

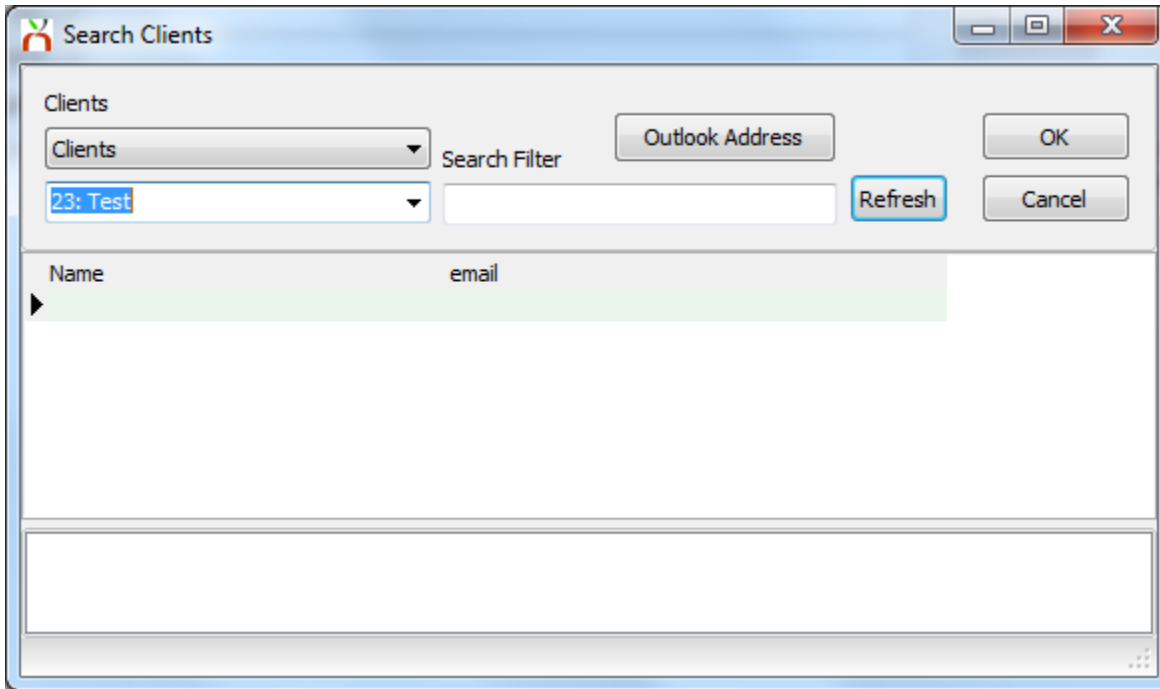
EMAIL

Email component upgraded for 64 bit Microsoft Outlook compatibility.

Converted HTML emails now retain additional formatting.

Converted emails now store the full email address even if the contact is only saved in the workstation address book.

The email address lookup will automatically display results for each of the categories chosen for Clients, Company, Policy Interests, or Producer. Refresh is not required to load the initial lists.

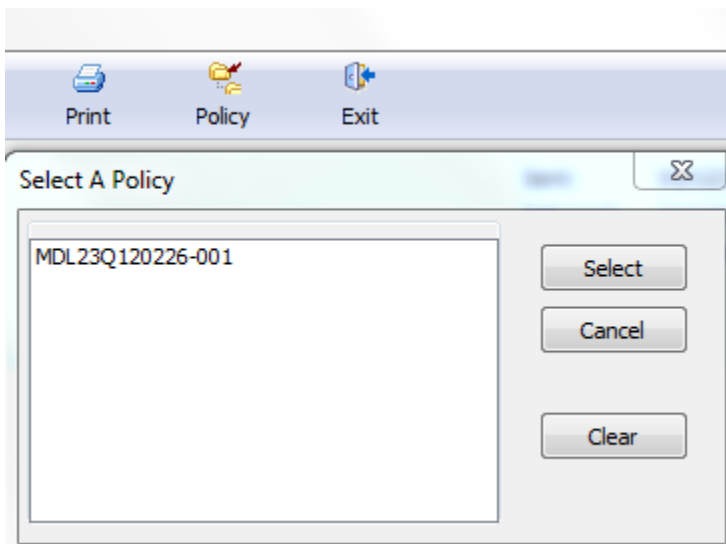


Address Lookup for Company will prefill the company code if opened from Policy Express.

