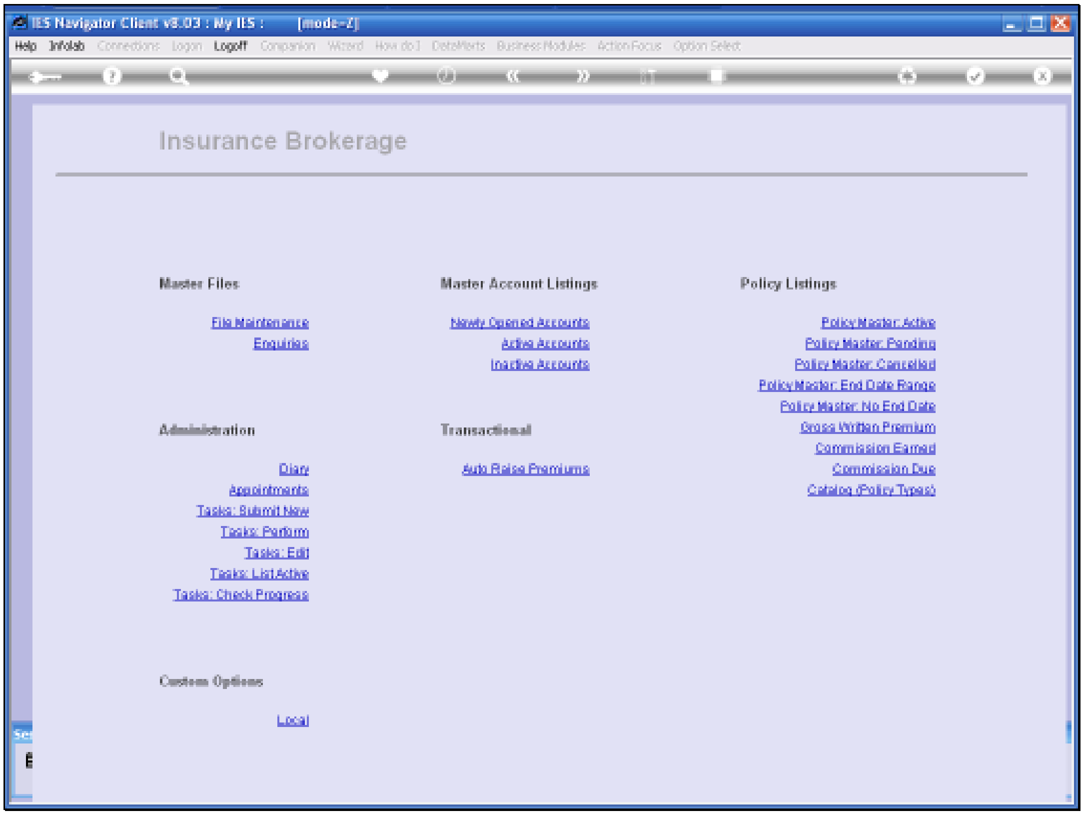
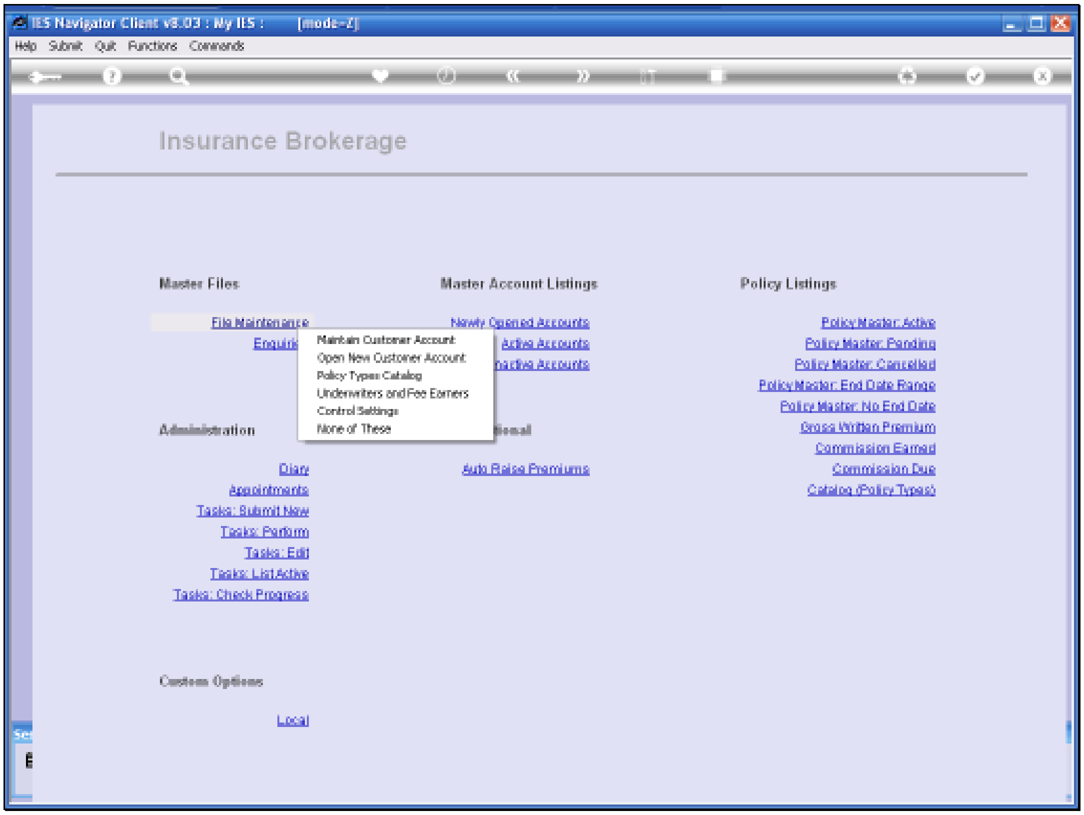


