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In this session we are going to look at how we can see the Policy Revenue from the Policy Master.

In this example we are currently looking at an Insurance Customer Account and this particular Customer has 3 Policies.

So let us go to the 1st Policy.

Insurance Policy Master

[AR Debtor Account](#) [New Claim Entry](#)
[Revenue](#) [New Task](#)

Policy Number: **45678**

Insurance Account: 14 Johannes Lewer

AR Debtor Account: D00021 Johannes Iouf

Currency: LOCAL R

Policy Type: 01 Household

Start Date: 01/11/2007

End Date: 30/11/2008

Renewal Date: 01/11/2008

Status: Active

Insurer: 0013: 1st National

Gross Fee: 2,400.00

Fee Earner: D006: Klaus Donshoe

Commission %: 10.00

Commission Basis: Net

Premium (Gross Inc): 200.00

Fee Interval: 1: Monthly

Fee Day: 1

Notes:

>>> Payments Received

	Date	Period
1	200.00	26/11/2007 02 [Nov 2007]

[Raised Premiums](#)

>>> Incidents

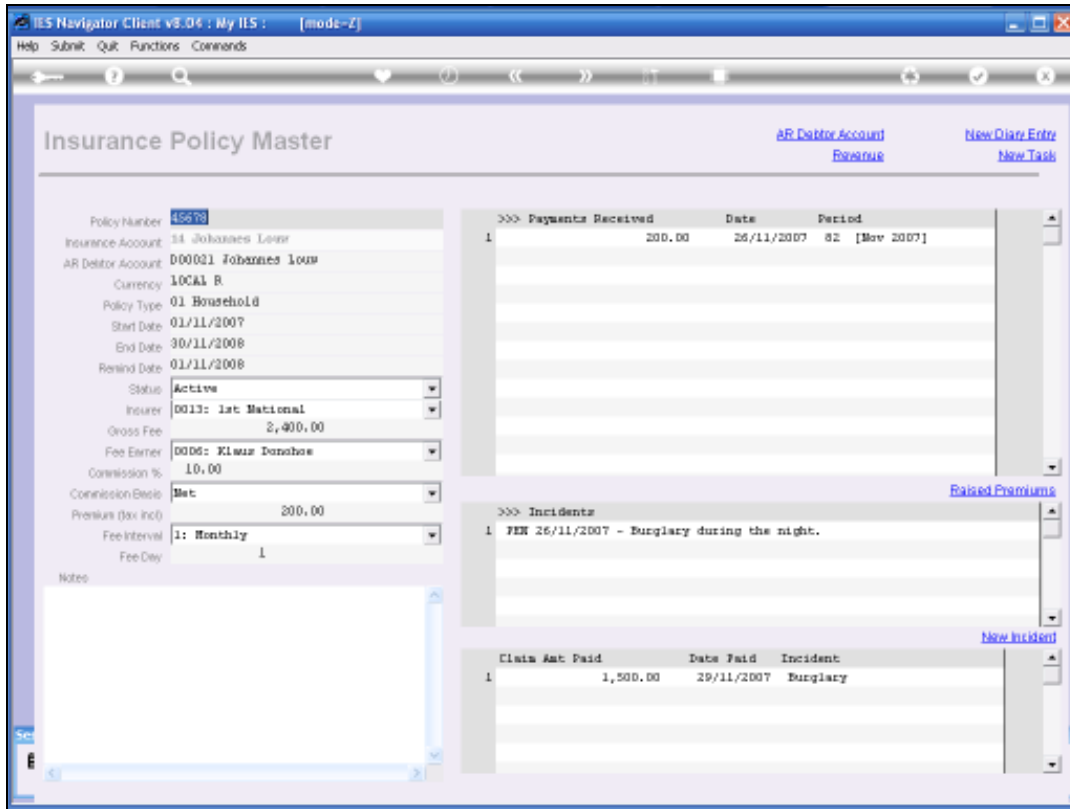
1	PER 26/11/2007 - Burglary during the night.
---	---

[New Incident](#)

Claim Amt Paid

	Date Paid	Incident
1	1,500.00	29/11/2007 Burglary

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Slide 3

On the Policy we choose the Revenue Function.

