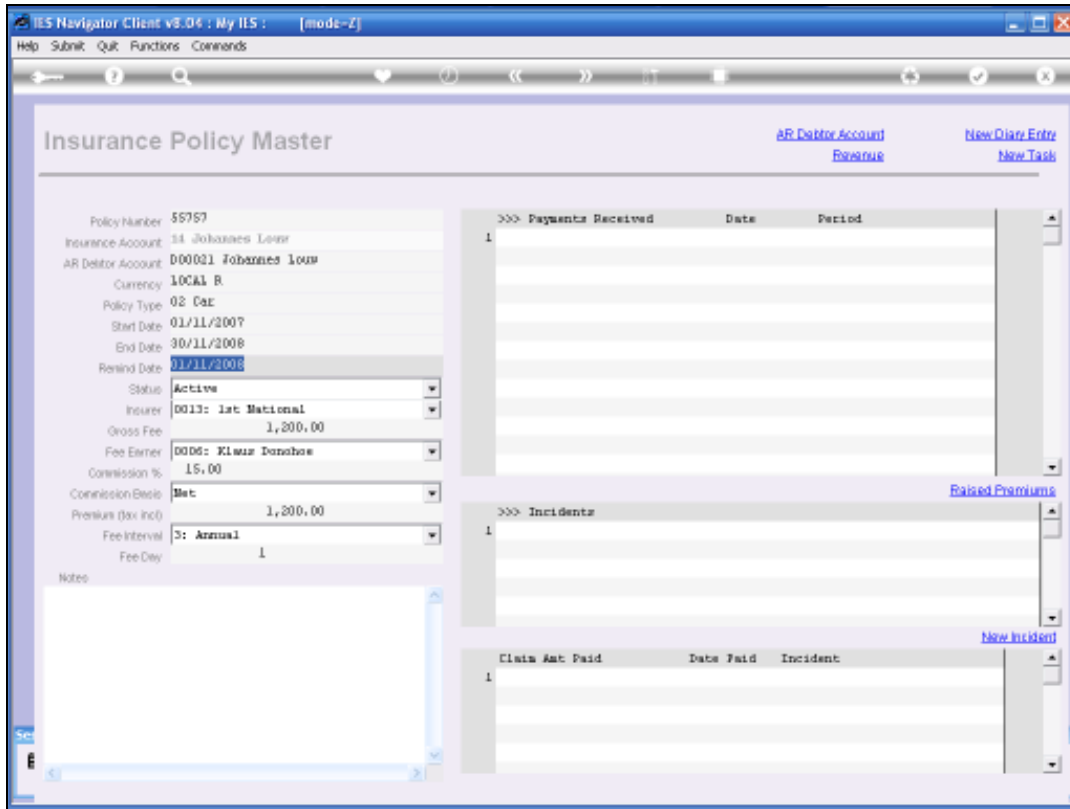


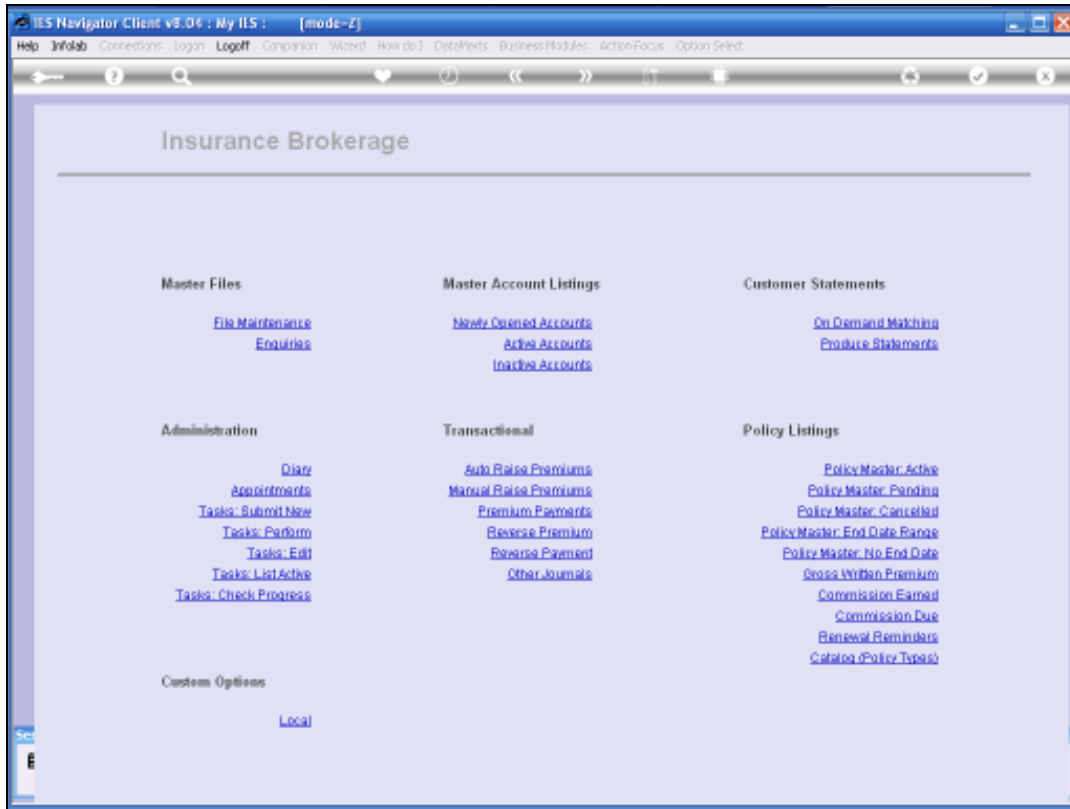
Slide 1

In this session we are looking at Renewal Reminders and we are looking at an example of a Policy Master Record at the moment.



Slide 2

Note that we have a Renewal Reminder Field on the Policy Master.



Slide 3

Before a Policy comes to End of Term of course we would like to be reminded so that we can work towards Renewing that Business, i.e. Renewing the Policy or do another Policy and therefore we use the Renewal Reminders Report to Alert us timeously of Policies that are coming to End of Term.

