

Slide 1

We will now look at the listing Options on the Policy Master that will give us lists of Active Policies, Pending Policies and cancelled Policies.

IES Navigator Client v8.03 : My IIS : [mode-Z]

Help Submit Quit Functions Comments

IES REPORTS AND QUERIES: - User Instructions

NAME: DISBURSE POLICIES: ACTIVE

1: - CHOOSE VERSION [Versions](#)  
Report Version: System Versions: Insurance Policies: Active

2: - CHOOSE SETTINGS  
Format: REPORT  
Output: FILE  
File Type: Data HTML FILE  
Template: 04: Infolab  
Report Header: Insurance Policies: Active

3: - CHOOSE DATA SELECTOR [Custom Selector](#)  
Fixed Choice: Insurance Policies: Active

4: - TO e-MAIL THE RESULTS Priority: Normal  
 Dispatch By E-Mail  
Mail To: Insurance Policies: Active  
Mail Title: Report by Mail

5: - ADAPT DATA SELECTION @ groups are present  
How to generate CHECK  
Selection Tip By Choice

Selection Tip	By Choice
1	

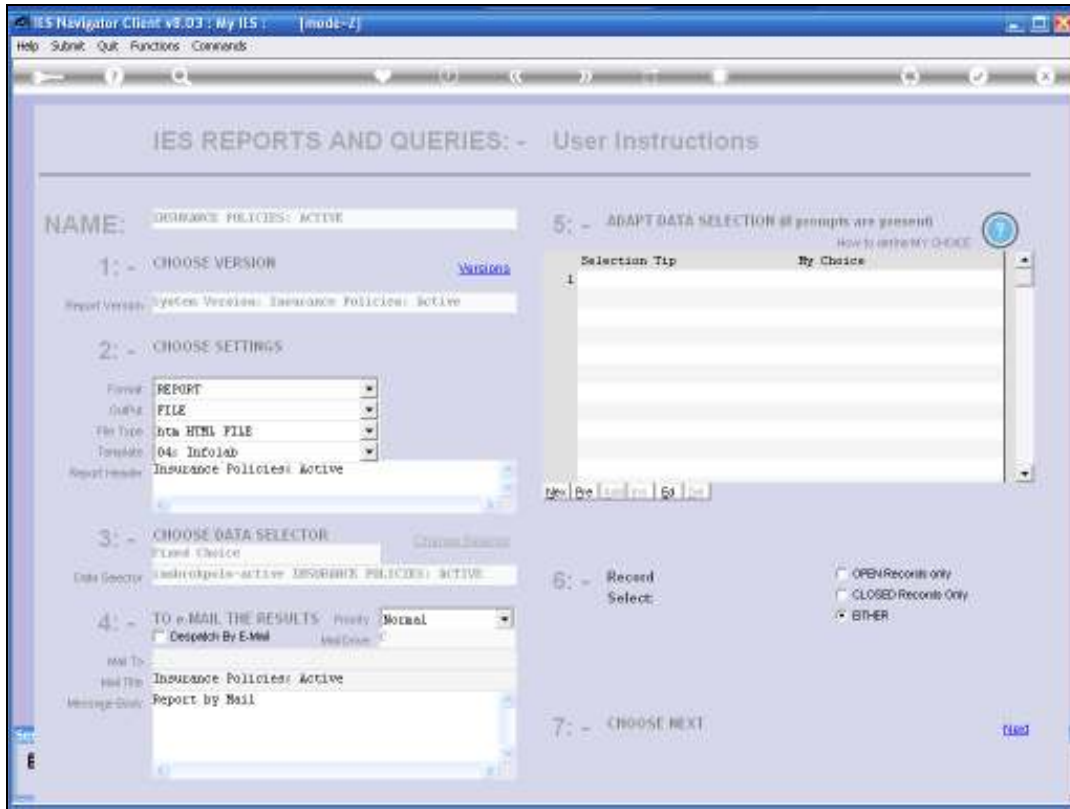
6: - Record Select  
 OPEN Records Only  
 CLOSED Records Only  
 BOTH

7: - CHOOSE NEXT [Next](#)

