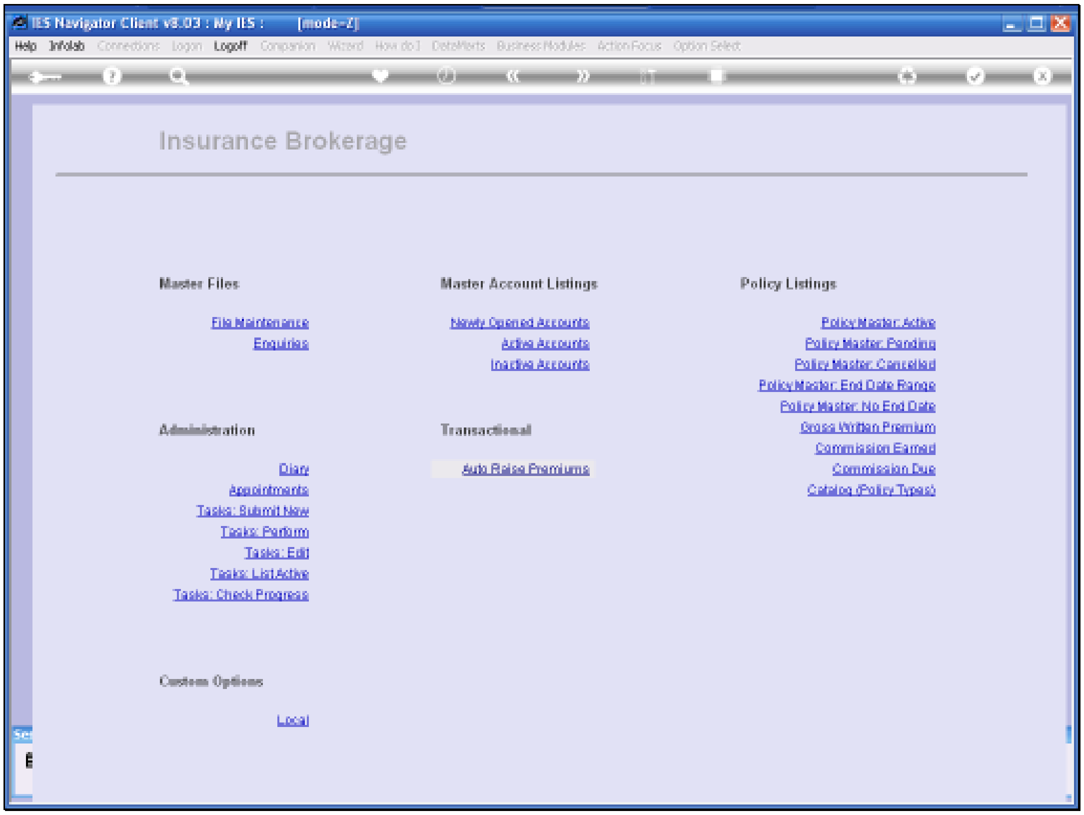
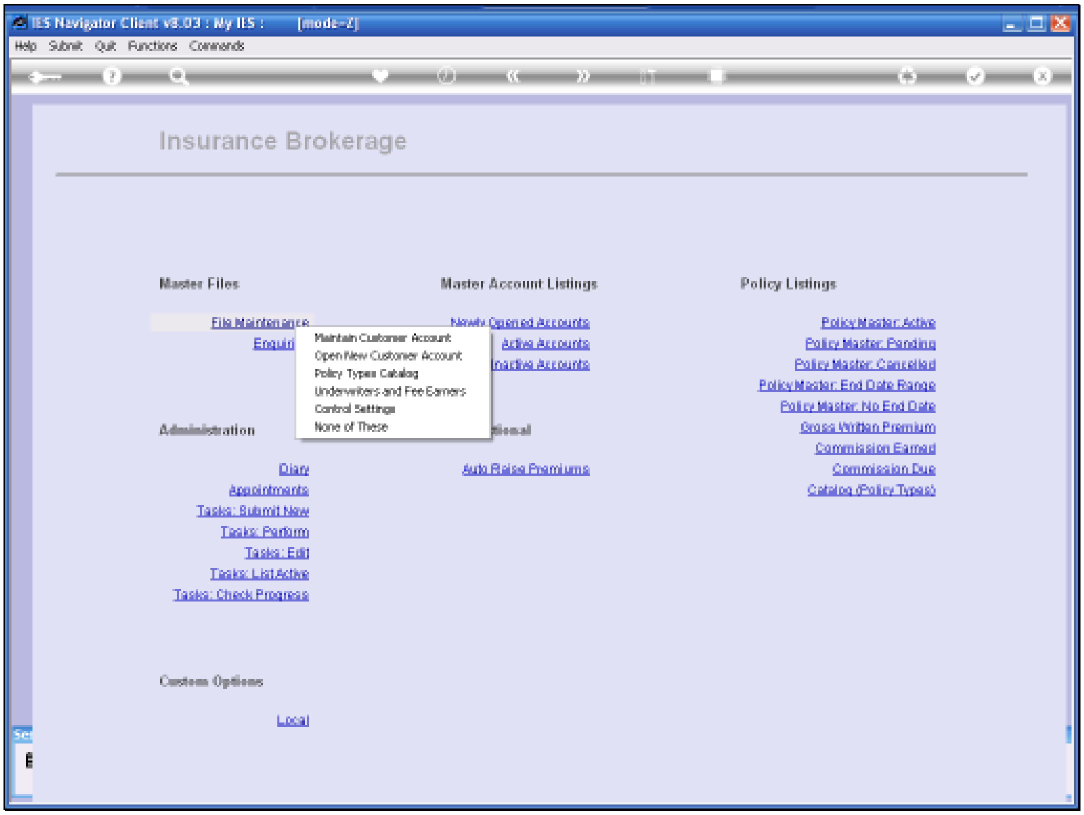


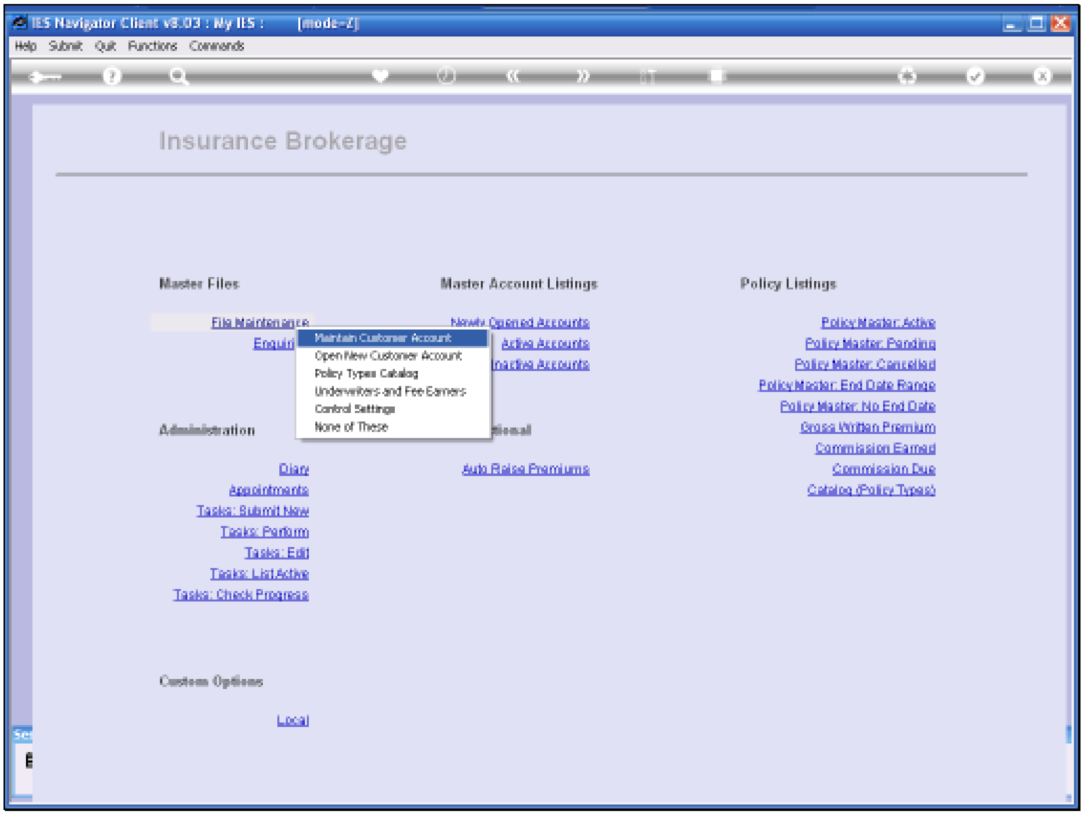
Slide 1

In this session we are looking at how we “Maintain” or work with Customer Insurance Accounts.

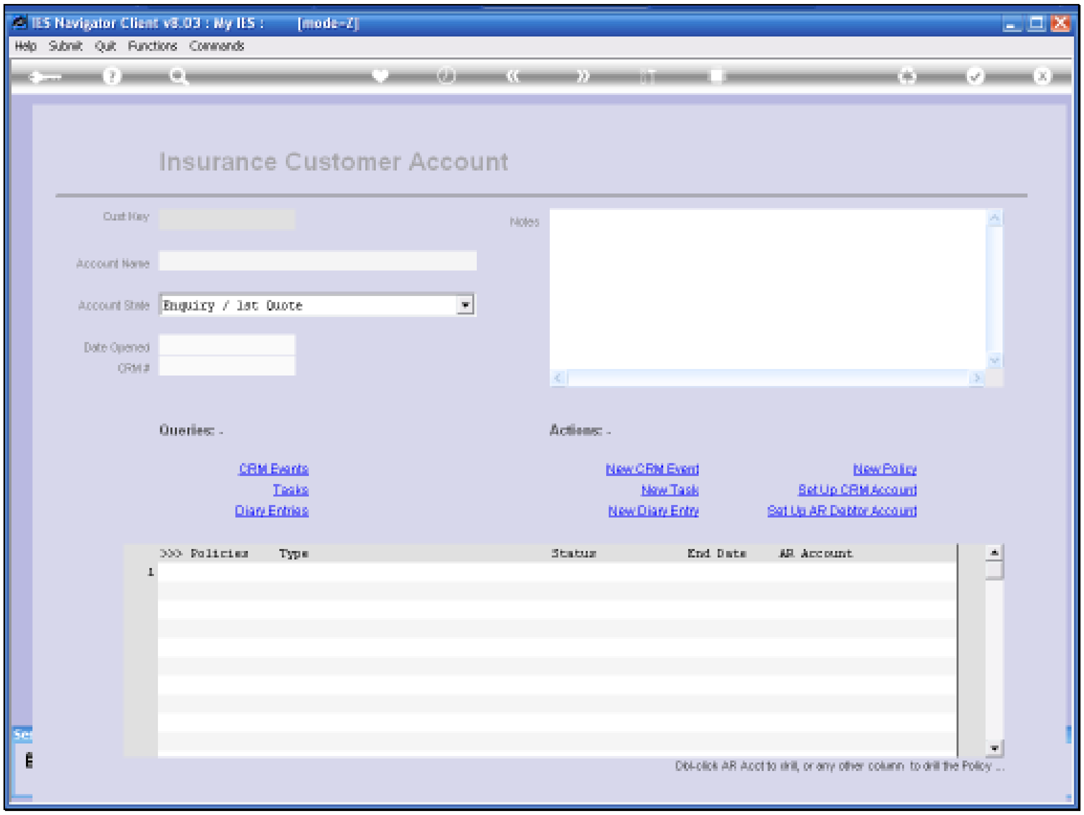


Slide 2

Of course we start by Selecting the appropriate Option from the Menu.


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
Control Settings
None of These
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
Auto Raise Premiums
Custom Options
Local

Slide 3



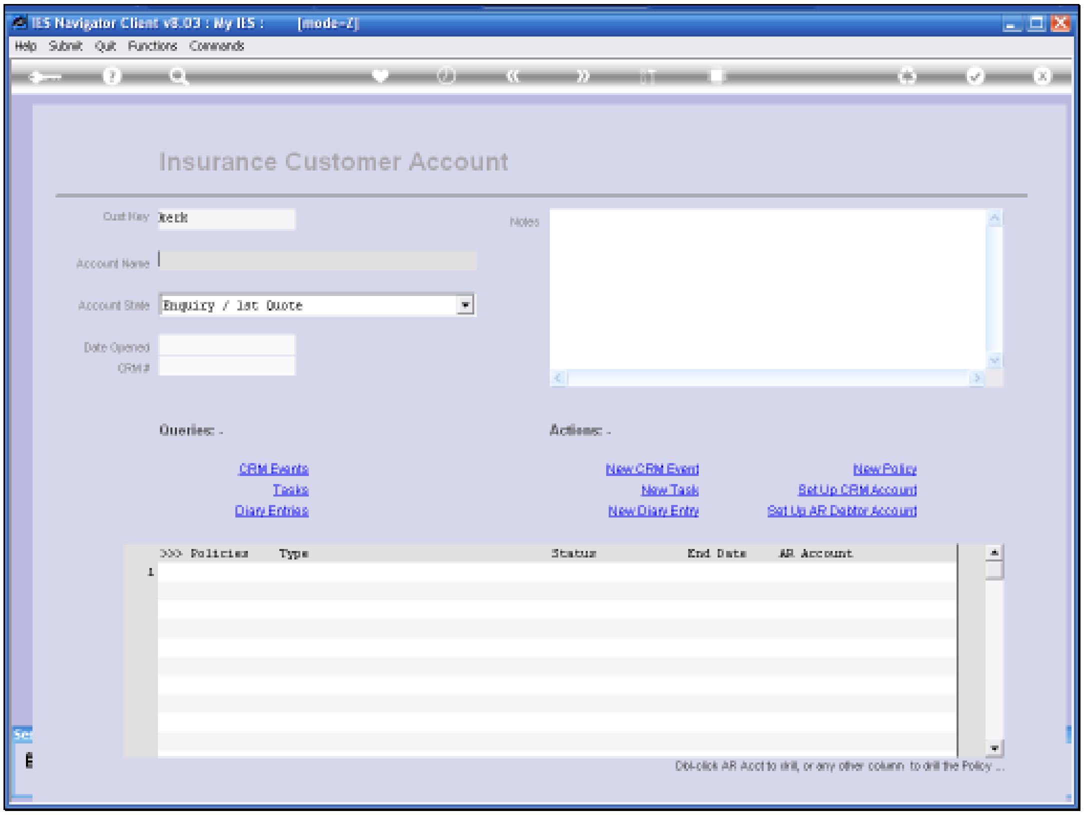
Slide 4

Then we can use any of the available Lookup Methods to identify the Account.

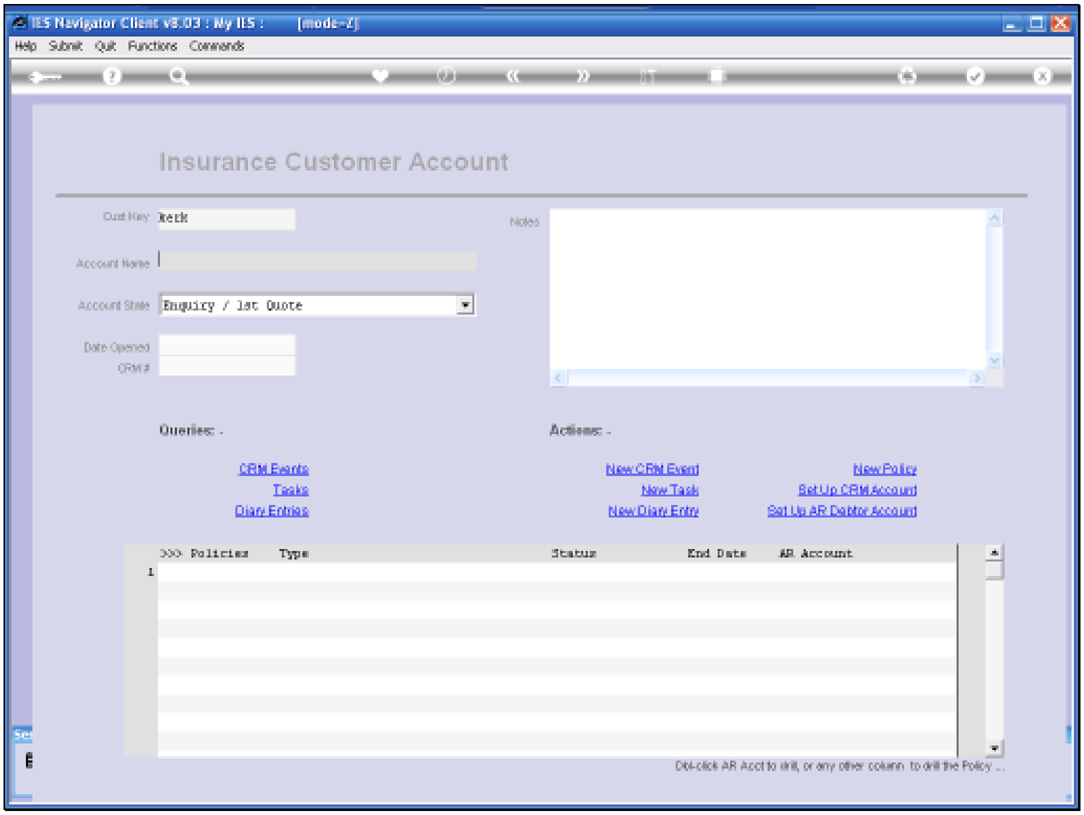
We can type in the Key.

We can type in part of the Name of the Account or we can simply use the F2 Lookup.

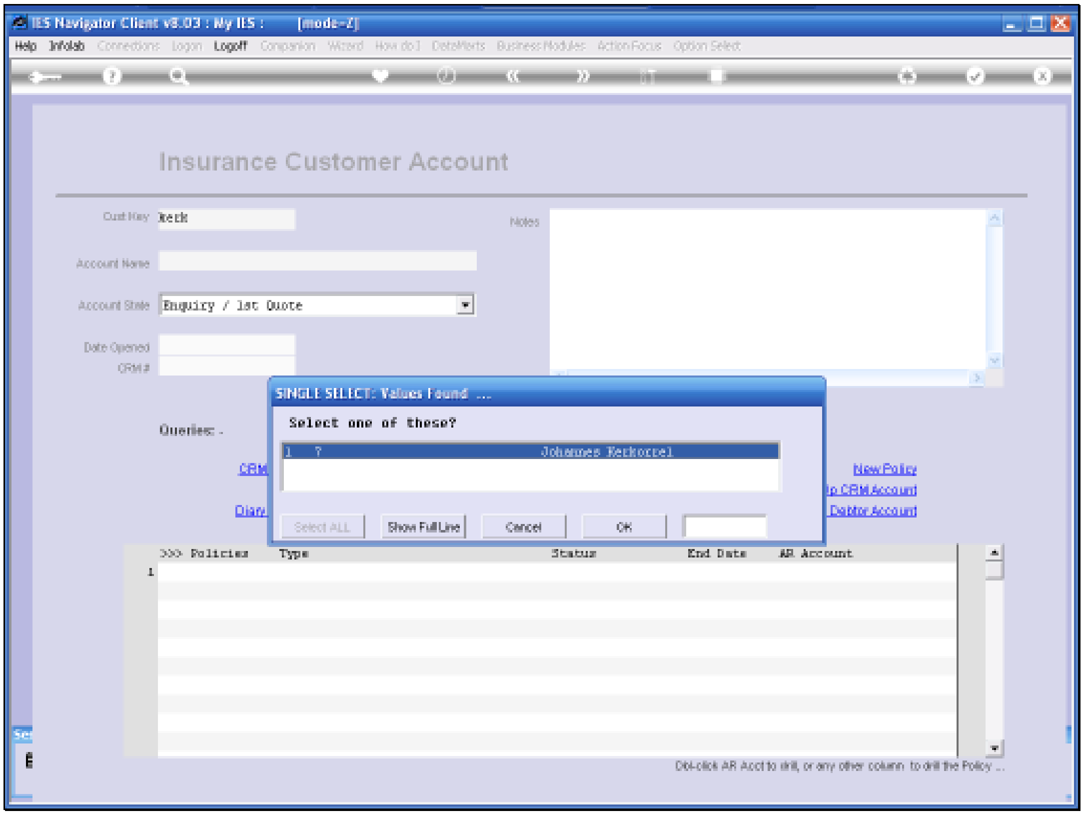
Or we can double click and select “Lookup”.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key
Account Name
Account State
Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies
Type
Status
End Date
AR Account
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 5

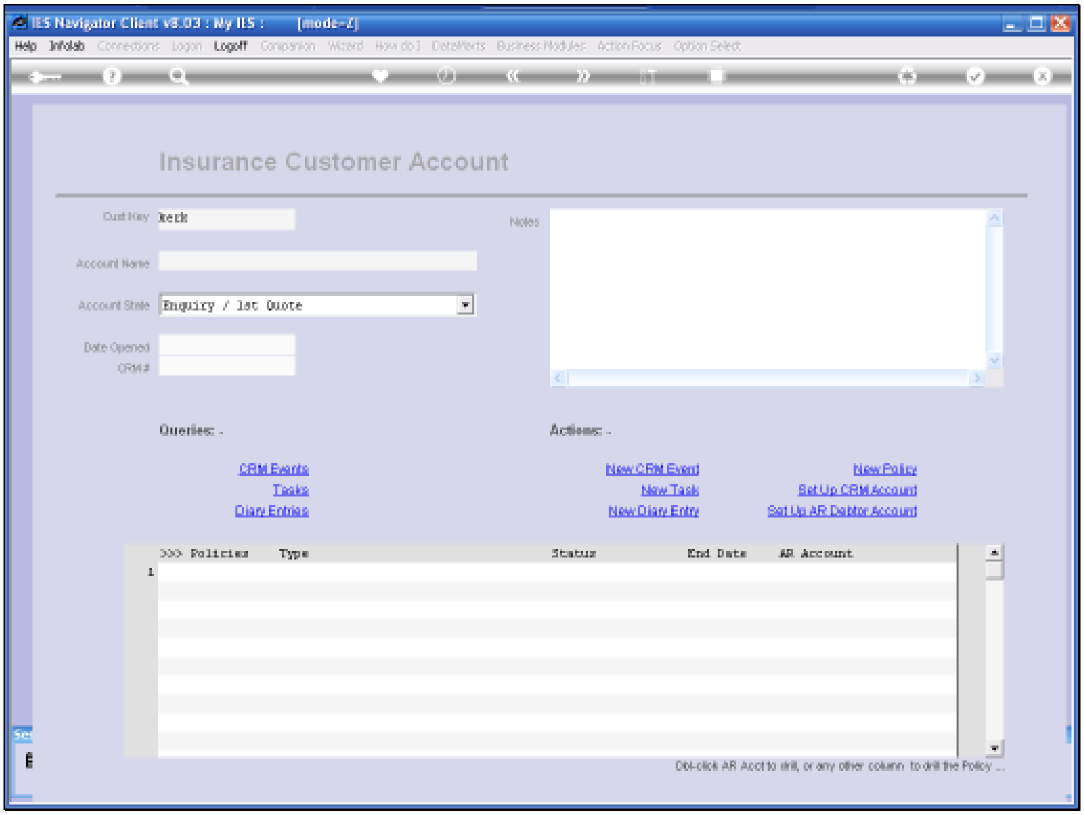

IES Navigator Client v8.03 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key
Account Name
Account State
Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies
Type
Status
End Date
AR Account
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 6

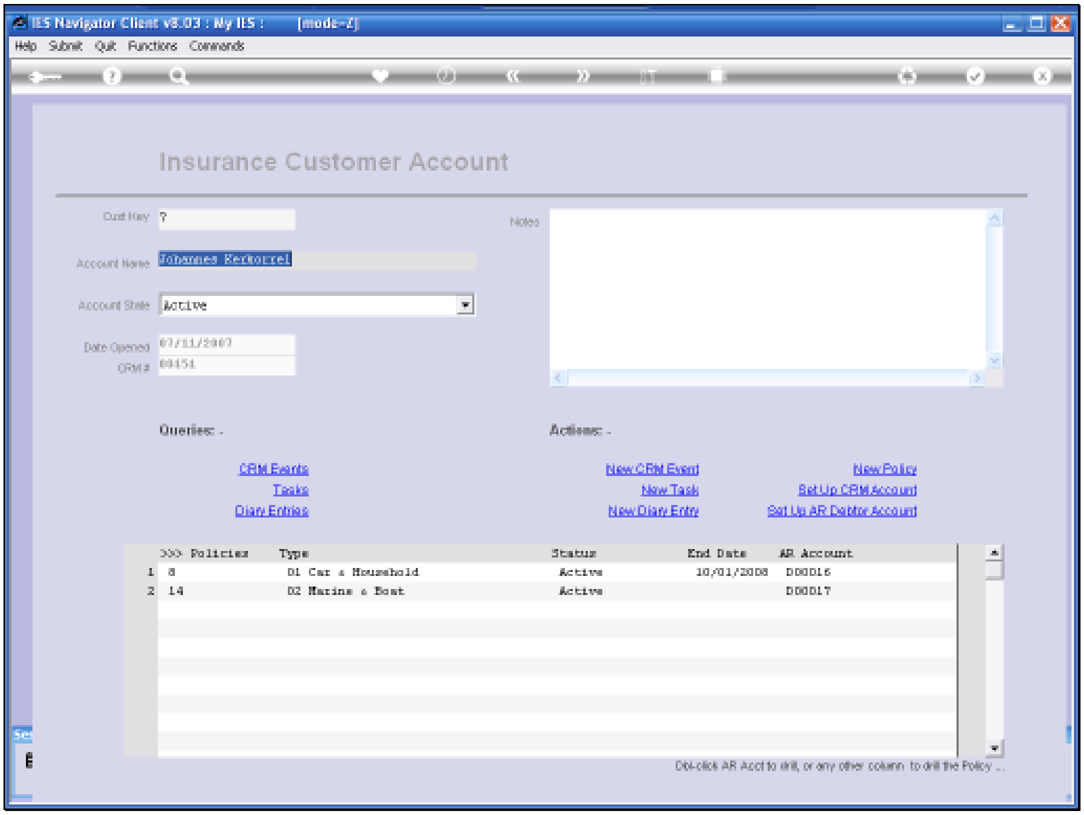


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Infolab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select
Insurance Customer Account
Cust Key kerk
Account Name
Account State Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: .
SINGLE SELECT: Values Found ...
Select one of these?
1 ? Johannes Kerkorrel
Select ALL
Show Full Line
Cancel
OK
New Policy
CRM Account
Debtor Account
>>> Policies Type Status End Date AR Account
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

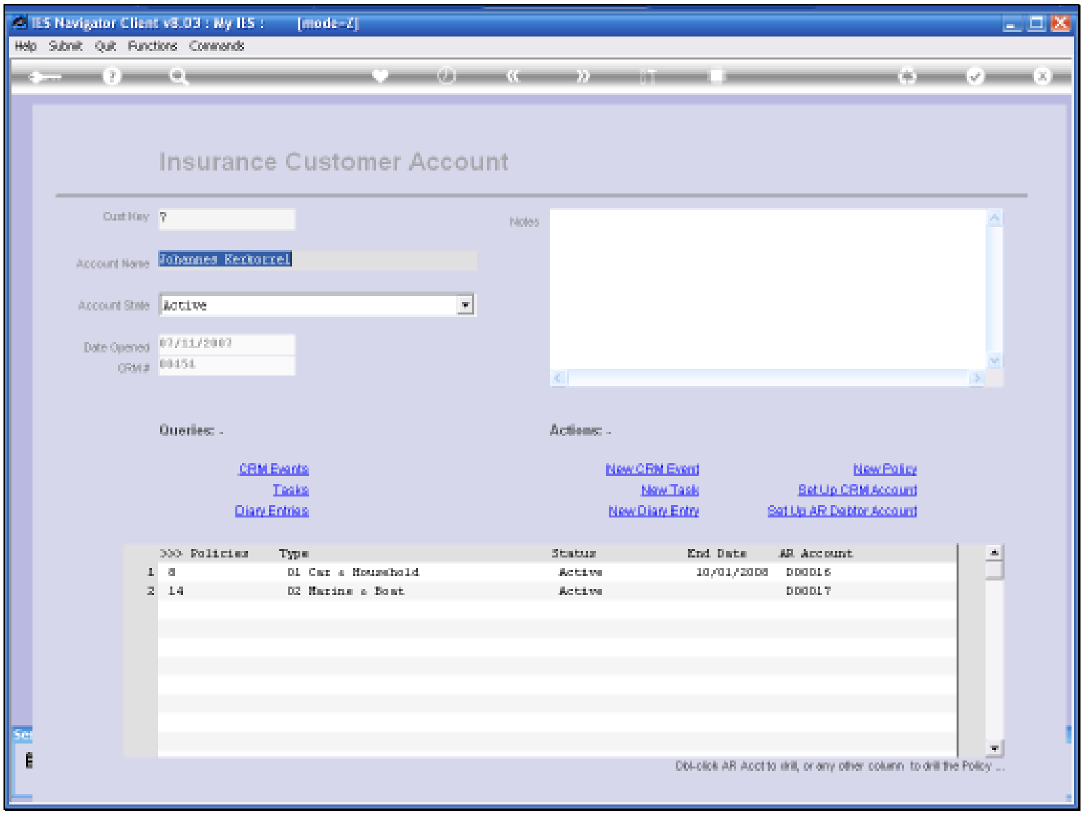
Slide 7


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 Customer Account
Cust Key
Account Name
Account State
Enquiry / 1st Quote
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 8


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM# 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 9



Slide 10

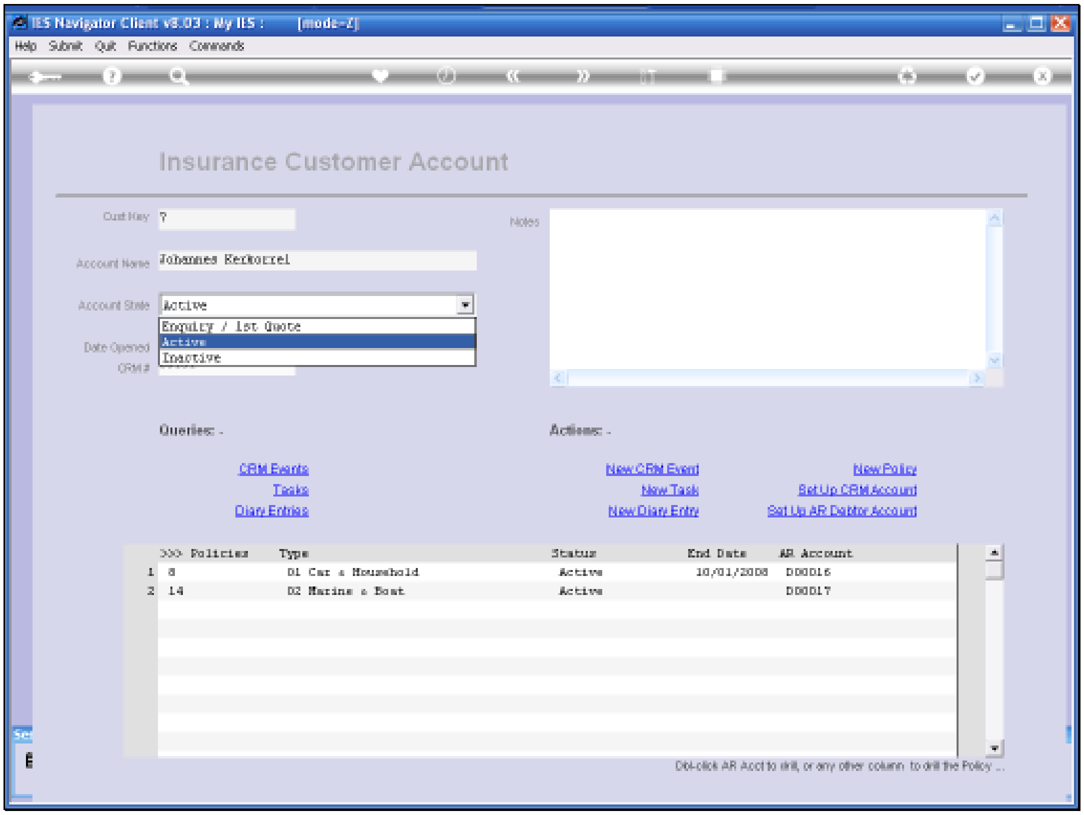
There are 3 different states for an Account to be in.