An address Lookup for Policy Interests only has been added.

An additional option for Interests, any interest in the system, is also available. The search filter can be used to find the desired address.

Emails can now be moved between policies, from client to policy, or from policy to client after they are attached.



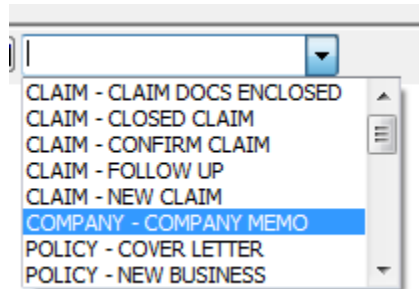
Hotkeys will now Bold, Underline, or change to Italic in the body of an email when composed. (**CTRL+B**, CTRL+U, *CTRL+I*)

Policy or client level attachments already in Agency Systems can be attached during the compose email process. Attachments outside Agency Systems can still be attached and batch print can still be used to email attachments.

A new client email can be started by selecting Create Email on the basic tab under the Email Band.

MEMOWRITER

Email memowriter selection drop down box now lists Category, then Name of the memo from the compose email window.



Memowriter merge code for Lein Holder now searches for Policy Interests Only. The window now contains additional holder lookup information including the address.

Memowriter now supports adding a header and footer to documents. Double click the area to enter the information.

ACORD FORMS

135 NC	(2009/08)	138 ID	(2011/07)
137 CA	(2010/12)	22	(2012/04)
137 IN	(2011/07)	23	(2010/05)
137 KS	(2011/03)	35	(2011/09)
137 MI	(2011/08)	50 KY	(2006/01)
137 MN	(2011/06)	61 CA	(2008/03)
137 PA	(2011/10)	815	(2009/02)

FORM UPDATES

Copy Interests added to Policy Express Interest menu. Interests can now be copied from other policies or forms in a batch similar to functionality previously updated on the ACORD 25.

ACORD 35 now allows the policy number and dates to be manually altered.

ACORD 125 Application address information now prefills.

DL Risk tab and download will now create the updated ACORD 126.

FORMS TAB UPDATES

Both the certificates and forms section of the forms tab have been altered to file older forms and certificates in a nested band that is closed by default.

Older forms and certificates are identified based on the expiration date of the policy. If every policy on the form has been expired for 90 days or more, the form is considered older.

Older certificates are filed under the certificates group in a section titled "Older Certificates". Older forms are filed in the forms group in a section titled "Expired Policies". However, the older/expired groups are only created if some newer forms are present; if all forms are older the special groups are not made.

AL3 RATING UPLOADS

You can now export previously downloaded AI3 files to various rating vendors. To enable this feature contact Agency Systems support.

- ACS2000
- PL Rater
- SEMCAT

MARKETING

Exclude Inactive Clients now selected by default.

Birth Date Query can now reference driver information.

EXPRESS CHECKS

The Policy Related Checks screen has been upgraded with Express Checks.

The new check screen allows users to place check distributions on account automatically when removed from an invoice. The screen will also prompt the operator to use an on account amount if available when paying invoices. The drop down boxes can be filtered by code or alphabetically by name.

Contact Agency Systems support for a detailed demo of the new check screen.

Amount Paid	Invoice	Dpt	SubGL	Due Date	Policy	Description	Original Amount	Amount O...
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The Policy Related Checks screen will still be available from the AP menu.

