



open gi

**Core 18 Phase 1**

**August 2022**

# Versions:

- Core 18.00A/0
- BACS 6.00A
- MLS 5.94
- Regulation Module 9.00A
- System Extension X2.89A/76
- Premium Finance 6.00A
- Integration Products



# Core 18

The Core 18 releases will focus on groups of enhancements around certain product features as well as ad hoc enhancements.

This release looks at our purging functionality.

In addition to these features, we will also be releasing additional purging features in EDI 6.00L.

# Core 18

Feature	Enhancement
Addition of new fields to the Claim Detail Purge and Purge History Modules Menus.	New fields have been added to 2 of the purging menus.
Delete risk level modules in bulk.	Delete module feature enhanced to delete a range of modules in Prospect and Core.
Prospect Background Purge to include Open GI commercial policies.	Prospect Background Purge has been enhanced to include these policy types.
Amend “mark for deletion” logic.	If a policy is marked for deletion and has diaries that require no further action, they will be removed via the background purges.
Executive replacement.	Executives can be replaced on the policy, prospect and outstanding diary entries.
Ability to set alert theme to flag policy status.	Change the theme colour using the first delay calc in Core and Prospect.

# Core 18

Feature	Requirement	Enhancement
Change sequence of policies in Add-on Marketplace.	To be able to amend the sequence of policies displayed by insurer and premium.	Added a choice of default sort order for the Add-on Marketplace list.
Finance offer at renewal option to include endorsements and add-ons.	Require a mechanism for obtaining an updated finance offer for a renewal where the amount to be finance has changed.	Annual policy renewal finance offer will be updated to include any selected add-ons and endorsements applying on the renewal date.
Document name validation in Calculations.		Added a setting which prevents searching for partial document names in calcs.

# Core 18

## Claim Detail Purge

Date of Loss Before

**Terminated Policies Only**

Delete up to Date

Insurer

Policy Type

Claim Status

Print purge report

## Purge History Modules

Delete history modules dated before

**Terminated Policies Only**

Delete up to Date

Only for Client/Policy

All Modules

Print Only

### Selected Modules

- 
- 
- 
- 
- 
- 
- 
- 
- 
-

# Core 18

**Risk List**

Previous Next Client Page Policy Page

Add Insert Transfer Order **Delete** Copy Merge Display Print Controls Reorder Show All Undo Range Deletion

**Risk List**

Policy Ref TARA01 PC10 Mr I E Example

**Risk Details Sequence and Types**

Module	Frame	Print	Schedule	History	Key Data
10	CF				
20	PC				
30	ERM				
40	ERM				
50	ERM				
60	BEN				
70	EXS				
80	NPI				
90	NSB				
210	BGS				
590	BGF				
600	DP				
610	BFD				
H10	DPU				

Hosted List

**Delete Module**

Delete Single Module Number

Delete from Module  to Module

Delete Module Range

OK Cancel

# Core 18

Executive Maintenance Menu Exit

Executive Amendment

Executive Replacement

Executive Replacement

OK

Cancel

Executive Code to be Replaced

Replacement Executive Code

To Be Replaced In

Replace Exec1

Replace Exec2

Replace Exec3

Replace In Diary

Print a report of changes?



# Core 18

Add-on Marketplace Control **Exit**

Update Cancel Print

### Branch

Branch	<input type="text" value="0"/>
Back Office Timeout in Seconds	<input type="text" value="44"/>
Sort by Inscor/Premium	<input type="text" value=""/>

### Quoted Policies

Enable New Quoted Add-on Policies?	<input type="text" value="Yes"/>
Print Documents at Offer Stage?	<input type="text" value="No"/>
Default Printer	<input type="text" value="spq"/>
Prompted?	<input type="text" value="No"/>
Print on Both Sides (Duplex)?	<input type="text" value="No"/>

### Live Policies

Enable Add-ons for MTAs?	<input type="text" value="Yes"/>
Default Printer	<input type="text" value="spq"/>
Prompted?	<input type="text" value="No"/>
Print on Both Sides (Duplex)?	<input type="text" value="No"/>
Charge Code for Overrides	<input type="text" value=""/>
Payment Processing	<input type="text" value="Consolidate Debt"/>
No. of Days Before Renewal Effective Date to Offer Renewal	<input type="text" value="30"/>

# Core 18

Select Add-ons Prospect Screen Operator Trail Online Diary

OpenAttach Policy Page

Exit List

Provider	Description	Key Features	Premium	Commission	Fee	Total Premium
Axa Assistance	UK Roadside Assistance and Local Recovery	Road side (more than 1 mile from home) assistance Covers:a m	19.60	15.00		36.40
Axa Assistance	European Recovery incl. Homestart and Mi...	Nationwide recovery in the UK including Homestart, Messaging	46.14	30.00		79.74
BD Elite	PLUS LEI & 14 Days Small Car Hire	BDElite PLUS delivers best in class Motor Claims Management,				
DAS	Demo AddOn Comm Override	Demo AddOn Comm Override	50.00			50.00
Independant	mta test	MTA TEST	25.00			25.00
Insure 4 Excess	Motor Excess Insurance up to £250	Excess on your motor insurance policy up to your annual cove	36.98			36.98
Insure 4 Excess	Motor Excess Insurance up to £750	Excess on your motor insurance policy up to your annual cove	47.54			47.54
Nice1	Replacement Vehicle	We will arrange and pay for a hire vehicle if your vehicle	28.00			28.00
NOVA	Motor Excess Protection (£200)	Motor Excess Protection. A must as an add-on, Different leve	18.48			18.48
NOVA	Motor Excess Protection (£350)	Motor Excess Protection. A must as an add-on, Different leve	21.84			21.84
NOVA	Motor Excess Protection (£500)	Motor Excess Protection. A must as an add-on, Different leve	24.64			24.64
Open Insurance	Roadside Assist	New! Comprehensive cover with Home Service as standard! Main	36.74			36.74
Open Insurance	Roadside Assist Plus	New! Comprehensive cover with Home Service as standard! Main	40.77			40.77

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