First we have the "Inquiry Mode". In other words we have done a first quote, but the Account is not really Active yet. Or it can be Active if there are any Active Policies on the Account. Or it can be In-Active, i.e. we did a first quote, but it never became Active, never Issued a Policy, or the Policy has not been Renewed and are no longer on the Active Policies List.

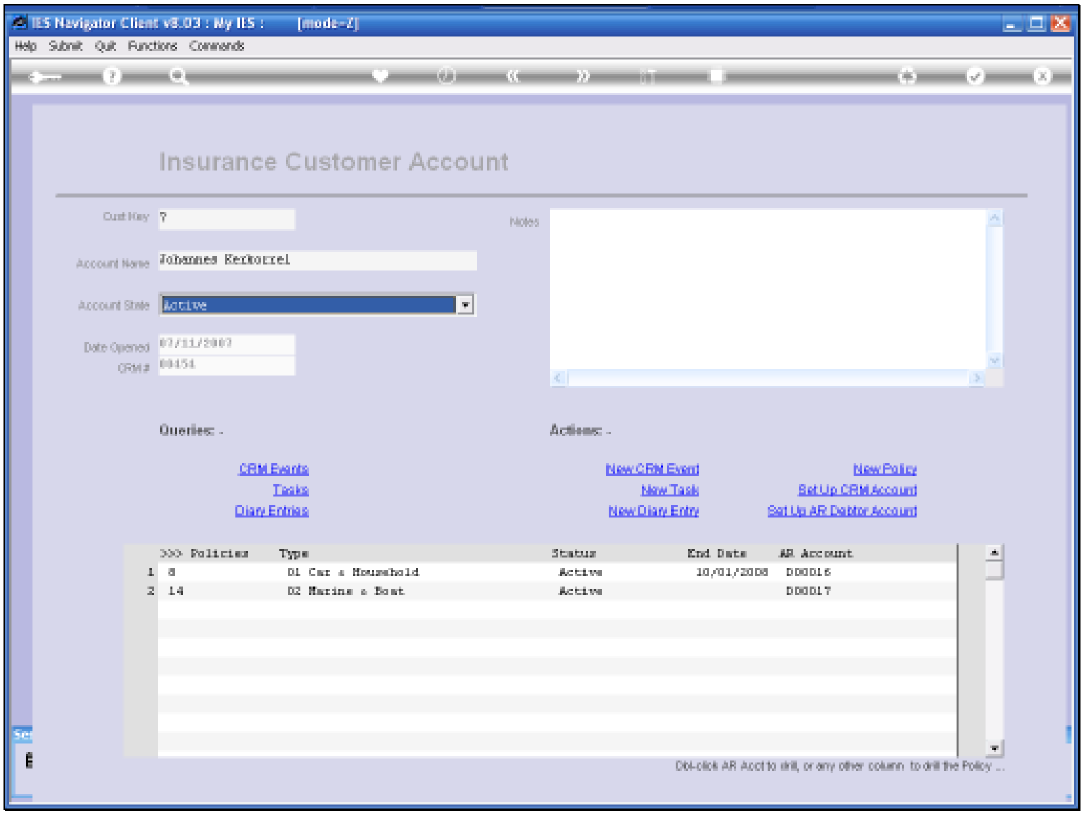
In this case we can also set the Account In-Active.

Now this is a setting that we do manually, except if we put a Policy in an Active state and the Account is not In-Active.

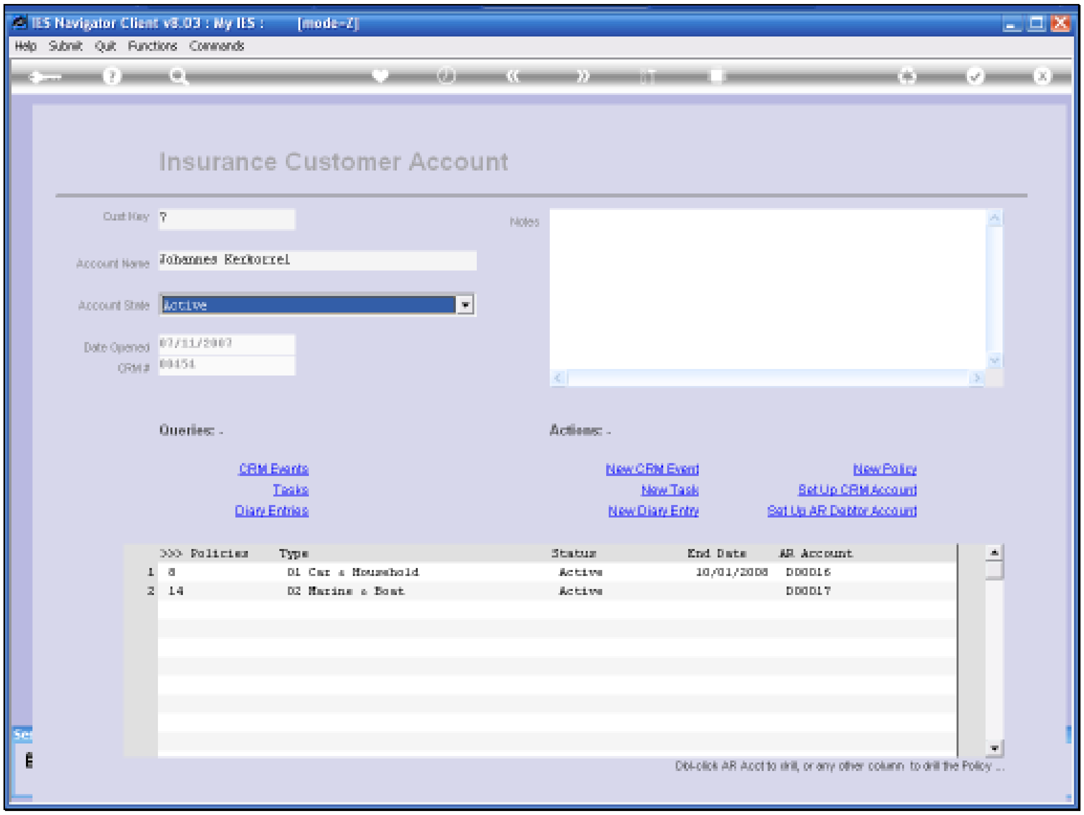
Then the Account will automatically turn Active.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Enquiry / 1st Quote
Active
Inactive
Date Opened
CRM #
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 11

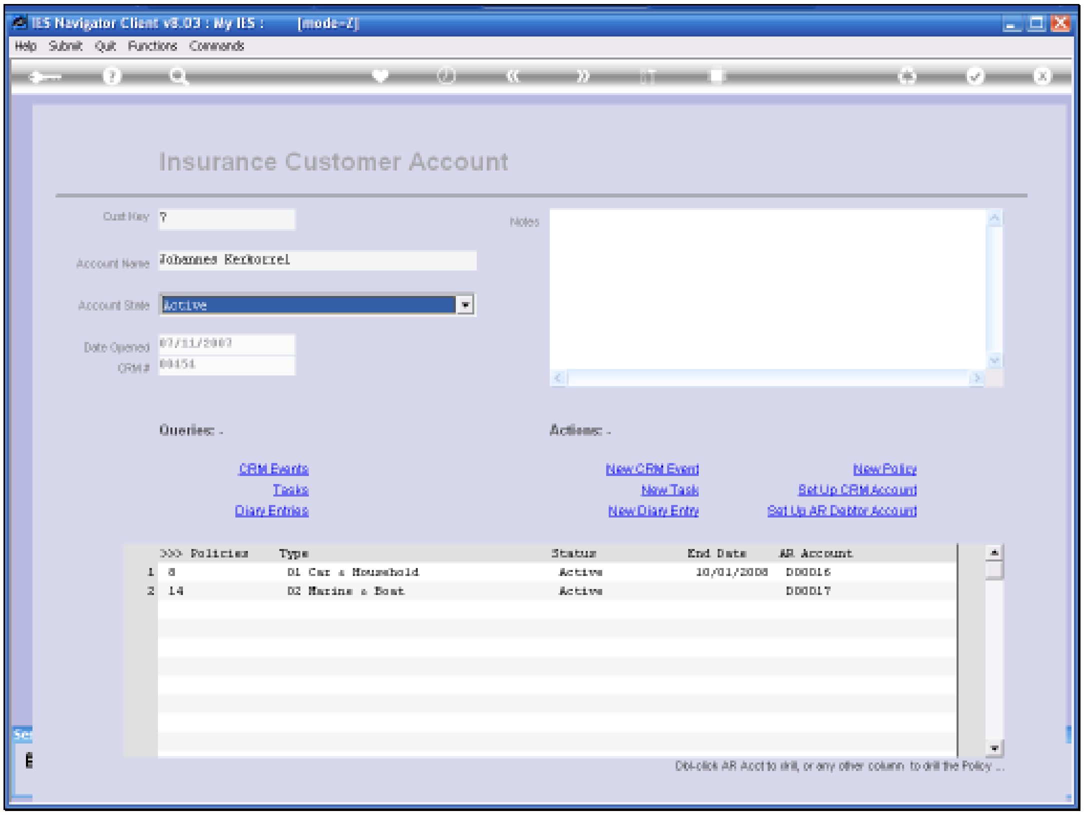

IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 12



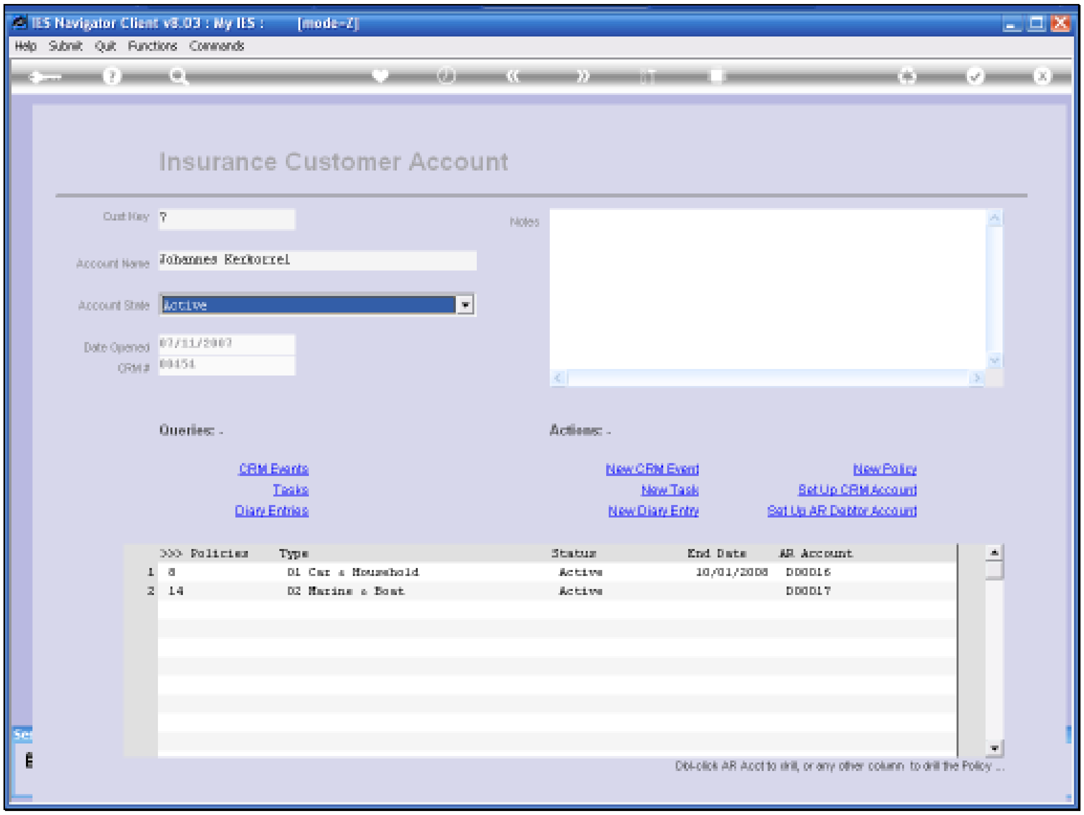
Slide 13

The “Date Opened” is something that the System will automatically insert when we first create the Account. We cannot Manually adapt or change that.

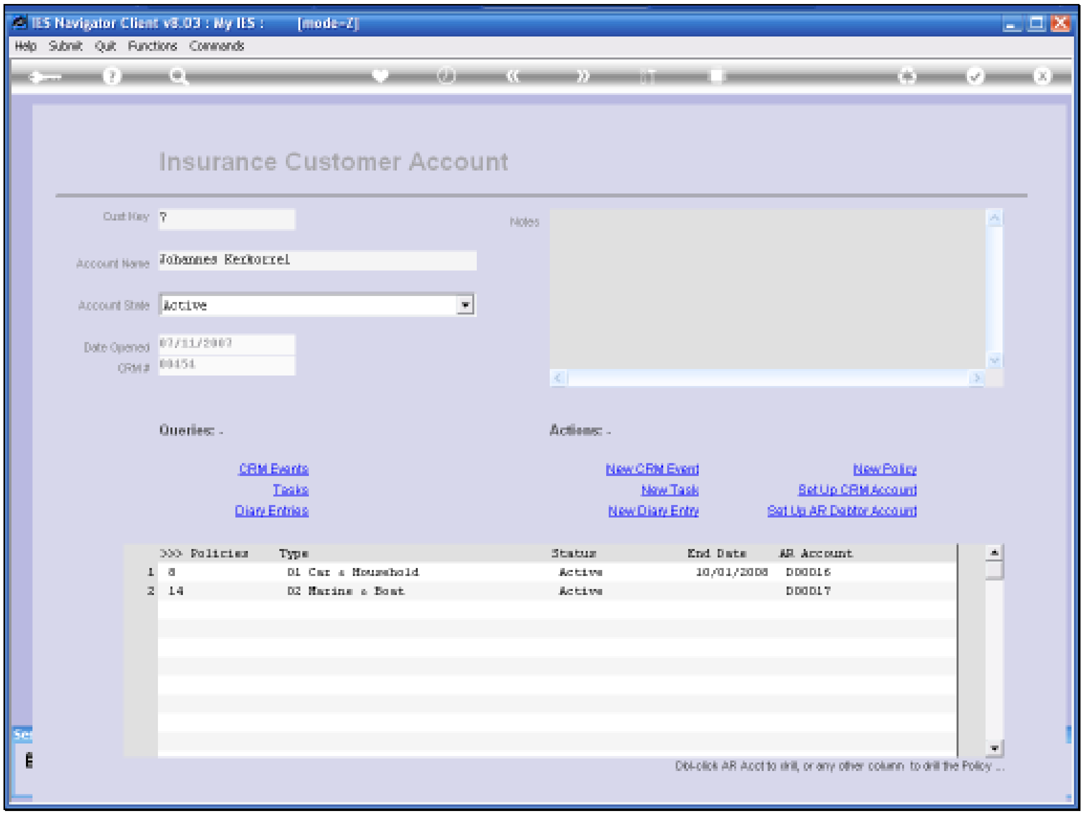


Slide 14

The CRM Number field also cannot be edited directly, but we can actually change that information by using the “Set Up CRM Account” function and we will look at that presently.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

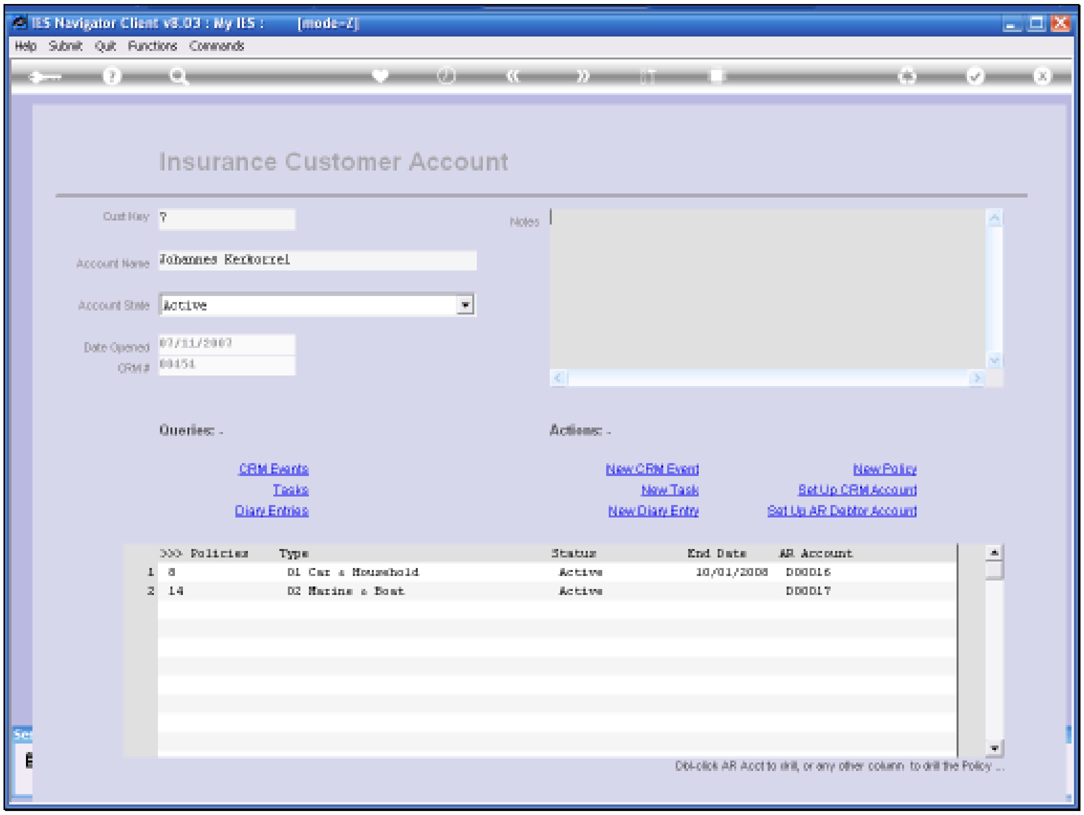
Slide 15



Slide 16

The “Notes” field of course can be used over and over again.

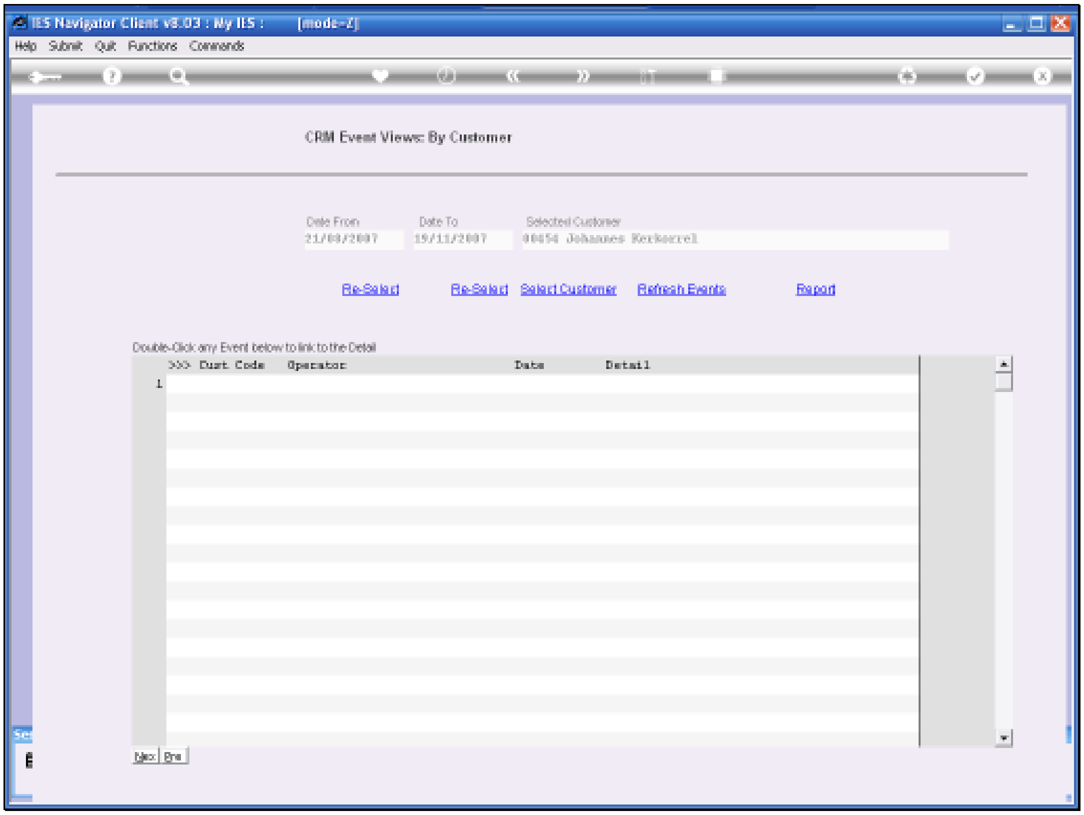
We can record any relevant Notes on this Account in the “Notes” field and we can make any changes that we want to make at any point in time.



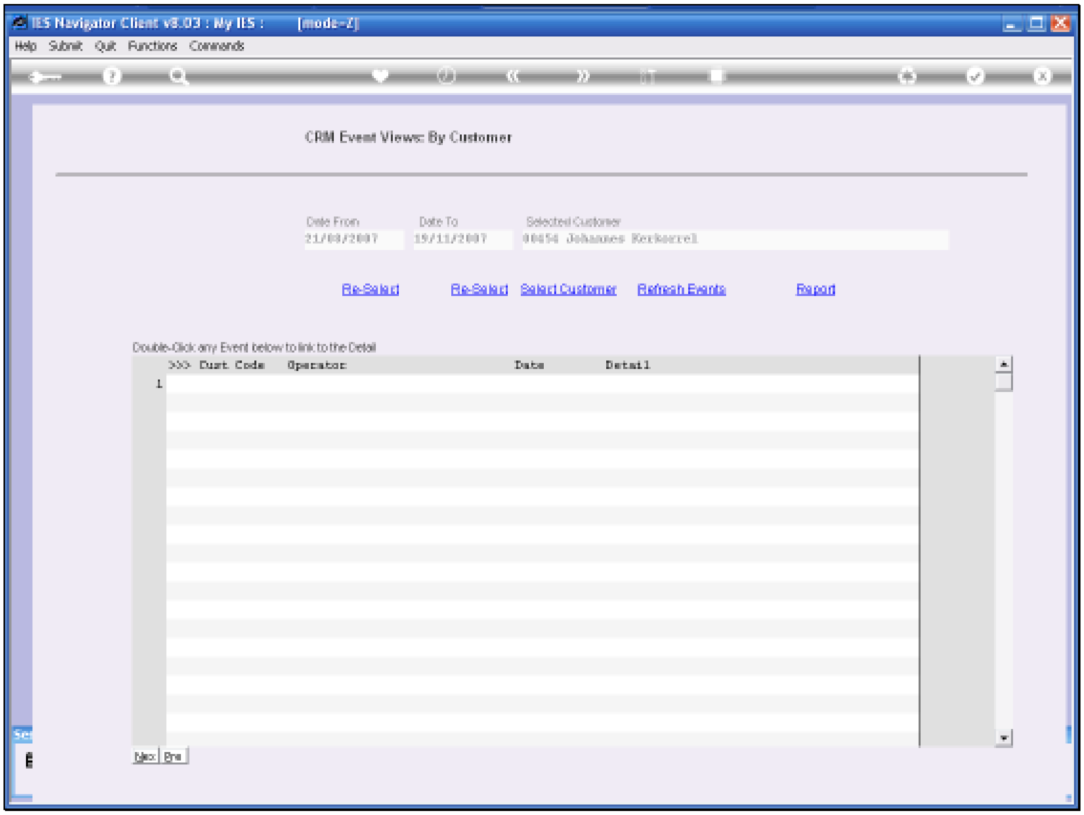
Slide 17

Next we look at the available Queries on the Account.