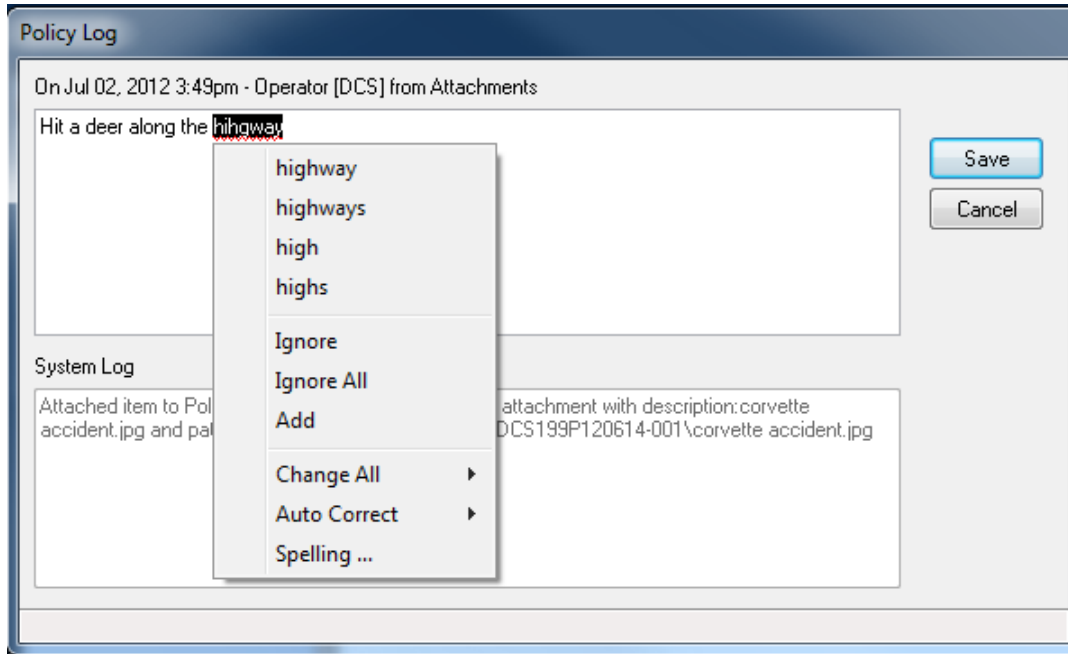
Client Explorer and Policy Express

Newton window title bar now displays the full Agency Name, not the first 25 characters.

Policy Express default open view now shows the DL risk information if available.

Default description column width for Emails, Attachments, and Policy Activity expanded.

Client Notes and Policy Activity items now include spell check.



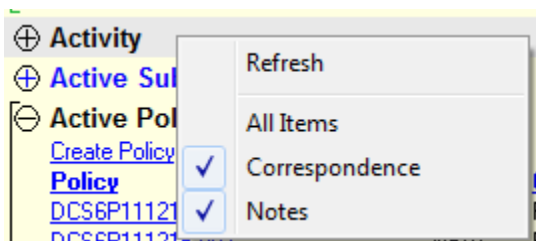
Retail invoices will perform a print preview when printed from express billing. The print preview window allows the user to change the selected printer, or export the invoice as a .PDF file. Once exported, the .PDF file can be included in an outgoing email through drag and drop.

Client Profile User Code 1, User Code 2, User Code 3, Source of Business, and Territory are now set with a drop down box. For existing clients, the initial drop down boxes will be configured based on prior data entry. There is a profile window to edit existing drop down options, create new options, or delete the options. (Edit Codes or Profiles – Other – User Codes)

Basic Information	Details	1099 Information	Contacts	Insureds
Client is Active?	Yes	Gets Late Charges?	Yes	
A/R Type	Open Item	A/R Forms	Both Statements and Invoices	
Territory		User Codes	A: A User Code	
Source of Business	SQB: Source of Business		B: B User Code	
License Number	SQB: Source of Business		C: C User Code	

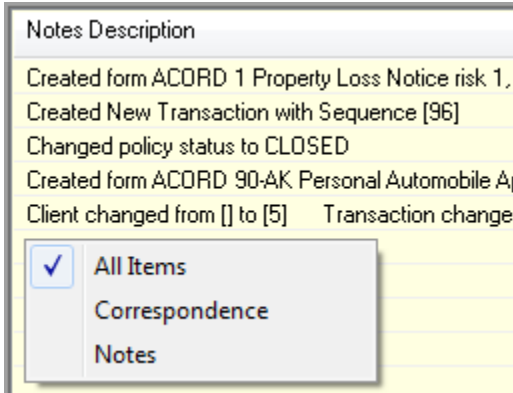
Policy Activity Filters

The basic tab Activity band now defaults to only showing Correspondence, including emails and attachments, and Policy Notes. All system activity can be displayed through the right click menu shown below.



The Activity search on the basic tab will still search all activity automatically. To clear the activity search or to reset the filters back to their default settings, select Clear from the basic tab of the client.

Policy Express -> View Existing Items -> Policy Activity has the same default filters, and right click menu options.

