



## 23.7.1 Client Product Release

### WHAT'S NEW IN THIS RELEASE

Feature	QL
New Submit button for Proposal Import and Edit Process	✓
New Laser Status Field	✓
Update to OCR Import Process	✓
Quote Manager: Laser Status Indicator	✓

### OVERVIEW

#### Version 7.1

Ringmaster is pleased to share some updates within Quote-LinQ for the entry of proposal information within a Quote. There are three features that we will cover with the product release for July 13, 2023. Below we will provide an overview with details on the functionality and visual changes associated with these new features.

- 1. Submit button available with the import and edit of the proposal.**
  - a. Once you have imported or edited a proposal you can select to 'Submit' it in Step 5 of the stepper process.
  - b. If you are not ready to submit the proposal you can 'Save' the proposal without a proposal status and without submitting it.
  - c. When you are ready to submit the proposal you will need to provide a proposal status and a Laser status.
  
- 2. OCR Proposal Import will default the template selection if there is only one template.**
  - a. If you only have 1 OCR template it will default so you will not have to select it. The template will now display both the template name and description.
  
- 3. Quote Manager: Laser Status Indicator**
  - a. A new indicator will display for Laser Status for each quote.

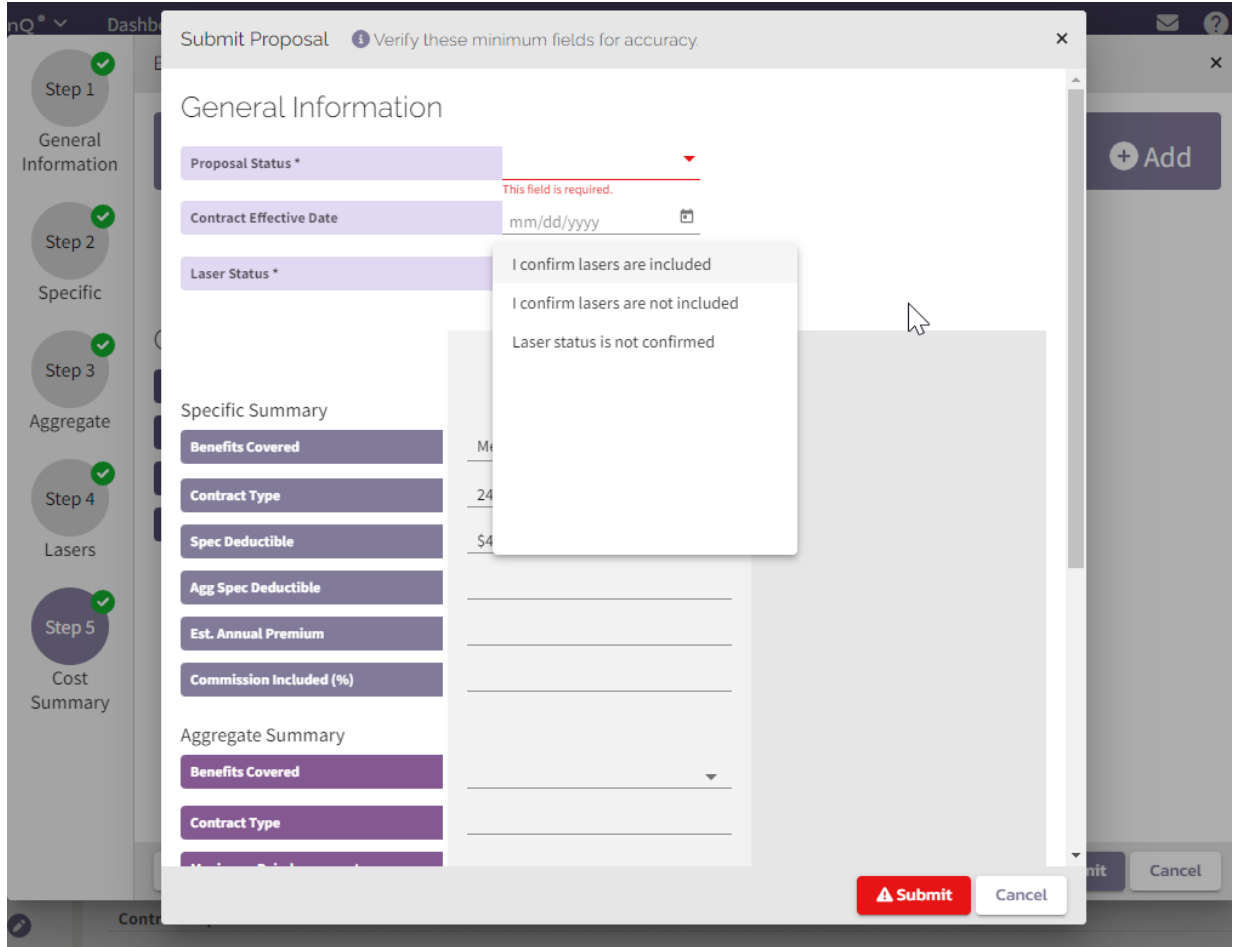
#### Proposal Import/Edit Process

#### Updates to Step 5 of the Stepper Process

Once you have manually entered the proposal or imported it through OCR and reach Step 5 you will see a new 'Submit' button.

The screenshot shows a web application window titled "Edit Proposal" with a subtitle "Import or Edit your proposal to continue." and a link for "Import Proposal". The window is divided into a sidebar on the left and a main content area. The sidebar contains five steps, each with a green checkmark: Step 1 (General Information), Step 2 (Specific), Step 3 (Aggregate), Step 4 (Lasers), and Step 5 (Cost Summary). The main content area has a header "Step 5: Confirm Estimated Costs" with an "+ Add" button. Below this is a table with one row labeled "Option 1" and icons for copy and delete. To the left of the table is a "Cost Summary" section with four rows: "Est. Annual Fixed Cost", "Est. Spec Annual Variable Costs", "Est. Agg Annual Variable Costs", and "Est. Maximum Annual Liability", each with a corresponding input field. At the bottom of the window is a navigation bar with "Back", "Submit", "Save", and "Cancel" buttons.