Policy Revenue

Policy Number: 45678
 Policy Type: 01 Household
 Insurer: 0013: Ist National
 Currency: LQCR, B
 Total Claims Paid: 1,500.00

>>> Date	Premium	Insurer	Commission
1 *** Total	600.00	540.00	60.00
2 26/11/2007	200.00	180.00	20.00
3 24/11/2007	200.00	180.00	20.00
4 24/11/2007	200.00	180.00	20.00

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The Revenue is not the same thing as Raised Premiums.

On the Premium Function we can see all Premiums that have been paid.

But here we are looking at the Revenue. This is only about collected Premium and of course we have indication of the Total Claims paid on this Policy.

Then in terms of the Revenue, we have a total line and then we have the detail of the various Premiums that have been collected with the portions for the Insurer and the Commission.

The screenshot shows a software window titled "IES Navigator Client v8.04 : My IIS : [mode-Z]". The main content area is titled "Policy Revenue" and contains a form with the following fields:

- Policy Number: 45678
- Policy Type: 01 Household
- Insurer: 0013: Ist National
- Currency: USDR, B
- Total Claims Paid: 1,500.00

Below the form is a table with the following data:

>>> Date	Premium	Insurer	Commission
1 *** Total	600.00	540.00	60.00
2 26/11/2007	200.00	180.00	20.00
3 24/11/2007	200.00	180.00	20.00
4 24/11/2007	200.00	180.00	20.00

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Policy Revenue

Policy Number: 45678
Policy Type: 01 Household
Insurer: 0013: 1st National
Currency: USDR, B
Total Claims Paid: 1,500.00

>>> Date	Premium	Insurer	Commission
1 *** Total	600.00	540.00	60.00
2 26/11/2007	200.00	180.00	20.00
3 24/11/2007	200.00	180.00	20.00
4 24/11/2007	200.00	180.00	20.00

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The screenshot shows a web application window titled "IES Navigator Client v8.04 : My IIS : [mode-Z]". The main content area is titled "Policy Revenue" and contains a form with the following fields:

- Policy Number: 45678
- Policy Type: 01 Household
- Insurer: 0013: Ist National
- Currency: LQCR, B
- Total Claims Paid: 1,540.00

Below the form is a table with the following data:

>>> Date	Premium	Insurer	Commission
1 *** Total	600.00	540.00	60.00
2 26/11/2007	200.00	180.00	20.00
3 24/11/2007	200.00	180.00	20.00
4 24/11/2007	200.00	180.00	20.00

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

Help Submit Quit Functions Commands

Insurance Policy Master

[AR Debtor Account](#) [New Claim Entry](#)
[Revenue](#) [New Task](#)

Policy Number: **45678**

Insurance Account: 14 Johannes Lewis

AR Debtor Account: D00021 Johannes Louis

Currency: LOCAL R

Policy Type: 01 Household

Start Date: 01/11/2007

End Date: 30/11/2008

Renewal Date: 01/11/2008

Status: Active

Insurer: 0013: 1st National

Gross Fee: 2,400.00

Fee Earner: D006: Klaus Donahoe

Commission %: 10.00

Commission Basis: Net

Premium (Gross Inc): 200.00

Fee Interval: 1: Monthly

Fee Day: 1

Notes:

>>> Payments Received			
	Date	Period	
1	200.00	26/11/2007	82 [Nov 2007]

[Raised Premiums](#)

>>> Incidents	
1	BUR 26/11/2007 - Burglary during the night.

