



TINUBU SURETY FOR CARRIERS

Version 7.0.225.x

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Features

ADMIN-20 – Client ImageRight - Additional Data in Page Description Field

- Updated the client's ImageRight to add the Bond Effective Date after the name of the bond action name in the description field.

ADMIN-81 – CyberSource Reference Code added to Electronic Payment Logs

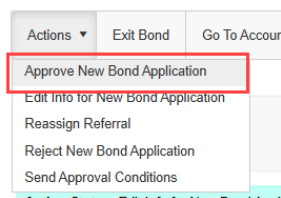
- When using CyberSource as the payment processor and ACH is the billing type selected, the response code populates into the Core.ElectronicPaymentLogs table. This matches the functionality that already exists for the Credit Card billing type.

BOND-10 – Authorization to Approve Referrals if the User is Allowed for Sub-Status

- When the UseUnderwritingAuthorityWithAccountStatuses setting is set to True, authority levels will define the approval criteria for a bond in relationship to what status/sub-status the account is in. Each authority level will have assigned account status/sub-statuses.

| Active Contract Authority Levels | | | | | | |
|----------------------------------|--------------|-----------------|---------------------------|---------------------------|--|------------|
| Name | Single Level | Aggregate Level | Project Duration Approval | Project Warranty Approval | Approval Account Statuses | Inactivate |
| No Authority | 0 | 0 | | | Active - Active, Active - Expired | Inactivate |
| Unlimited | -1 | -1 | | | Active - Active, Active - Expired, Suspended - Suspended | Inactivate |

- A user will be able to approve bonds only if the user's authority level contains the account status/sub-status that the account for the bond has.



BOND-91 – Investigate and Fix ClearTestAgencies Performance Issues

- This ticket is part of the larger initiative of improving Tinubu's background jobs. The ClearTestAgencies job has been updated to prevent possible failures that may occur.

CORE-160 – Customer Credit Reporting Access to Legacy Reports

- For a client's credit reporting storage, a fix is needed to ensure reports pulled and stored prior to the separated storage of reports remain accessible.

DAT-4 – Total Premium to Include Additional Fees in Data Warehouse

- The Total Premium fields in the reporting warehouse currently does not include the amounts from the Additional Fees added to bonds. This is being adjusted to include the fees in the aggregation of all premium values.

UW-28 – Account and Bond Read-Only Access

- For users accessing bonds and accounts, functionality to turn a user into a read-only type user is needed. This will be accomplished through user role permissions (allowed actions). This feature is to enhance the user role permissions to have read-only roles within account and bond access.

ADMIN-45 – User Role Permissions for Adding and Editing Diary Notes

- Additional permissions have been added for user roles to have access to adding and/or editing diary notes for bonds and accounts. These are four permissions to control:
 - Creating Bond Diary Notes
 - Editing Bond Diary Notes
 - Creating Account Diary Notes
 - Editing Account Diary Notes

| | | | Management | Payment Profiles | |
|------|------|--|--------------------|--------------------------|---|
| true | true | | Bond Management | Edit Bond Diary Notes | Allows users to edit existing diary notes for bonds. |
| true | true | | Bond Management | Add Bond Diary Notes | Allows users to add new diary notes on bonds. |
| true | true | | Account Management | Edit Account Diary Notes | Allows users to edit existing diary notes for accounts. |
| true | true | | Account Management | Add Account Diary Notes | Allows users to add new diary notes for accounts. |

[Back To Security Roles](#)

- The implementation of these permissions will be performed with UW-18 and UW-19 in a future release. These permissions will not affect functionality until then.

UW-30 – Default Behavior for Queues' Underwriter Filter

- The queues are being enhanced to default the behavior for the Underwriter filter in the queue to pre-select the user navigating to the queue if the user is an underwriter for the accounts or bonds from that queue.