Slide 1

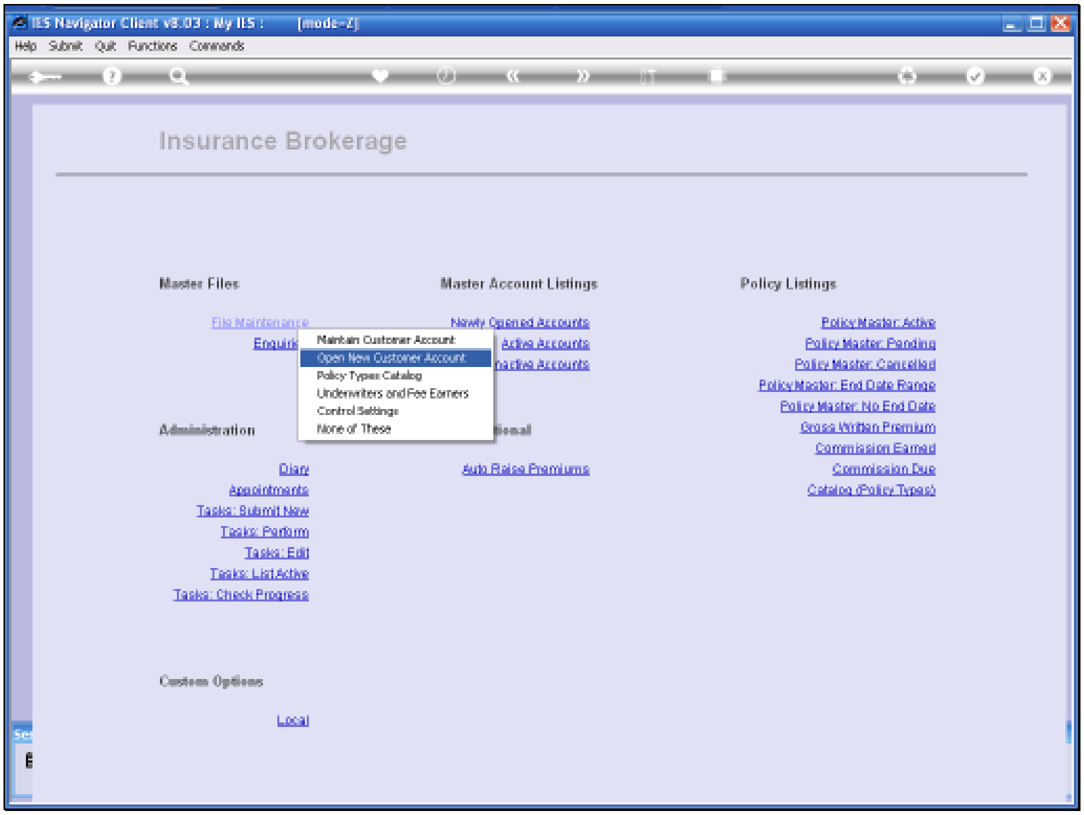
We will open a New Insurance Customer Account whenever we deal with a New Customer for whom we do not yet have an Account.