[New Incident](#)

Claim Amt Paid	Date Paid	Incident
1	1,500.00	29/11/2007 Burglary

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Insurance Policy Master

[AR Debtor Account](#) [New Claim Entry](#)
[Revenue](#) [New Task](#)

Policy Number: **45678**

Insurance Account: 14 Johannes Lewer
AR Debtor Account: D00021 Johannes Iouf
Currency: LOCAL R
Policy Type: 01 Household
Start Date: 01/11/2007
End Date: 30/11/2008
Renewal Date: 01/11/2008
Status: Active
Insurer: 0013: 1st National
Gross Fee: 2,400.00
Fee Earner: D006: Klaus Donshoe
Commission %: 10.00
Commission Basis: Net
Premium (Gross Inc): 200.00
Fee Interval: 1: Monthly
Fee Day: 1

Notes

>>> Payments Received

	Date	Period
1	200.00	26/11/2007 02 [Nov 2007]

[Raised Premiums](#)

>>> Incidents

1	PER 26/11/2007 - Burglary during the night.
---	---

[New Incident](#)

Claim Amt Paid

	Date Paid	Incident
1	1,500.00	29/11/2007 Burglary

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OutKey: 14

Account Name: Johannes Louw

Account State: Active

Date Opened: 21/11/2007

ORN#: 09463

Queries: -

- [CRM Events](#)
- [Tasks](#)
- [Diary Entries](#)

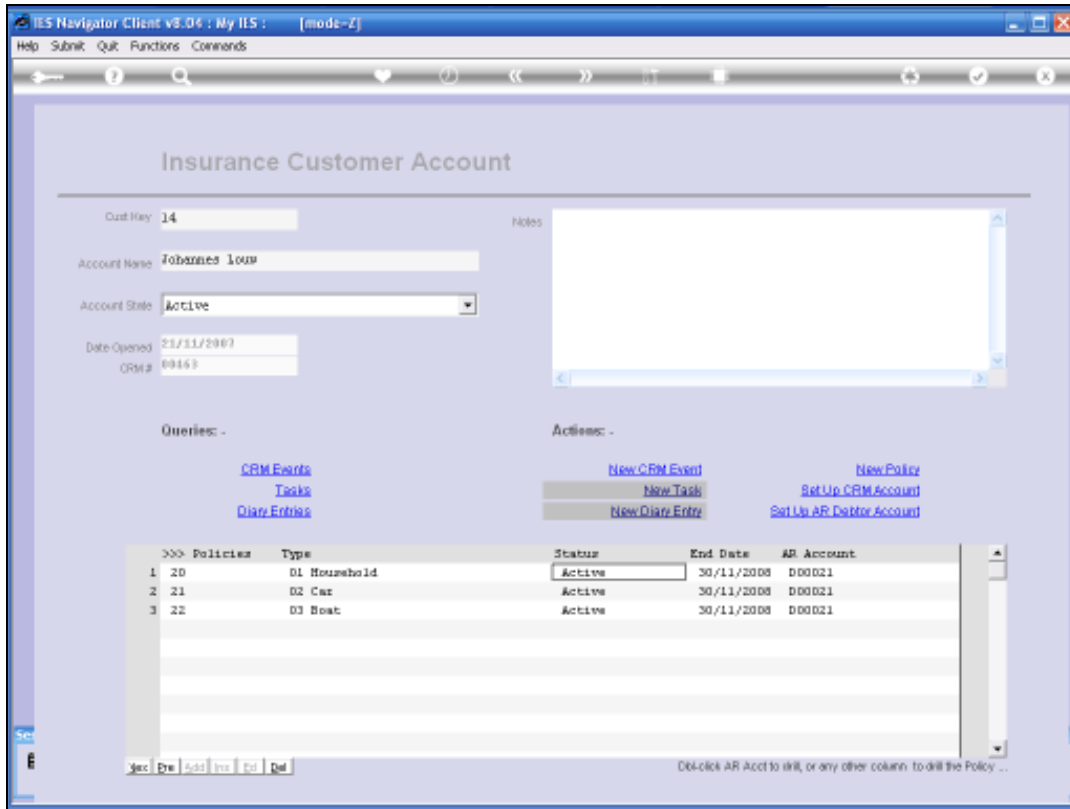
Actions: -

- [New CRM Event](#)
- [New Task](#)
- [New Diary Entry](#)
- [New Policy](#)
- [Set Up CRM Account](#)
- [Set Up AR Doctor Account](#)