UW-10 – Default Underwriter Filter for Pending Bonds Queue

- If the user navigating to the Pending Bonds queue is an underwriter for bonds in the queue, the Underwriter filter pre-selects the user in the filter. The user can adjust the filter back to 'All' or other options.

| Pending Bonds | | | | | | | | | | |
|----------------------|-----------------------|---------------------|-------------------|---------------------|-------------|----------------|------------------------------------|------------------|-------------------|--|
| Branch | Life Cycle | Select Bond Family | Underwriter | Assigned Approver | | | | | | |
| All | All | All | Name, Underwriter | All | | | | | | |
| Bond/Tracking # | State/Province/Region | Category | Agency Code | Agency | Branch Name | Applicant | Last Action | Last Action Date | Underwriter | |
| 11182416203913096... | FL | Pawnbroker (GOLDEN) | TEST | *** Test Agency *** | New England | Bond Applicant | Edit Info for New Bond Application | 11/18/2024 | Name, Underwriter | |

UW-11 – Default Underwriter Filter for Pending Quotes - New Business Queue

1. If the user navigating to the Pending Quotes - New Business queue is an underwriter for bonds in the queue, the Underwriter filter pre-selects the user in the filter. The user can adjust the filter back to 'All' or other options.

| Pending Quotes | | | | | | | | | | |
|---------------------------|-----------------------|--------------------------------|-------------|----------------------------------|----------------|------------|------------|------------------|-------------------|--|
| Select Bond Family All | | Branch All | | Underwriter Name, Underwriter | | | | | | |
| Bond/Tracking # | State/Province/Region | Category | Agency Code | Agency | Applicant | Penalty | Days Until | Quote Expiration | Underwriter | |
| 1182416395843050365 | KY | Annual Variable Penalty (TEST) | TEST | *** Test Agency *** | Bond Applicant | \$5,000.00 | | | Name, Underwriter | |

UW-12 – Default Underwriter Filter for Pending Quotes - Renewals Queue

1. If the user navigating to the Pending Quotes - Renewals queue is an underwriter for bonds in the queue, the Underwriter filter pre-selects the user in the filter. The user can adjust the filter back to 'All' or other options.

| Pending Quotes | | | | | | | | | | |
|---------------------------|-----------------------|--------------------------------|-------------|----------------------------------|----------------|------------|------------|------------------|-------------------------|-------------------|
| Select Bond Family All | | Branch All | | Underwriter Name, Underwriter | | | | | | |
| Bond/Tracking # | State/Province/Region | Category | Agency Code | Agency | Applicant | Penalty | Days Until | Quote Expiration | Current Expiration D... | Underwriter |
| AQ-1002 | KY | Annual Variable Penalty (TEST) | TEST | *** Test Agency *** | Bond Applicant | \$5,000.00 | | | 11/17/2025 | Name, Underwriter |

UW-13 – Default Underwriter Filter for Pending Renewals - Review Required Queue

1. If the user navigating to the Pending Renewals - Review Required queue is an underwriter for bonds in the queue, the Underwriter filter pre-selects the user in the filter. The user can adjust the filter back to 'All' or other options.

| Pending Renewals | | | | | | | | | | |
|------------------|--------------------------------|--------------------|---------------------|----------------------------------|---------------|------------|-----------|-----------------|-------------------|----------------|
| Branch All | | Bond Family All | | Underwriter Name, Underwriter | | | | | | |
| Bond # | Category | Agency Code | Agency | Branch Name | Obligee State | Penalty | Lead Time | Expiration Date | Underwriter | Days To Expire |
| AQ-1003 | Annual Variable Penalty (TEST) | TEST | *** Test Agency *** | New England | Kentucky | \$5,000.00 | 45 | 12/17/2024 | Name, Underwriter | 29 |

UW-14 – Default Underwriter Filter for Expired Accounts Queue

1. If the user navigating to the Expired Accounts queue is an underwriter for accounts in the queue, the Underwriter filter pre-selects the user in the filter. The user can adjust the filter back to 'All' or other options.