IES Navigator Client v8.04 : My IES : [mode-Z]

Help Submit Quit Functions Comments

IES REPORTS AND QUERIES: - User Instructions

NAME:

1: - CHOOSE VERSION [Versions](#)
Report Version:

2: - CHOOSE SETTINGS
Format:
Output:
File Type:
Template:
Report Header:

3: - CHOOSE DATA SELECTOR [Custom Selectors](#)
Data Selector:

4: - TO e-MAIL THE RESULTS Priority:
 Dispatch By E-Mail [Add Email...](#)
Mail To:
Mail From:

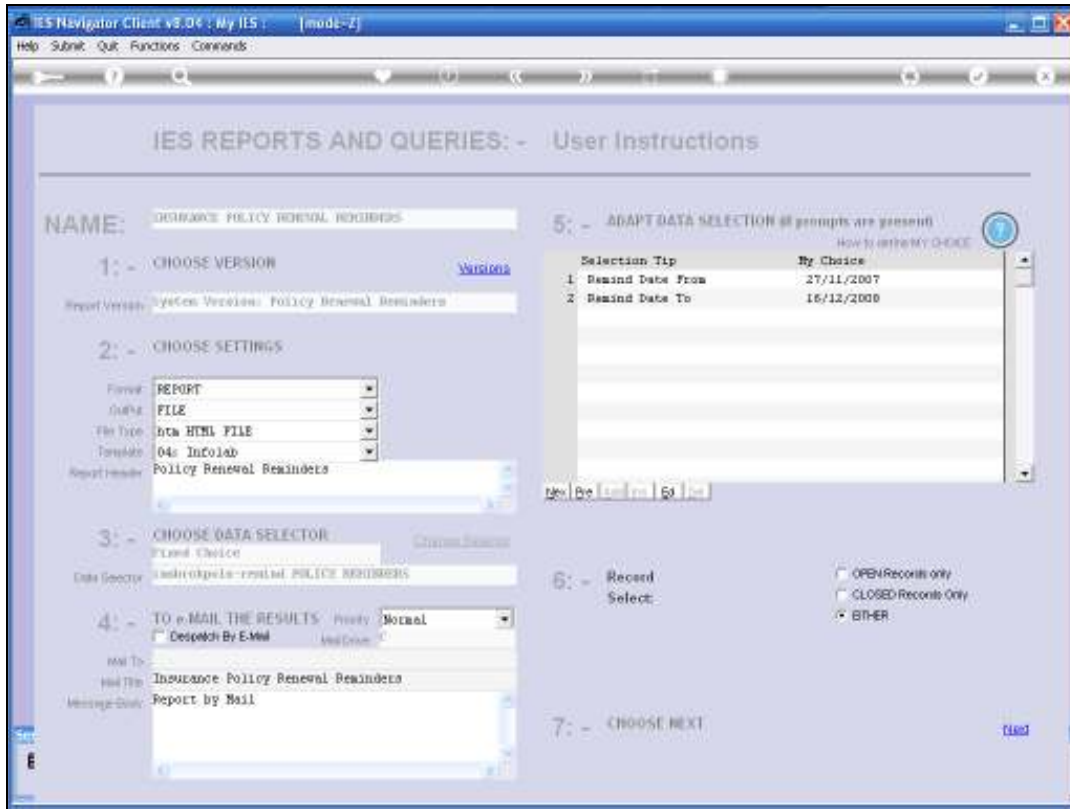
5: - ADAPT DATA SELECTION @ groups are present
How to INTERPRET CHOICE