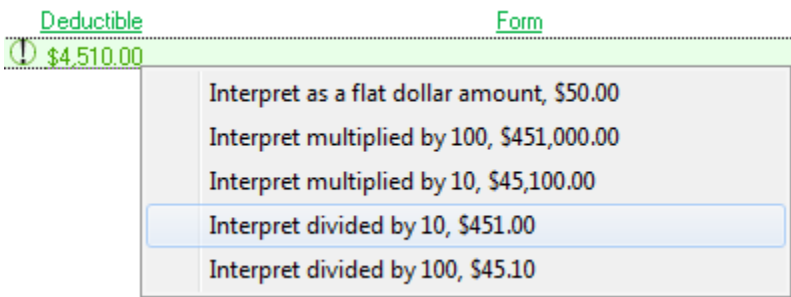


DL Risk Tab

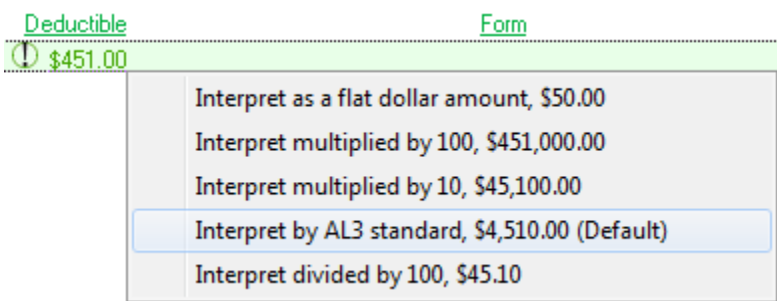
Risk downloads for homeowner policies contain deductibles which can be represented by either a raw number, or as a percent. There is a standard for how this value should be formatted, but not all companies follow the AL3 standard correctly.

We have created a user interface to manually correct individual items sent incorrectly from the company. This can be done directly from the DL Risk tab after a download has been processed, or prior to processing from the download pending tab.

Left Click on the deductible to access the menu.



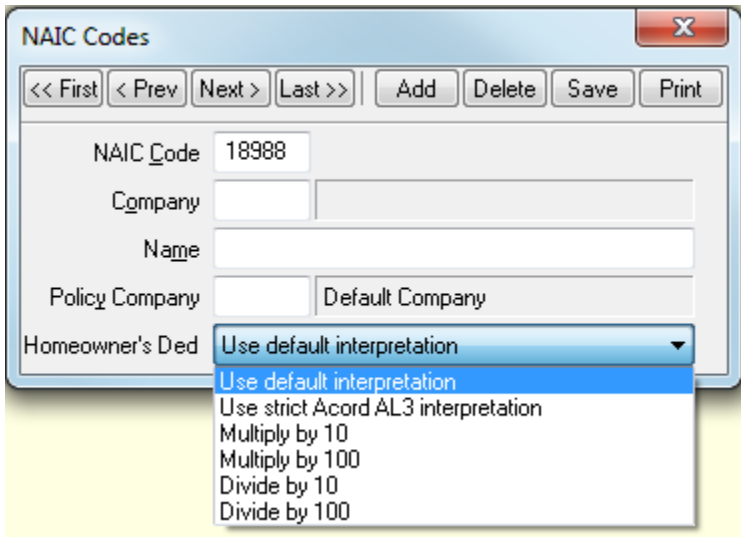
The homeowner deductible will show a visible marker (!) if the deductible is sent as a percent, or if a deductible was altered from a flat value, to a percent value.



If a deductible has been altered, the original value will be displayed as a menu option with the additional label of (Default).

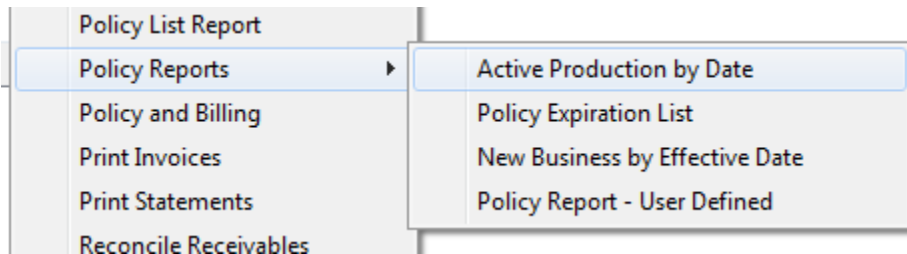
The updated deductible amount will be shown on the DL Risk tab, any new ACORD 80 Homeowner Application, Policy Express, and from the Download Alert Suspense Item Quick Jump menu.

You can also set a default behavior for future transactions specific to an NAIC code (Company).