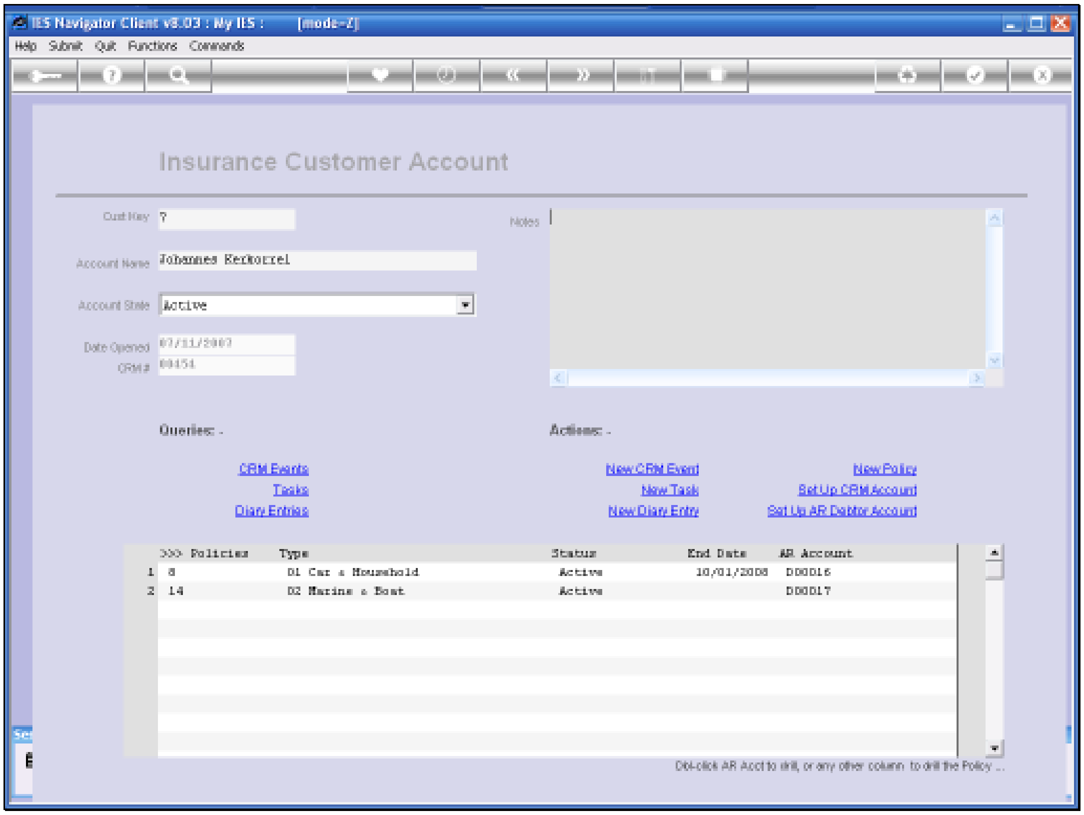
If we choose “CRM Events” then the CRM Events for this Account will be opened and if there are any Events in the Default Data Range, then it will be shown.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
CRM Event Views: By Customer
Date From
21/08/2007
Date To
19/11/2007
Selected Customer
00454 Johannes Kerkorrel
Re-Select
Re-Select
Select Customer
Refresh Events
Report
Double-Click any Event below to link to the Detail
>>> Cust Code Operator Date Detail
Next Prev

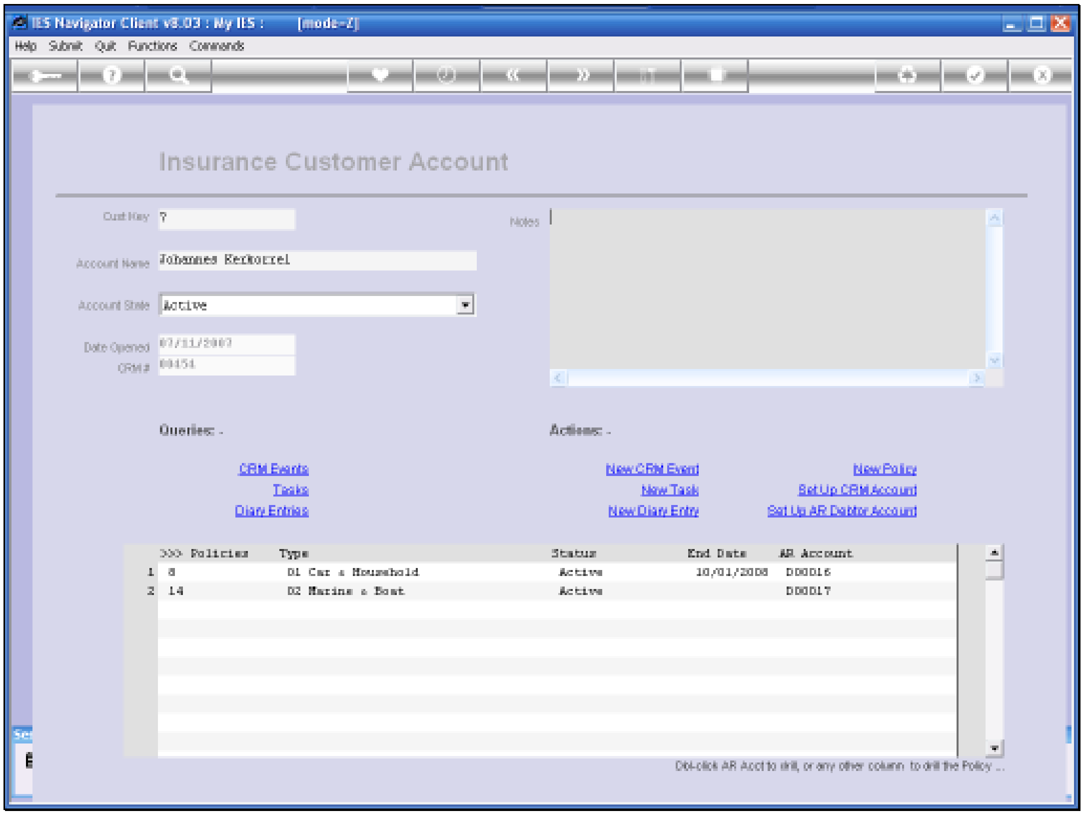
Slide 18


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
CRM Event Views: By Customer
Date From
21/08/2007
Date To
19/11/2007
Selected Customer
00454 Johannes Kerkorrel
Re-Select
Re-Select
Select Customer
Refresh Events
Report
Double-Click any Event below to link to the Detail
>>> Cust Code Operator Date Detail
Next Pre

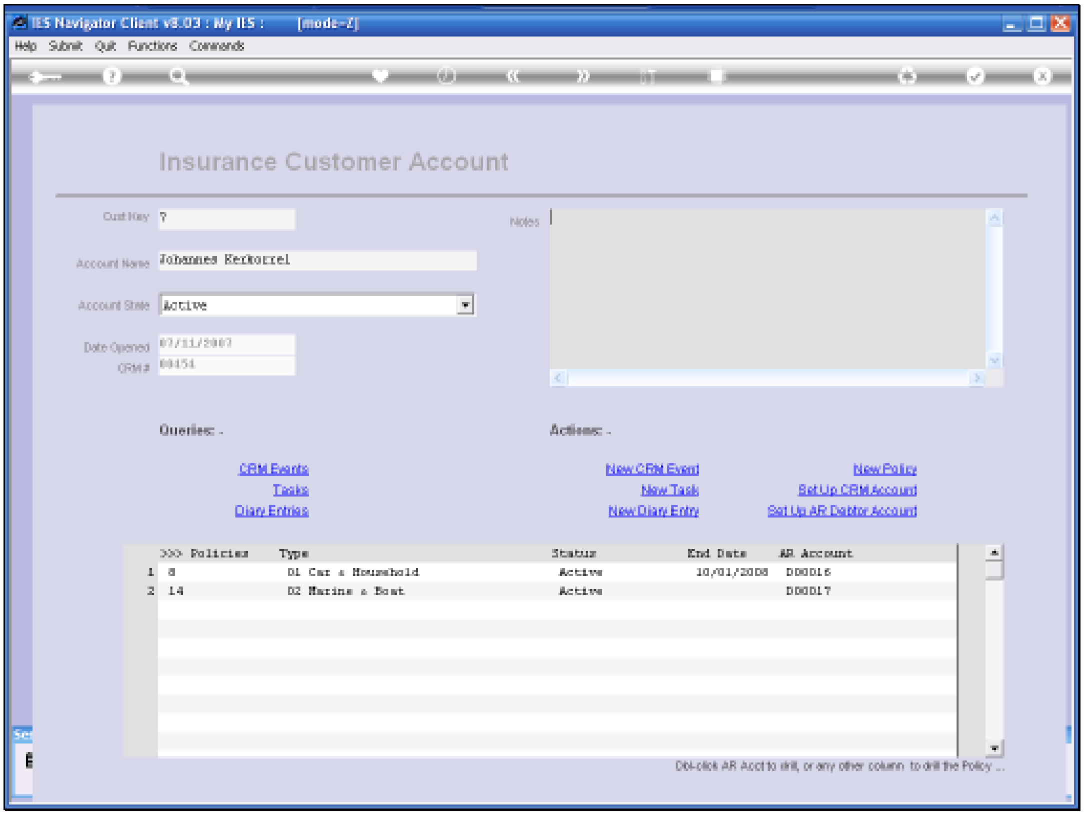
Slide 19


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 20


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

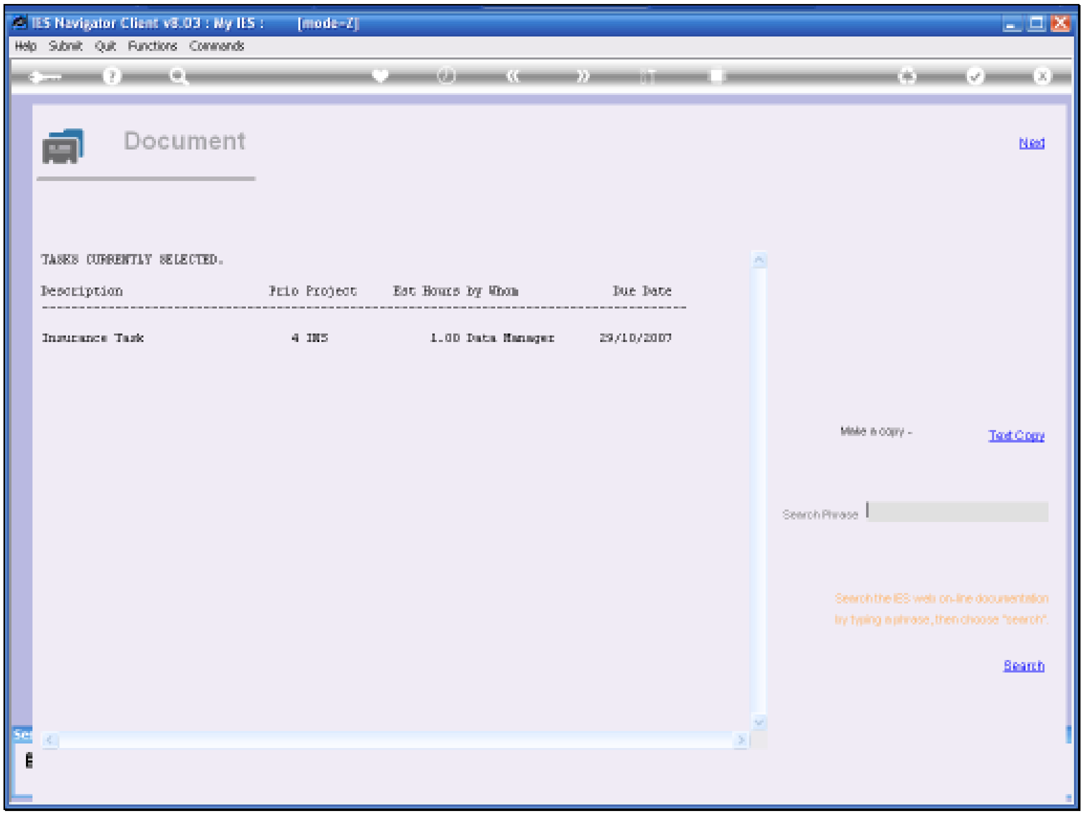
Slide 21



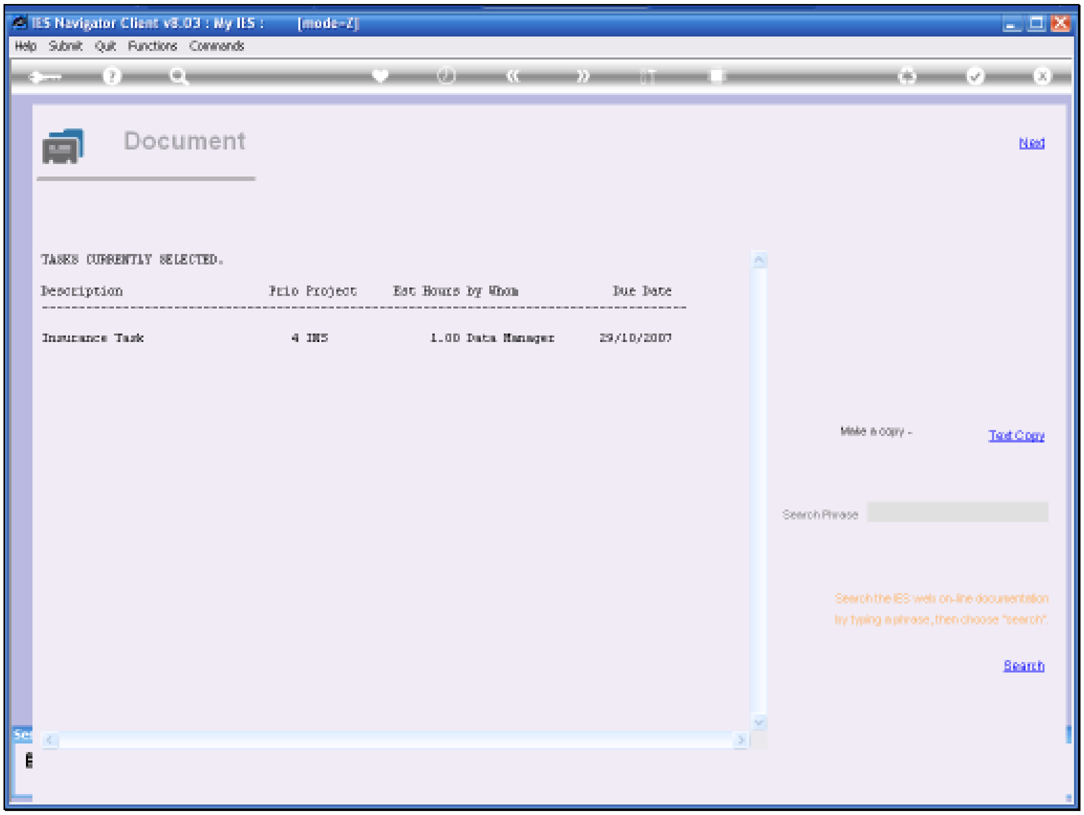
Slide 22

The link to “Tasks” is here for convenience, but does not specifically relate only to this Account.

So when we choose this link, we will see all Tasks that are flagged for the Insurance.

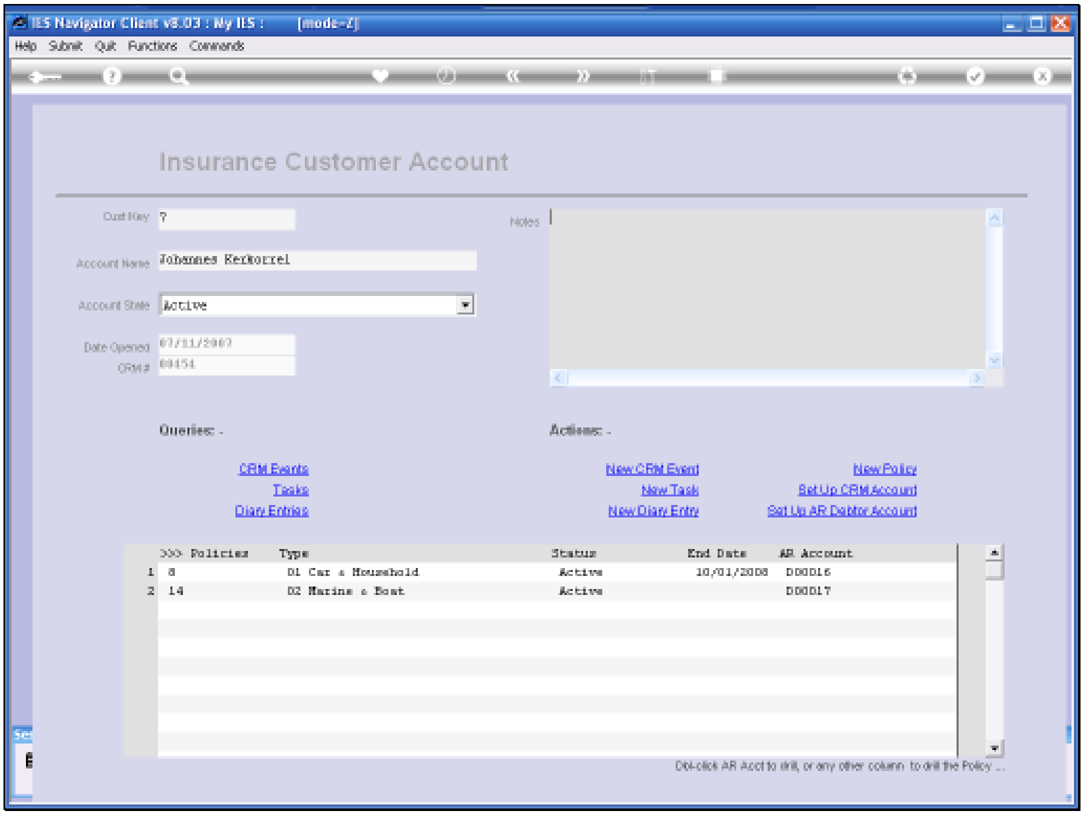

IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Document
Next
TASKS CURRENTLY SELECTED.
Description Prio Project Est Hours by Whom Due Date
Insurance Task 4 INS 1.00 Data Manager 29/10/2007
Make a copy - Text Copy
Search Phrase
Search the IES web on-line documentation by typing a phrase, then choose "search".
Search

Slide 23

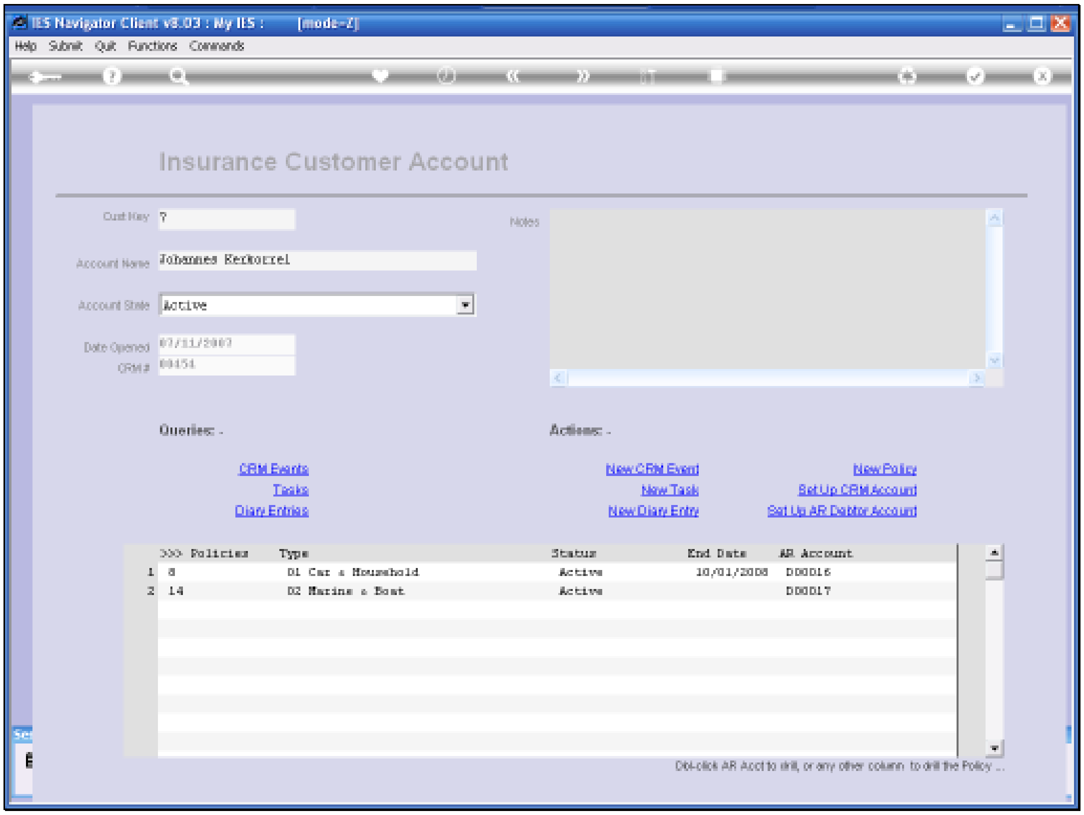


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Document
Next
TASKS CURRENTLY SELECTED.
Description Prio Project Est Hours by Whom Due Date
Insurance Task 4 INS 1.00 Data Manager 29/10/2007
Make a copy -
Text Copy
Search Phrase
Search the IES web on-line documentation by typing a phrase, then choose "search".
Search

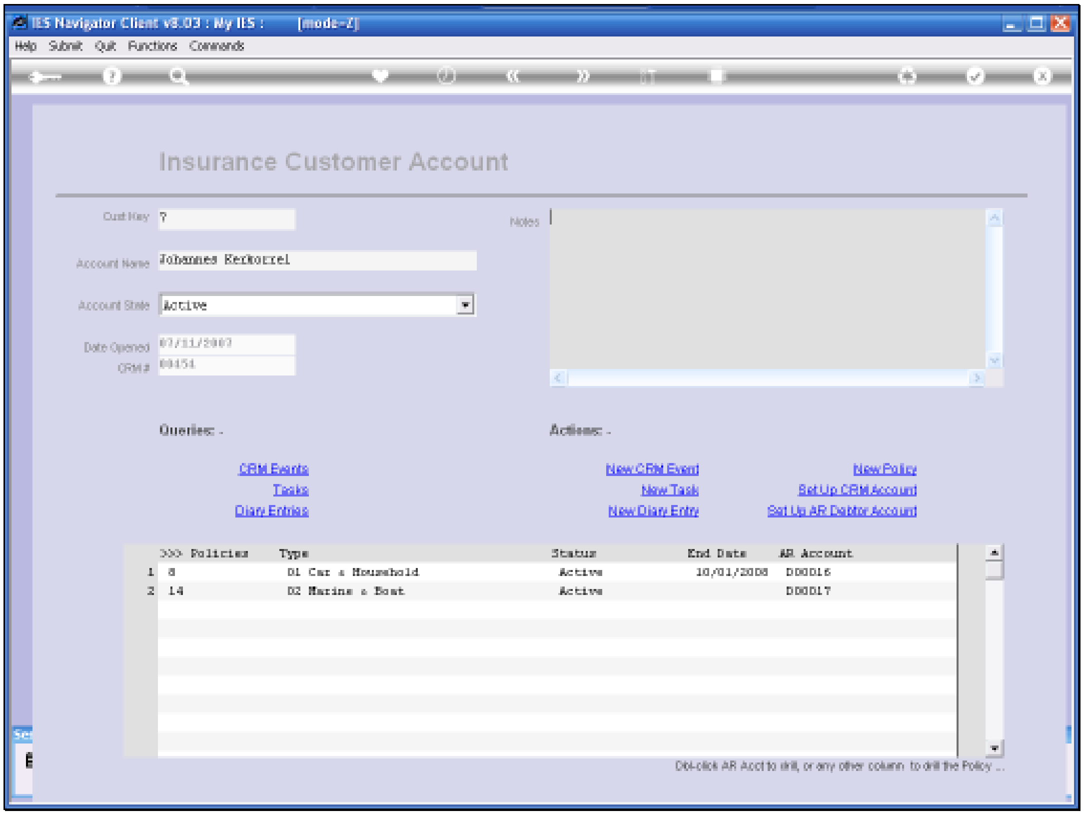
Slide 24


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 25


IES Navigator Client v8.03 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

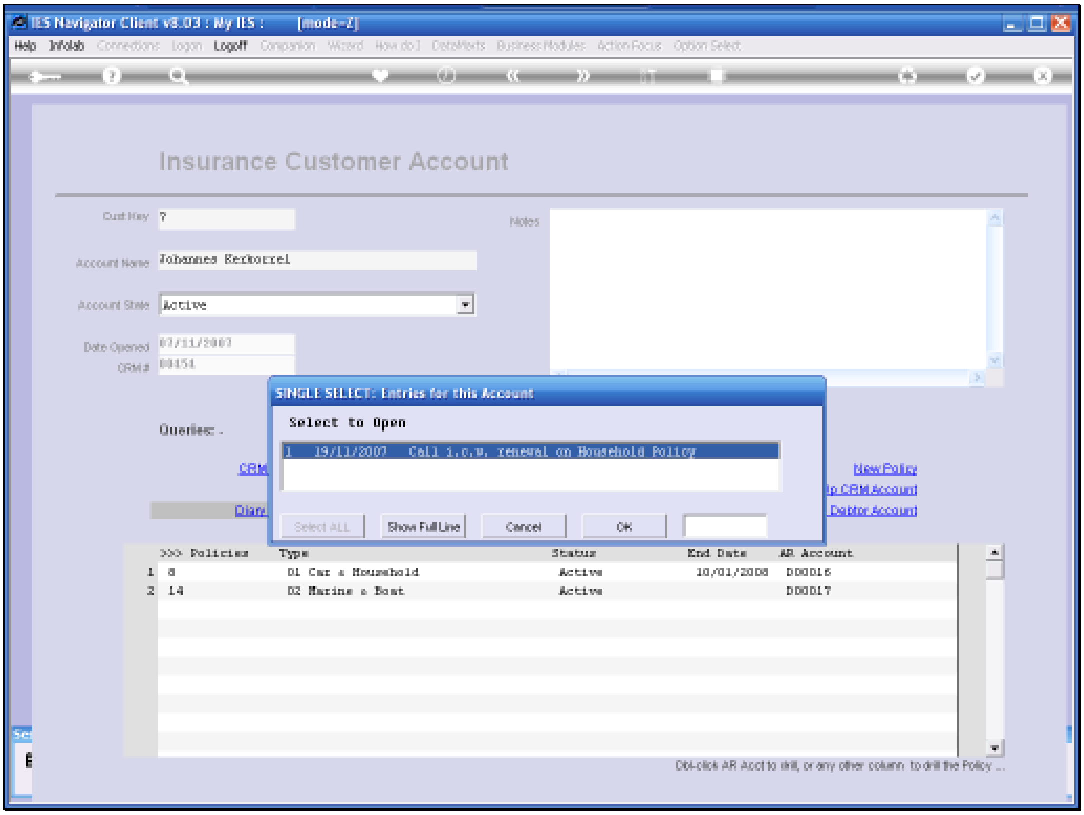
Slide 26



Slide 27

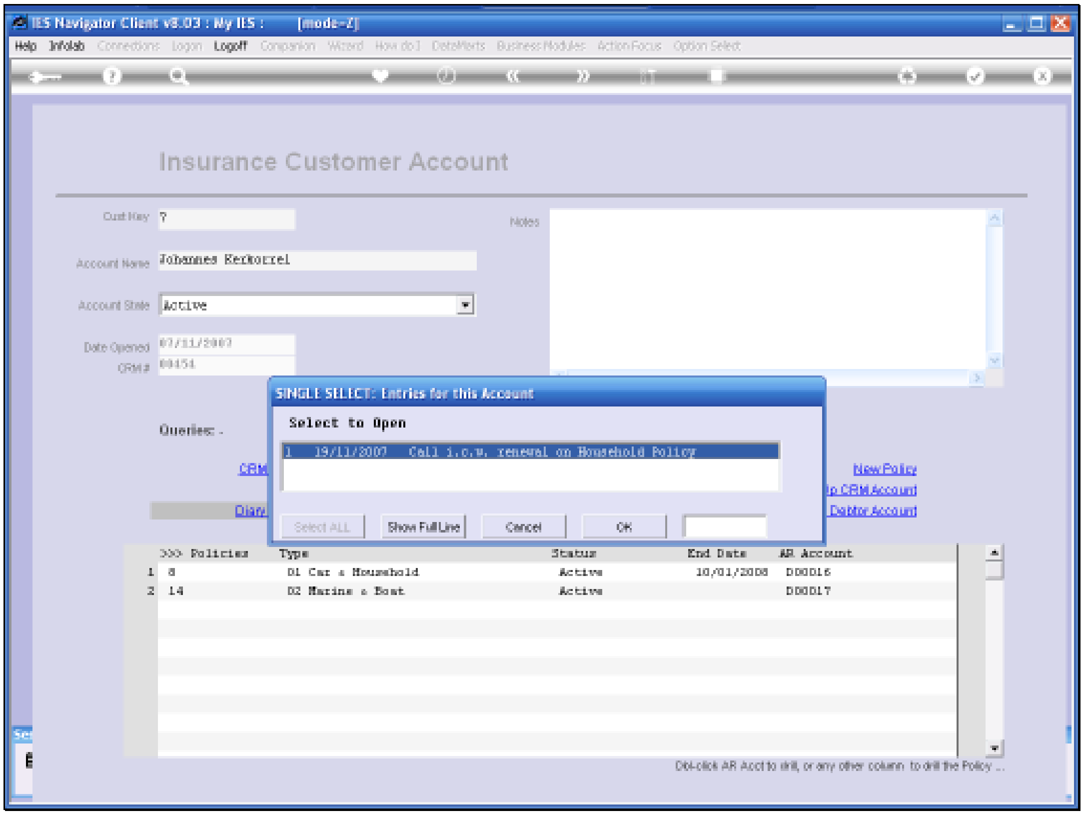
The “Query on Diary Entries” is for this specific Account and the System will list any Diary Entries that are found for this Account.