Policy	Type	Status	End Date	AR Account
1 20	D1 Household	Active	30/11/2008	D00021
2 21	D2 Car	Active	30/11/2008	D00021
3 22	D3 Boat	Active	30/11/2008	D00021

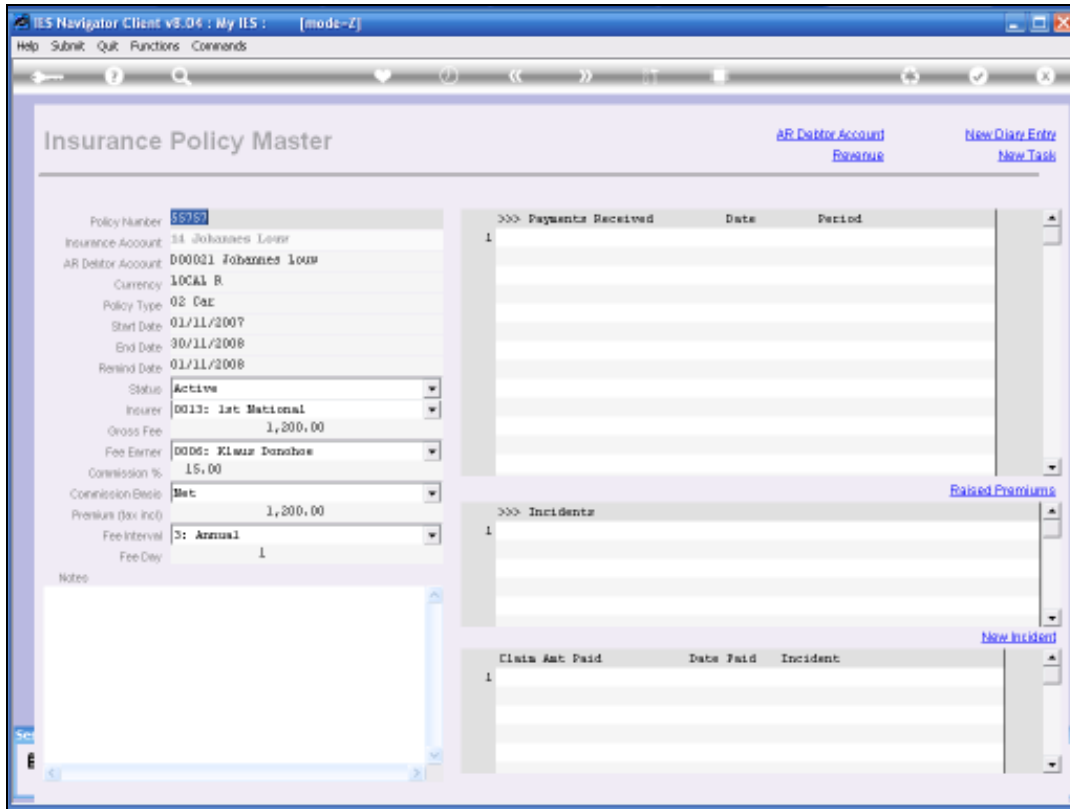
DB-click AR Acct to drill, or any other column to drill the Policy ...