| Expired Accounts | | | | | | | |
|------------------|----------------|---------------------------|---------------------|----------------------------------|------------------|-------------------|-----------------|
| Branch All | | Select Bond Family All | | Underwriter Name, Underwriter | | | |
| Account # | Account Name | Agency Code | Agency | Branch | Last Action Date | Underwriter | Expiration Date |
| 1000007 | Bond Applicant | TEST | *** Test Agency *** | New England | 11/18/2024 | Name, Underwriter | 1/1/2024 |

UW-15 – Default Underwriter Filter for Pending Account Submissions Queue

1. If the user navigating to the Pending Account Submissions queue is an underwriter for accounts in the queue, the Underwriter filter pre-selects the user in the filter. The user can adjust the filter back to 'All' or other options.

Pending Account Submissions

Branch: All | Select Bond Family: All | Life Cycle: All | **Underwriter: Name, Underwriter** | Assigned Approver: All

| Account/Tracking # | Account Name | Agency Code | Agency | Branch | Last Action Date | Sub-Status | Underwriter |
|----------------------|----------------|-------------|---------------------|-------------|------------------|----------------|--------------------------|
| 11182417032318755407 | Bond Applicant | TEST | *** Test Agency *** | New England | 11/18/2024 | New Submission | Name, Underwriter |

UW-55 – TX Notary V2 Integration

1. The Texas Secretary of State (SOS) is modernizing the API they use for their Notary Portal. With the migration to a new API, Tinubu was required to update our integration with the TX SOS. Along with sending data to a new API, there is also a different workflow within the TSC application due to no longer sending over an attachment as required with the legacy connection. Therefore, there this epic also included UI/UX changes to capture all the necessary data in the database before sending the application using the REST API. Therefore, this epic also included UI/UX changes to accommodate the new workflow.

UW-16 – TX Notary Integration Update

1. This ticket created new paths of execution to the New Texas Notary REST API in preparation for the deprecation of the legacy API.

UW-17 – TX Notary User Experience

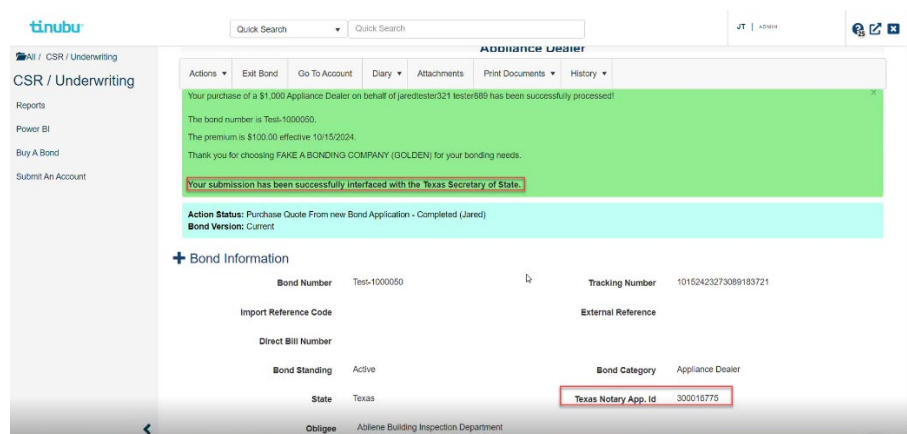
1. The new TX Notary REST API necessitated some UI/UX improvements including the following:
 - a. A new web service configuration has been created as TX Notary Provider V2. The attributes below will need to be configured for the web service:
 - i. URL = Texas Notary Application Submission URL
 - ii. Second URL = Texas Notary Token Validation URL
 - iii. Username = Client Id
 - iv. Password = Client Secret
 - v. MiscVal1 = User Token

Web Service Configurations

TexasNotaryProviderV2

- OpenIdIdp
- SamIdp
- SubmissionProvider
- TaxCalculationProvider
- TexasNotaryProvider
- TexasNotaryProviderV2**
- UserProfileProvider