Selection Tip	By Choice
1 Remind Date From	27/11/2007
2 Remind Date To	16/12/2008

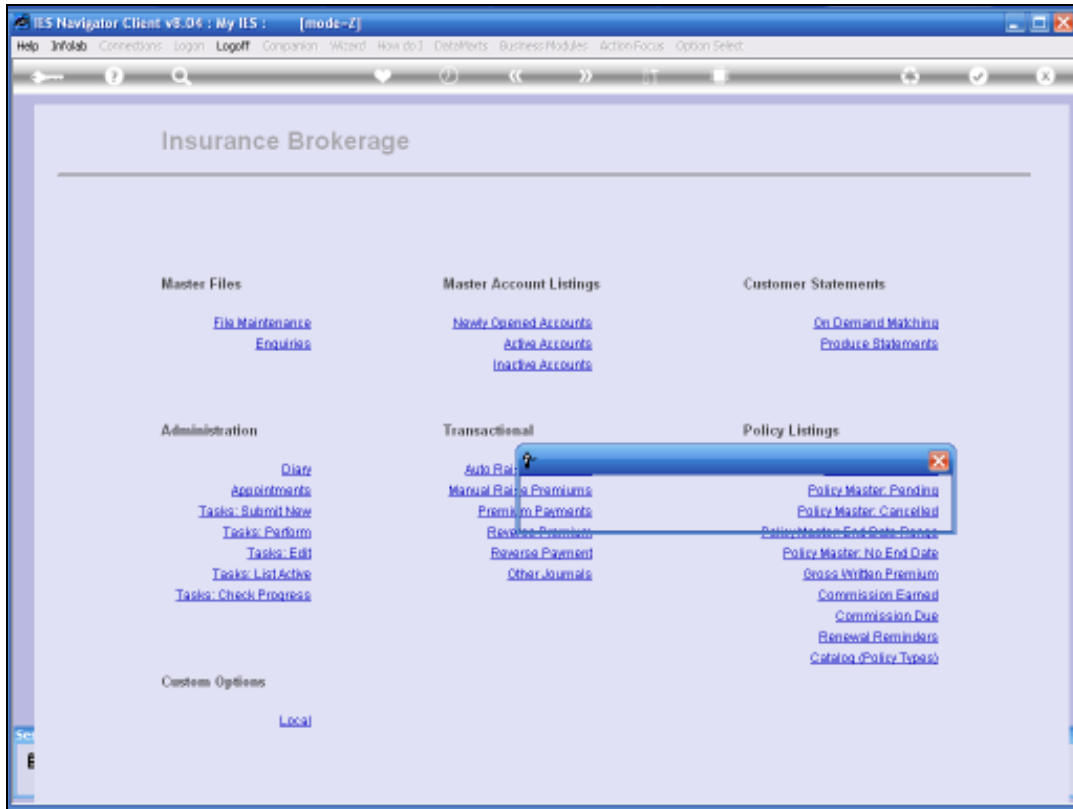
6: - Record Select: OPEN Records only
 CLOSED Records Only
 EITHER