Because we can have multiple Policies connected to the same Account, we will not open a New Account for a Customer that we already have an Account for.

In the case where we are doing a New Quote for somebody that we do not have an Account for yet, we will Open or Create a New Insurance Customer Account.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Brokerage
Master Files
File Maintenance
Enquiri
Maintain Customer Account
Open New Customer Account
Policy Types Catalog
Underwriters and Fee Earners
Control Settings
None of These
Master Account Listings
Newly Opened Accounts
Active Accounts
nactive Accounts
Policy Listings
Policy Master: Active
Policy Master: Pending
Policy Master: Cancelled
Policy Master: End Date Range
Policy Master: No End Date
Gross Written Premium
Commission Earned
Commission Due
Catalog (Policy Types)
Administration
Diary
Appointments
Tasks: Submit New
Tasks: Perform
Tasks: Edit
Tasks: List Active
Tasks: Check Progress
Auto Raise Premiums
Custom Options
Local

Slide 2


IES Navigator Client v8.03 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Brokerage
Master Files
File Maintenance
Maintain Customer Account
Open New Customer Account
Policy Types Catalog
Underwriters and Fee Earners
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None of These
Master Account Listings
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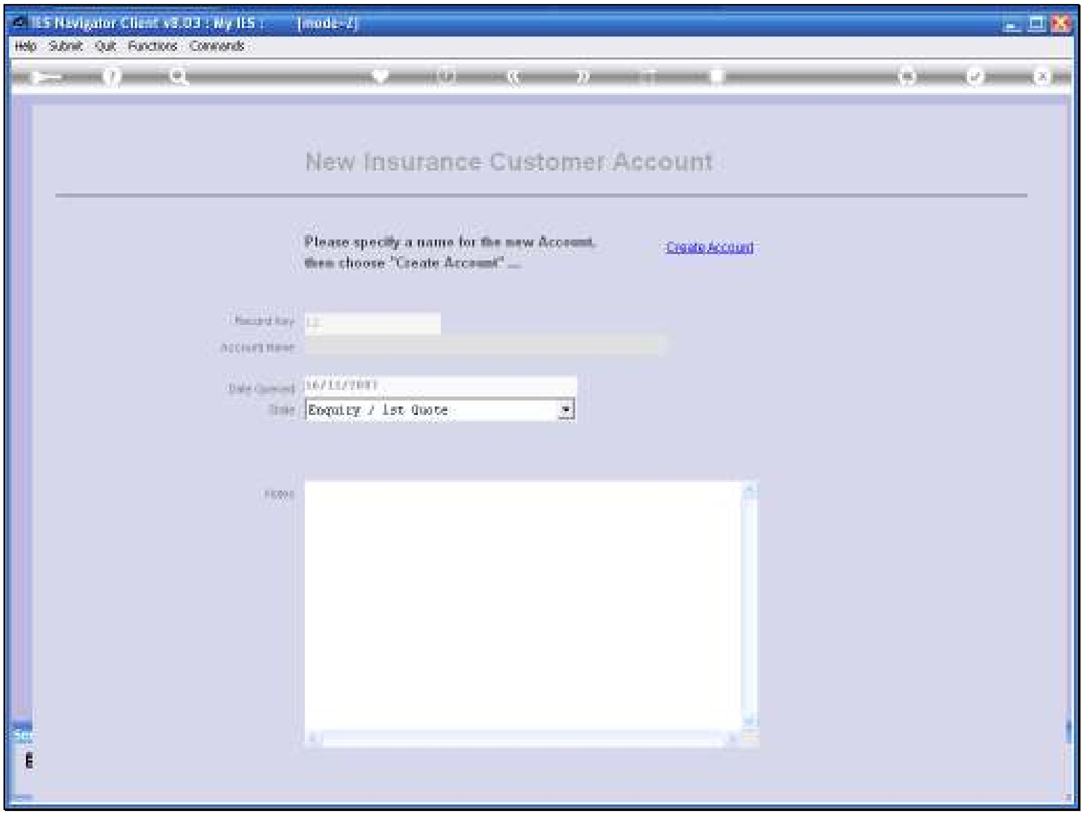
Policy Master: Active
Policy Master: Pending
Policy Master: Cancelled
Policy Master: End Date Range
Policy Master: No End Date
Gross Written Premium
Commission Earned
Commission Due
Catalog (Policy Types)
Administration
Diary
Appointments
Tasks: Submit New
Tasks: Perform
Tasks: Edit
Tasks: List Active
Tasks: Check Progress
Auto Raise Premiums
Custom Options
Local

Slide 3



Slide 4

The System will automatically assign a new Account number. We do not have to do that.

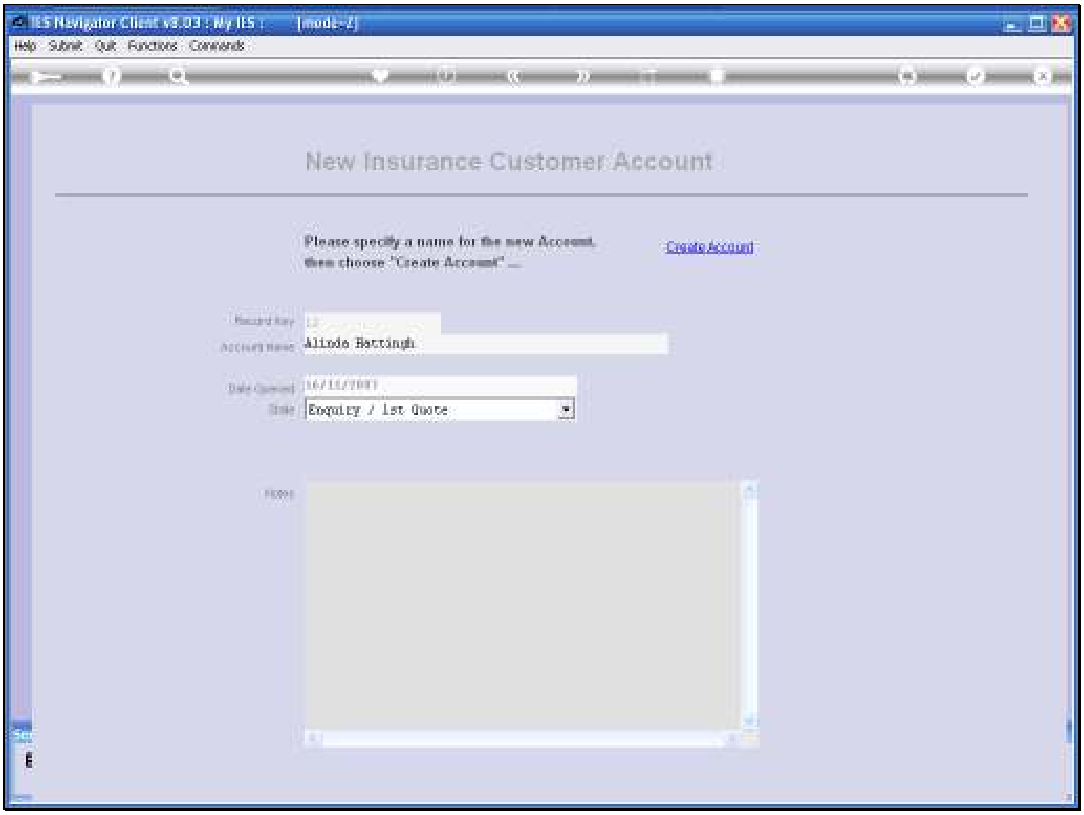
All that is really required is that we specify a Name for this Account and then we can create it.