- b. The addition of the TX Secretary of State required questions to the bond applications are needed. These questions need to be configured on the people question group on the account application:
 - i. First Name
 - ii. Middle Name
 - iii. Last Name
 - iv. Suffix
 - v. Full SSN
 - vi. Address Id
 - vii. Address Type
 - viii. Date of Birth
 - ix. Email
 - x. Social Security Number
 - xi. Driver's License Number
 - xii. Driver's License State
 - xiii. Felony Conviction
 - xiv. Has Name Changed
 - xv. Escrow Indicator
 - xvi. Escrow License Number
 - xvii. Escrow License State
 - xviii. Escrow License Expiration Date
- c. The appropriate messaging on bond purchase screen indicating success/failure of application submission to TX Secretary of State has been added to the bottom of the page message.



- d. An optional email delivery of detailed application submission failure reasons can be configured to be sent.



Fixes

ADMIN-82 – Emails not Sent Appropriately to Carrier AIF during Pending Actions

1. If a bond is in the referred status, and the AIF is changed during the approval, the email was being sent to the previous AIF for Carriers. The fix will allow the email to be sent to the email of the new AIF.

Email To (multiple emails separate by semicolon)

 Send email to applicant*

 Send email to Agency Default Email*

 Send to user who entered transaction*

 Send to AIF*

 Send email to Responsible Underwriter*

 Send email to user who initiated Bond Lifecycle*

Email From*

support@tinubu.net

BOND-4 – Unable to Edit Attachments added by Other Users

1. This ticket allows a user to edit an attachment that was attached by another user. Users previously were receiving an 'Unauthorized to create attachment' error.

• Unauthorized to create attachment.

BOND-8 – Fix for Account Comparison Rule Approvals

1. This corrects the logic for account comparison rules where some bonds that were getting referred will now be approved, per the setup of the rule.

Application Status

Agency Code: TEST
 Agency Name: *** Test Agency ***
 Agency Address: Casselberry, FL 32707-3611

Account Name: Test Account
 Account Number: 700000

Quoted

Your application for a \$123.00 Payment and/or Performance Bond on behalf of Test Company has passed the underwriting criteria established for this bond type and is now available for purchase.

This bond quotation is in your Pending Quotes queue and will be available for 0 days, after which time it will automatically expire.

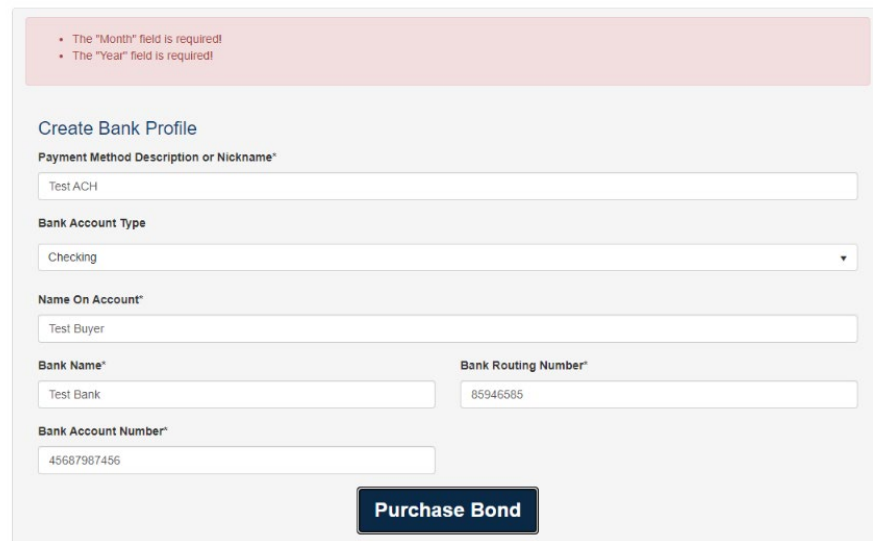
The tracking number is 10232409361498391421
 If purchased, the premium will be \$4.00 effective 10/23/2024.
 Thank you for considering FAKE A BONDING COMPANY (GOLDEN) for your bonding needs.

