



CBS Data Extract Module



Extractable Files

CLI	Client masterfile
CLM	Claim masterfile
CEH	Claims Estimate History
CLD	Claims Notes
CLG	Claims Payments Accounts Header
CLV	Vehicle Claims Details
ACI	Claims Accounting (Insurer)
ACM	Claims Accounting (Main Payment Request)
SCH	Express (Scheme) masterfile
PLY	Policy masterfile
IAC	Insurers on Policy
IAD	Insurers on Policy (by Sub Cover for Multi Risk)
IWC	Coverage Summary by Policy
IWH	Coverage Summary History
IWE	Interest Wording Version
PPD	Periodic Deductions and Instalments
SLV	State Levies
IWT	Transaction Description file
BPH	Banking Pre List Header
BPL	Banking Pre List Detail
RCP	Cash Receipts
CAC	Client Accounting
ICA	Insurer Accounting
SBA	Sub Agent Accounting
TPB	Third Party Broker Accounting
CHQ	Cheque Request File
JNL	Sub Ledger Journal File
ICP	Insurer Accounting Payment File
CLC	Client Group Code
CLN	Claims Notes

Introduction

The CBS Data Extract module has been developed to replace earlier export options. The new module exports masterfile, policy, claims and accounting data from a CBS database based on a range of runtime selection criteria.

Data Extraction

Masterfile, policy, claims and accounting data can be extracted from thirty (30) of the main files within CBS based on invoice date for policy and accounting transactions or date created for clients and claims.

At policy level a utility is available to determine which Coverage Summary information is to be extracted. Nominating specific Interest Wording variable fields for extract eliminates creation of unnecessary policy text or non relevant information.

Data can be extracted from a single or multiple files in a single run; the list to the left details what files can be extracted.

In addition selected company/branch, insurer, sub agent, third party broker, risk code, income class and other masterfile data is also extracted.

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Output Options

The Extract module creates a series of ASCII delimited files, which can be imported into a spreadsheet or relational database. These files are stored in a nominated directory as individual files.

The file options facilitate both simple and more comprehensive data extracts. For example, a simple mail merge requirement could be accommodated by extracting client records from the Client (CLIFILE) masterfile in a format compatible with the merge facilities of Microsoft Word. More comprehensive requirements could be addressed by extracting all of the available information.

Optional Facilities

In addition to the standard facilities described above, optionally an export of aged debtors, written and earned income (CLIR38) and Coverage Summary variables for bordereaux reporting can be included. These options are customised for individual requirements, additional charges may apply.

Relational Database

Extracting CBS data to a relational database provides additional analysis and reporting options. Complementing the Data Extract module a Microsoft Access database has been developed specifically to cater for the data exported.

The database schema mirrors the file structure of CBS and includes a menu and utilities to import the files generated by the Data Extract module. Licence fee for the Access database includes two sample reports.

System Requirements

The CBS Extract facility is an optional module available under licence from Ebix. Licence fees also apply for the optional Access database. Contact your local Ebix office for prices or additional information.