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Core 18 Phase 2

November 2022

Your upcoming new Core features

- Tripos password length increase.
- Document Archive in Purge.
- Open Document Centre and Open Print Manager email SMTP authentication.
- System lock message.
- Mini Fleet usability improvements.
- Suspended executives.
- CreditLine Plus receipt to be added to client banner in Open Print Manager/Open Document Centre.
- Automatic insurer reconciliation enhancements.
- Capturing customer vulnerabilities.

Core 18 Phase 2

Feature	
Tripos password length Increase	We're increasing the password length to 60 characters for Microsoft Windows Active Directory customers.
Document Archive in Purge	This will soon be included in the Core and Prospect Background Purge processes.
Email SMTP authentication	<p>Emails from our applications will become more secure and widely supported by modern software such as Office 365.</p> <p>This change brings our software in line with industry standards.</p>



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System lock messages



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Mini Fleet usability improvements

Mini Fleet usability improvements

We're replacing some dropdowns with radio buttons.

The image shows a screenshot of a web form titled "Cover Details". The form has two main sections. The first section is labeled "Type of Cover" and contains three radio button options: "Comprehensive" (which is selected and highlighted in blue), "Laid Up Fire And Theft", and "Laid Up Fire Theft And Accidental Damage". A question mark icon is visible to the right of the "Comprehensive" option. The second section is labeled "Please select the Vehicle Type" and contains five radio button options: "Commercial Car", "Heavy Commercial Vehicle", "Light Commercial Vehicle", "Other Vehicle Type", and "Special Types/Agricultural".

Cover Details

! Type of Cover

- Comprehensive ?
- Laid Up Fire And Theft
- Laid Up Fire Theft And Accidental Damage

! Please select the Vehicle Type

- Commercial Car
- Heavy Commercial Vehicle
- Light Commercial Vehicle
- Other Vehicle Type
- Special Types/Agricultural

Mini Fleet usability improvements

We're simplifying the adding/editing of groups, for example vehicles.



Mini Fleet usability improvements

A 'Preview Experience Form' will also be available.

Period Details

[Preview Experience Form](#)

Claim Period 1 - 24/10/2021 - 24/10/2022

[View/Edit Details](#)

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Preview Motor Fleet Experience Form

Insured's Name: Effective Date:

Trade: Policy Number:

Address:

Period	Vehicle Years <small>not number of vehicles</small>	Total Number of Claims Reported <small>Including outstanding claims</small>	Claims Paid <small>Including payments on outstanding claims</small>			Claims Outstanding			Total Paid and Outstanding	Total Position at Last Year		
			A.D.	F.&T.	T.P.	A.D.	F.&T.	T.P.		Vehicle Years	No. of Claims	Paid and Outstanding
2021 / 2022	2.00	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00			
Calculated to										24 October 2022		

Period	Cover in Period <small>(Including Excesses, amount and type, if applicable)</small>	Event date of last claim included
2021 / 2022	TPRRO £100 AD, £0 F, £0 T & £0 WS	Date: 24/10/2022



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Suspend executives

Suspended executives

The Ability to suspend executives and remove them from the active list.

The screenshot shows a web application window titled "open gi" with a subtitle "Open-I SESSION One Branch: 0". The interface includes a navigation bar with "Executive Amendment" and "EXIT" buttons, and "Previous" and "Next" buttons. Below this is a "Update mode entered" section with "OK" and "Cancel" buttons. The main form area contains several input fields: "Code" (0012), "Name" (Mrs S Simpson), "Extended Name" (Mrs S Simpson), "Job title", "Extended Job title", "Email", "Department", "Extended department", "Home Tel. No.", "Work Tel. No.", and "Mobile Tel. No.". The "Status" dropdown menu is open, showing "Active" and "Suspended" options. The "Notes" field is also visible.

