

Client Product Release October 2023 - 10.1

WHAT'S NEW IN THIS RELEASE

Feature	QL	SL
Record Display - Retaining Column View	✓	✓
Record Display - Retaining Search or Filter View	✓	
Adding the ability to change the "Request/RFP Type"	✓	
Make Effective Date a default Column in Records/RFP or Request	✓	

OVERVIEW

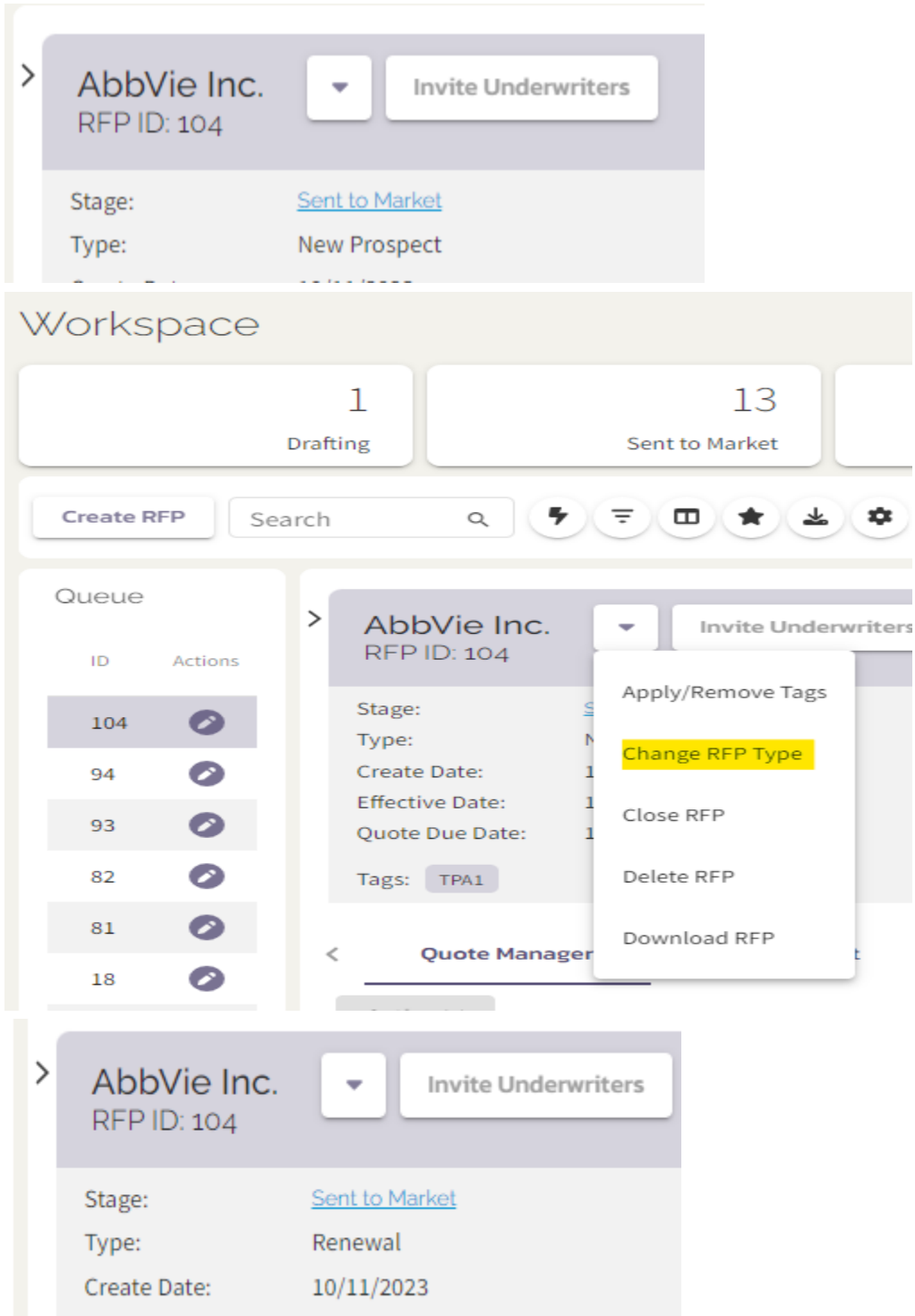
Ringmaster is pleased to provide you with an overview of the changes that will be introduced into Quote-LinQ during the next release.

I. Record Display View

- A. In all record sets when you make a change to your view within this record set, the view or updates enabled by adding columns, creating or executing a saved filter or using the search tool will be retained during **this "browser session"** when you navigate away from this screen, and then back to this same record set.
 1. This clip will provide an example of the experience when adding fields to your selected record set and navigating away from this screen. [Columns Added](#)
 2. This clip provides an example of the experience when you execute a saved filter. [Saved Filters](#)
 3. This clip provides an example of using the search feature. Note in this example there were several other screens accessed during this view, but when returned to the same records where the view was originally changed, the original "search" was retained. Removing data from the search does open up the view, but continues to retain the columns that were added to the view. [Search Feature](#)

II. Changing the Request Type

- A. You will now have the ability to "change" the request type if it was inadvertently created as a New Prospect, and should have been marketed as "Existing Business".
- B. TPA - Changing from New Prospect to Existing Business. After selecting the item displayed below within the header drop down menu, the RFP type will automatically change to Renewal.
 1. **NOTE: This change will create a notification to the carrier for "cover sheet" change. You may want to ensure that you add a note to the cover sheet OR send a message to all carriers when you make this type of change.**



The screenshot displays the Ringmaster RFP management interface. At the top, a card for 'AbbVie Inc. RFP ID: 104' shows its current stage as 'Sent to Market' and type as 'New Prospect'. Below this is a 'Workspace' section with two summary boxes: 'Drafting' (1) and 'Sent to Market' (13). A toolbar includes a 'Create RFP' button, a search field, and several utility icons. On the left, a 'Queue' table lists RFPs with their IDs and edit actions.

ID	Actions
104	
94	
93	
82	
81	
18	

The main view shows the details for RFP ID 104, including its stage, type, and dates. A context menu is open over the 'Invite Underwriters' button, with the 'Change RFP Type' option highlighted in yellow. Other menu items include 'Apply/Remove Tags', 'Close RFP', 'Delete RFP', and 'Download RFP'.

Below the main view, another card for 'AbbVie Inc. RFP ID: 104' is shown, but with a different type: 'Renewal'. Its stage is still 'Sent to Market' and its create date is '10/11/2023'.

A. Broker - Change will result in a change from New Prospect to Incumbent Renewal. (workflow and actions steps are the same as above)

II. Make RFP/Request Effective Date a default Column in Records/RFP or Request

TPA View

RFPs

Action ▾ Search 🔍 [Filter] [Grid] [Star] [Download] [Settings]

<input type="checkbox"/>	ID	Name	Group	Effective Date
<input type="checkbox"/>	94	Stop Loss 2018 Dunder Mifflin Paper Company, Inc. Incumbent Renewal	Dunder Mifflin Paper Company, Inc.	1/1/2024

Broker View

Requests

Action ▾ Search 🔍 [Filter] [Grid] [Star] [Download] [Settings]

<input type="checkbox"/>	ID	Name	Group	Effective Date	Quote Due Date	Responders
<input type="checkbox"/>	6823	Hippo Ear Wax Inc. (2024)	Hippo Ear Wax Inc.	1/1/2024	9/22/2023	0