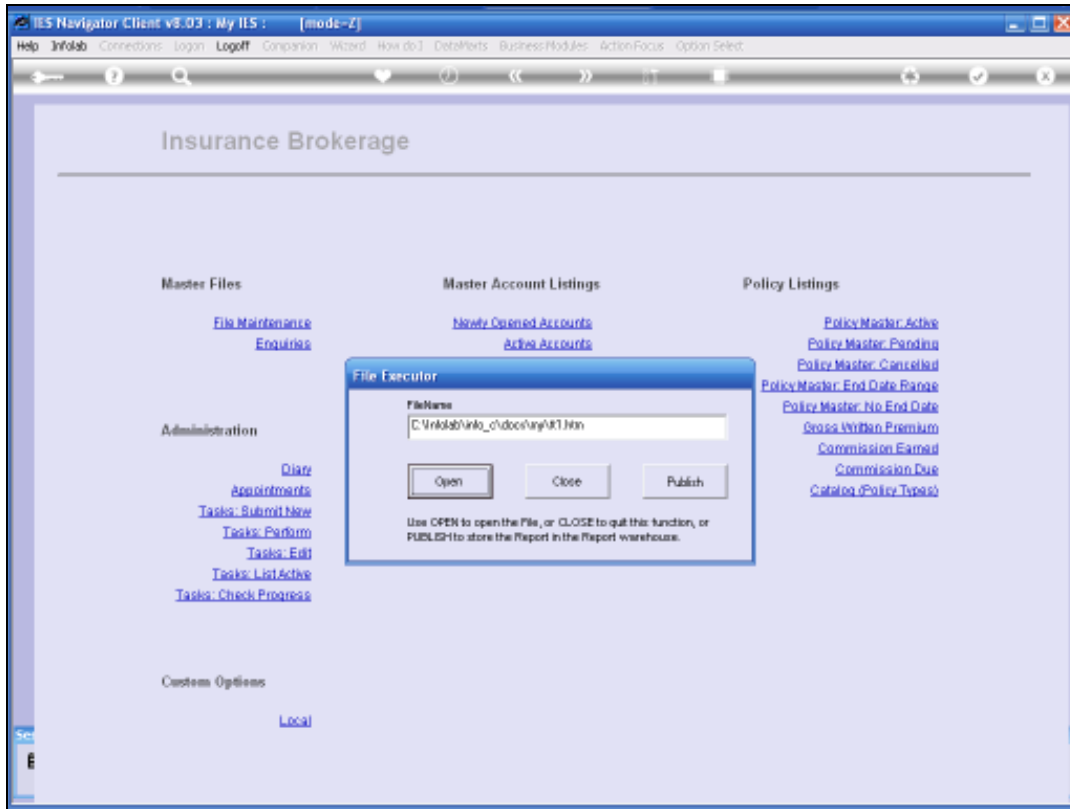
Slide 2

Starting with the Active Policies, this list will include all Policies on the Policy Master, that are in the Active state and of course this Report Support Versions.

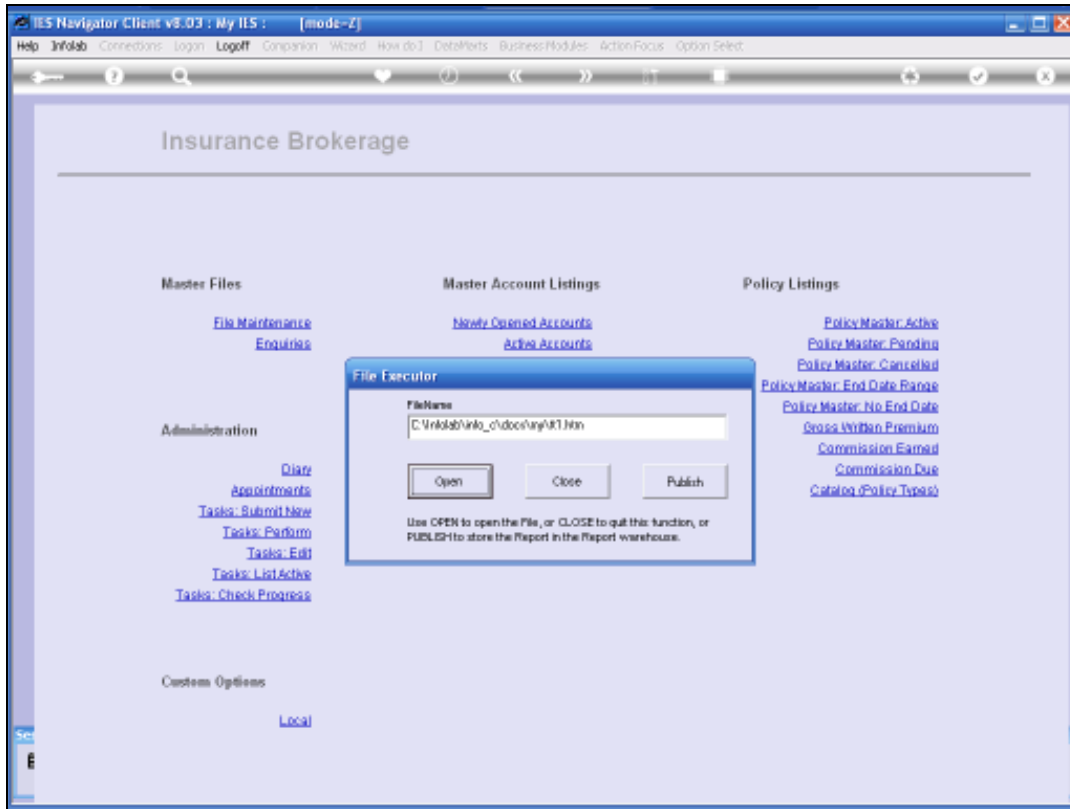
So we can quickly and easily make changes to the Report if we want to include additional information in the content.