More likely we will make some notes, possibly to indicate some activity that has already taken place.

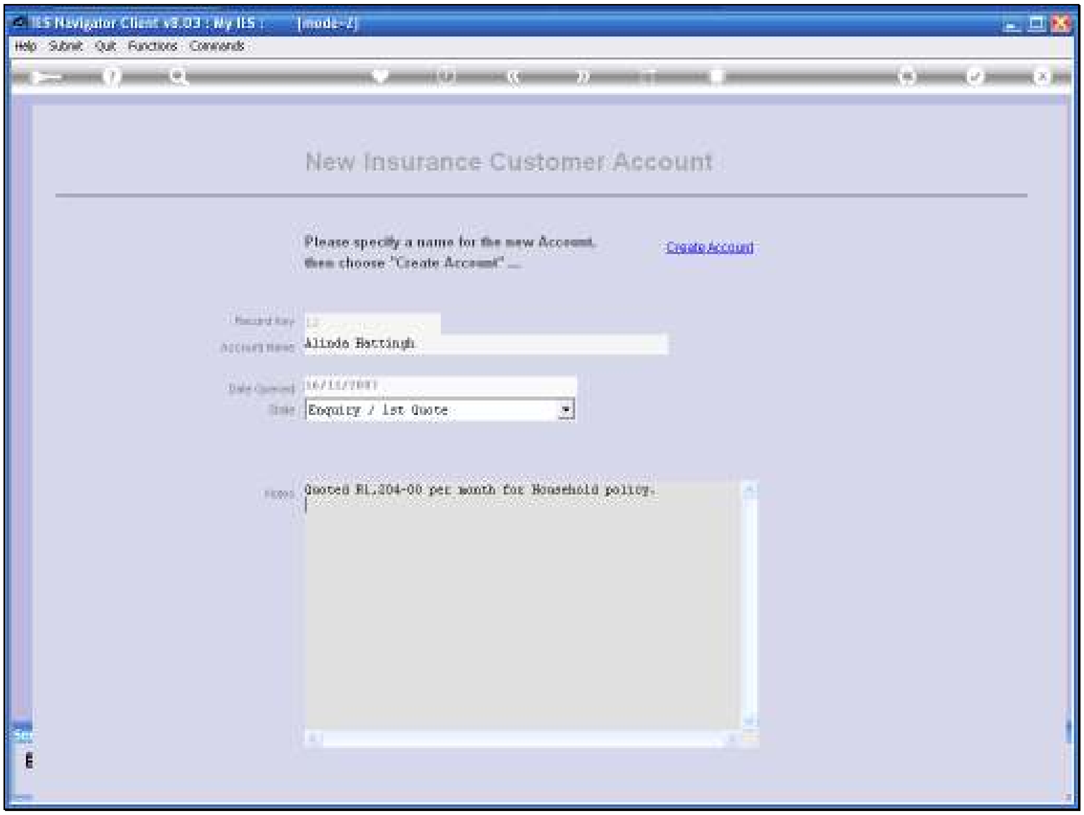
Perhaps a Quote has been given that we want the Details so that we can retrieve it later.