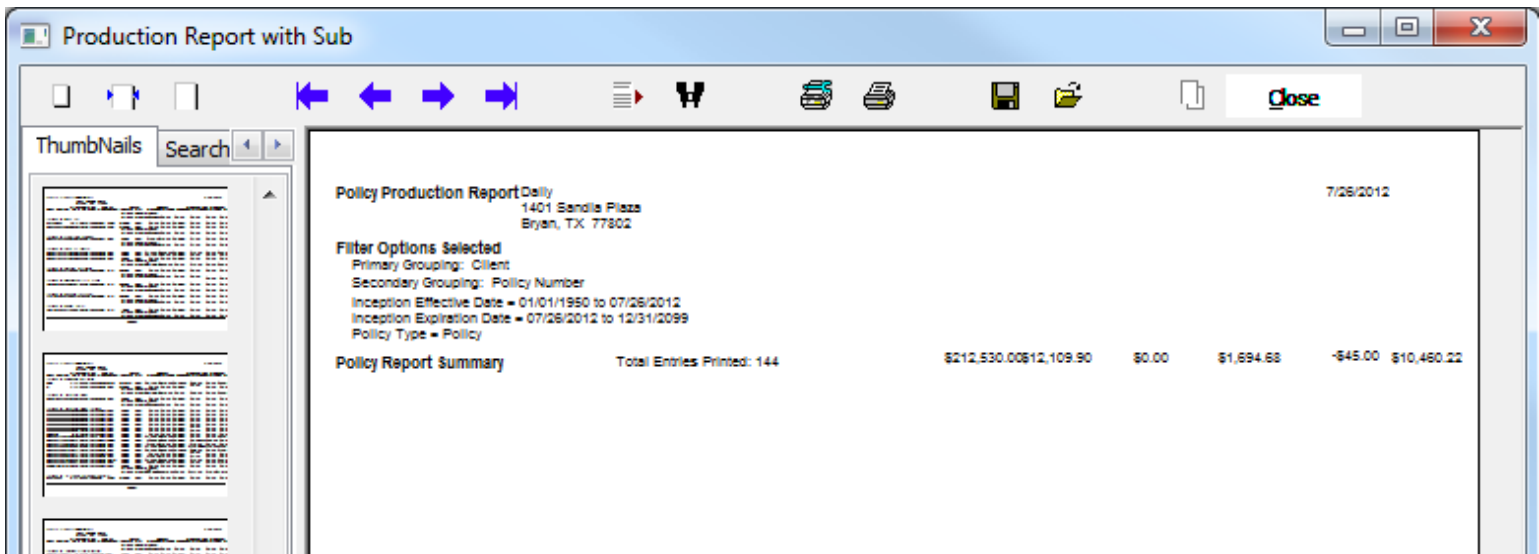


Policy Report

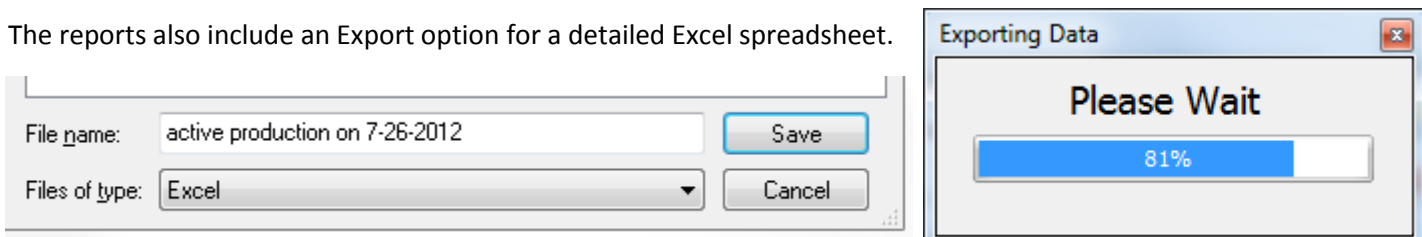
The AR -> Policy Report options have been simplified to provide three commonly used reports with easier to use options, and the user defined policy report including report templates as the fourth option. The user defined report retains all previously available filter options for specialized reporting needs.



Each report includes a Preview option for a printable report.



The reports also include an Export option for a detailed Excel spreadsheet.



- Active Production by Date:

Active Production by Date will display premium totals for active policies on the day specified.

Each policy will only be listed once showing the most recent sequence including the total invoice premium displayed.