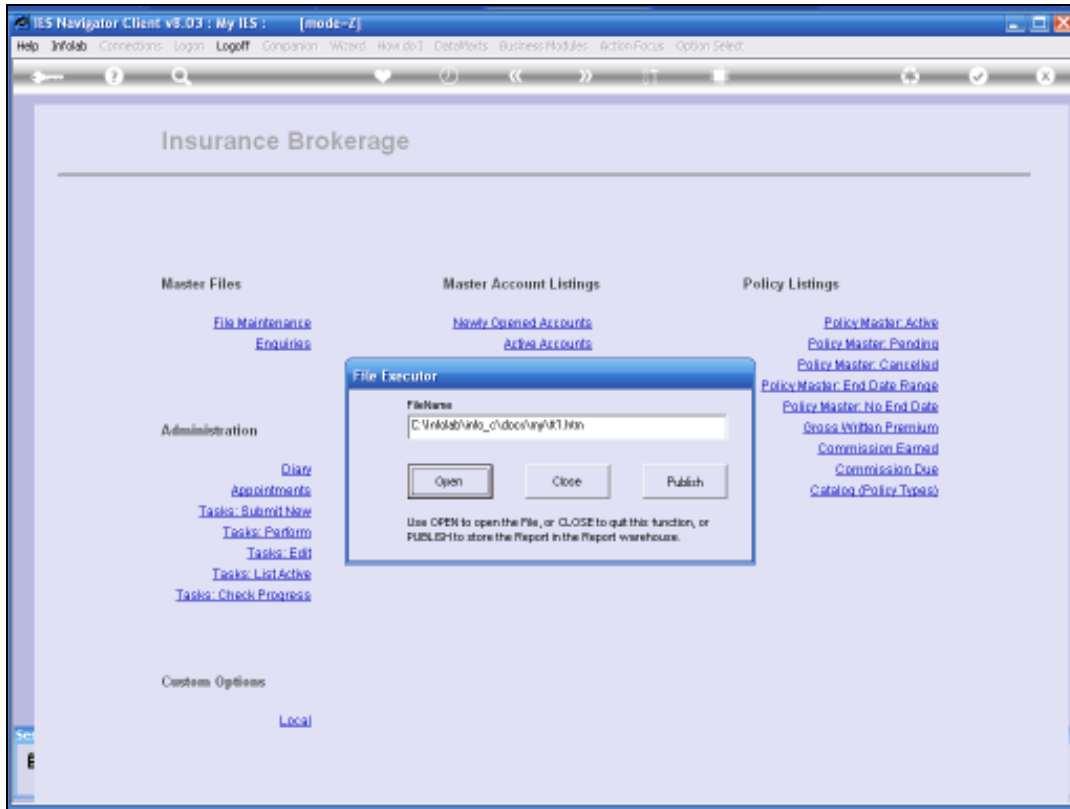
Slide 3



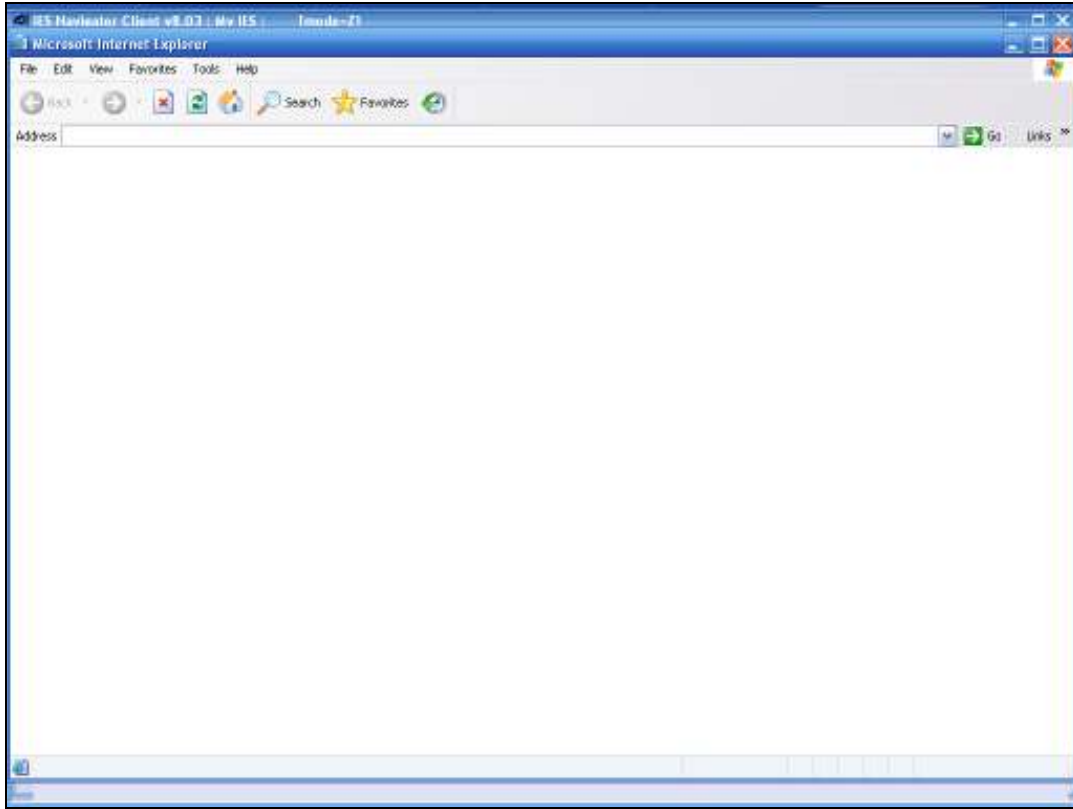
Slide 4