Then of course, if the Customer does not go ahead with the policy, we can simply make this New Account in active.

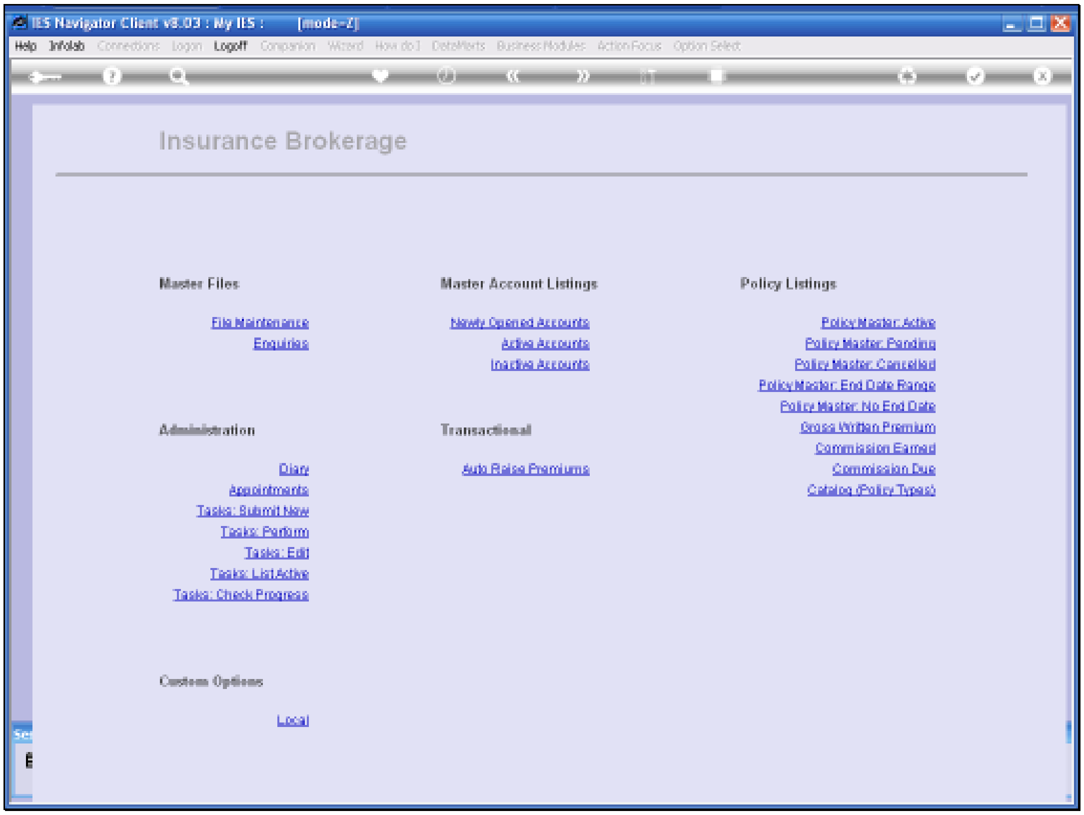
No other Internal Financial Accounts are created at this stage. The System is simply opening a record for a New Customer.