The Export will also include the estimated annualized premium.

- Policy Expiration List

Policy Expiration List will display each individual policy transaction with an expiration date in the date range specified.

Since the policy list report will only report on the last transaction of a policy, the policy report provides a different method for generating an expiration list.

The policy report will show every transaction even if it has already been renewed.

- New Business by Effective Date

New Business by Effective date will list only new business transactions and any endorsements on that new business for the period specified.

This is a very beneficial tool that can be used to compare new business production volume by producer.

- Policy Report – User Defined

Express Billing

The buttons at the top have been updated. The text description for each button is now automatically visible.

The screen is now wider, and the invoice line description is visible without viewing the line details.

The screen is now taller allowing enough space for all seven invoice lines without the need to scroll vertically.

The screenshot displays the Express Billing application window for policy DCS1P120716-001. The interface includes a menu bar with options like Policy, Attachments, Other, Payments, and Administration. Below the menu is a toolbar with icons for New, Save, Search, Delete, Ext Pol, Pol Log, Claims, Diary, Forms, Memo, Image, Print, History, and Exit. The main area is divided into several sections: Client Info, Policy Info, Invoice Header, Cash Details, and Invoice Lines. The Client Info section shows Client 1, Sample Test Client, and No Named Insured. The Policy Info section shows Policy DCS1P120716-001, Trans NEW, Class PAL, Cmp AET, Prd DCS, Dpt PL, Effective 08/01/2012 to 08/01/2013, Cmp Stat Approved, and Pol Type Policy. The Invoice Header section shows Invoice 000080, Bill Method Agency, Inv Date 08/02/2012, and GL 08/02/2012. The Cash Details section shows Payment checkbox, Receipt # *AUTO*, Date 08/02/2012, Bank 102 Premium Trust Account, Chk No, Amount \$0.00, and Description. The Invoice Lines section is a table with 7 rows, each representing an invoice line with columns for Line, Amount, Cls, Trm, Cmp, Agy%, Prd, Prd%, SubPrd, SubPrd%, and Description. The bottom status bar shows Entered on 07/16/2012, P: \$28.00, N: \$0.00, CI: \$28.00, and GT: \$28.00.

Line	Amount	Cls	Trm	Cmp	Agy%	Prd	Prd%	SubPrd	SubPrd%	Description
1	\$1.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	A
2	\$2.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	B
3	\$3.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	C
4	\$4.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	D
5	\$5.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	E
6	\$6.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	F
7	\$7.00	PAL	NEW	AET	0.000	DCS	12.000		0.000	G

Other

Changed the Named Insured Risk Location screen prompts to be clearer on delete. (MGA/BROKER)

Corrected an error when searching for claims by Claimant Name if the named contained a ' (Example: John's Construction).

Policy view user ID field length expanded.

Adjustment Wizard in Express Billing will no longer change the policy producer to the operator.

County Code on the client basic tab will now reference the zipcode + 4 digit extension.

Make policy screen in download now includes a view download button to show the full details of the policy prior to processing.

Make Policy [X]

Policy: 9898989813

Insured: Test Name 123I

Transaction: END | Endorsement

Class: FIR | Dwelling Fire

Company: AET | Aetna Insurance Co.

Producer: DCS | DCS Customer Support

Department: PL | Personal Lines

Effect Date: 11/15/2002

Expire Date: 03/23/2003

Policy Type: Policy

View Download | OK | Cancel



AL3 Download - 1174.1

Policy 9898989813 for Test Name 123I, Policy Change effective 11/15/2002

Policy Number: 9898989813
 Policy Term: 03/23/2002 to 03/23/2003
 Line Of Business: DFIRE
 NAIC: 18988
 Current Term Amount: \$315.00
 Net Change Amount: \$0.00

>> More Transaction Details

⊕ First Named Insured: Test Name 123I

⊖ Coverage

⊕ Forms

⊕ Remarks

⊖ Location 0001 1114 Union St, Port Huron

>> Location Details

Home	Built 2000	Construction F						
⊕ Details								
Coverage	Effective	Expires	Full Term	Net Change	Limit 1	Deductible	Form	
NHDIS								⊕
MAXCR			\$-91.00	\$0.00				⊕
DWELL			\$368.00	\$0.00	\$85,000.00	\$500.00		⊕
DD			\$0.00	\$0.00	\$2,000.00			⊕