7: - CHOOSE NEXT [Next](#)

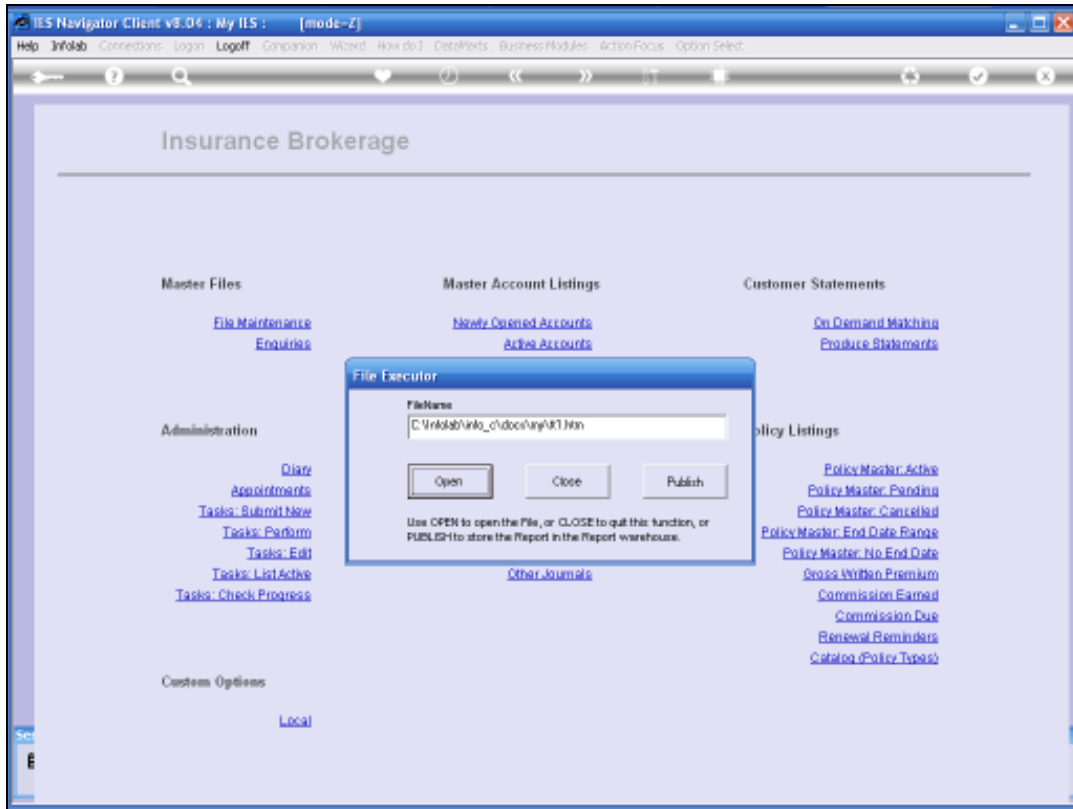
Slide 4



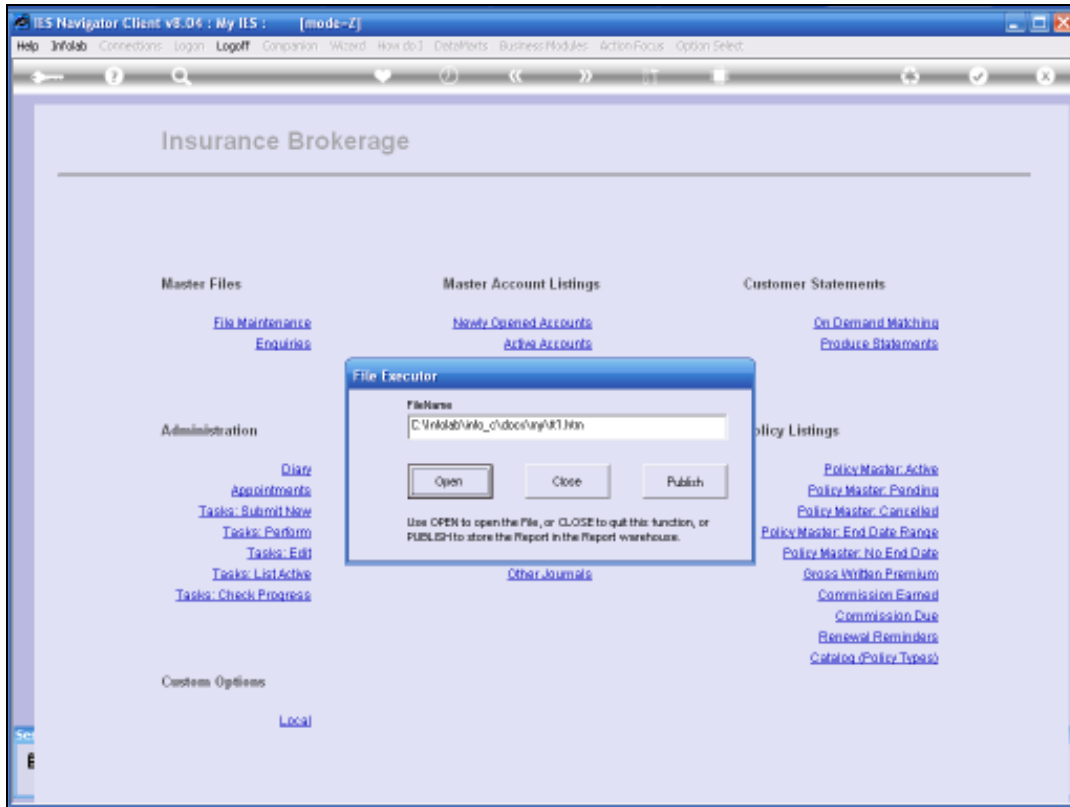
Slide 5



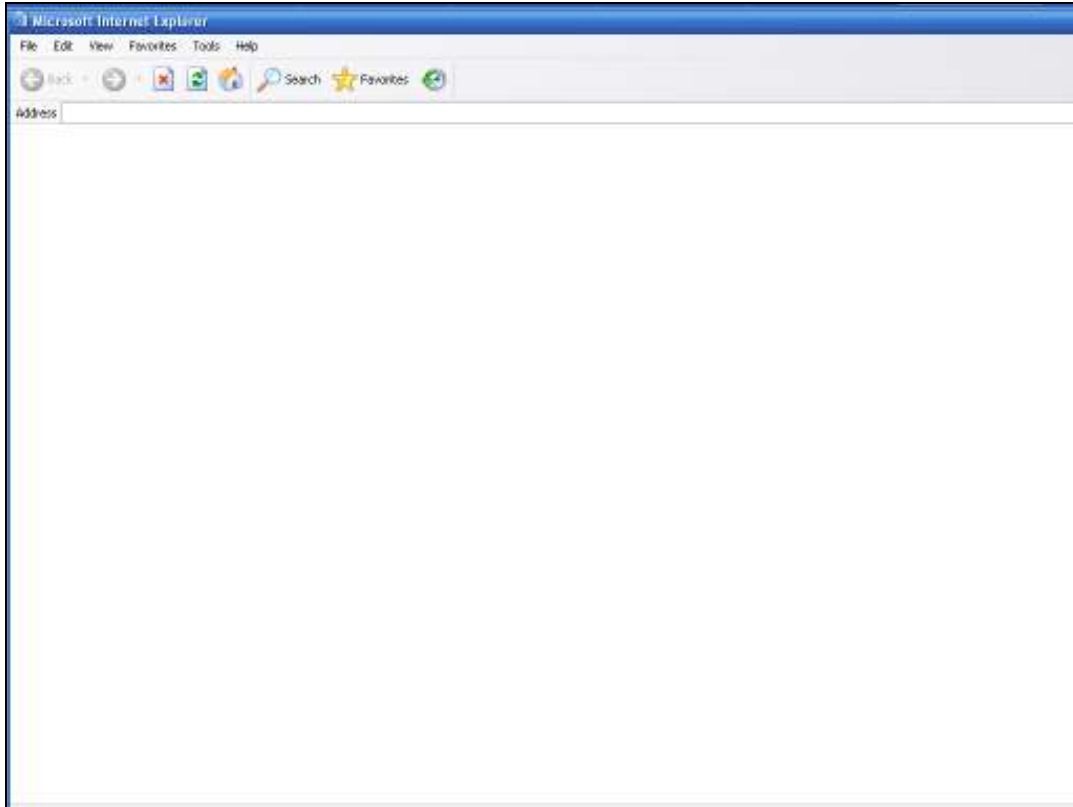
Slide 6



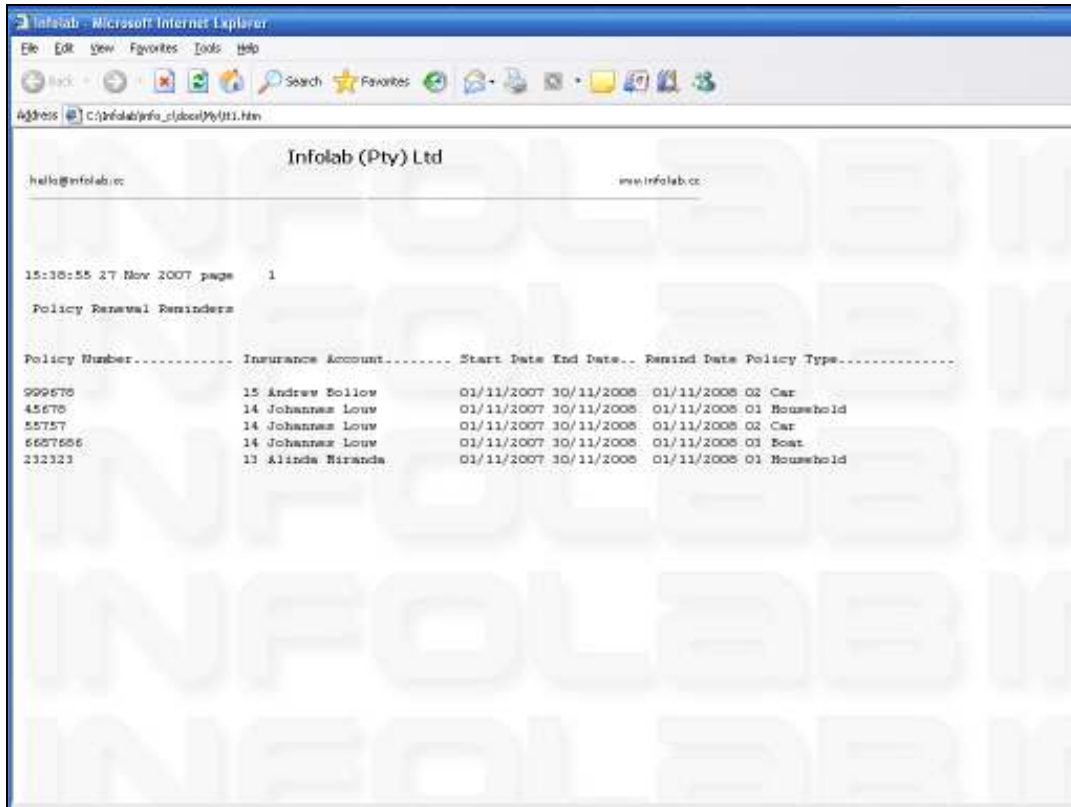
Slide 7



Slide 8



Slide 9



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Policy Renewal Reminders

Policy Number	Insurance Account	Start Date	End Date	Remind Date	Policy Type
999676	15 Andrew Bollow	01/11/2007	30/11/2008	01/11/2008	02 Car
45678	14 Johannes Louw	01/11/2007	30/11/2008	01/11/2008	01 Household
55757	14 Johannes Louw	01/11/2007	30/11/2008	01/11/2008	02 Car
6657656	14 Johannes Louw	01/11/2007	30/11/2008	01/11/2008	01 Boat
232323	13 Alinda Miranda	01/11/2007	30/11/2008	01/11/2008	01 Household

Slide 10

So here we have an Example of the Reminders Report and we can now include entries in the Diary or in the Task Management System or in any other way that we want to ensure that we follow up on these Policies for Renewal.