Code	0012
Name	Mrs S Simpson
Extended Name	Mrs S Simpson
Job title	
Extended Job title	
Email	
Department	
Extended department	
Home Tel. No.	
Work Tel. No.	
Mobile Tel. No.	
Status	Suspended
Notes	



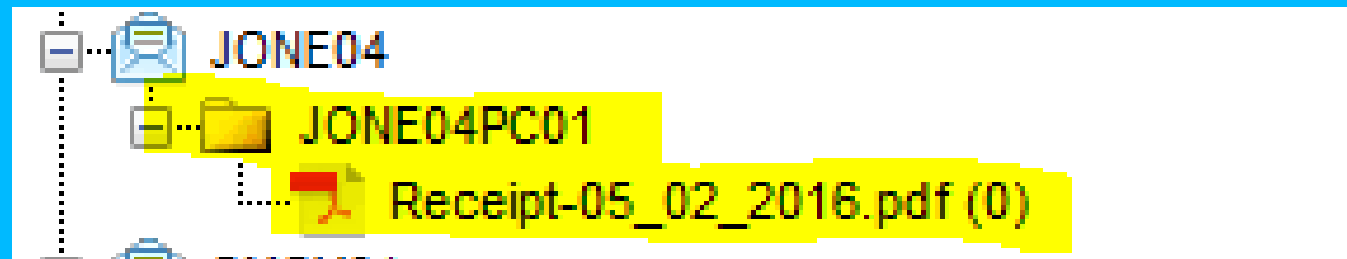
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CreditLine Plus receipt

CreditLine Plus receipt

- A new setting will allow you to allocate CreditLine Plus receipts to a client, when in a queue (Open Print Manager or Open Document Centre).
- This setting is located in:
 - Creditline Menu->Credit Line Maintenance->Broker Control Information.

	Printer Id	New Page	Copies	Include Banner
Automatic Receipt	<input type="text" value="cpq:"/>	No <input type="button" value="v"/>	<input type="text" value="1"/>	<input type="button" value="Yes"/> <input type="button" value="v"/>
Requested Receipt	<input type="text" value="CPQ:"/>	No <input type="button" value="v"/>	<input type="text" value="1"/>	





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Automatic insurer
reconciliation enhancements

Automatic insurer reconciliation enhancements

- You'll soon be able to restrict the "write-off" of premiums, to those within default tolerances.
- Renewal transactions will behave as if it's a New Business transaction for reconciliation purposes only (optional).
- You can have full reconciliation of transactions for invoiced clients where the difference is within the default tolerances (optional).
- You'll be able to enter Default Tolerance for the Effective Date difference.

Previous options

Default Tolerance Levels

Gross Premiums

Net Premiums

Tolerance Levels for Specified Policy Type

Gross Premiums

Gross Premiums

Gross Premiums

Gross Premiums

Gross Premiums

Net Premiums

Net Premiums

Net Premiums

Net Premiums

Net Premiums

Write-off Remaining Debt

Charge Code for Write-off

Note that Gross Premium Tolerances DO NOT apply to Invoice Clients.

Updated options

Default Tolerance Levels

Gross Premiums (+/-)

Net Premiums (+/-)

Days (+/-)

Tolerance Levels for Specified Policy Type

Gross Premiums

Gross Premiums

Gross Premiums

Gross Premiums

Gross Premiums

Net Premiums

Net Premiums

Net Premiums

Net Premiums

Net Premiums

Write-off all Remaining Debt

Write-off remaining debt if within tolerance

Charge Code for Write-off

Apply Tolerance to Invoice Clients

Print Invoice



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Capturing customer vulnerabilities

Capturing customer vulnerabilities

You'll be able to create and manage your own client vulnerabilities list.

A new VIP field will also be added to the Client screen.

The image shows a software interface with two overlapping windows. The top window is titled 'VIP' and contains a form with the following fields: 'VIP' (value: 001), 'Vulnerability' (value: Vulnerability 1), 'Description' (text area with placeholder 'This is where the description would be'), and 'Status' (value: Active). The bottom window is titled 'Client Ref.' and contains a form with various fields. A purple circle highlights a 'VIP' field in the 'Customer Classification' section of this form. The 'VIP' field is a dropdown menu with a yellow background and a green arrow. Other fields in the 'Client Ref.' form include: Name & Address, Post Code, Contact Pref, Phone 1, Phone 2, E-mail, Forenames, Salutation, O/S Diary, Occupation, Date of Birth, Marital Status, No of Children, GWP, Sex, Agent, Executive, Exec2, Credit Rating, Mailshot Code, Prospect Code, SMS Opt Out, Invoice, Statement, Statement Bal, Personal Data Use Agreement, 3rd Party Data Use Agreement, and Fact Find.



Questions?

Contact our Customer Support team

or

Send your questions to our dedicated Facebook group:

<https://www.facebook.com/groups/ogicorecommunity>

All Core 18 enhancements and resources can be found at:

<https://opengi.co.uk/core-18-upgrade/>

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