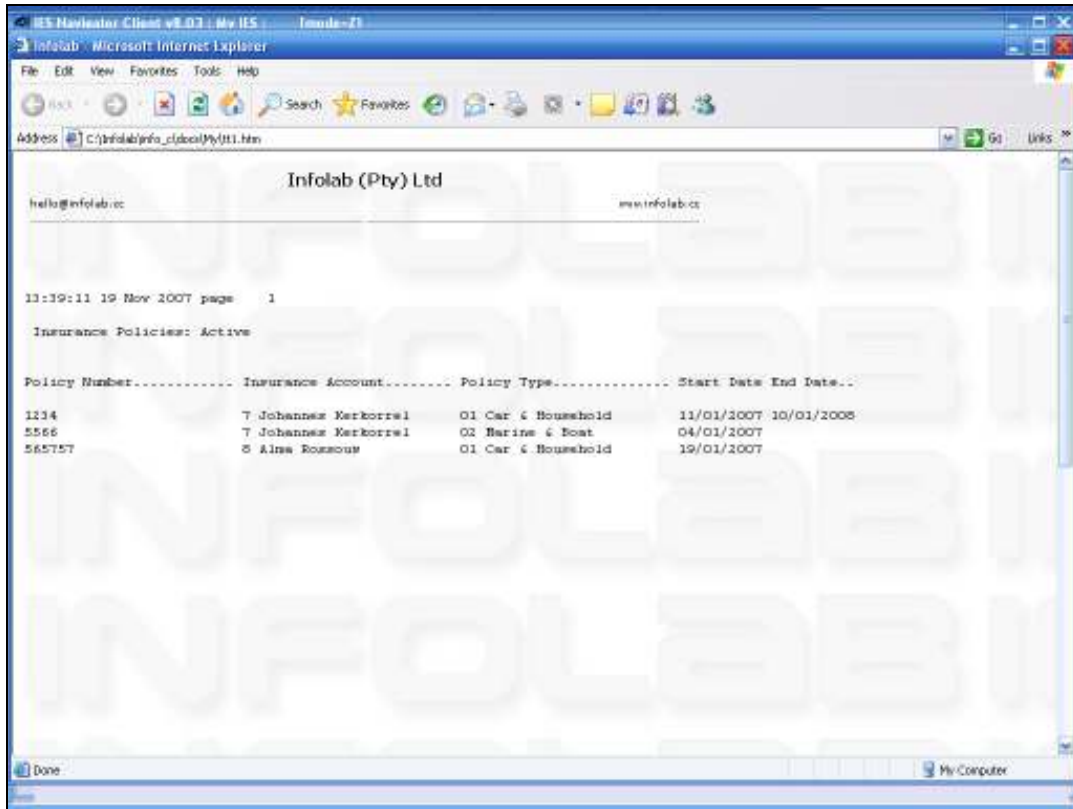
Slide 5



Slide 6



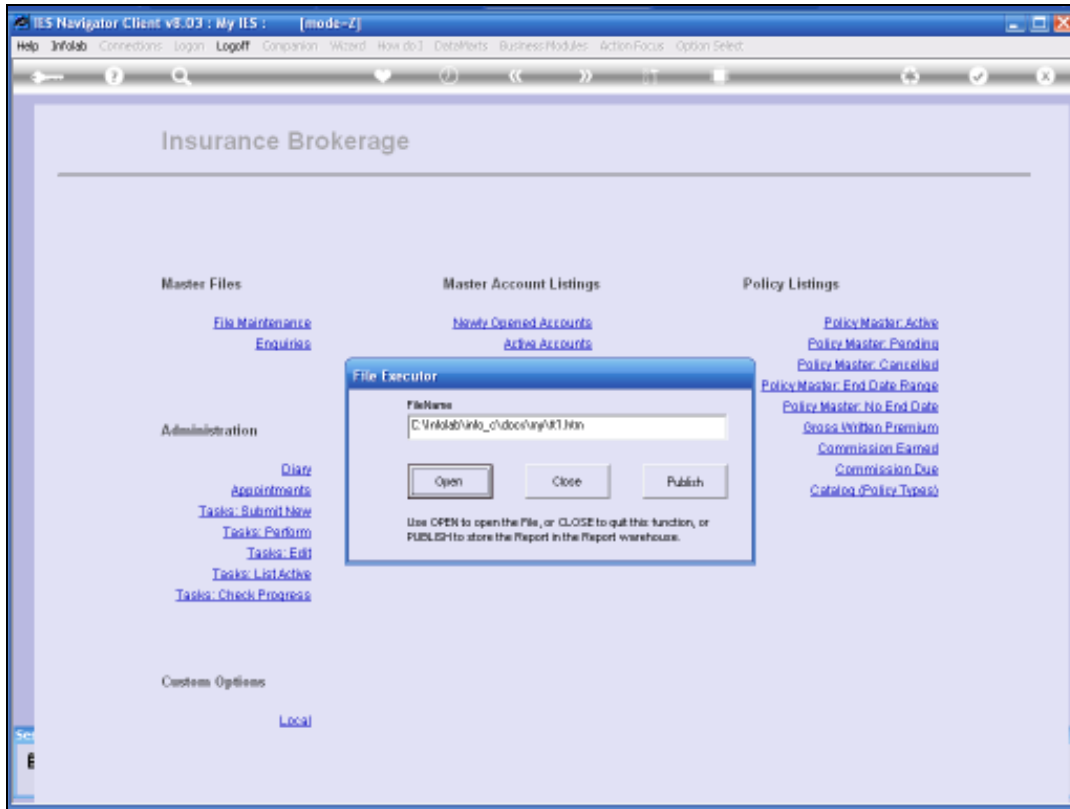
Slide 7



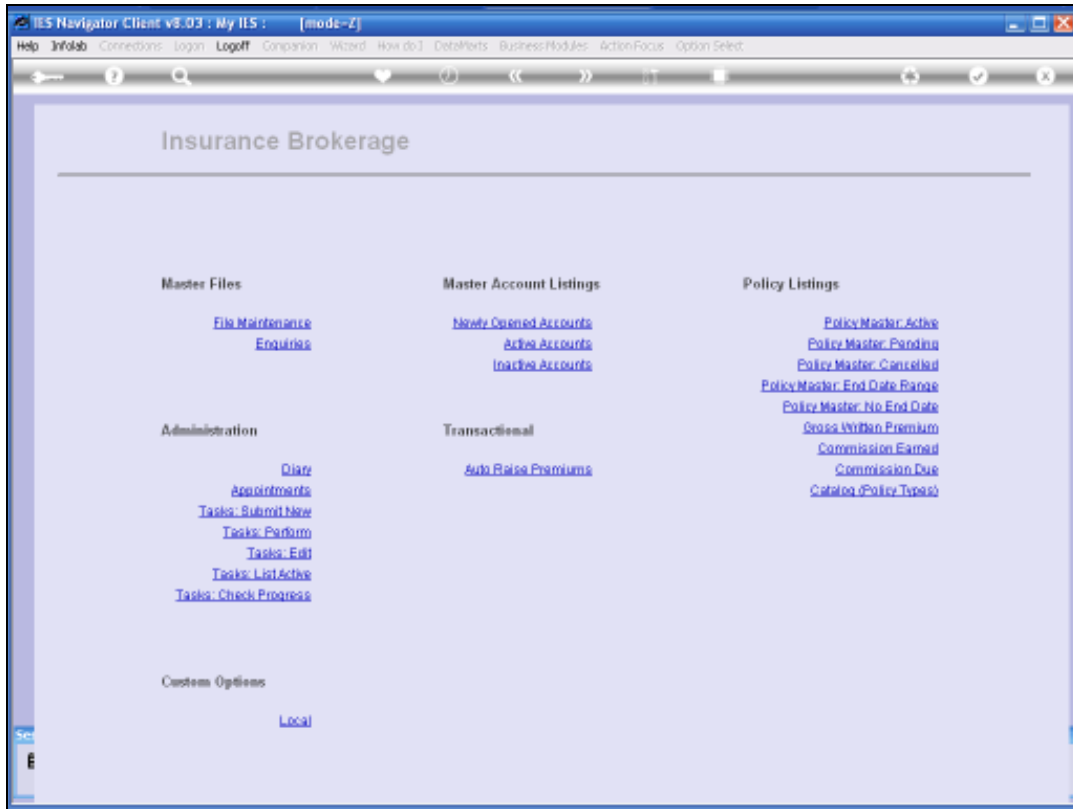
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This is an example of the Active Policies listing.





