

## **SWOUGAS Meeting Minutes-January 26, 2010**

**Geoff Dunn**, the new SWOUGAS president introduced himself and welcomed everyone. He also introduced Leslie LaCroix (former president) and Dianna George (former president) and Robin Monson (Secretary) and Sue Clark (Treasurer). Geoff reminded everyone to make sure they rsvp. to Sue Gibson for future meetings on the **Friday prior to the Tuesday meeting**.

Geoff also asked if anyone was interested in becoming the VP or Secretary of the group?

### **Tim Sheridan and Vince Conry from Applied Systems update: 10.4, Epic 4.0 and WARP.**

Version 10.4 is now in beta testing in Canada and was to be released in February. Since this meeting Applied Systems has asked interested brokers to participate in the 10.4 Release Candidate.

#### **New Features with 10.4:**

Front end scanning.

Barcodes define individual's mailbox.

New CSIO Home and Auto forms.

CSIO payment form print with application.

Discount fields have been revised so discounts will download correctly.

Employee Benefits program working in U.S.

Improved scanning capabilities from remote offices.

Drag and drop emails, can do in bulk also.

#### **WARP:**

Aviva has full inquiry now.

North Waterloo and Jevco are in the implementation phase.

Portage is evaluating.

Pembridge is in talks with Applied.

Wawanesa-not looking at it yet.

There is a chart on the Applied website listing who has WARP capabilities.

Dianna asked about ability to have drop down after butterfly to choose broker code as they have multiple and can only do one now. Tim and Vince were to get back to her.

#### **EPIC:**

Canadian content is now in EPIC.

Version 6 will be Canadian version.

Postal code look up in Ontario home and auto applications.

Quick links to get information, i.e. policy balance.

Custom forms.

Import/Export risks to and from Policies/Certificates.

Notes for EPIC 4 are on the Applied Portal.

'Get your data ready' documents are on the portal.

Must be on 10.4 (bridge to EPIC).

Consistency is key, accounting in balance, archiving and purging old data.

Workstation configuration:

Pentium 4 or better,

2.0 ghz,

500 mb free disk space,

256 mb memory,

128 graphic memory,

Windows XP or Vista business edition, Windows 7-version 2.

Sequel based-need licence in-house.

### **Leslie LaCroix Presentation on Retention Reporting**

Instructions and sample have been distributed by email. Please advise if you have not received.

Leslie went through process of this report using the book of business report information and reviewed using Pivot Tables.

The MACRO for this report was developed in US.

It's a fantastic tool for brokers!

### **Oliver Morin from Compu-Quote**

Oliver is a sales representative for Compu-Quote. He gave an overview of the new Motorcycle, Snowmobile, Miscellaneous Vehicle rater.

Training sessions have begun in Ontario. He was not sure of release date, probably April 2010.

Jevco is the first carrier for Motorcycle.

Axa rates will be on for Miscellaneous vehicles.

York rates for snowmobiles will be on.

There are new tabs for Miscellaneous Vehicles and 'M' licence details for Drivers. Also new OPCF option under Coverage. Compu-quote does not verify the VIN number yet.

Use the 'TAB' key to make sure no fields are missed.

Oliver did discuss option of printing Liability slips on Compu-Quote however you would be unable to prove that one was printed and the printing is not saved in Compu-quote.

Leslie said they had recently been to court and needed to prove date/time a liability slip was printed and could do so on TAM.

There will be ITV changes in April 2010, a new calculation engine. Most changes will be behind the scenes. IBAC is looking at a simplified, industry standard version. Compu-Quote would like to offer integration with RCT, RSMeans also, currently integration is just with ITV.

The question was asked if we could have single sign on for the companies offering a credit discount instead of having to enter different ID's and passwords. Oliver said they are looking into it.

**Next Meeting is scheduled for April 27, 2010, however TASCnet is having the annual 2-day Education Conference. Details to follow.**