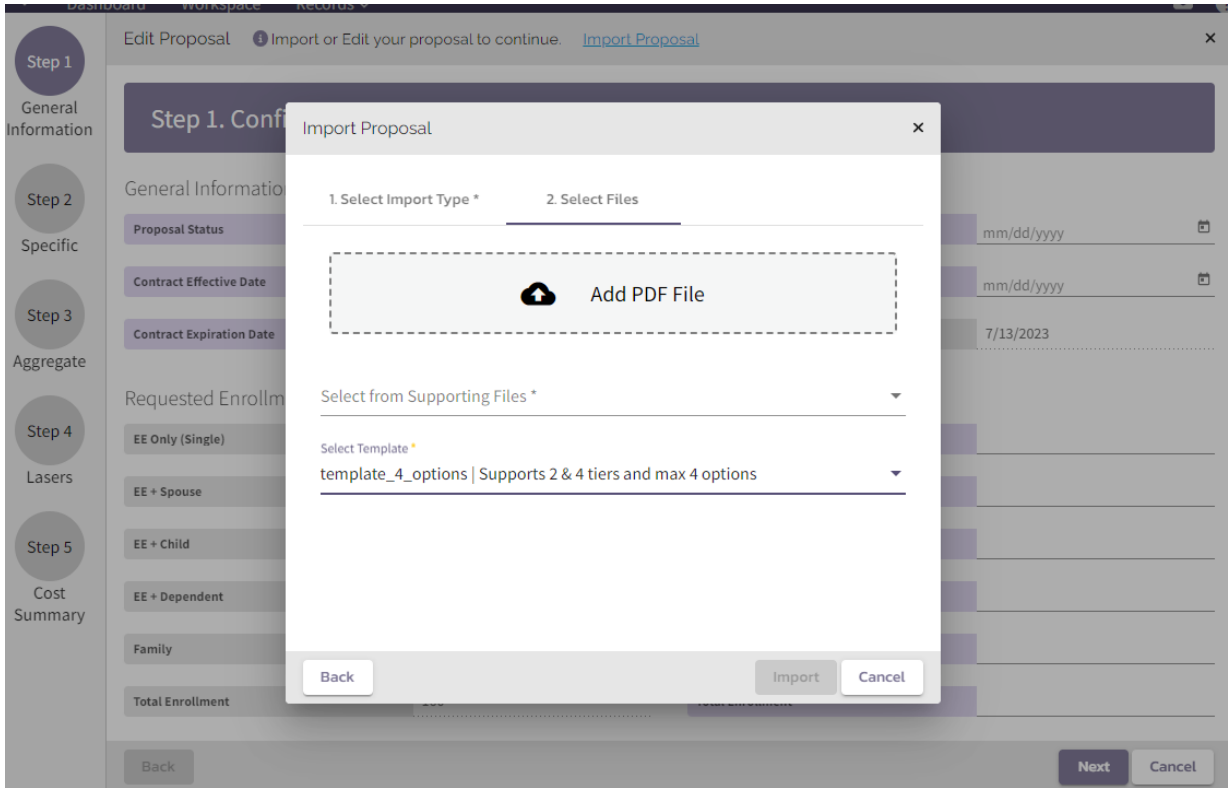
1. If you select 'Save' you are able to save the proposal without a proposal status and without the new Laser status. Once the proposal is in 'Submitted' stage the 'Save' button will not be available.
2. When you select 'Submit' the 2 status fields will be required.



3. Laser statuses are
  - a. I confirm lasers are included (automatically selected if you entered lasers in the stepper).
  - b. I confirm Lasers are not included
  - c. Laser status is not confirmed
  
4. Laser status settings if proposal submitted through ESL integration.
  - a. 'I confirm lasers are included' will automatically be selected if lasers were included in the ESL data.
  - b. 'Laser status is not confirmed' will automatically be selected if lasers were not included in the ESL data.

### **Proposal Import using OCR**

When you select to 'Import Proposal' the Template selection will default if you only have 1 template. It will also show the template description next to the name.



## Producer View

### New Laser Status Indicator

1. A new laser status indicator has been added to each accordion after the audit icon.
2. If the proposal has not been submitted this icon will be gray without a hover
3. If the proposal has been submitted
  - a. If the laser status = “I confirm lasers are not included”, this icon will be gray and upon hover it will display “Lasers not included”
  - b. If the laser status = “I confirm lasers are included”, this icon will be yellow and upon hover it will display “Lasers included”
  - c. If the laser status = “Laser status is not confirmed”, this icon will be red and upon hover it will display “Laser status not confirmed”

Stage: [Sent to Market](#)

Type: New Prospect

Create Date: 7/11/2023

Effective Date: 1/1/2024

Quote Due Date: 12/11/2023

Tags: TPA1 New Prospects

**Quote Manager**

Cover Sheet

Supporting Files























Admin Fees

Census

Claims History

Flagged Members

Action ▾

<input type="checkbox"/>	 Carrier 1	100%	<b>Carrier 1</b> <a href="#">View Profile</a>	Submitted <i>Illustrative</i>	     	<b>Lasers included</b>
<input type="checkbox"/>	 Carrier 2	100%	<b>Carrier 2</b> <a href="#">View Profile</a>	Submitted <i>Illustrative</i>	     	<b>Laser status not confirmed</b>
<input type="checkbox"/>	 MGU 3	100%	<b>MGU 3</b> <a href="#">View Profile</a>	Underwriting	     	<b>Lasers not included</b>
<input type="checkbox"/>	 Carrier 3	100%	<b>Carrier 3</b> <a href="#">View Profile</a>	New	