Help Submit Quit Functions Commands
New Insurance Customer Account
Please specify a name for the new Account,
then choose "Create Account" ...
Create Account
Alinda Hattingh
Enquiry / 1st Quote

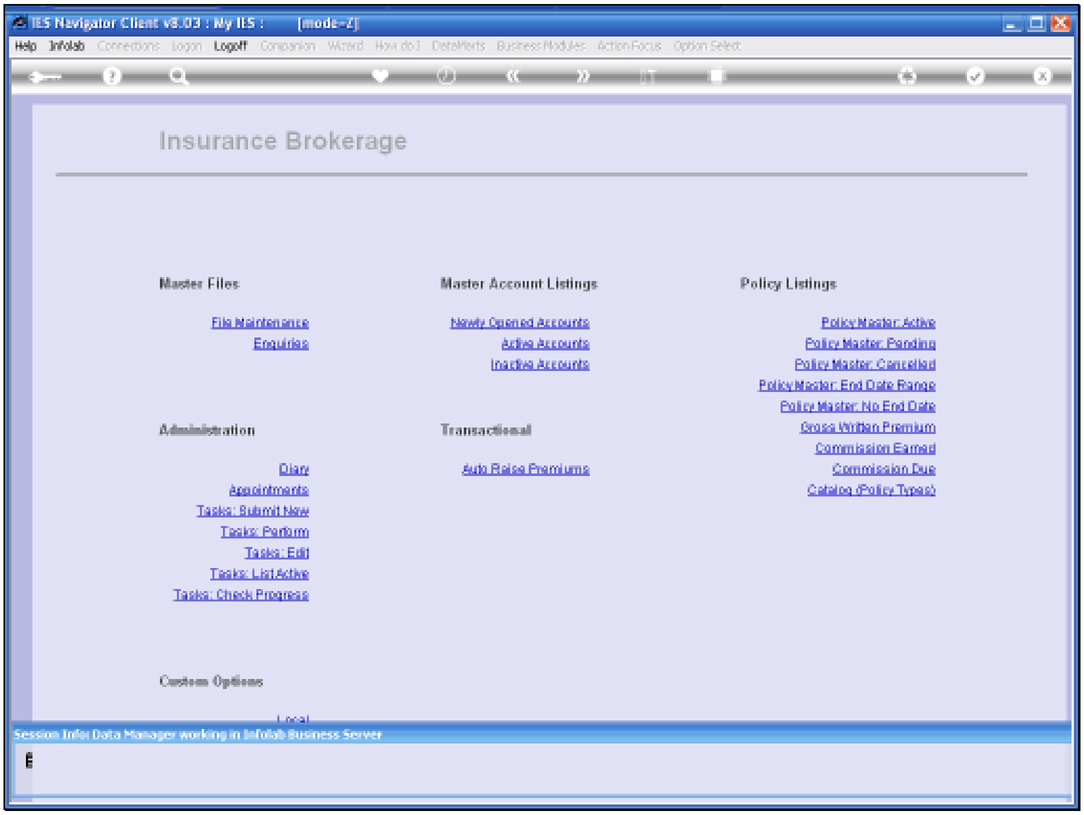
Slide 5


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
New Insurance Customer Account
Please specify a name for the new Account,
then choose "Create Account" ...
Create Account
Alinda Hattingh
Enquiry / 1st Quote
Quoted R1,204-00 per month for Household policy.