If we select any of those, then that particular Diary Entry will be Opened for Maintenance or Modification, or further attention.

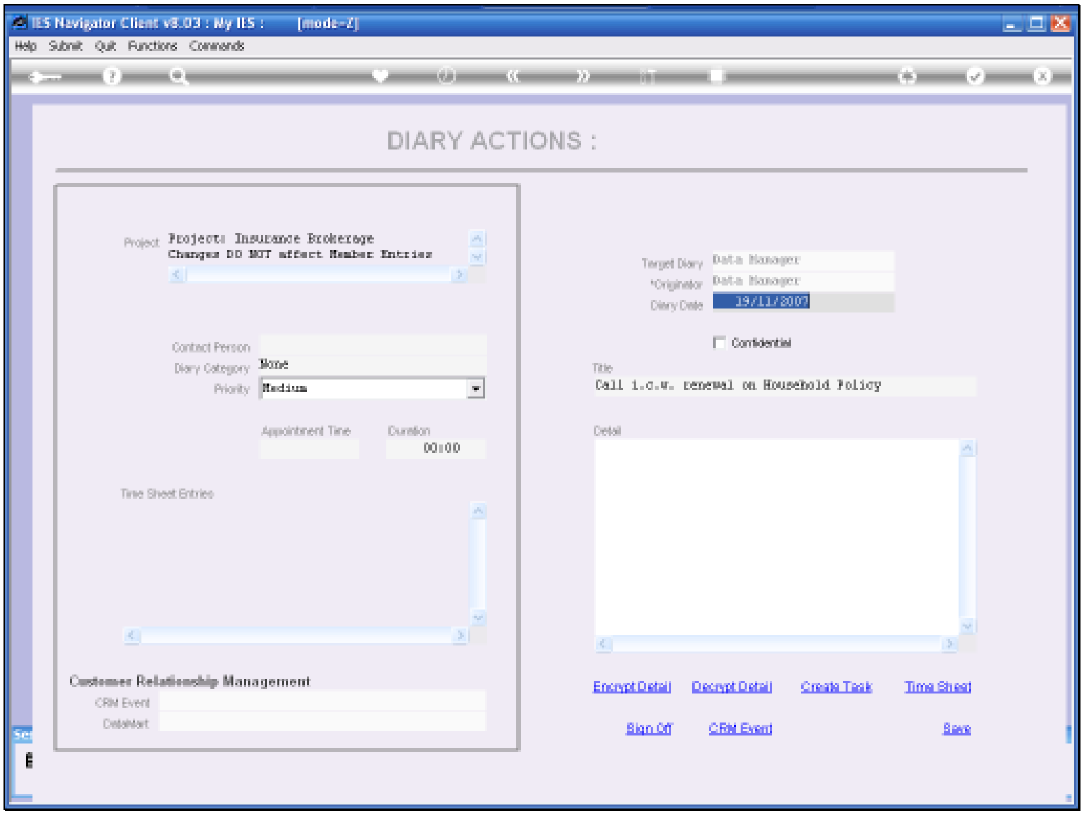


IES Navigator Client v8.03 : My IES : [mode=Z]
Help Infolab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
SINGLE SELECT: Entries for this Account
Select to Open
1 19/11/2007 Call i.c.w. renewal on Household Policy
Select ALL
Show Full Line
Cancel
OK
Queries: -
New Policy
Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

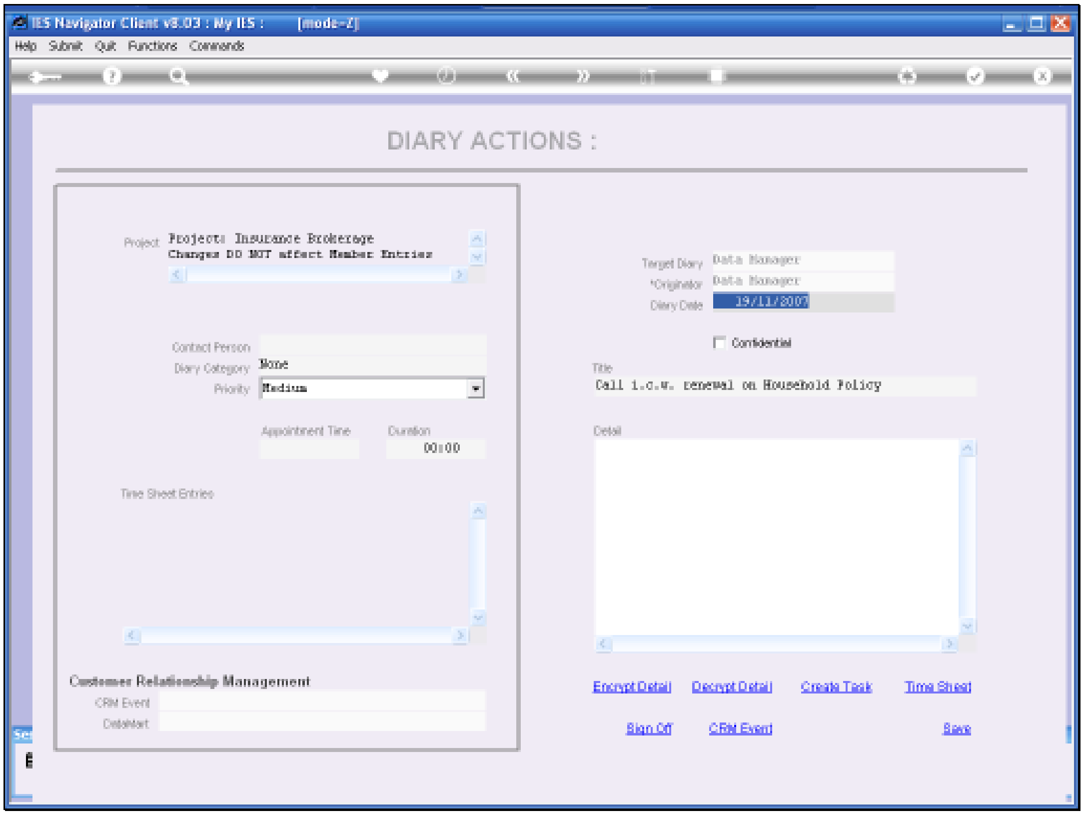
Slide 28


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 Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM# 00451
Notes
Queries: .
SINGLE SELECT: Entries for this Account
Select to Open
1 19/11/2007 Call i.c.w. renewal on Household Policy
Select ALL
Show Full Line
Cancel
OK
New Policy
Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

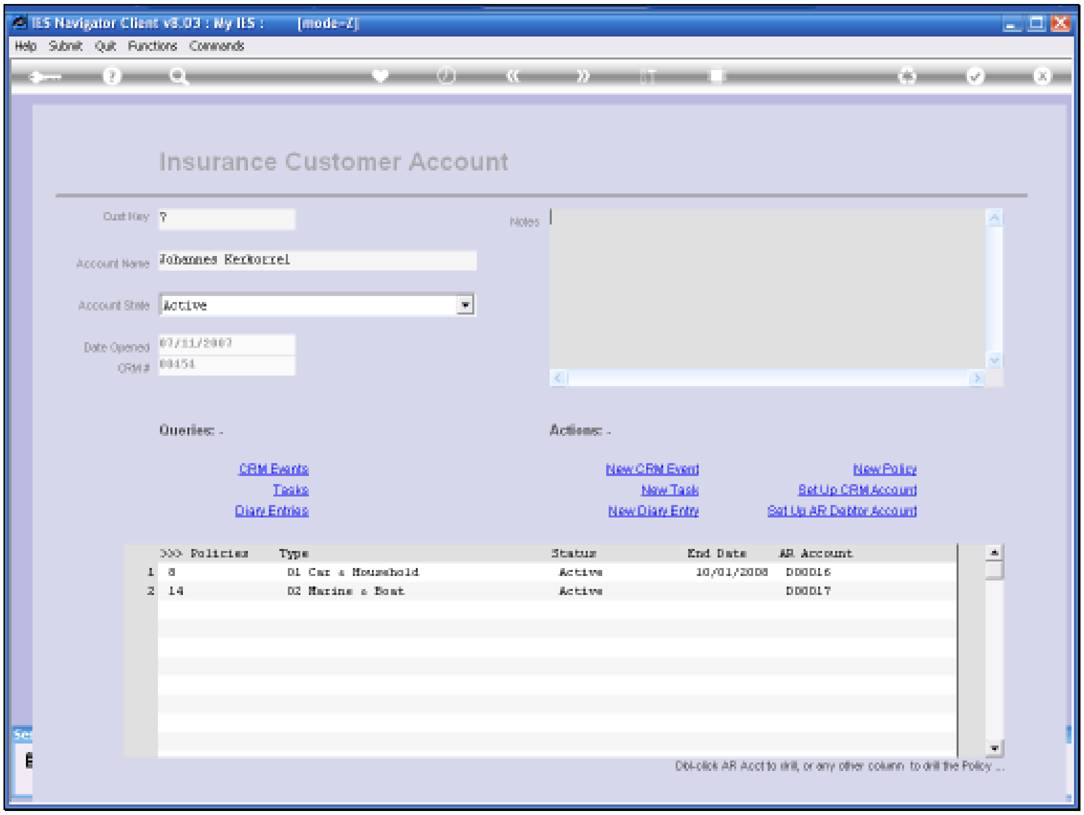
Slide 29


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
DIARY ACTIONS :
Project
Project: Insurance Brokerage
Changes DO NOT affect Member Entries
Contact Person
Diary Category
None
Priority
Medium
Appointment Time
Duration
00:00
Time Sheet Entries
Customer Relationship Management
CRM Event
Datamart
Target Diary
Data Manager
*Originator
Data Manager
Diary Date
19/11/2007
Confidential
Title
Call i.c.w. renewal on Household Policy
Detail
Encrypt Detail
Decrypt Detail
Create Task
Time Sheet
Sign Off
CRM Event
Save

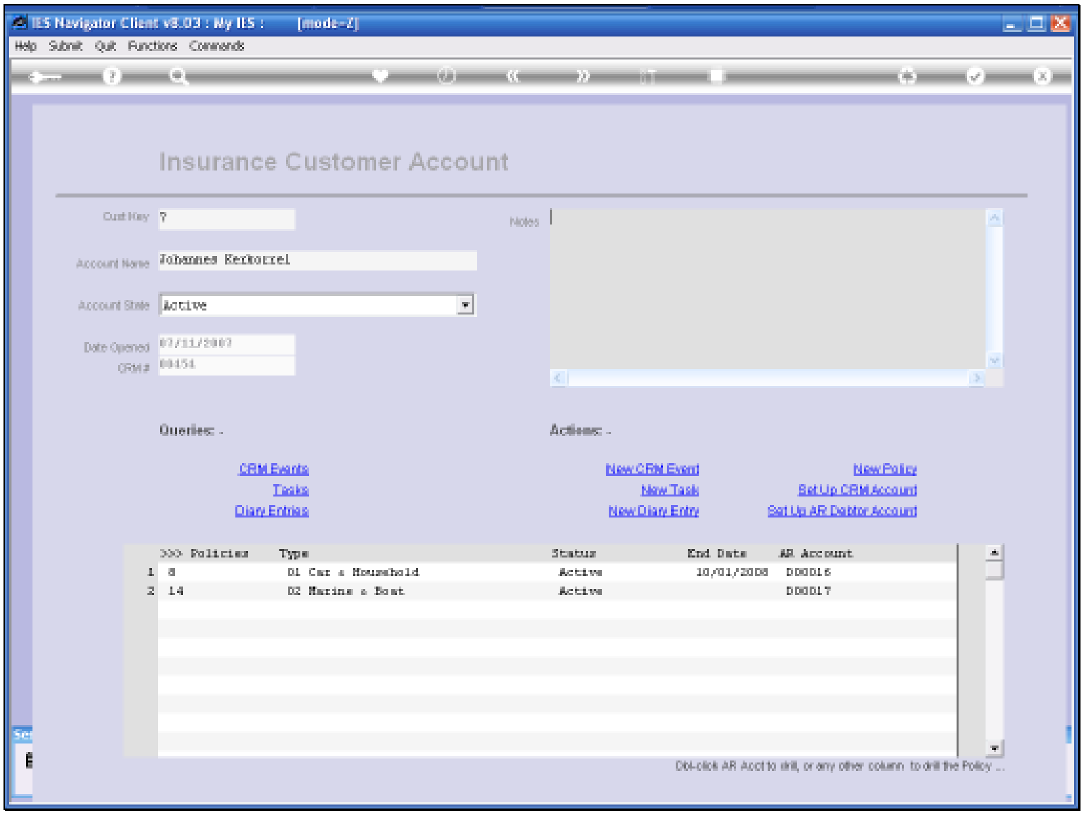
Slide 30


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
DIARY ACTIONS :
Project
Project: Insurance Brokerage
Changes DO NOT affect Member Entries
Contact Person
Diary Category
None
Priority
Medium
Appointment Time
Duration
00:00
Time Sheet Entries
Customer Relationship Management
CRM Event
Datamart
Target Diary
Data Manager
*Originator
Data Manager
Diary Date
19/11/2007
Confidential
Title
Call i.c.w. renewal on Household Policy
Detail
Encrypt Detail
Decrypt Detail
Create Task
Time Sheet
Sign Off
CRM Event
Save

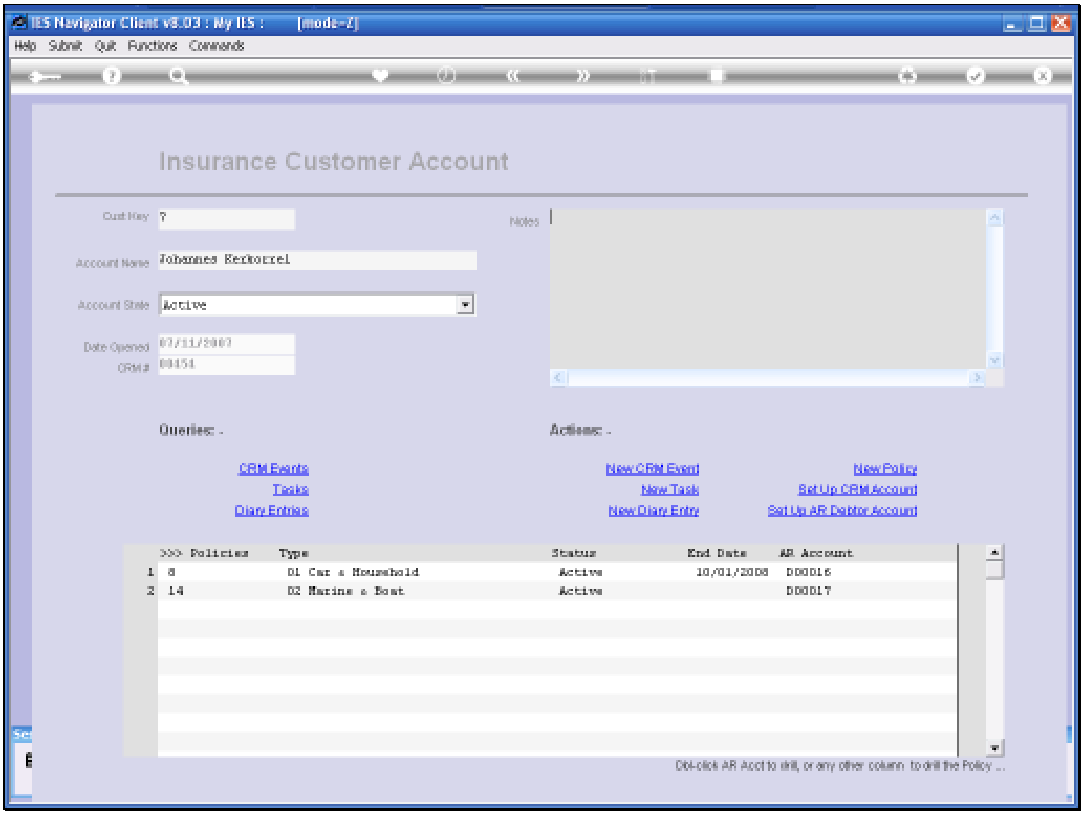
Slide 31


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 32


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

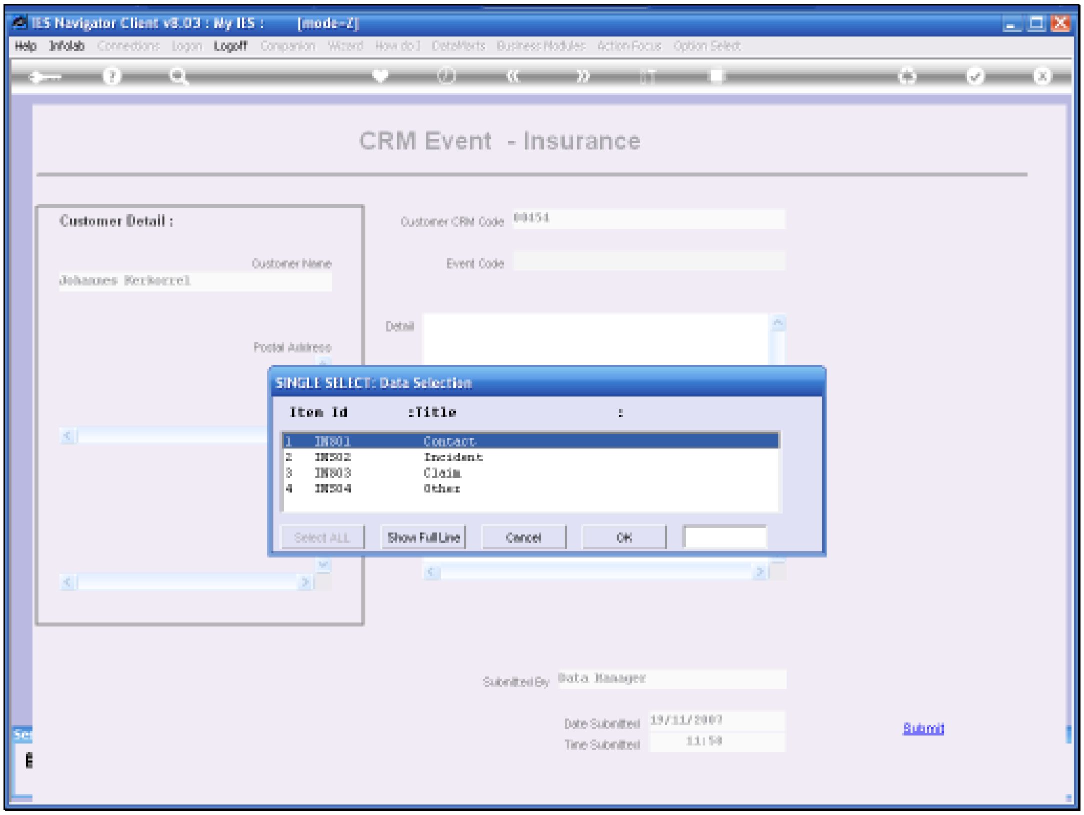
Slide 33



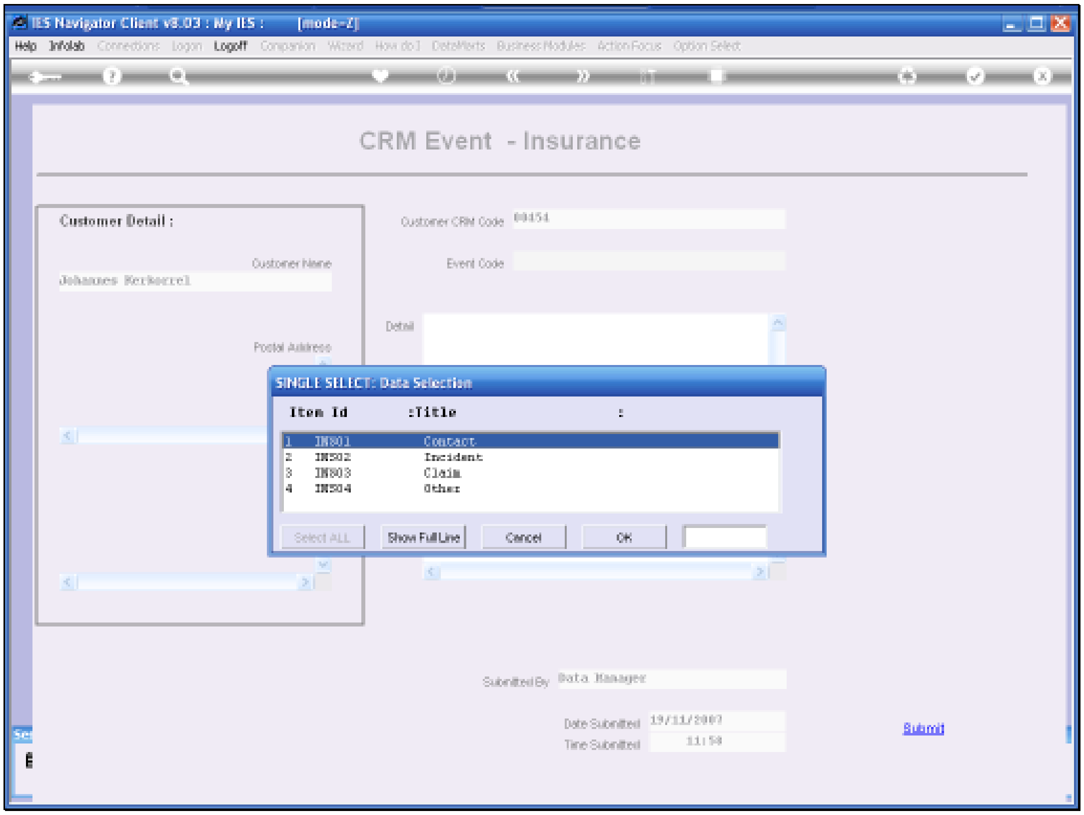
Slide 34

Next we look at the Actions, starting with "New CRM Event".

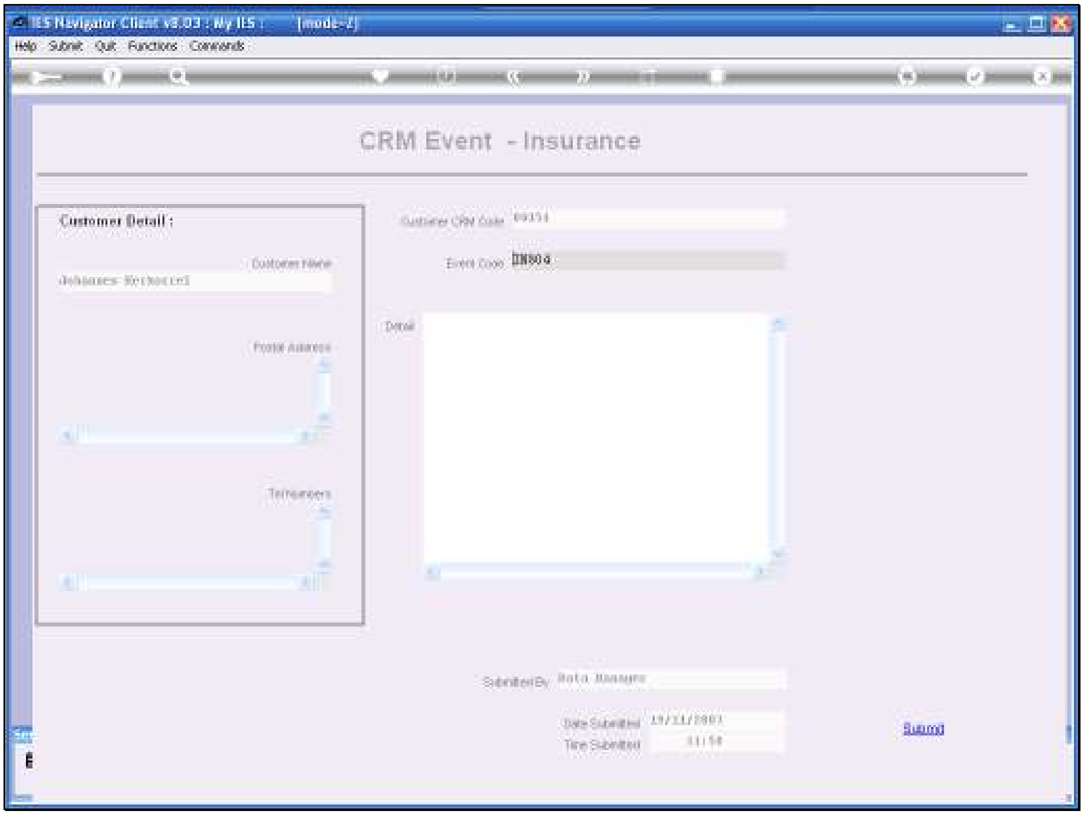
We can record a New CRM Event on the specific Account at any time and we can select from the Categories Setup for our CRM and Record the Detail.