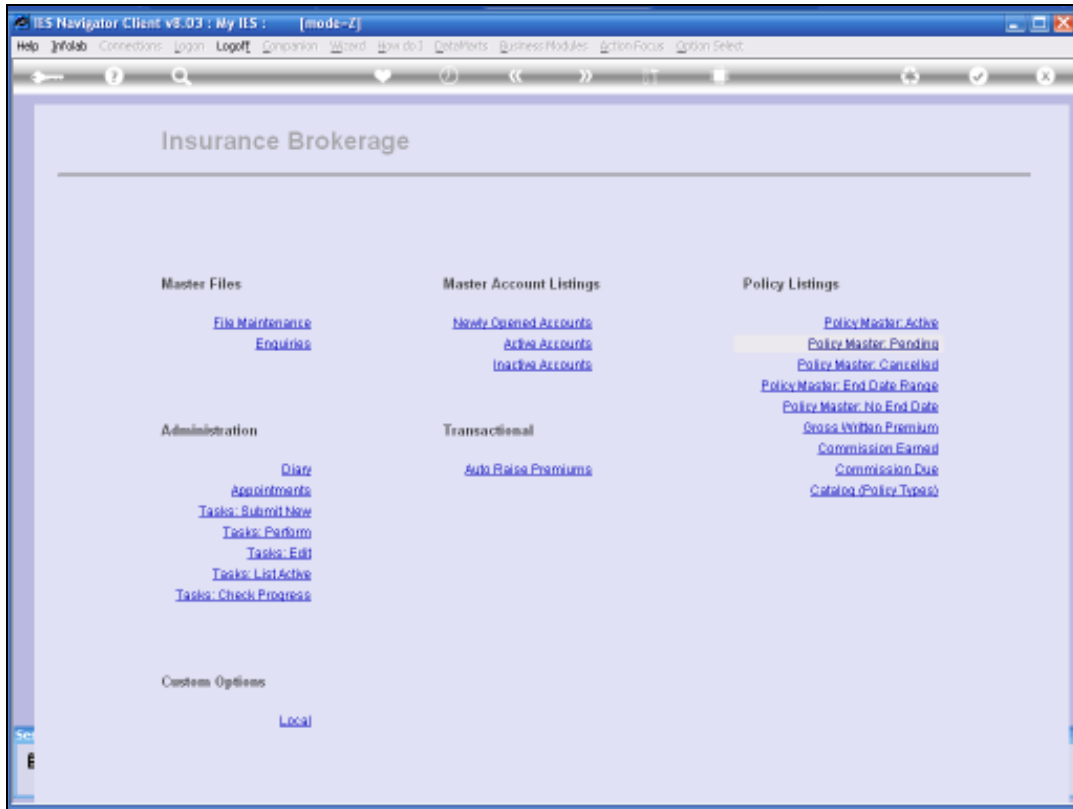
Slide 9



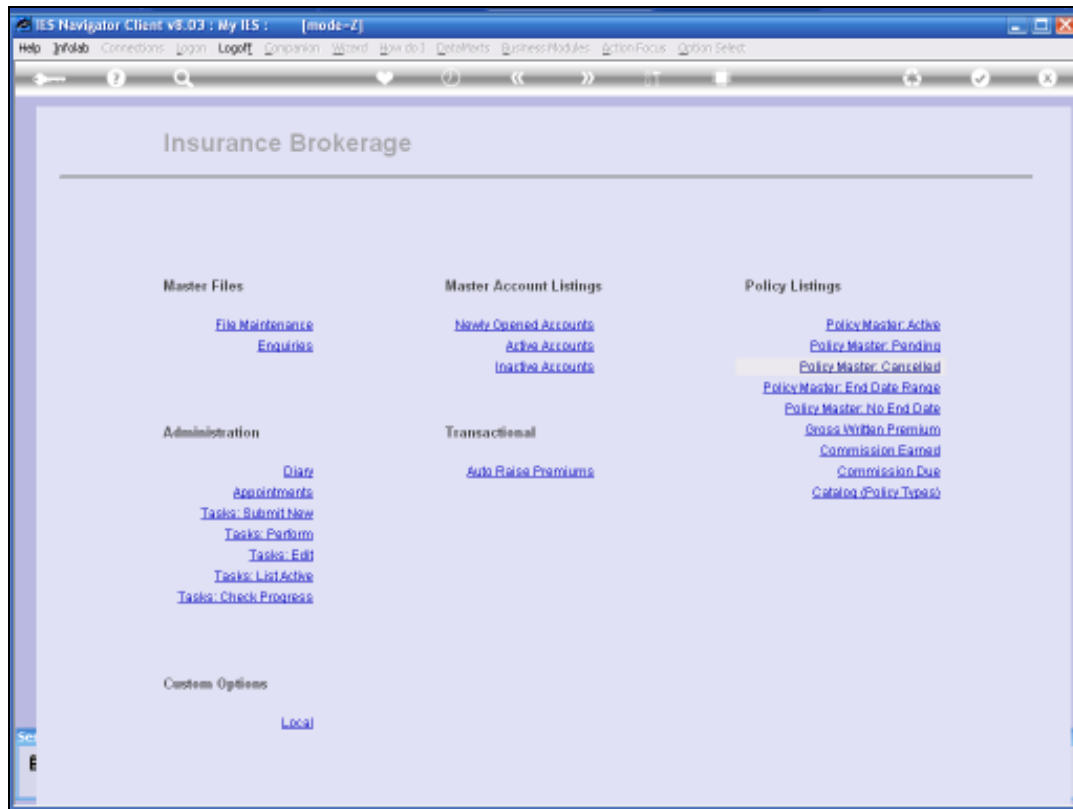
Slide 10

Pending Policies will usually be those Policies where we have done a 1<sup>st</sup> quote, or we are at some other stage, before the Policy is actually issued and becomes Active.

So this is a useful Report to follow up on Policies that are in the Pending state.



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And of course, Cancelled Policies would include Policies that have never become Active, i.e. they went from Pending straight to Cancelled because they were not Issued and then became Inactive. It would also include Policies that have been Active but have now come to End of Term and have become Cancelled.