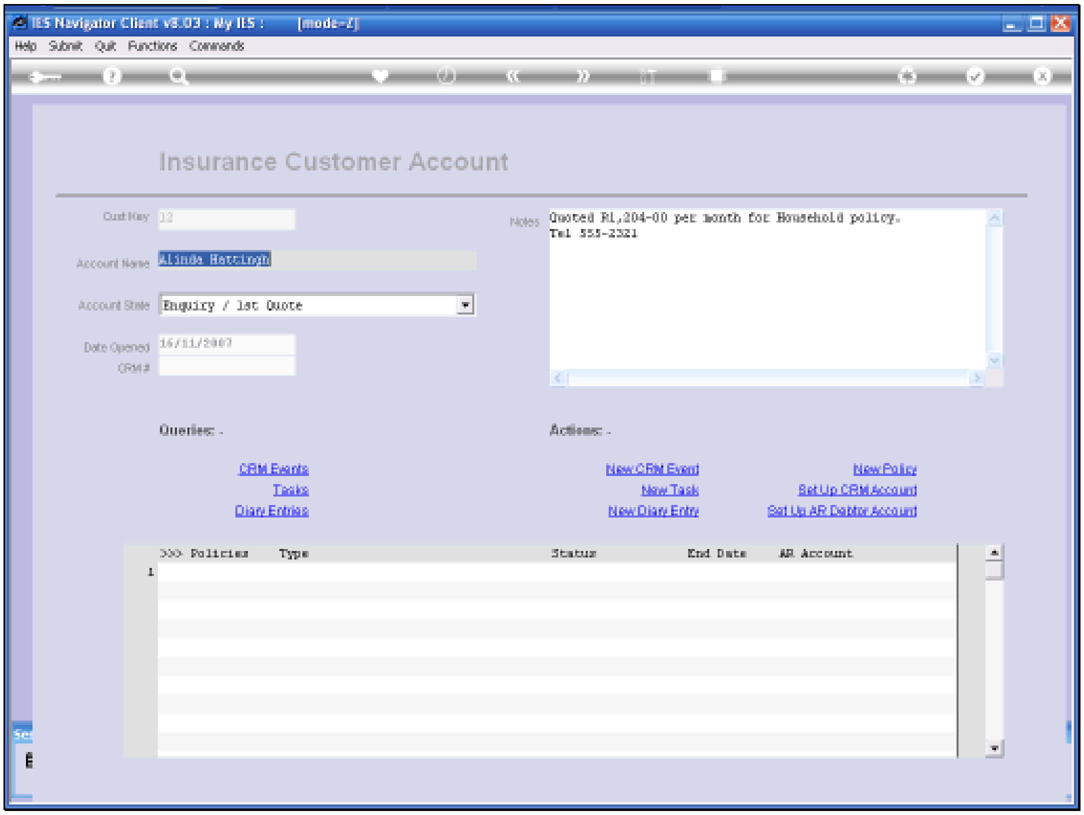
Slide 6


IES Navigator Client v8.03 : My IES : [mode=Z]
Help Infolab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select
Insurance Brokerage
Master Files
File Maintenance
Enquiries
Master Account Listings
Newly Opened Accounts
Active Accounts
Inactive Accounts
Policy Listings
Policy Master: Active
Policy Master: Pending
Policy Master: Cancelled
Policy Master: End Date Range
Policy Master: No End Date
Gross Written Premium
Commission Earned
Commission Due
Catalog (Policy Types)
Administration
Diary
Appointments
Tasks: Submit New
Tasks: Perform
Tasks: Edit
Tasks: List Active
Tasks: Check Progress
Transactional
Auto Raise Premiums
Custom Options
Local

Slide 7


IES Navigator Client v8.03 : My IES : [mode=Z]
Help Infolab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select
Insurance Brokerage
Master Files
File Maintenance
Enquiries
Master Account Listings
Newly Opened Accounts
Active Accounts
Inactive Accounts
Policy Listings
Policy Master: Active
Policy Master: Pending
Policy Master: Cancelled
Policy Master: End Date Range
Policy Master: No End Date
Gross Written Premium
Commission Earned
Commission Due
Catalog (Policy Types)
Administration
Diary
Appointments
Tasks: Submit New
Tasks: Perform
Tasks: Edit
Tasks: List Active
Tasks: Check Progress
Transactional
Auto Raise Premiums
Custom Options
Local
Session Info: Data Manager working in Infolab Business Server

Slide 8



Slide 9

The moment we choose "Create Account" the System will Open a New Account and will connect us to the Maintenance Option for this New Customer Account.

A this time we can add further detail or perform other Actions, even list a New Policy if we want to.

More likely, at this stage, we will not have anything further to add and can simply Exit this screen.

But, we can work with this account in Maintenance Mode at any other point in time.

We will deal with that in another Tutorial.