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
CRM Event - Insurance
Customer Detail :
Customer CRM Code 00454
Customer Name
Johannes Kerkorrel
Event Code
Detail
Postal Address
SINGLE SELECT: Data Selection
Item Id :Title :
1 INS01 Contact
2 INS02 Incident
3 INS03 Claim
4 INS04 Other
Select ALL Show Full Line Cancel OK
Submitted By Data Manager
Date Submitted 19/11/2007
Time Submitted 11:58
Submit

Slide 35


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
CRM Event - Insurance
Customer Detail :
Customer Name
Johannes Kerkorrel
Postal Address
Customer CRM Code 00454
Event Code
Detail
SINGLE SELECT: Data Selection
Item Id :Title :
1 INS01 Contact
2 INS02 Incident
3 INS03 Claim
4 INS04 Other
Select ALL
Show Full Line
Cancel
OK
Submitted By Data Manager
Date Submitted 19/11/2007
Time Submitted 11:58
Submit

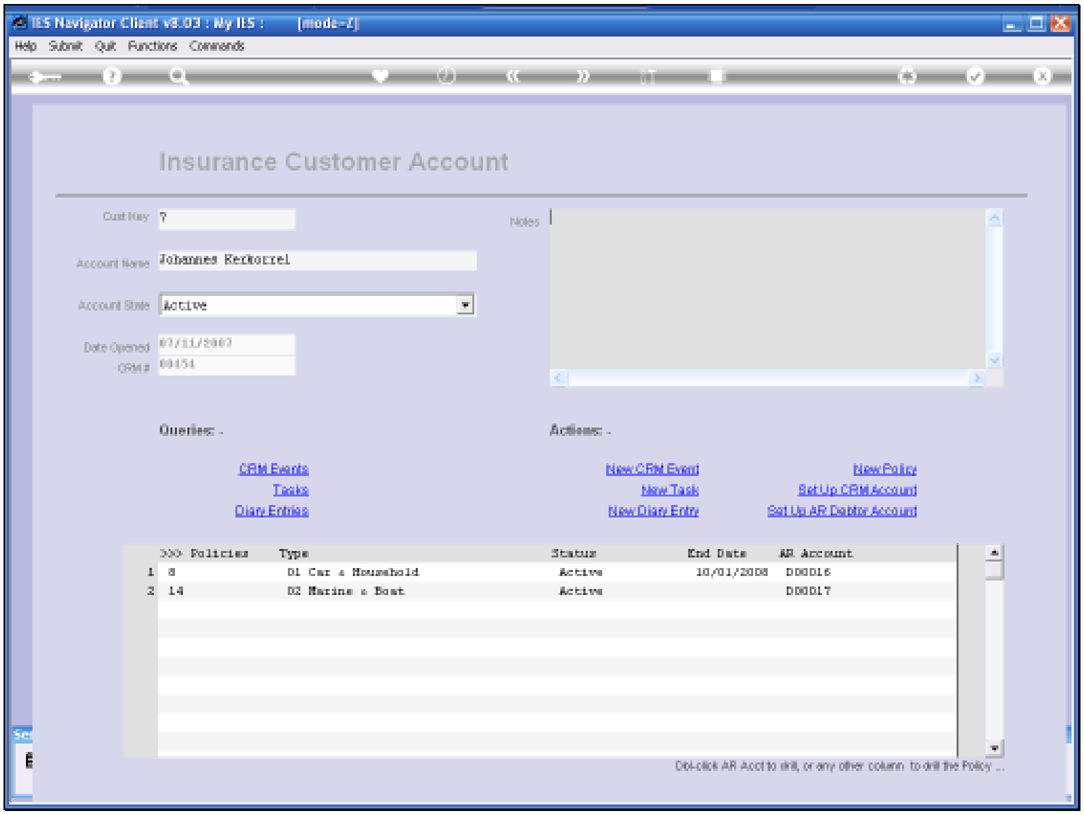
Slide 36


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
CRM Event - Insurance
Customer Detail :
Customer Name
Postal Address
Telnumbers
Customer CRM Code
Event Code
Detail
Submitted By
Date Submitted
Time Submitted
Submit

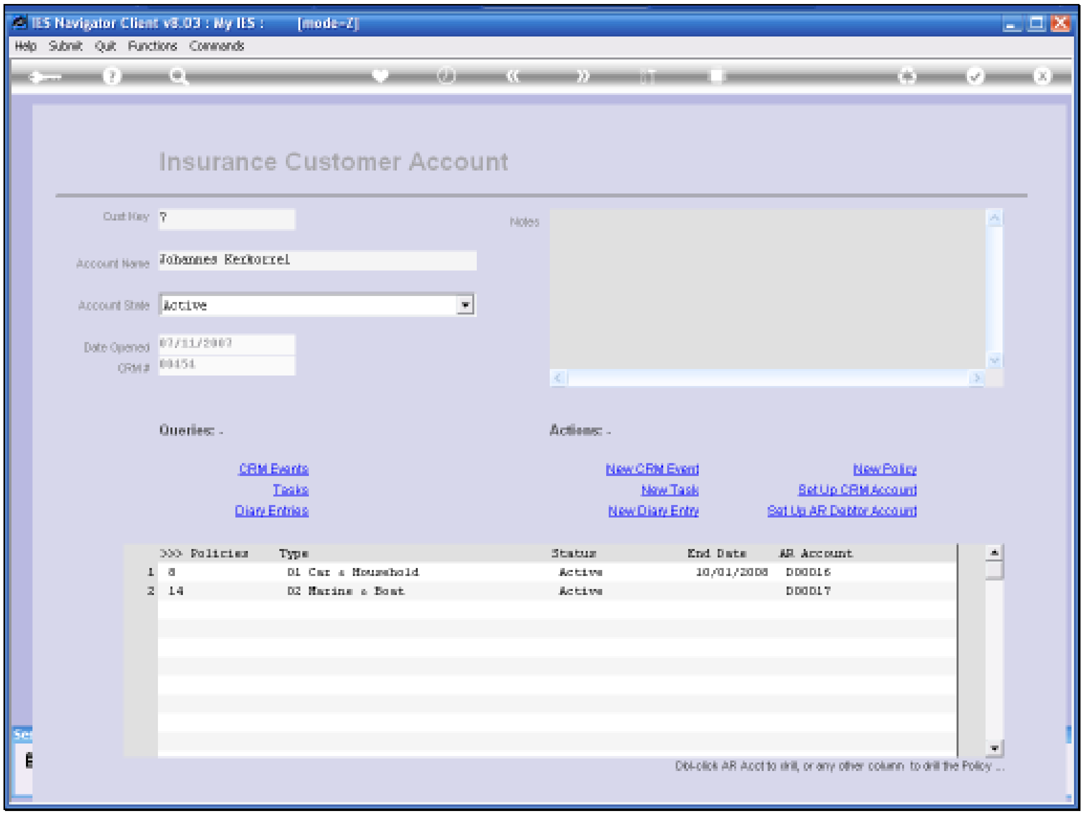
Slide 37


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
CRM Event - Insurance
Customer Detail :
Customer Name
Postal Address
Tel Numbers
Customer CRM Code
Event Code
IN804
Detail
Submitted By
Date Submitted
Time Submitted
Submit

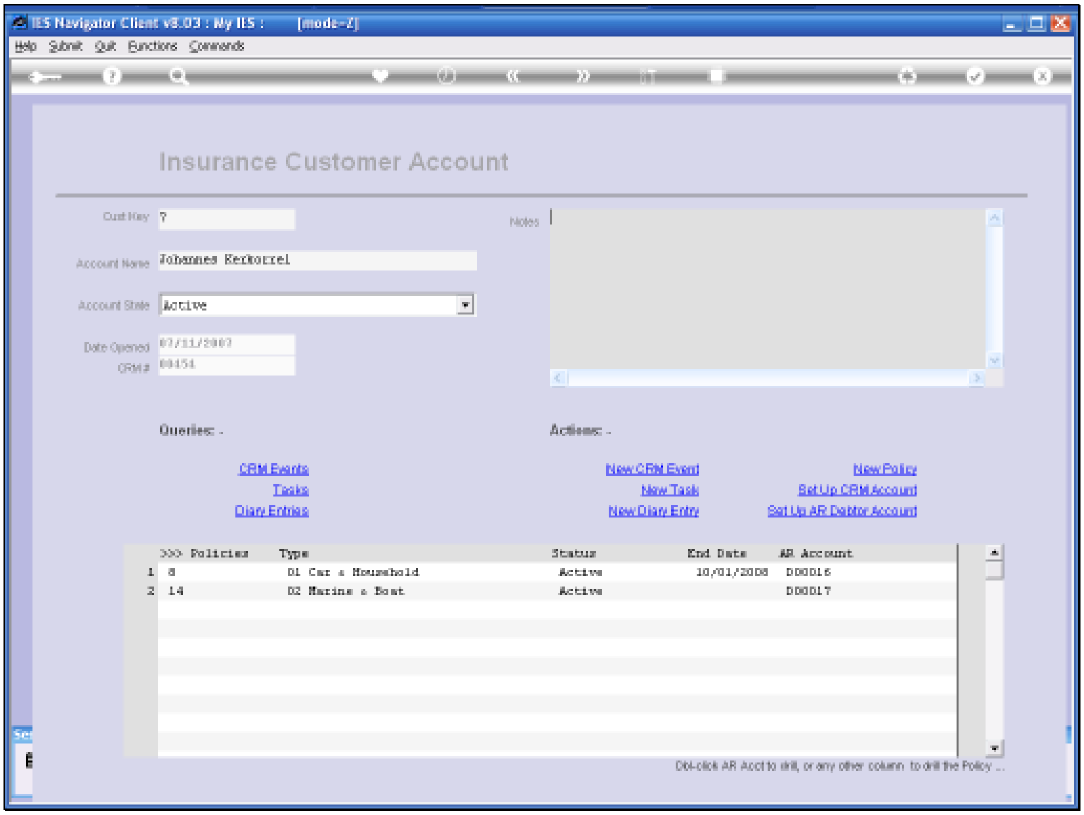
Slide 38


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 39


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 40



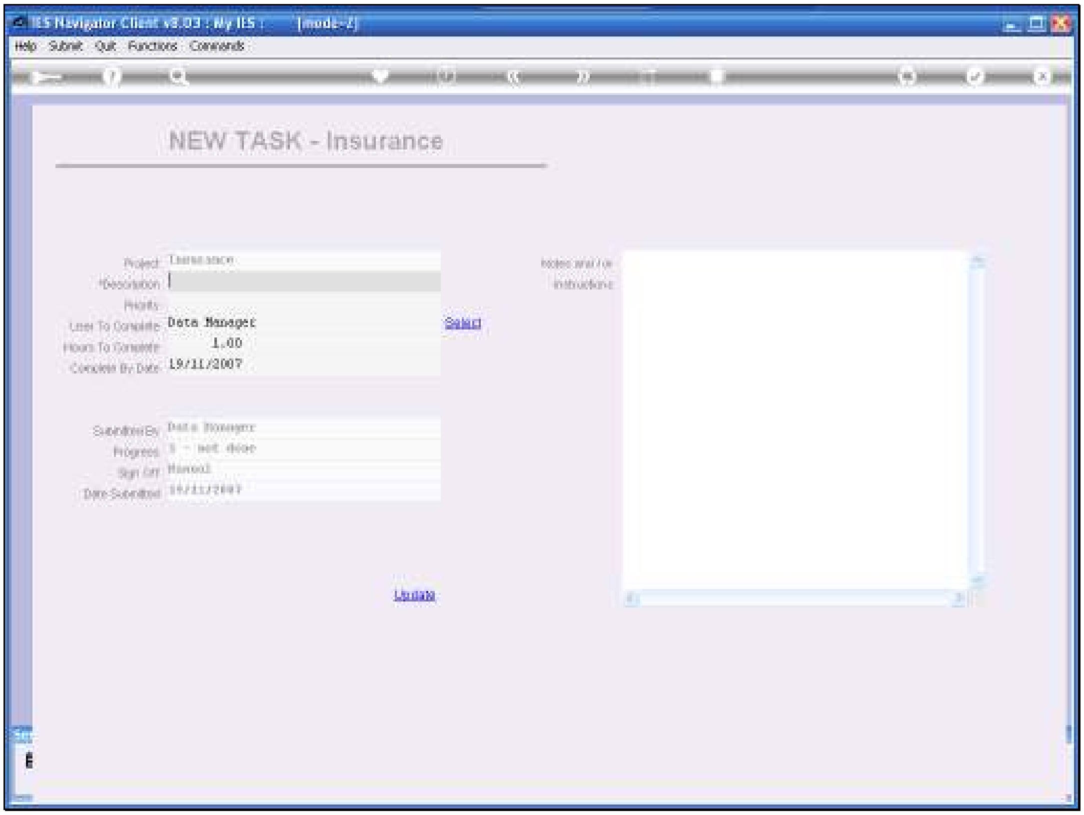
Slide 41

We can submit a New Task directly from the Account here, by using the "New Task" Function and we can record any Task that will be flagged for Insurance.

It can be for myself or for another User, provided that I have the necessary Task Access level specified on my Task Profile.

But, the Task is flagged for Insurance, not specifically for this account.

So if it is specifically for this Account then we should make a note in the Description, on the Task, that it is for this particular Account.



Slide 42

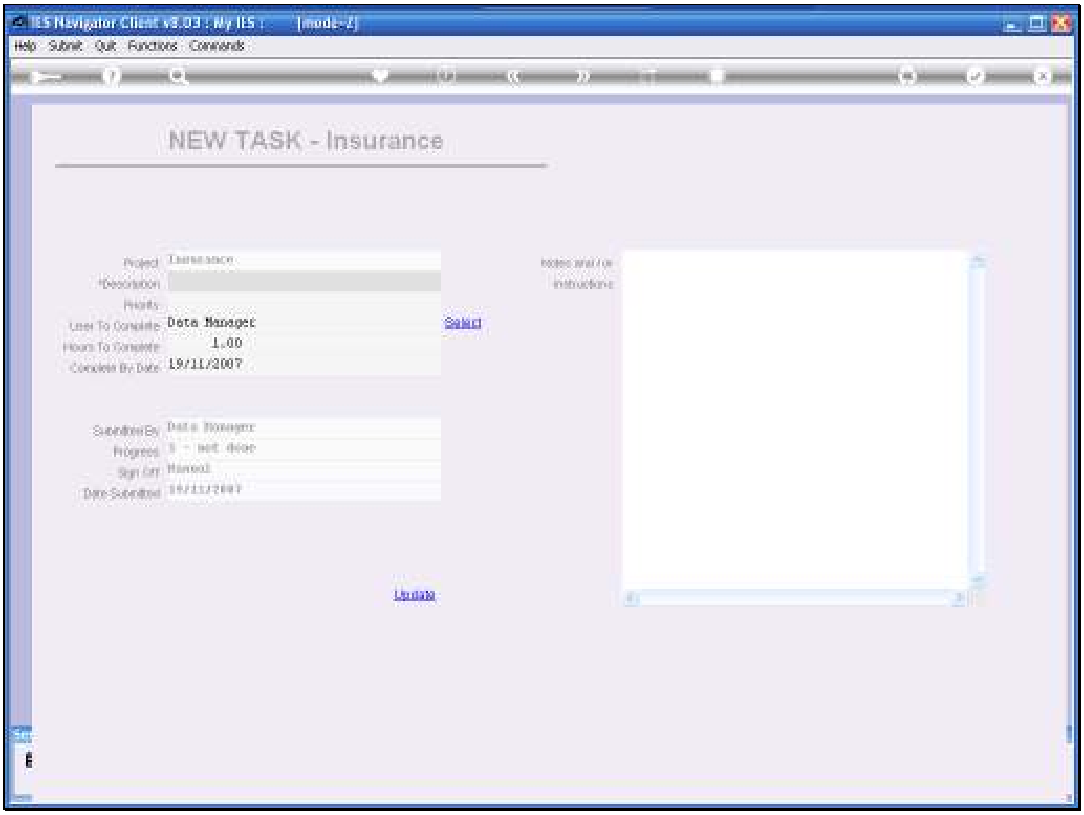
The minimum requirements for Updating a New Tasks, is to have some Description and to select a priority.

We can also change some of the other Fields. For example, a different “User to Complete”.

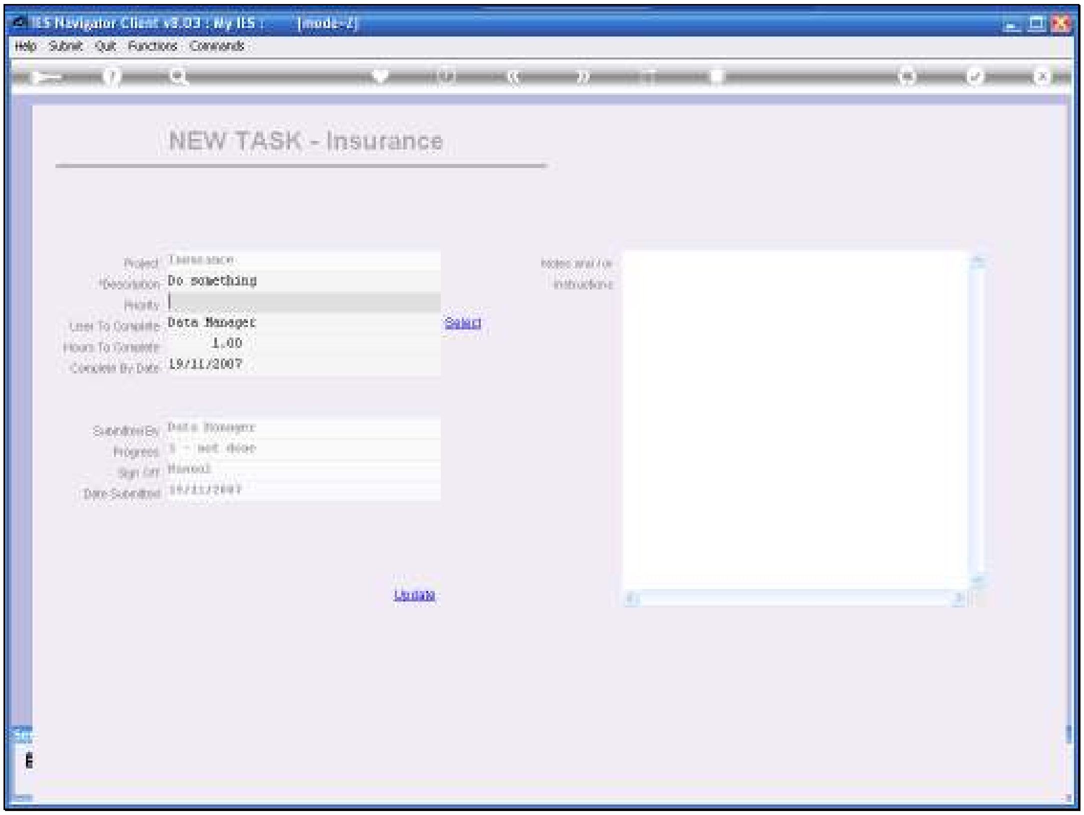
We can put a different Time or “Hours to Complete”. We can put a different “Complete By Date”, and we can also detail further instructions in the Instructions Field.

If we have a Description and we have selected our priority, then we can choose “Update”.

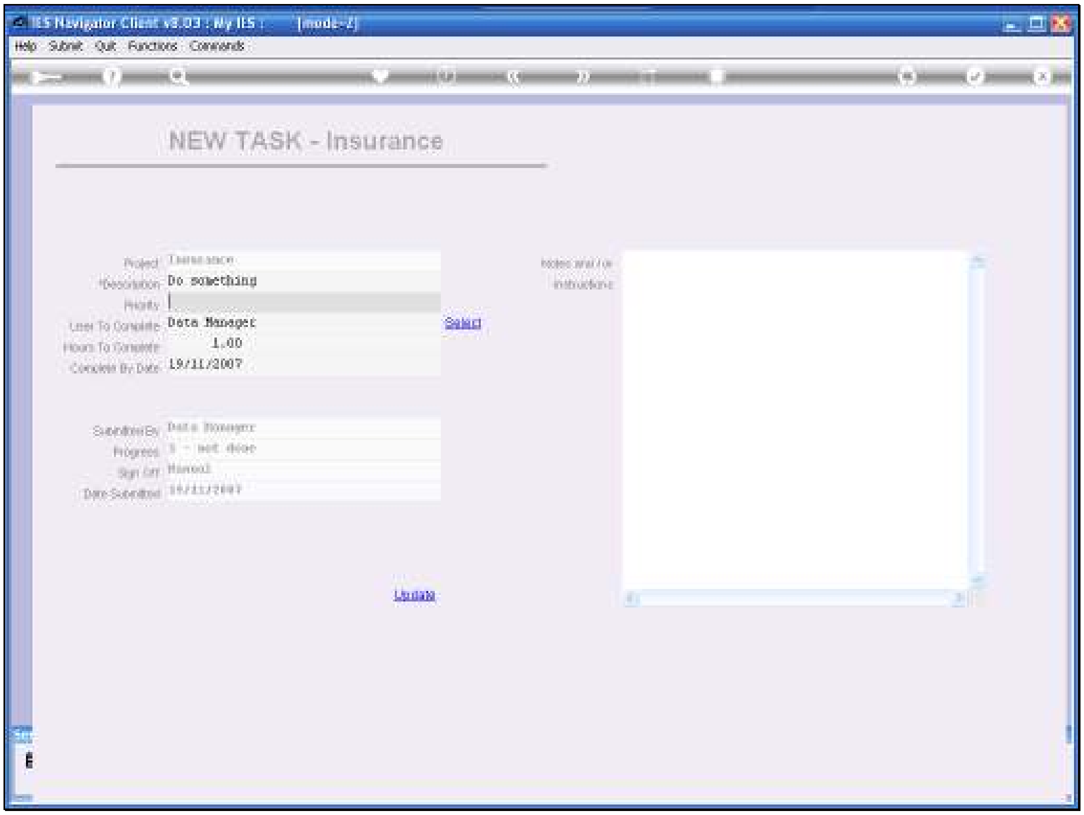
Those are the minimum things that we need to do to Submit a New Task.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
NEW TASK - Insurance
Project Insurance
*Description
Priority
User To Complete Data Manager
Select
Hours To Complete 1.00
Complete By Date 19/11/2007
Submitted By Data Manager
Progress 1 - not done
Sign Off Manual
Date Submitted 19/11/2007
Update
Notes and / or Instructions

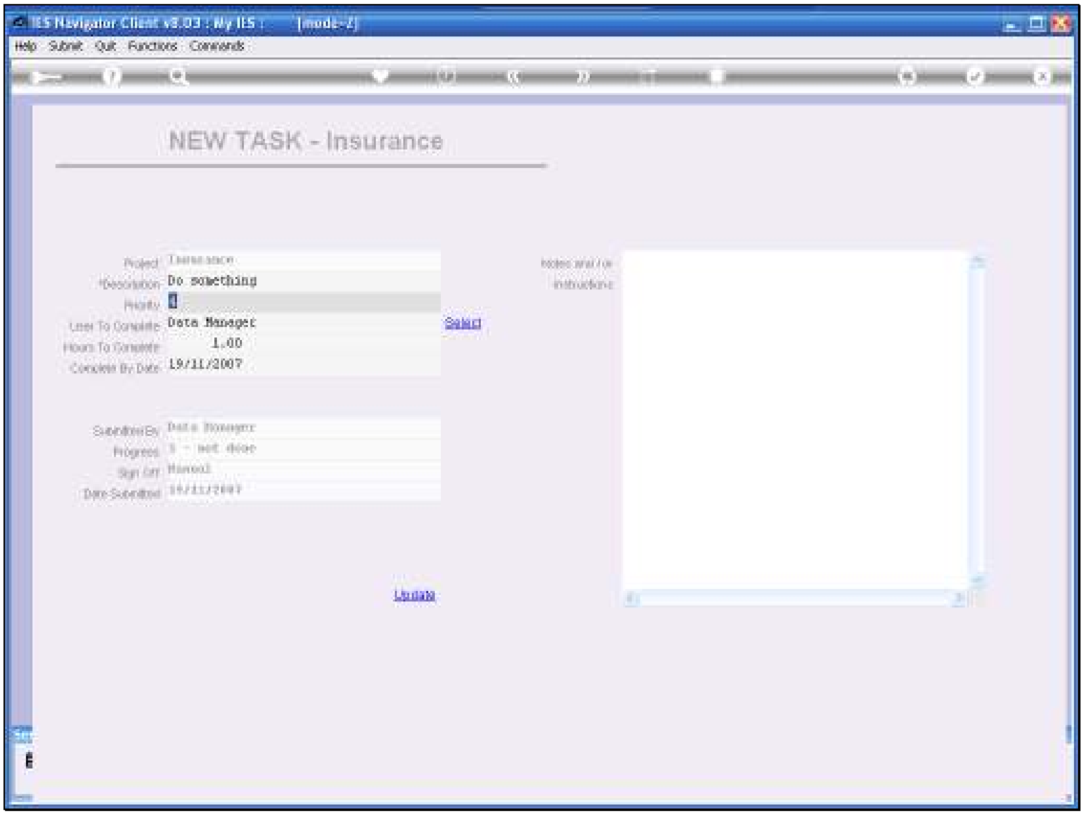
Slide 43


IES Navigator Client v8.03 : My IES : [mode-2]
Help Submit Quit Functions Commands
NEW TASK - Insurance
Project Insurance
*Description Do something
Priority
User To Complete Data Manager
Select
Hours To Complete 1.00
Complete By Date 19/11/2007
Submitted By Data Manager
Progress 1 - not done
Sign Off Manual
Date Submitted 19/11/2007
Update
Notes and / or Instructions

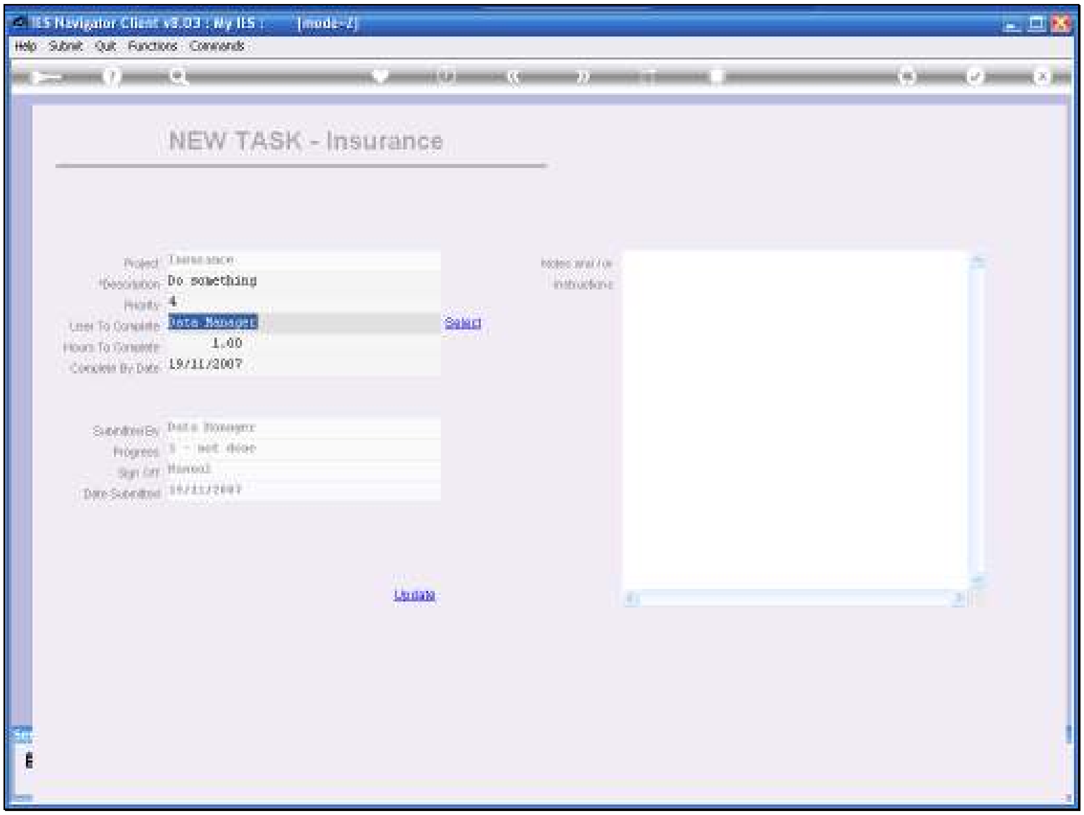
Slide 44


NEW TASK - Insurance
Project Insurance
*Description Do something
Priority
User To Complete Data Manager
Select
Hours To Complete 1.00
Complete By Date 19/11/2007
Submitted By Data Manager
Progress
Sign Off Manual
Date Submitted 19/11/2007
Update
Notes and / or Instructions

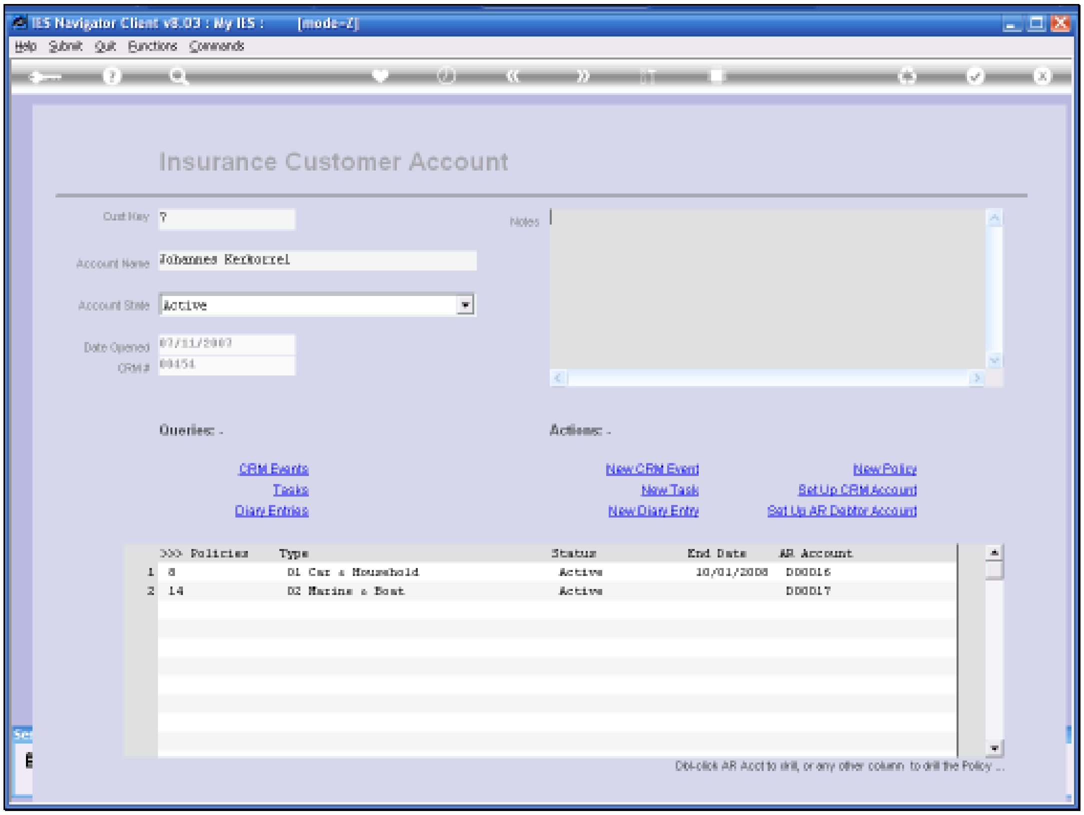
Slide 45


NEW TASK - Insurance
Project Insurance
*Description Do something
Priority 4
User To Complete Data Manager
Select
Hours To Complete 1.00
Complete By Date 19/11/2007
Submitted By Data Manager
Progress
Sign Off
Date Submitted
Update

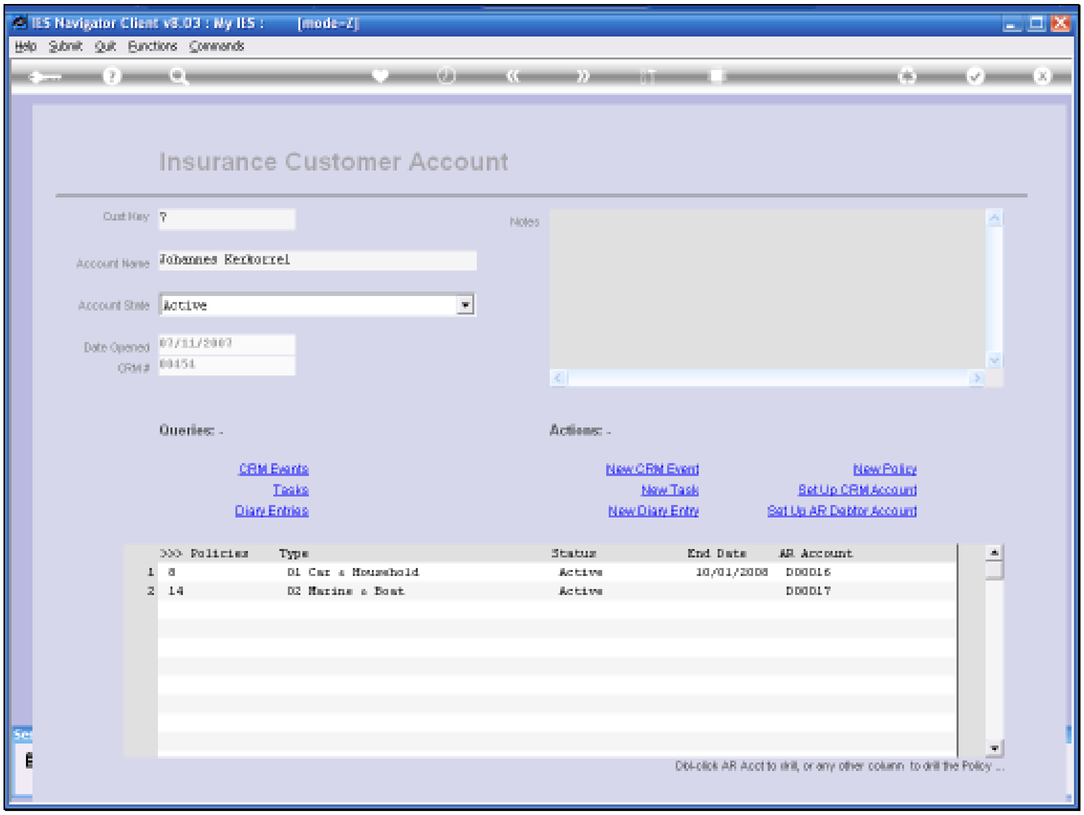
Slide 46


Help Submit Quit Functions Commands
NEW TASK - Insurance
Project
*Description
Do something
Priority
4
User To Complete
Data Manager
Select
Hours To Complete
1.00
Complete By Date
19/11/2007
Submitted By
Progress
Sign Off
Date Submitted
Update

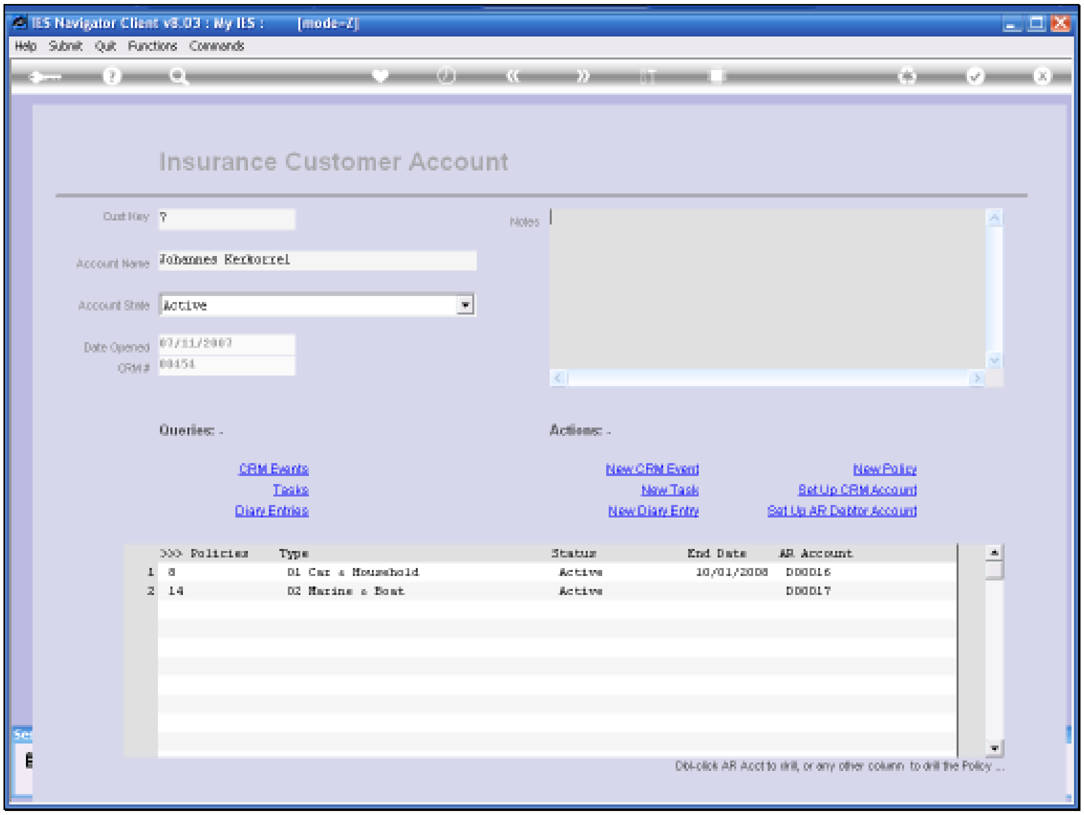
Slide 47


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 48

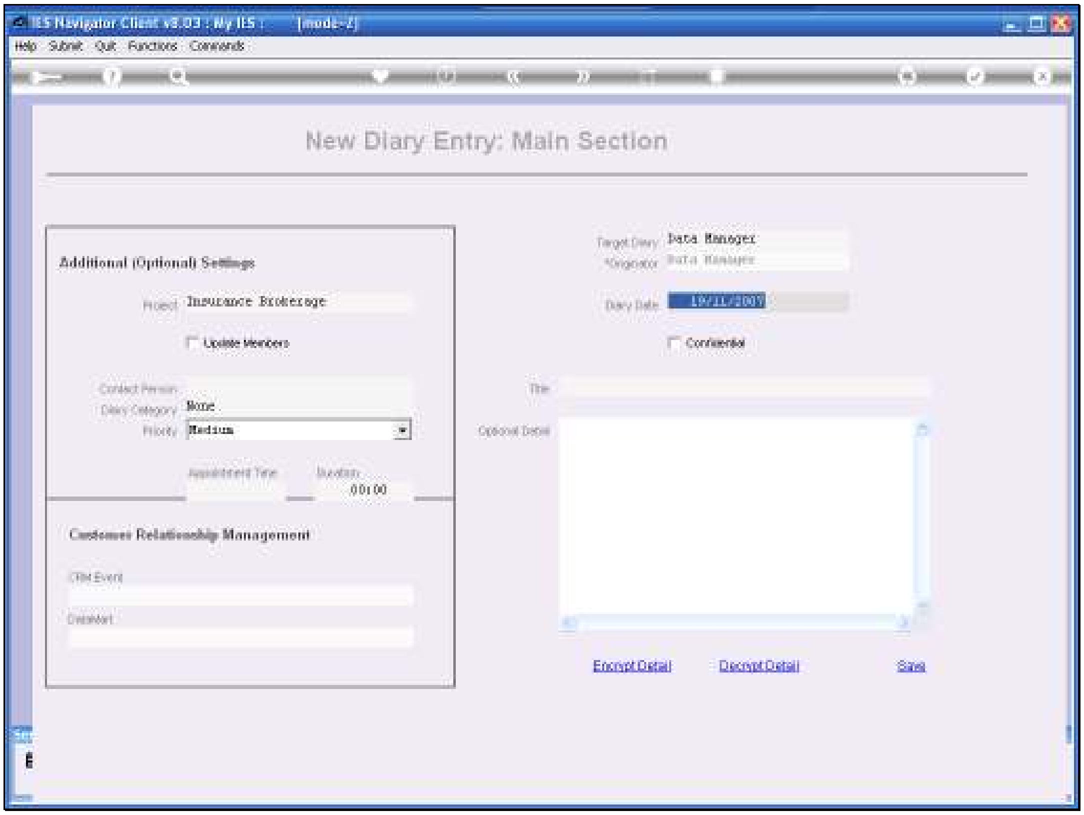

IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 49



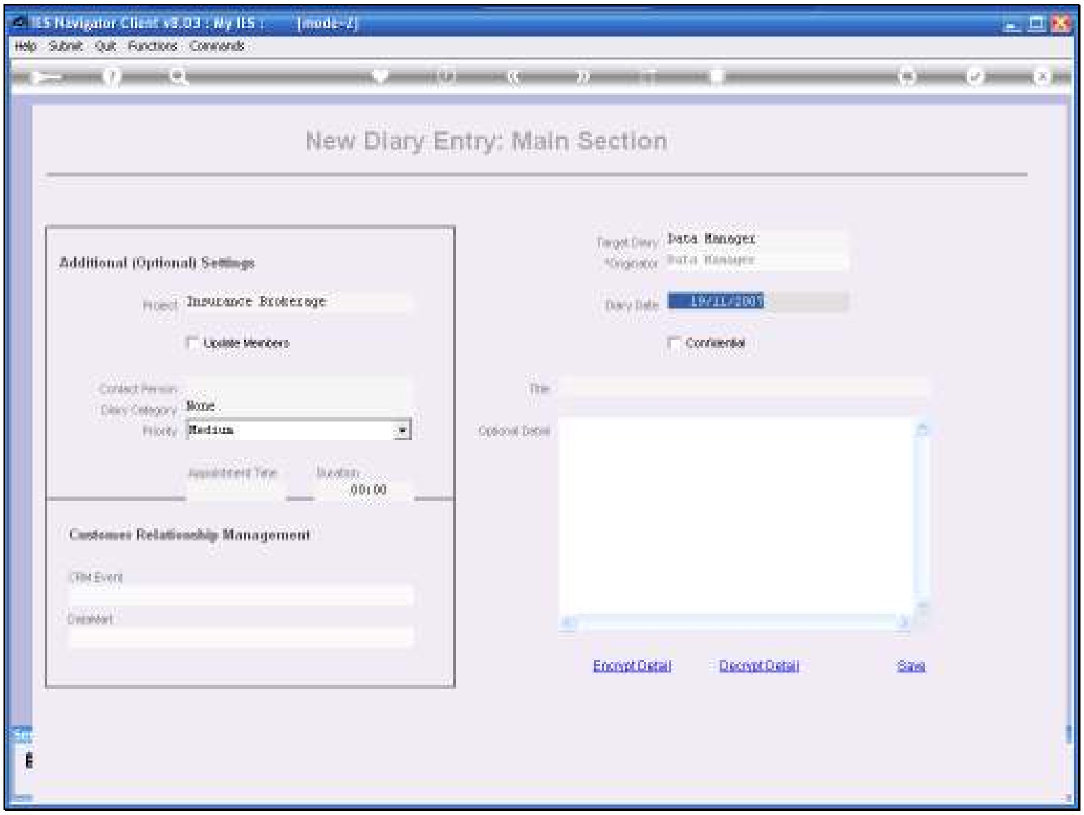
Slide 50

When we “Submit” a New Diary entry, from the Account, then it is flagged for Insurance and also specifically for this Account.

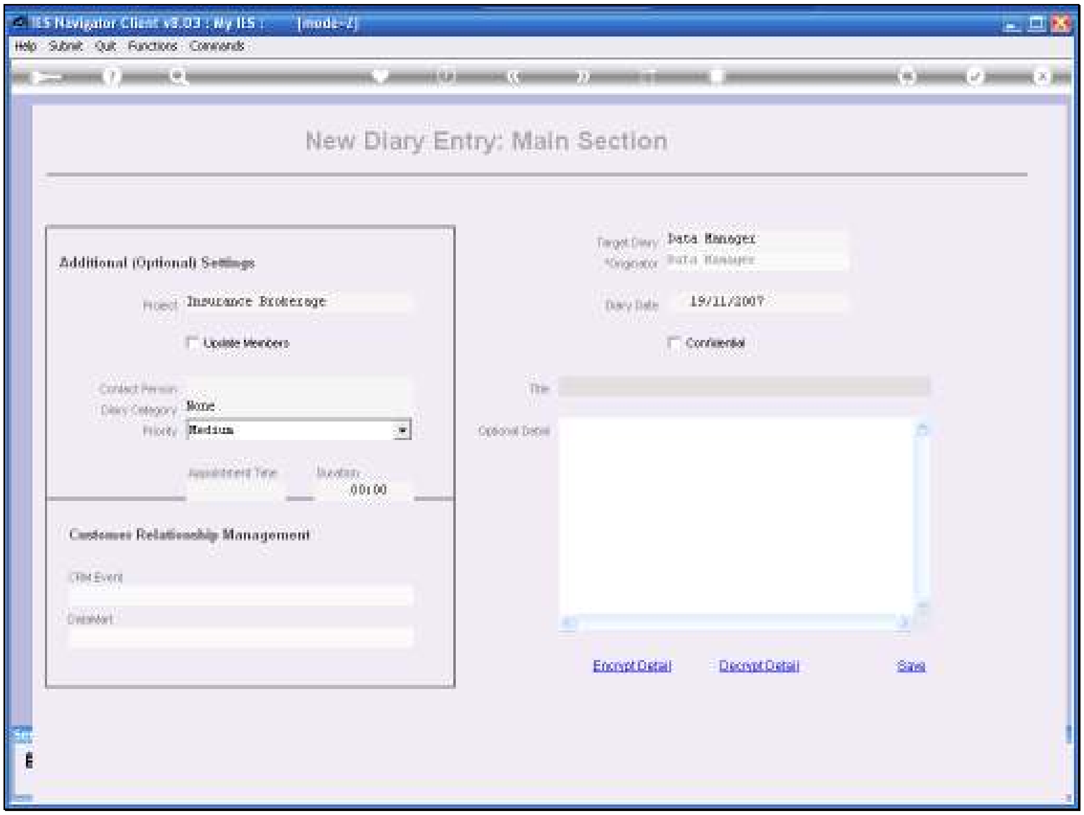


Help Submit Quit Functions Commands
New Diary Entry: Main Section
Additional (Optional) Settings
Project Insurance Brokerage
Update Members
Contact Person
Diary Category None
Priority Medium
Appointment Time
Duration
00:00
Customer Relationship Management
CRM Event
Datamart
Target Diary Data Manager
*Originator Data Manager
Diary Date 19/11/2007
Confidential
Title
Optional Detail
Encrypt Detail
Decrypt Detail
Save

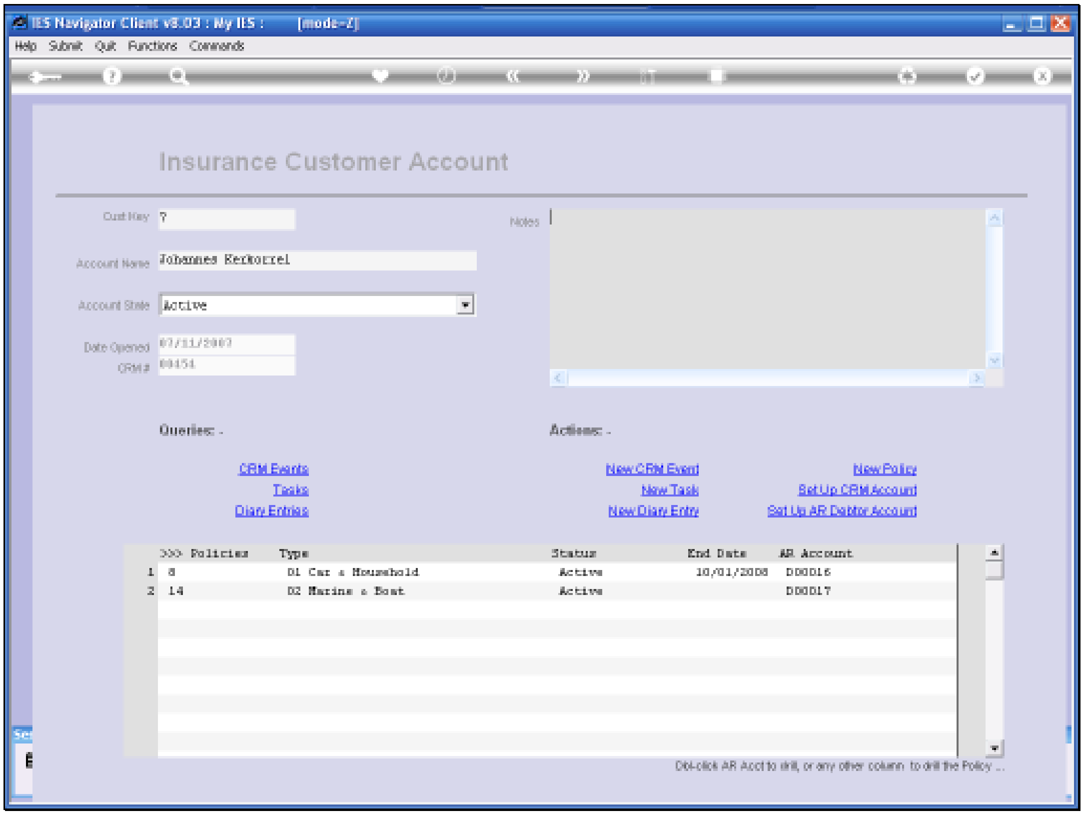
Slide 51


Help Submit Quit Functions Commands
New Diary Entry: Main Section
Additional (Optional) Settings
Project Insurance Brokerage
Update Members
Contact Person
Diary Category None
Priority Medium
Appointment Time
Duration 00:00
Customer Relationship Management
CRM Event
Datamart
Target Diary Data Manager
*Originator Data Manager
Diary Date 19/11/2007
Confidential
Title
Optional Detail
Encrypt Detail
Decrypt Detail
Save

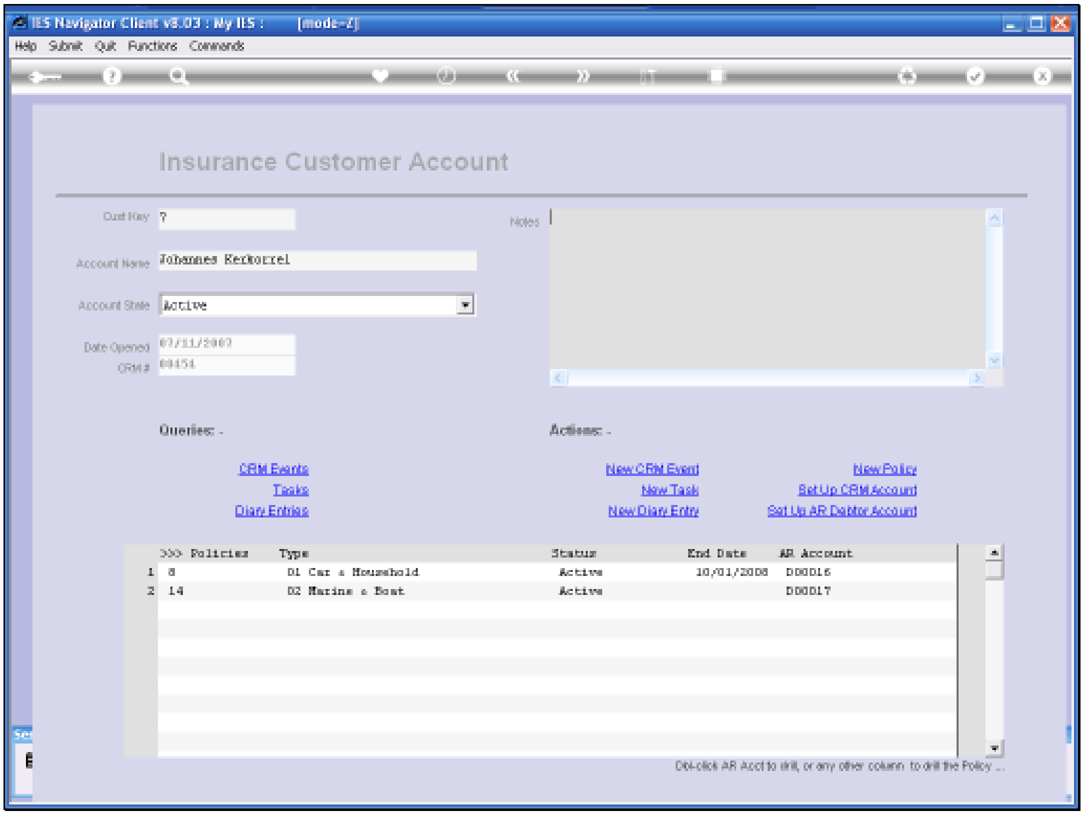
Slide 52


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
New Diary Entry: Main Section
Additional (Optional) Settings
Project Insurance Brokerage
Update Members
Contact Person
Diary Category None
Priority Medium
Appointment Time
Duration 00:00
Customer Relationship Management
CRM Event
Datamart
Target Diary Data Manager
*Originator Data Manager
Diary Date 19/11/2007
Confidential
Title
Optional Detail
Encrypt Detail
Decrypt Detail
Save

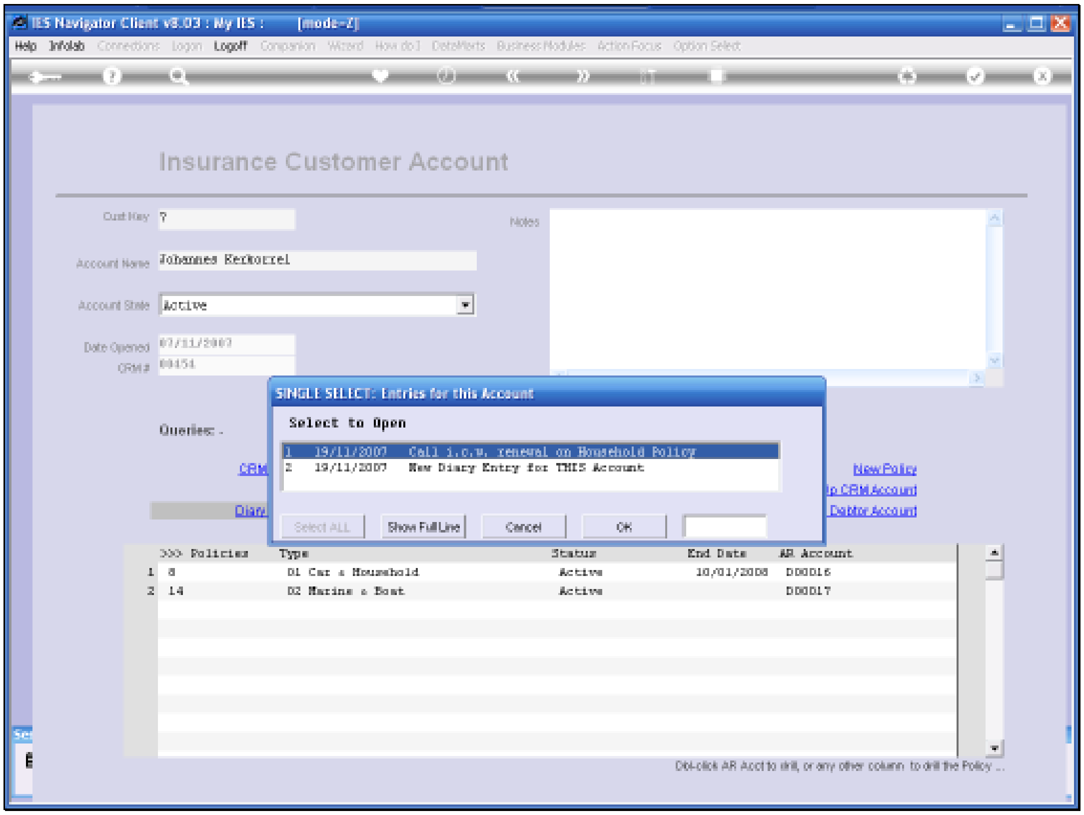
Slide 53


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

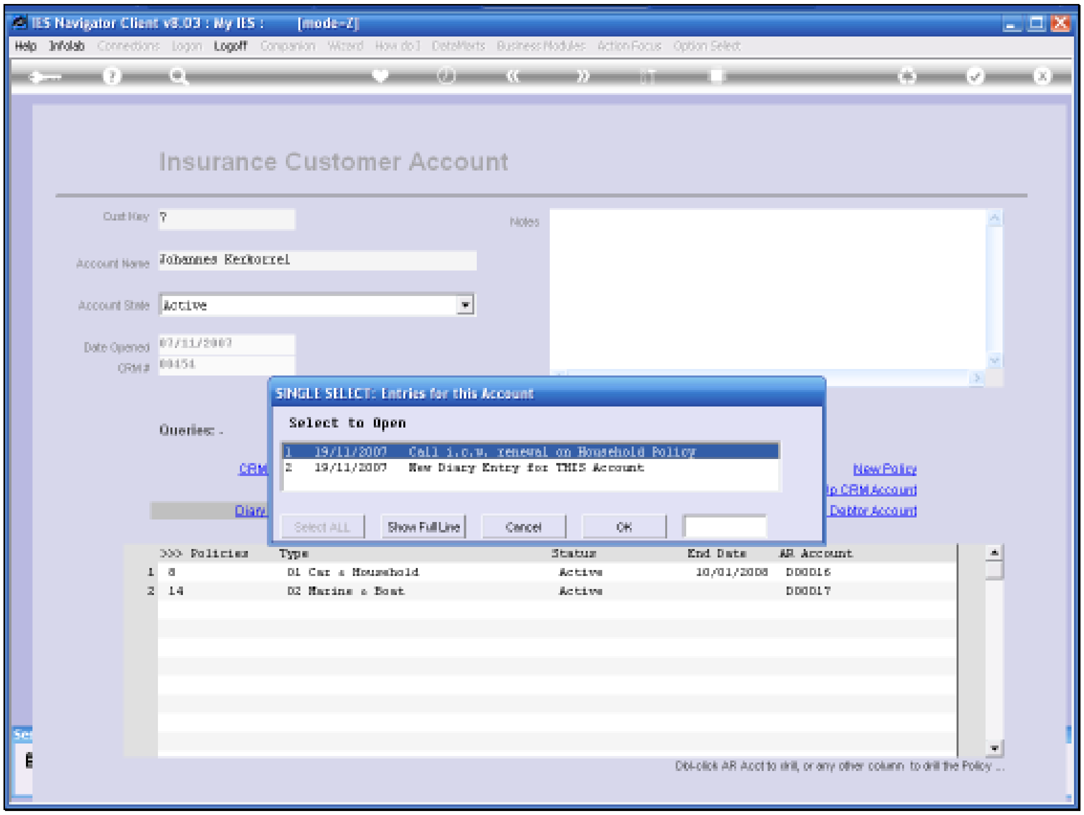
Slide 54


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 55

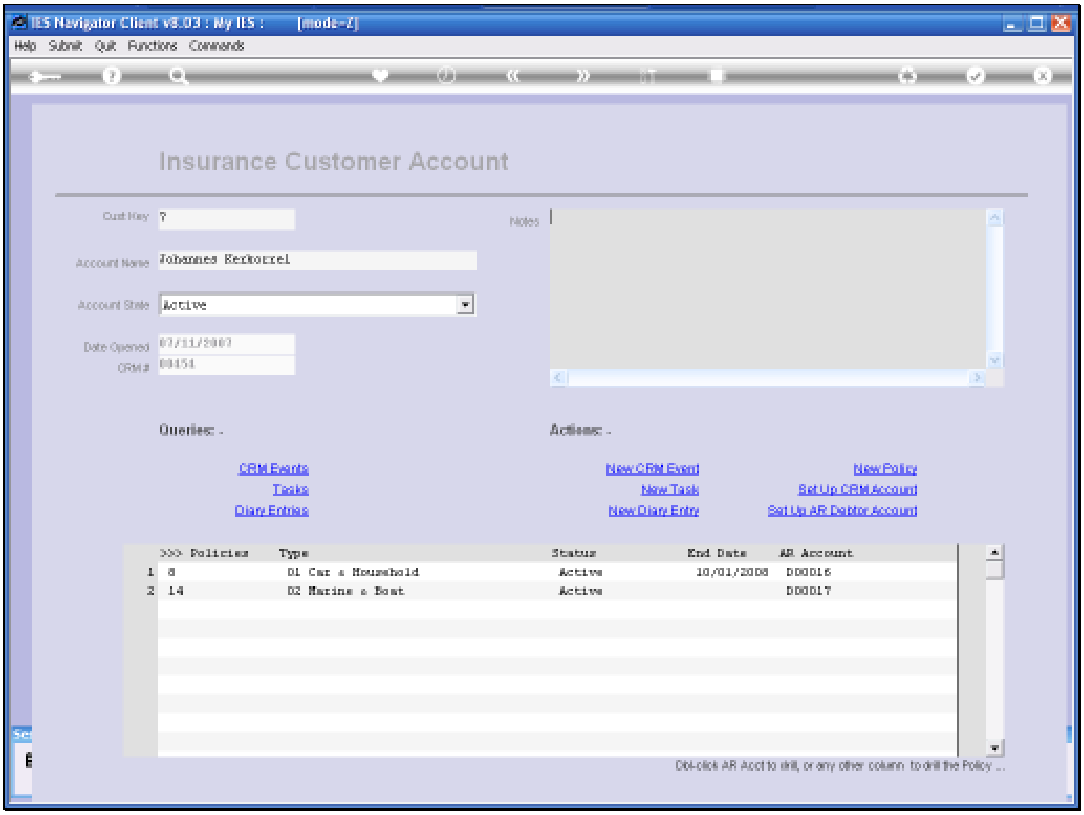

IES Navigator Client v8.03 : My IES : [mode-Z]
Help Infolab Connections Logon Logoff Companion Wizard How do I DataMarts Business Modules Action Focus Option Select
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
SINGLE SELECT: Entries for this Account
Select to Open
1 19/11/2007 Call i.o.w. renewal on Household Policy
2 19/11/2007 New Diary Entry for THIS Account
Select ALL
Show Full Line
Cancel
OK
New Policy
CRM Account
Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 56

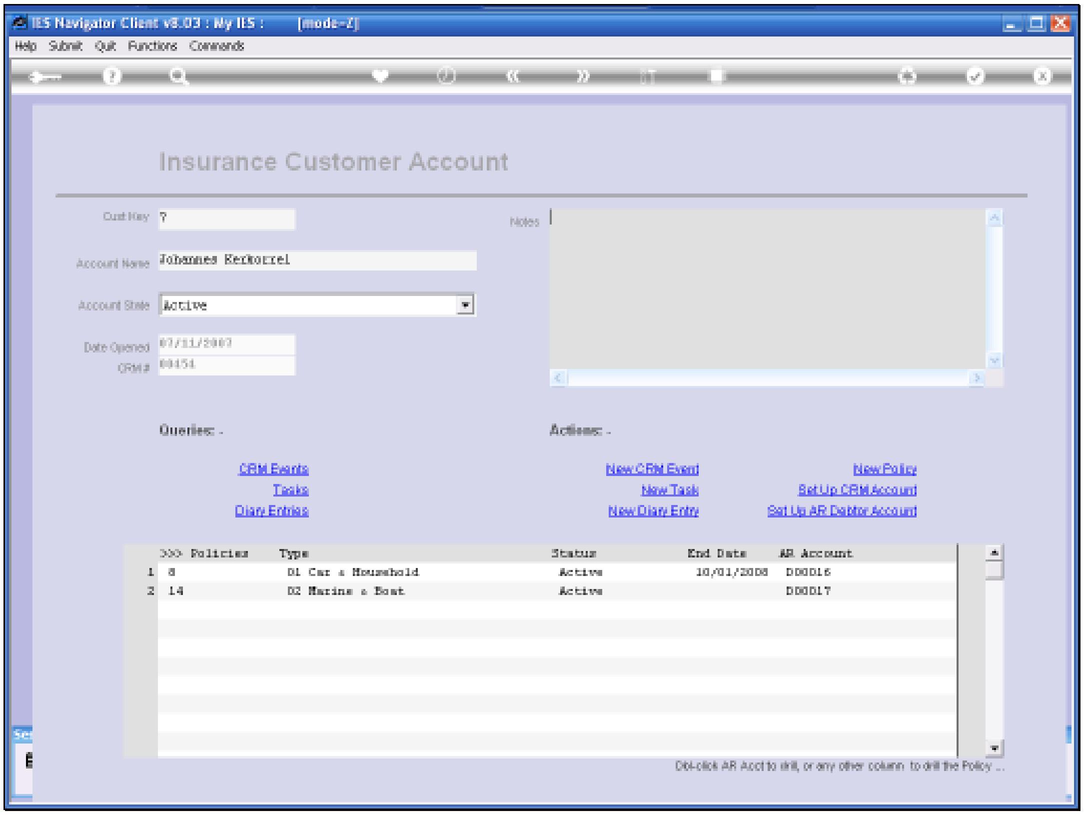


Slide 57

Now as we can see here, the New Entry is listed on the Query of Diary Entries for this Account.

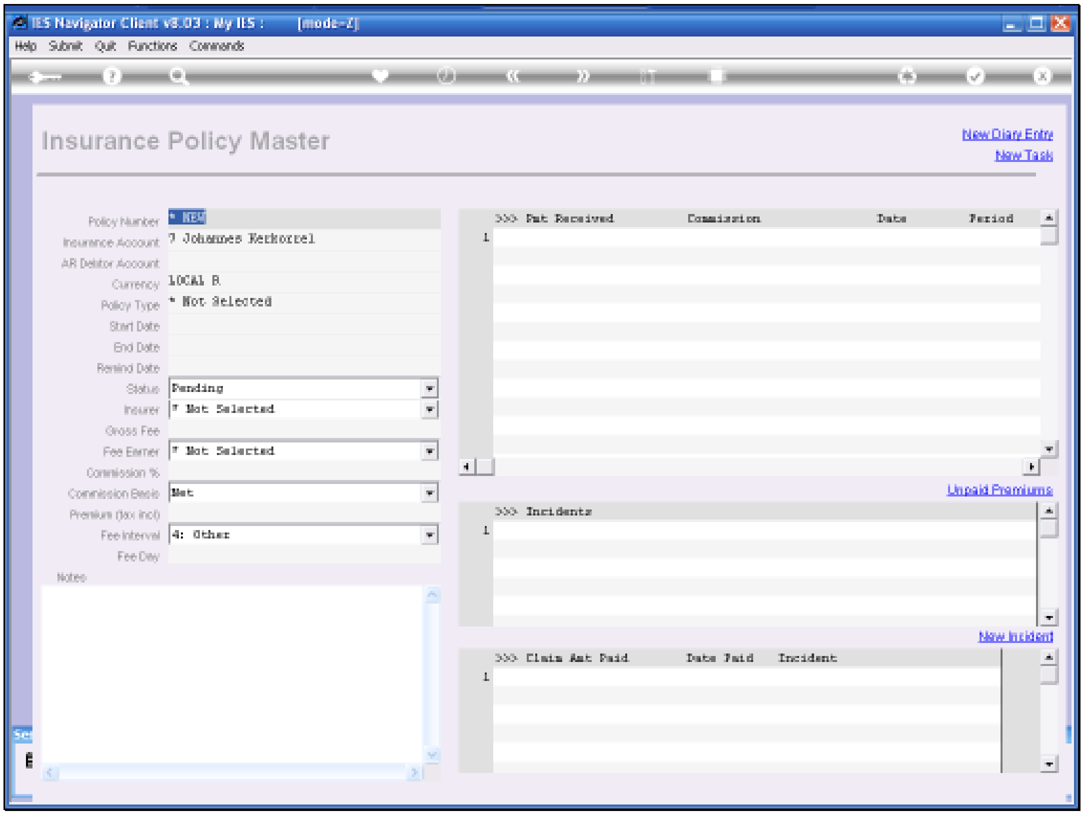

IES Navigator Client v8.03 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 58

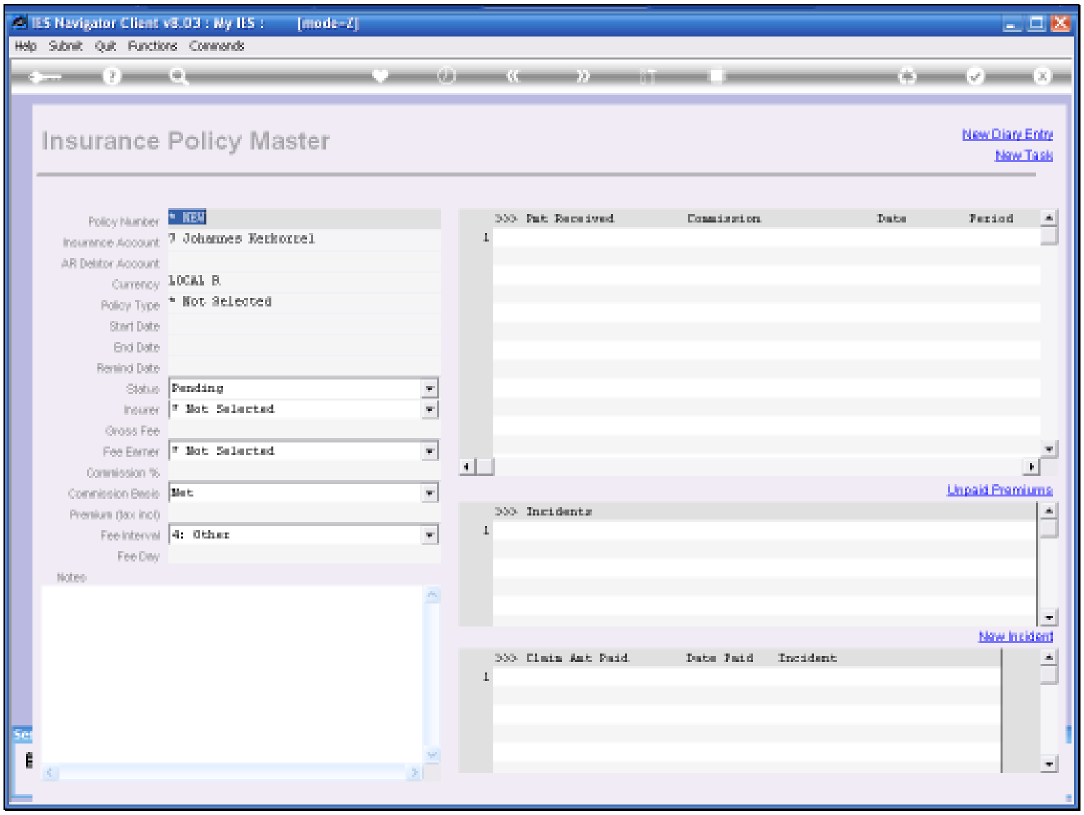


Slide 59

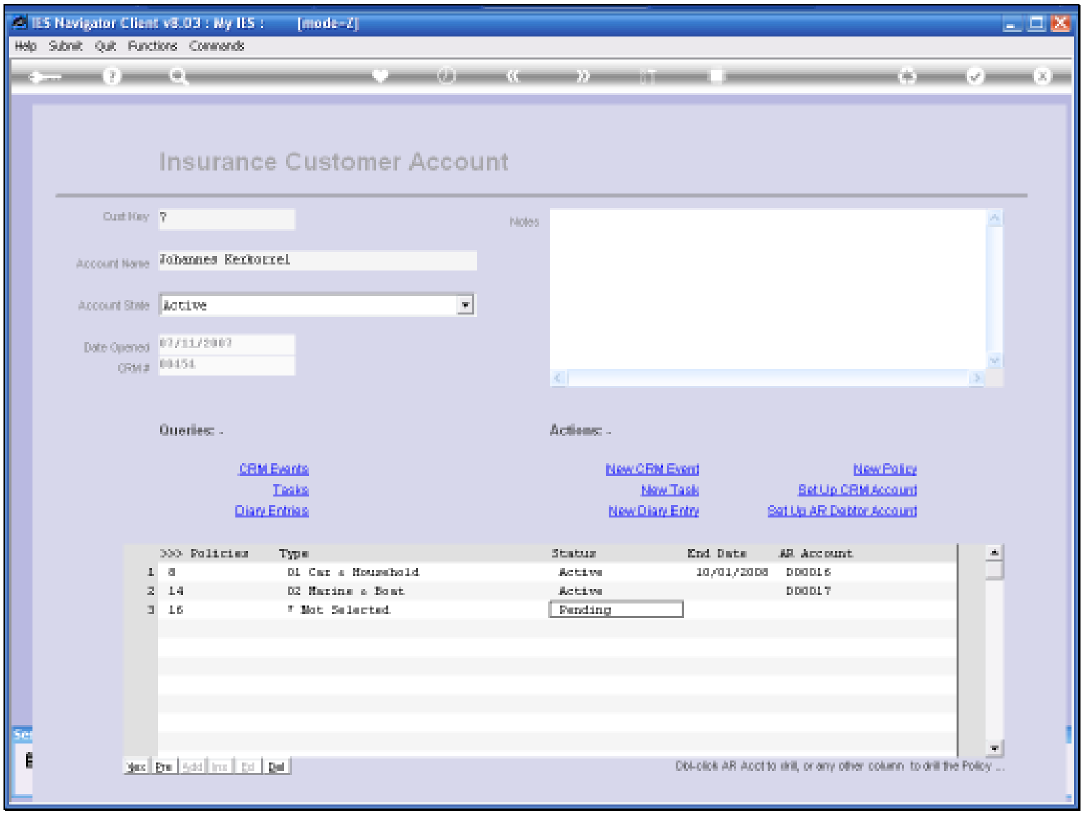
A New Policy Record can be opened by dbl clicking an empty row on the list of Policies or by using the New Policy Function.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Policy Master
New Diary Entry
New Task
Policy Number
* NEW
Insurance Account
7 Johannes Kerkorrel
AR Debtor Account
Currency
LOCAL R
Policy Type
* Not Selected
Start Date
End Date
Remind Date
Status
Pending
Insurer
* Not Selected
Gross Fee
Fee Earner
* Not Selected
Commission %
Commission Basis
Net
Premium (tax incl)
Fee Interval
4: Other
Fee Day
Notes
>>> Pmt Received Commission Date Period
Unpaid Premiums
>>> Incidents
New Incident
>>> Claim Amt Paid Date Paid Incident

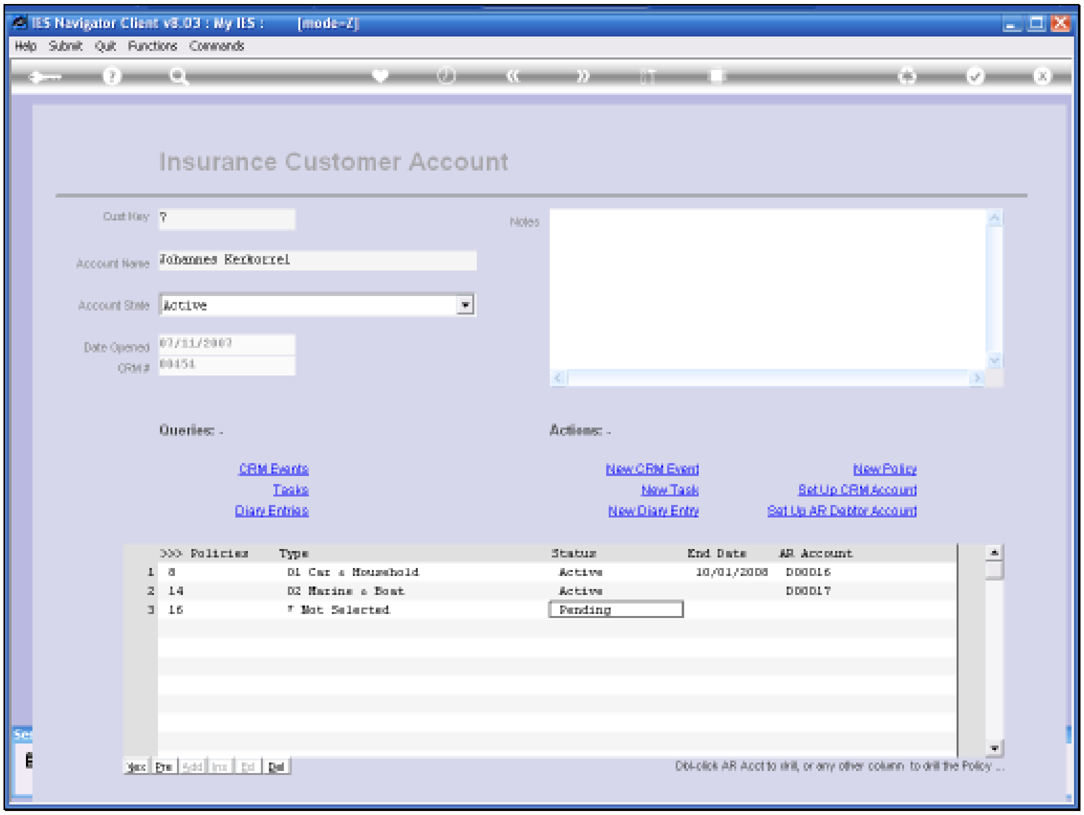
Slide 60


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Policy Master
New Diary Entry
New Task
Policy Number * NEW
Insurance Account ? Johannes Kerkorrel
AR Debtor Account
Currency LOCAL R
Policy Type * Not Selected
Start Date
End Date
Remind Date
Status Pending
Insurer * Not Selected
Gross Fee
Fee Earner * Not Selected
Commission %
Commission Basis Net
Premium (tax incl)
Fee Interval 4: Other
Fee Day
Notes
>>> Pmt Received Commission Date Period
Unpaid Premiums
>>> Incidents
New Incident
>>> Claim Amt Paid Date Paid Incident

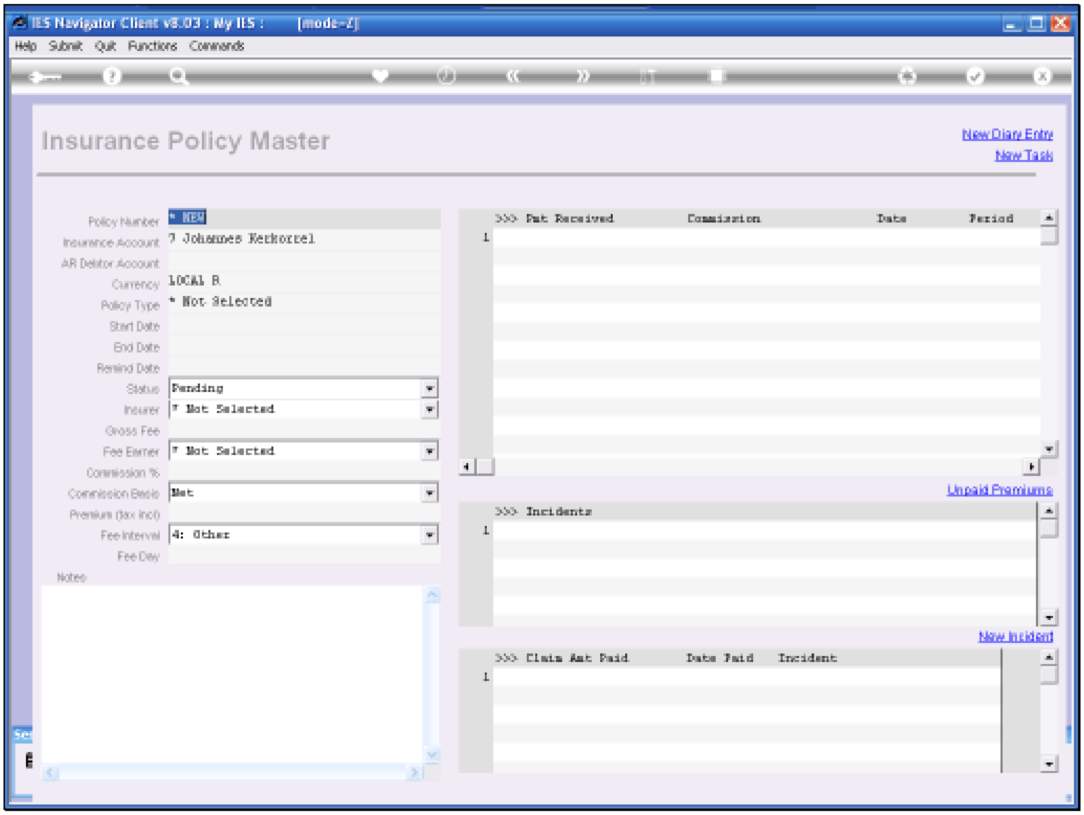
Slide 61


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

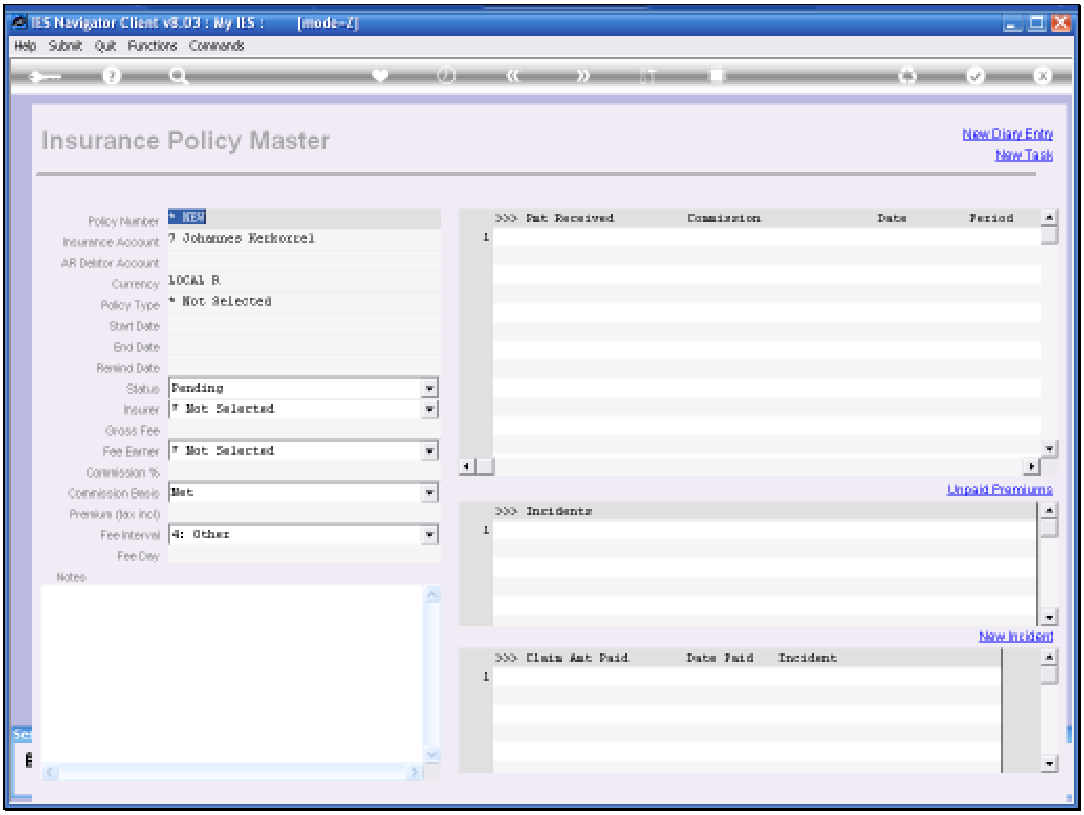
Slide 62


IES Navigator Client v8.03 : My IES : [mode=2]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00454
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

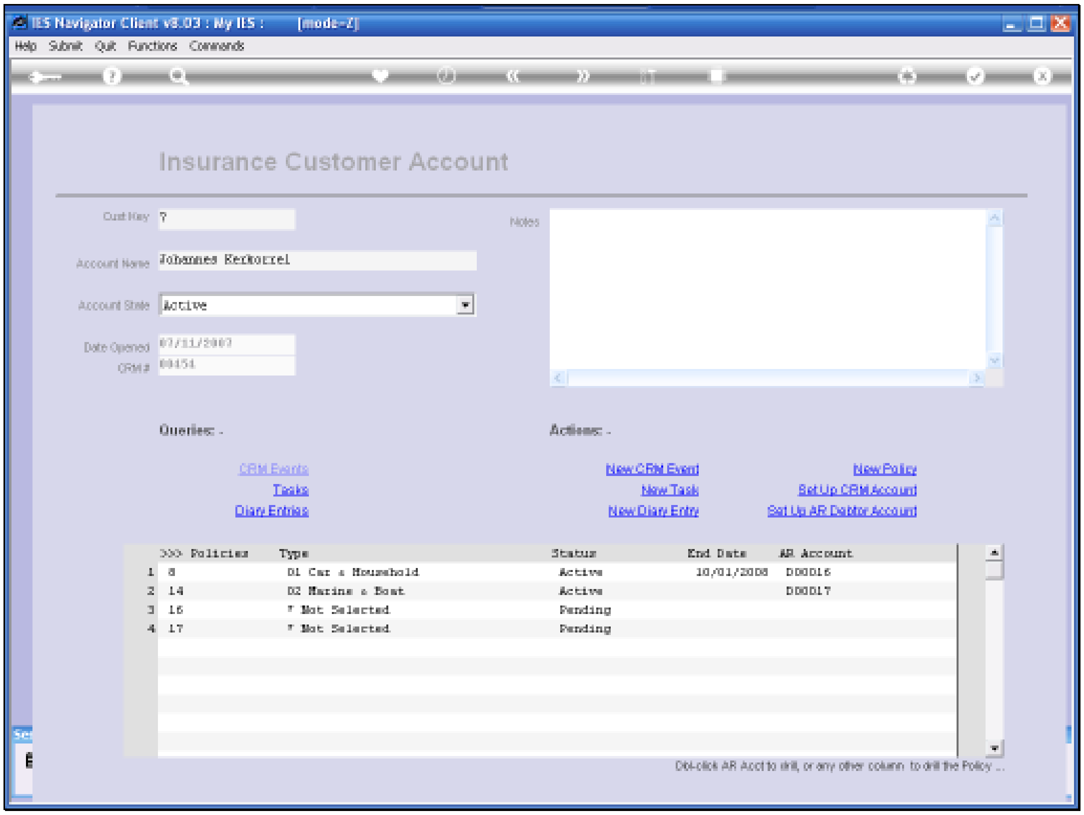
Slide 63


IES Navigator Client v8.03 : My IES : [mode=Z]
Help Submit Quit Functions Commands
Insurance Policy Master
New Diary Entry
New Task
Policy Number * NEW
Insurance Account 7 Johannes Kerkorrel
AR Debtor Account
Currency LOCAL R
Policy Type * Not Selected
Start Date
End Date
Remind Date
Status Pending
Insurer * Not Selected
Gross Fee
Fee Earner * Not Selected
Commission %
Commission Basis Net
Premium (tax incl)
Fee Interval 4: Other
Fee Day
Notes
>>> Pmt Received Commission Date Period
Unpaid Premiums
>>> Incidents
New Incident
>>> Claim Amt Paid Date Paid Incident

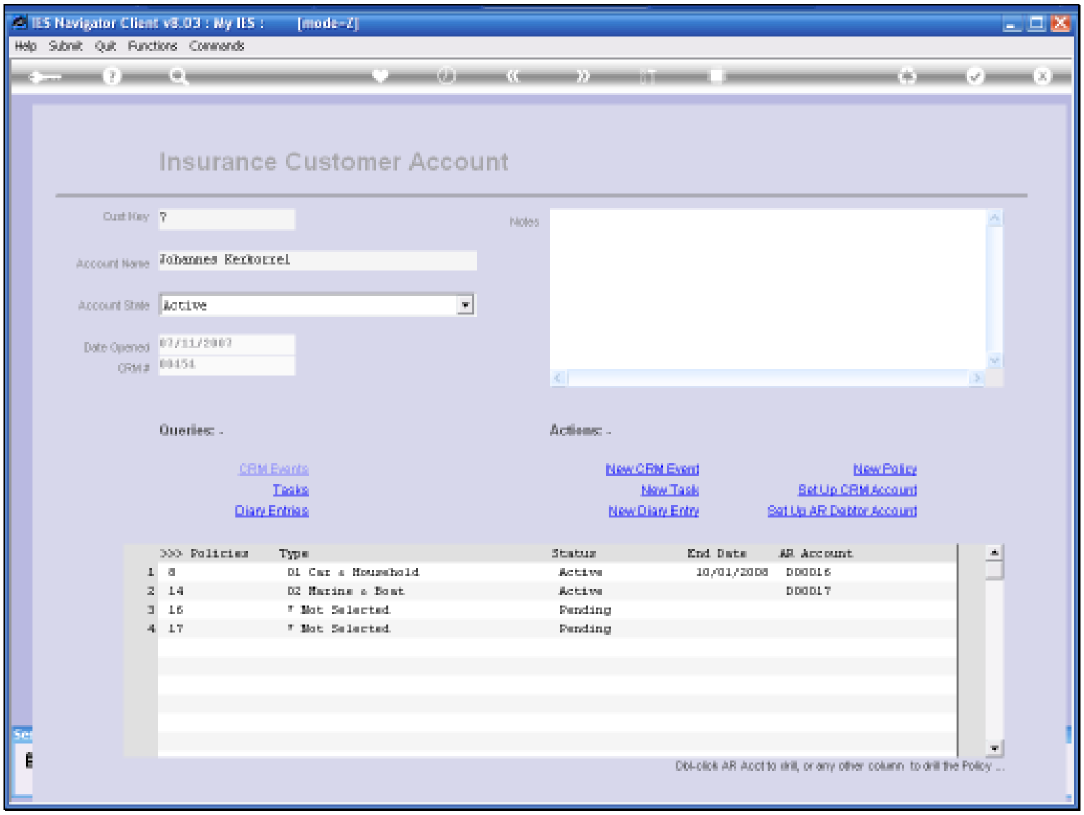
Slide 64


IES Navigator Client v8.03 : My IES :
Help Submit Quit Functions Commands
Insurance Policy Master
New Diary Entry
New Task
Policy Number
* NEW
Insurance Account
7 Johannes Kerkorrel
AR Debtor Account
Currency
LOCAL R
Policy Type
* Not Selected
Start Date
End Date
Remind Date
Status
Pending
Insurer
* Not Selected
Gross Fee
Fee Earner
* Not Selected
Commission %
Commission Basis
Net
Premium (tax incl)
Fee Interval
4: Other
Fee Day
Notes
>>> Pmt Received
Commission
Date
Period
Unpaid Premiums
>>> Incidents
New Incident
>>> Claim Amt Paid
Date Paid
Incident

Slide 65

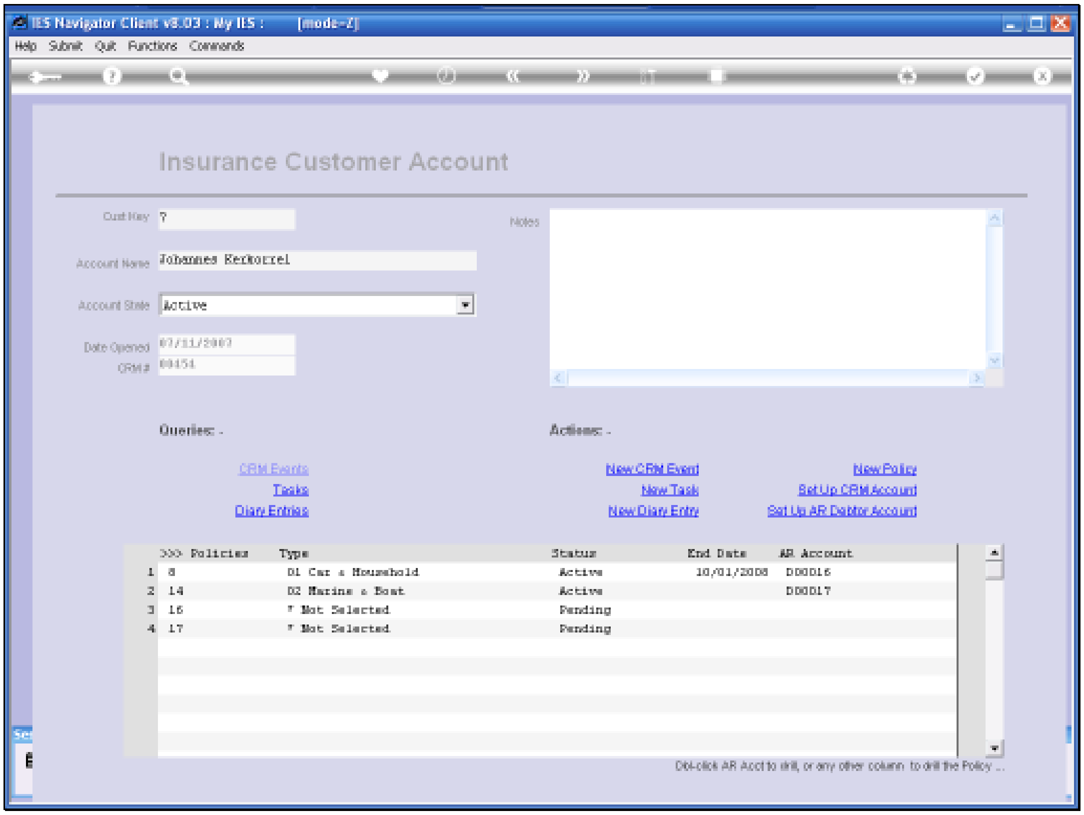

IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
4 17 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 66



Slide 67

We deal with the Policy Master itself in a separate Tutorial.

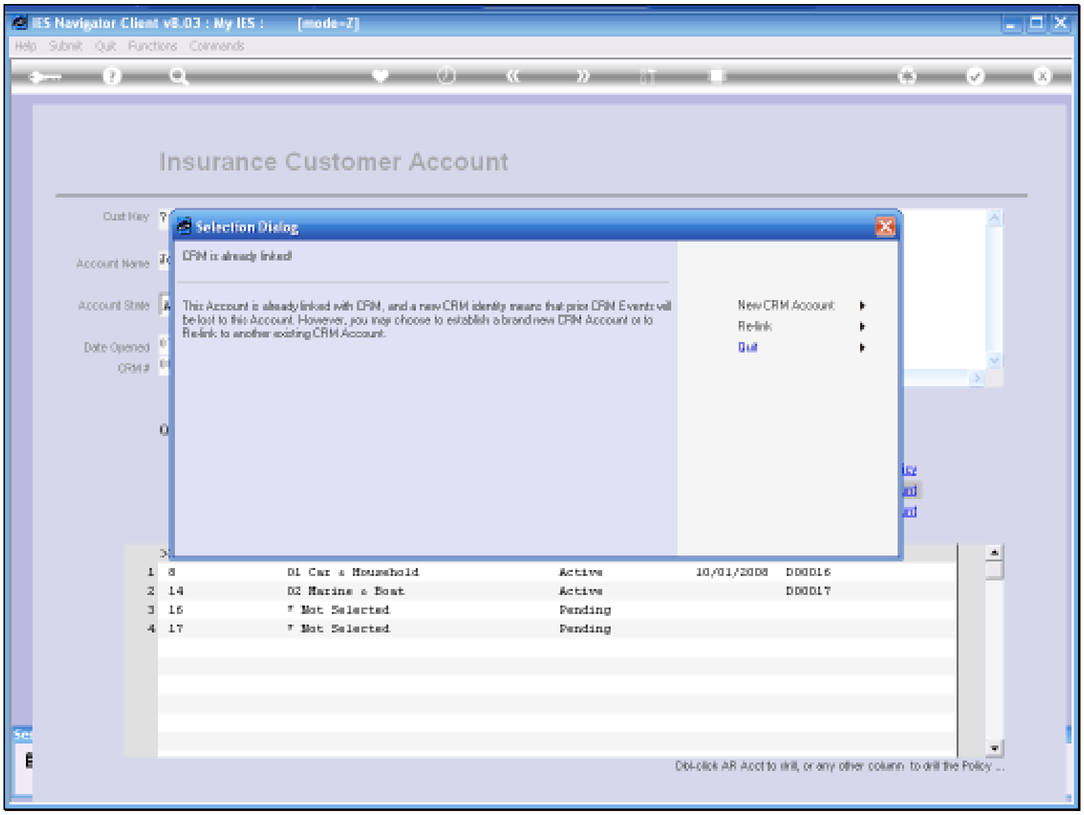


Slide 68

If no CRM Account is listed for this Insurance Account yet, or if we want to Link or Re-Link to a different CRM Number, then we use “Set Up CRM Account”

The important thing to understand about CRM is that we may have one or multiple AR Debtor Accounts linked to this Insurance Account, by virtue of being used on the Policies listed on this Account.

It is rather important to have the same CRM number for the AR Debtor Accounts as we have for the Insurance Account because we have grouped together our CRM Events properly.



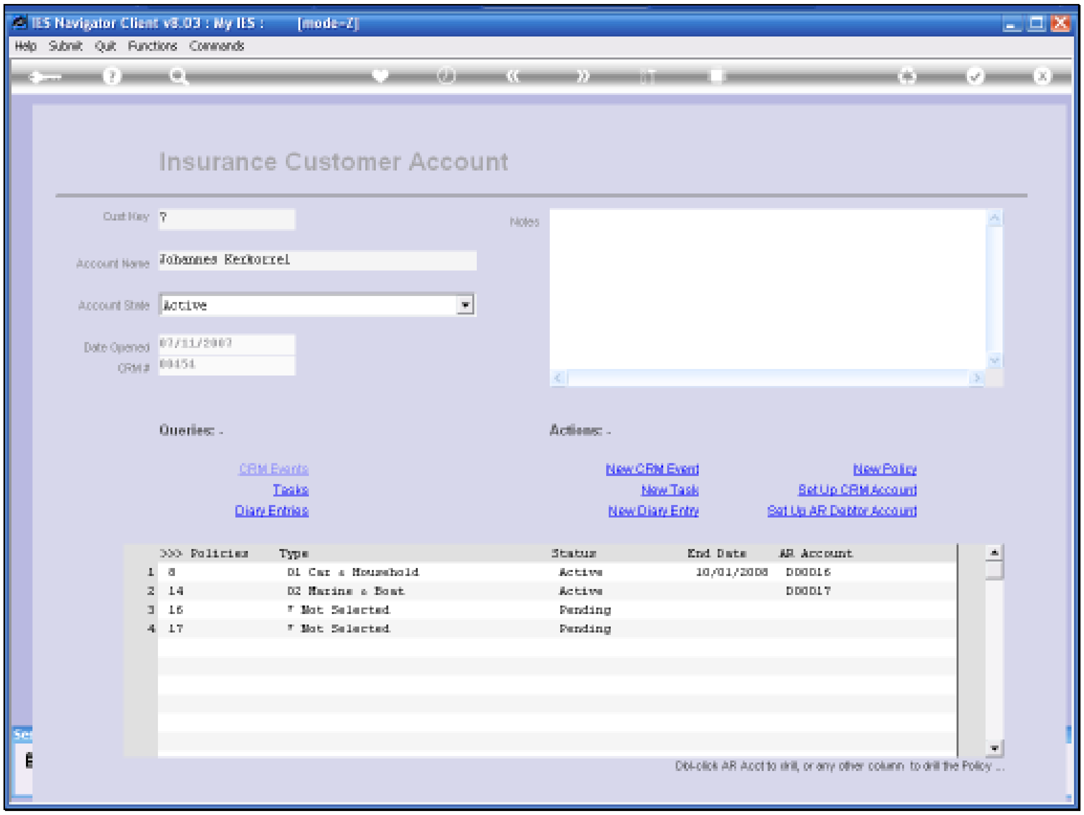
Slide 69

So when we use this Option, and the System does not tell us which we should do first.

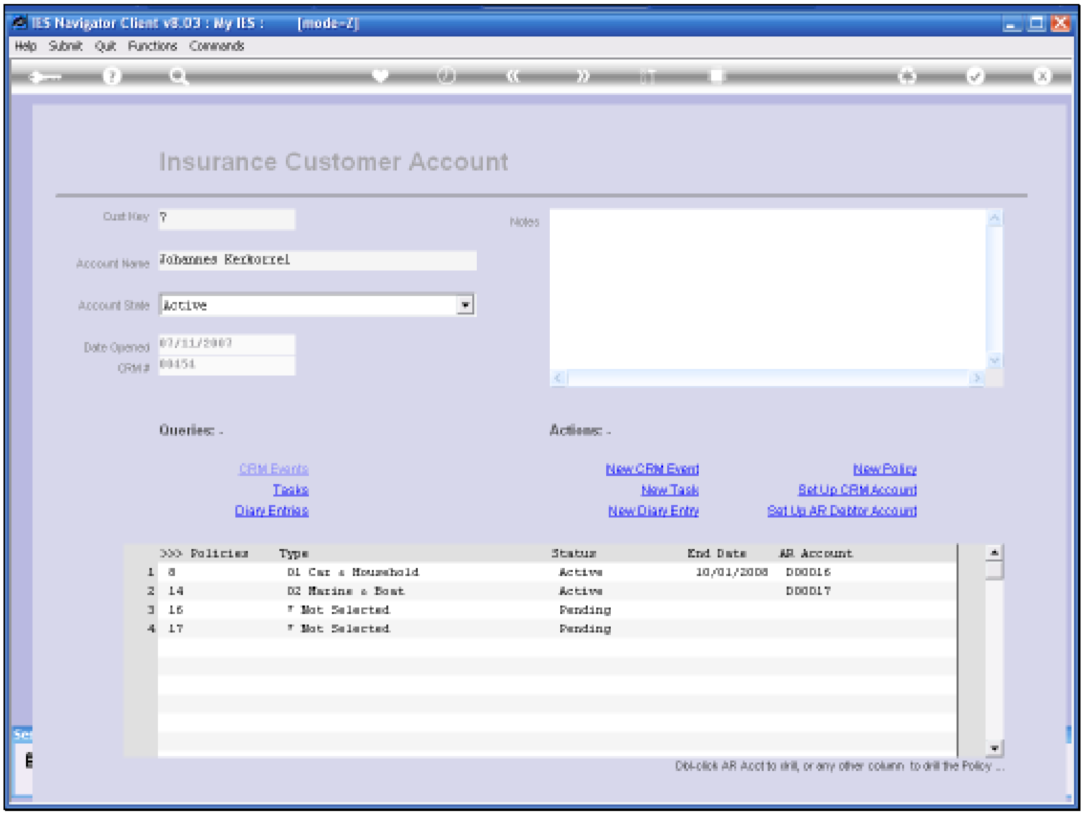
So we could Open the A R Debtor Account/Accounts first and use that CRM and link it here. Or we can Open it from her and then when we Open any A R Debtor Accounts, make sure that we link this CRM Number to those Accounts.

So - if there is already a CRM Number present, as it is in this case, then we have the Option, not only to make a New CRM Account, but also to Re-Link to a different CRM Number.

If there is no CRM Number yet, then of course the System will simply allow us to create a New CRM Account or Re- Link, or Link to an existing CRM which we may already have set up on the A R Debtor Account.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
4 17 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 70



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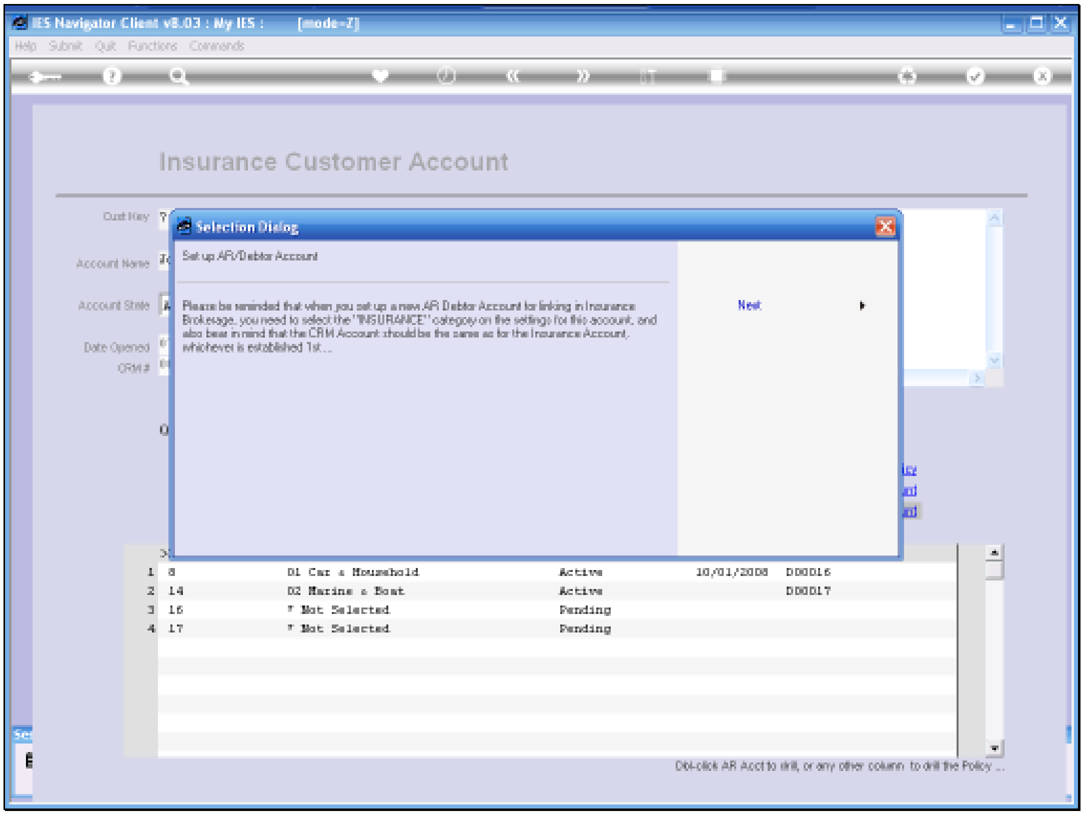
We can have one or multiple Policies listed for the same Insurance Account and we can have one or multiple A R Debtor Accounts linked.

The AR Debtor Account is linked to the Policy itself and there really should be, or is recommended to be a separate A R Debtor Account for each Policy.

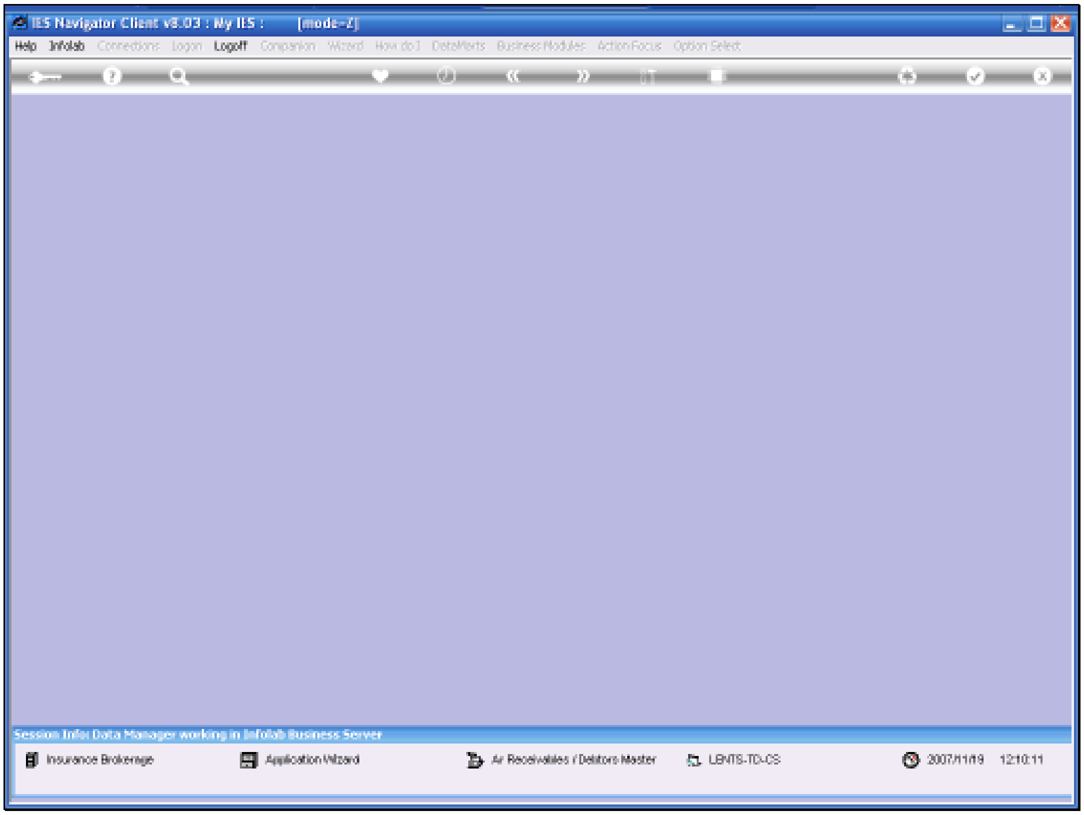
The Currency of the Policy determines what Currency the A R Debtor Account that is linked, should be managed in.

So if we want to Set Up a AR Debtor Account, we can do it from here. But we certainly need Access to the normal Function for opening these A R Debtor Accounts on our Profile. Otherwise the System will not allow us to use it via this link.

What this link does, it takes us into the facility or Option to Open or Manage AR Debtor Accounts.


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key
Account Name
Account State
Date Opened
CRM #
Selection Dialog
Set up AR/Debtor Account
Please be reminded that when you set up a new AR Debtor Account for linking in Insurance Brokerage, you need to select the "INSURANCE" category on the settings for this account, and also bear in mind that the CRM Account should be the same as for the Insurance Account, whichever is established 1st…
Next
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
4 17 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy …

Slide 72


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
Session Info: Data Manager working in Infolab Business Server
Insurance Brokerage
Application Wizard
Ar Receivables / Debtors Master
LENTS-TD-CS
2007/11/19 12:10:11

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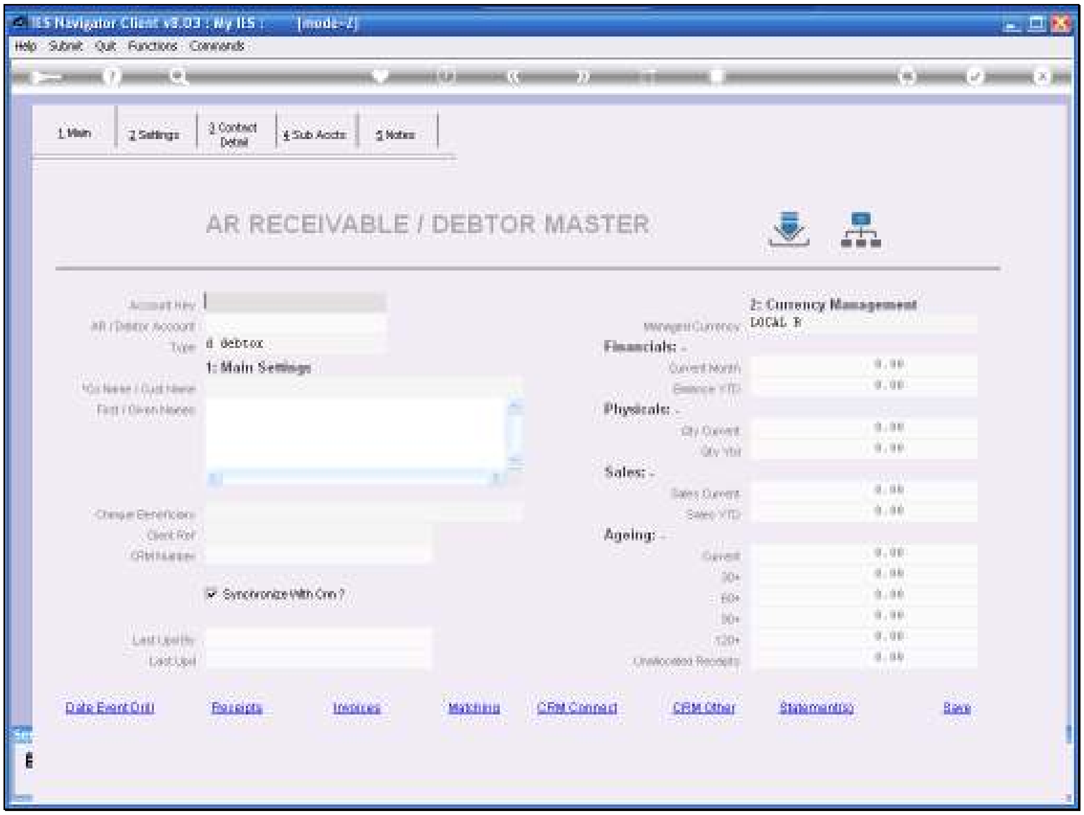
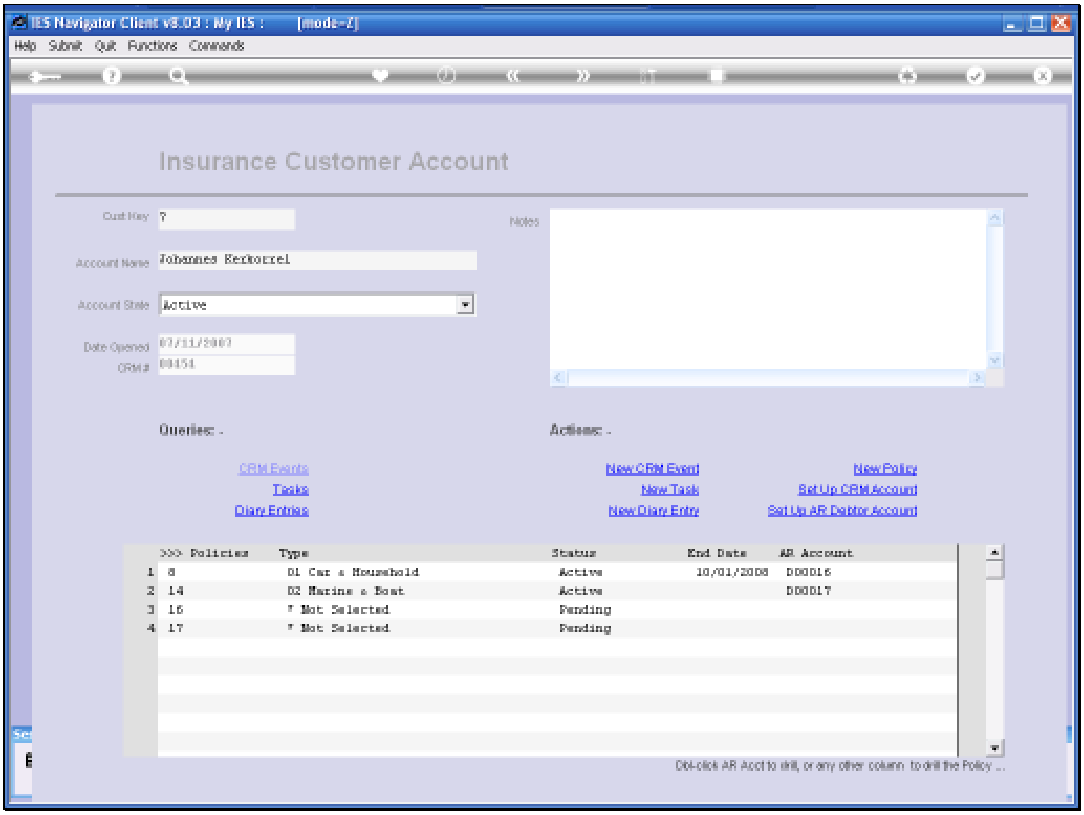
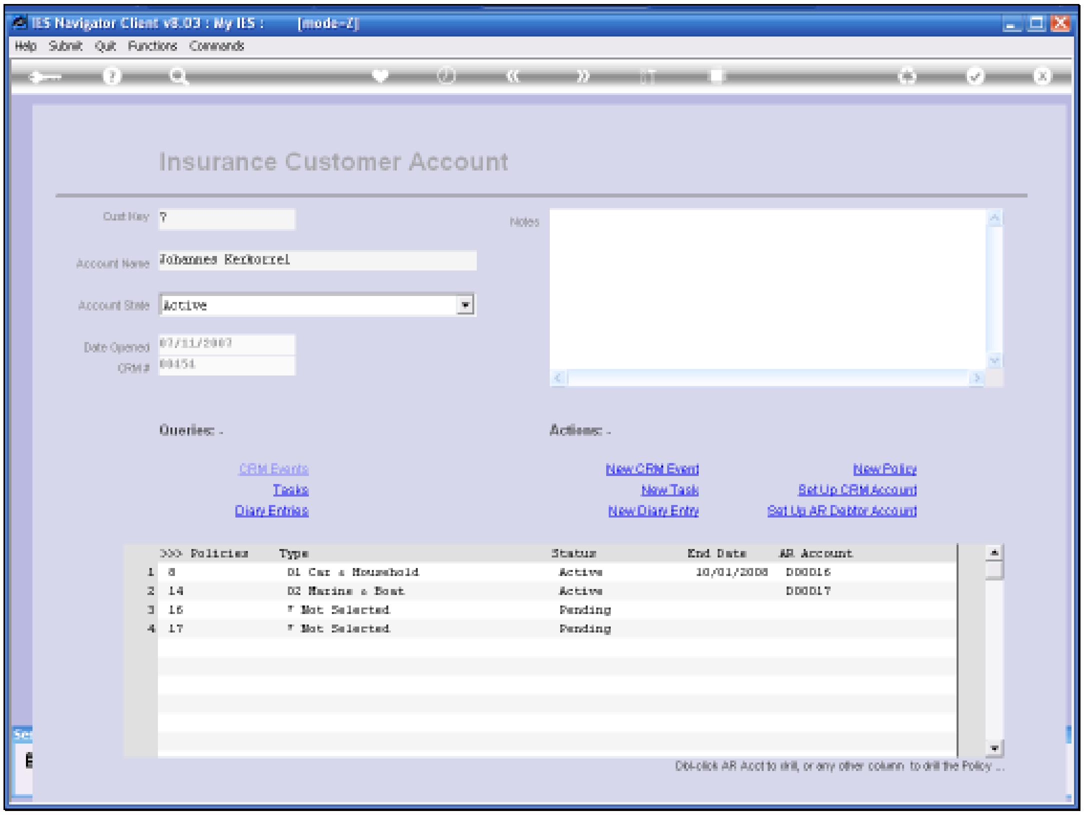

AR RECEIVABLE / DEBTOR MASTER
1 Main
2 Settings
3 Contact Detail
4 Sub Accts
5 Notes
Account Key
AR / