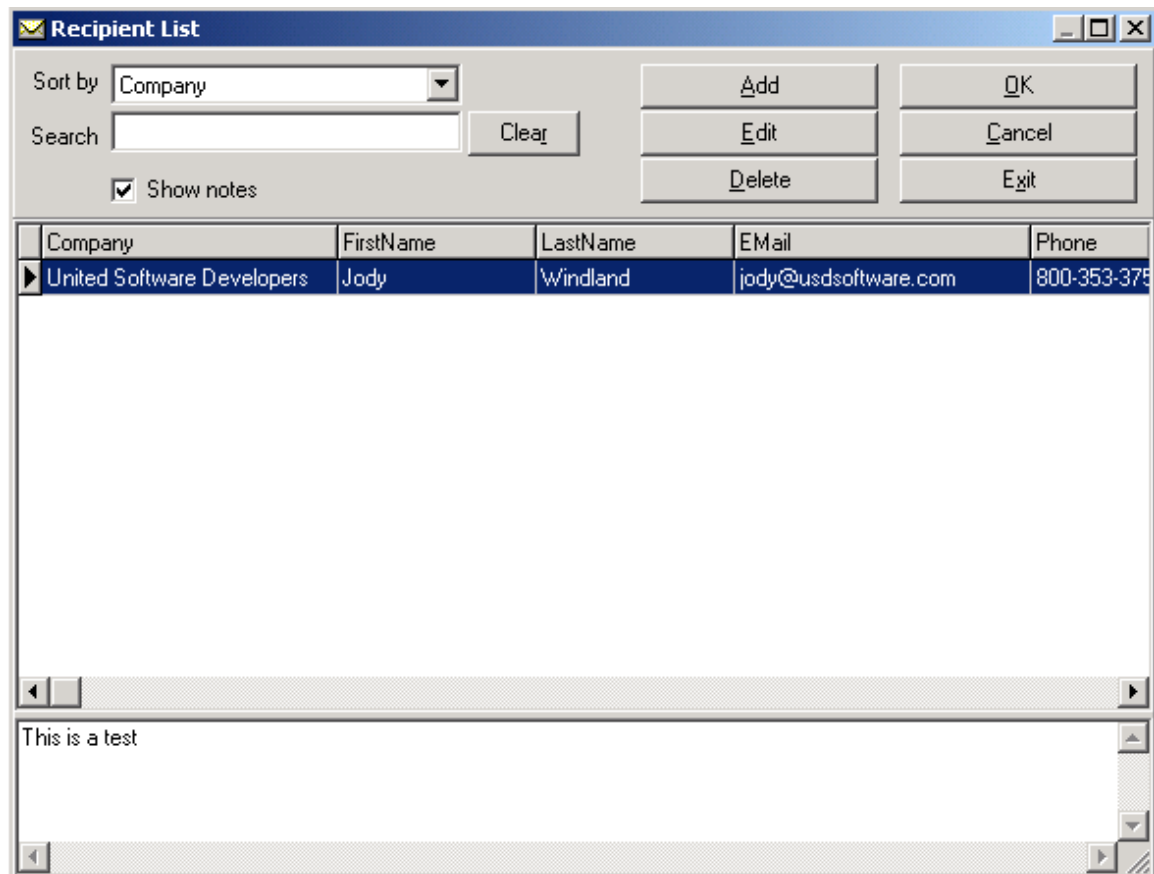
Attach:

ID card

Additional Attachments: 0 attached files

Ok (Upload Message) Cancel

- 8) Click on [ ... ] to the right of “To E-mail address”, this will bring up the recipient list screen:



**Recipient List**

Sort by: Company [v]

Search: [ ] Clear

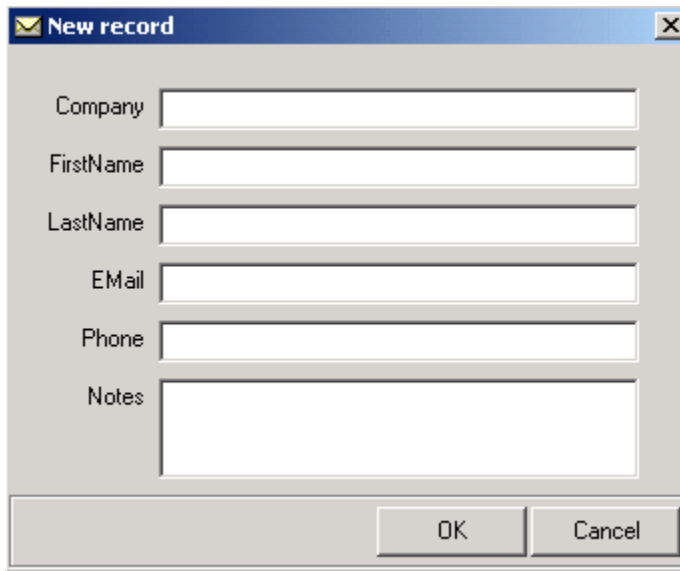
Show notes

Add Edit Delete OK Cancel Exit

Company	FirstName	LastName	EMail	Phone
▶ United Software Developers	Jody	Windland	jody@usdsoftware.com	800-353-375

This is a test

- 9) If the recipient you want to send to is already in the list, click on their name, then click on “OK”. If not click on “Add” and the New record screen will appear:



The image shows a 'New record' dialog box with the following fields:

- Company
- FirstName
- LastName
- EMail
- Phone
- Notes

Buttons: OK, Cancel

- 10) Enter the recipient information in the fields provided and then click “OK”. This should return you to the Recipient List screen.
- 11) Click on the name of the recipient and then click “OK”, this should return you to the New Message screen with the recipient’s email address now filled in next to “To E-mail address”.
- 12) Click on OK (Upload Message) to send your email.
- 13) To Exit from the program click on “Exit” on the lower right-hand corner of the screen.