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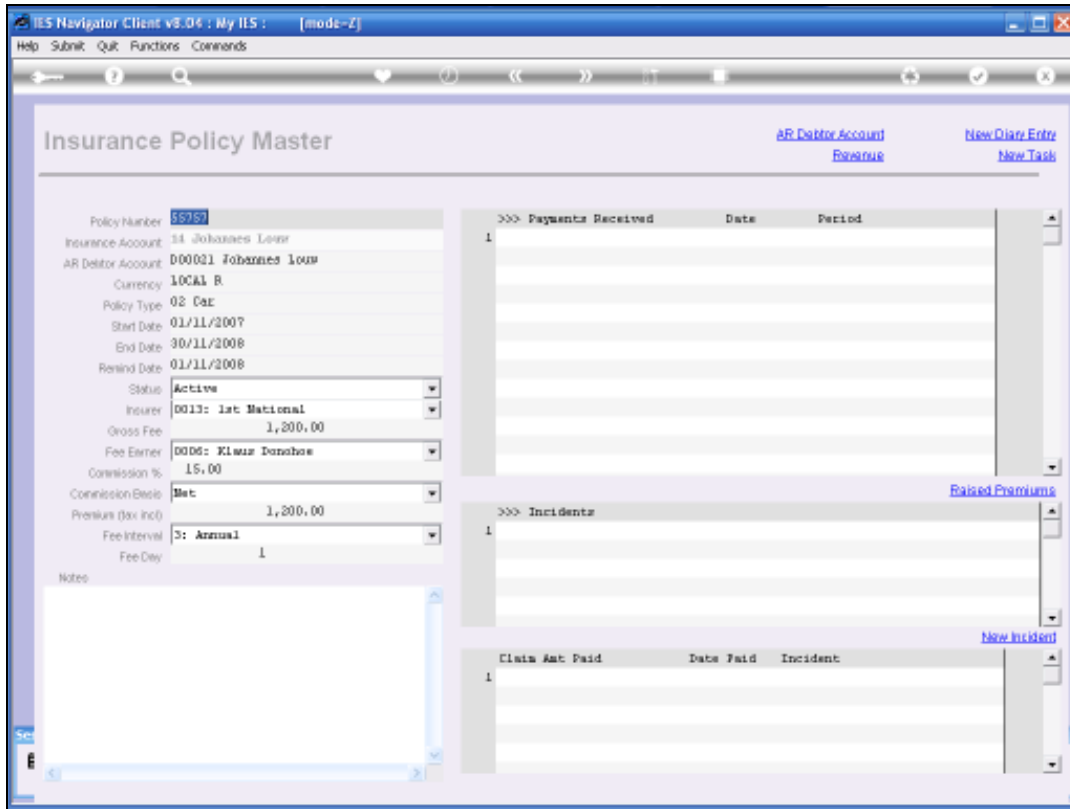


Slide 11

Then we look at the next Policy for this particular Account.



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Slide 13

The screenshot shows a software window titled "IES Navigator Client vs.04 : My IIS : [mode-Z]". The main content area is titled "Policy Revenue" and contains a form with the following fields:

- Policy Number: 05257
- Policy Type: 02 Car
- Insurer: 0013: Ist National
- Currency: LACRL B
- Total Claims Paid: 0.00

Below the form is a table with the following data:

>>> Date	Premium	Insurer	Commission
1 *** Total	1,200.00	1,042.11	157.89
2 24/11/2007	1,200.00	1,042.11	157.89

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On this particular Policy there are no Claims that have been Paid and only one Premium has been collected so far.

The screenshot shows a software window titled "IES Navigator Client vs.04 : My IIS : [mode-Z]". The window contains a "Policy Revenue" section with the following fields:

- Policy Number: 05257
- Policy Type: 02 Car
- Insurer: 0013: Ist National
- Currency: LACRL B
- Total Claims Paid: 0.00

Below these fields is a table with the following data:

>>> Date	Premium	Insurer	Commission
1 *** Total	1,200.00	1,042.11	157.89
2 24/11/2007	1,200.00	1,042.11	157.89

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