BOND-13 – Correction of CyberSource Payments Failing

1. CyberSource Credit Card and ACH payments stopped working post release 222. This ticket will resolve this challenge.

BOND-50 – Cannot Pay for New Bond with ACH

1. When trying to purchase a bond with the ACH billing type, the system would throw an error stating the Month and Year fields are required. This ticket fixes this and allows the purchase to be completed.



The screenshot shows a web form titled "Create Bank Profile". At the top, a red error banner contains two messages: "The 'Month' field is required!" and "The 'Year' field is required!". Below the banner, the form fields are as follows:

- Payment Method Description or Nickname***: Text input field containing "Test ACH".
- Bank Account Type**: Dropdown menu with "Checking" selected.
- Name On Account***: Text input field containing "Test Buyer".
- Bank Name***: Text input field containing "Test Bank".
- Bank Routing Number***: Text input field containing "85946585".
- Bank Account Number***: Text input field containing "45687987456".

A dark blue button labeled "Purchase Bond" is located at the bottom right of the form.

BOND-60 – Background Color Fixes

1. Some background colors have changed, causing the text to be difficult to view with client specific colors. This fix updates the colors for the text to be more legible.

BOND-132 – Error when Purchasing Bonds with a 100 Character Obligee Name

1. When trying to purchase a bond with an obligee containing over 100 characters, users experience the error, "We're sorry an unexpected error has occurred. Object reference not set to an instance of an object." This fix allows for these bonds to be submitted and purchased without error.

CORE-63 – Fix for Additional Fees in TransSync

1. The TransSync API feed delivers a data section for the individual fees applied to a bond transaction. This section has been delivering with no data. The data for the FeeRates in TransSync has been adjusted to include each fee's information.

CORE-152 – Correction to Commission for Renewal Recalculation with Change Agency

- When a renewal application submission includes an agency change, the commission from the new agency did not get pulled in when triggering the Recalculate button during the transaction. This is corrected so if the user triggers Recalculate, the new commission from the new agency is used.
 - NOTE: This issue does not affect the final submission of the renewal application. This issue is limited to the Recalculate button calculation in the middle of the transaction.

UW-20 – Fix for Payment Profiles to be Added to Accounts

- There had been an error occurring when adding a payment profile to accounts directly. Most payment profiles are added to an account when a payment is issued on a bond, and this functionality has worked and continues to work. The error has been corrected to allow payment profiles to be added directly on accounts without a bond to be purchased immediately.

| Is Default | Payment Type | Last 4 | Description | Edit | Delete |
|------------|--------------|--------|-------------|------|--------|
| true | Credit Card | 1111 | 51115 | Edit | Delete |
| false | Bank ACH | 8412 | 555 | Edit | Delete |

UW-145 – Fix to Account Name Search for Special Characters

- When using the Find Account > Account Name search option with a non-alphanumeric character in the search criteria, the search would return results that match the text prior to the special character but disregard the text after the special character. This has been corrected to return the results that match the search criteria including the special character and all other characters before and after it.

| # | Name | State | Agency | Branch | Commercial Limit | Contract Limit | Status | Underwriter | Actions |
|---------|--------------------|---------|---------------------|-------------|------------------|----------------|--------|--------------------|-------------------|
| 1000008 | C & M Company | Florida | *** Test Agency *** | New England | 10,000,000 | 0 | Active | Automation, QaTest | Edit Buy a Bond |
| 1000027 | D & M Company | Florida | *** Test Agency *** | New England | 10,000,000 | 0 | Active | Automation, QaTest | Edit Buy a Bond |
| 1000026 | C & M Incorporated | Florida | *** Test Agency *** | New England | 10,000,000 | 0 | Active | Automation, QaTest | Edit Buy a Bond |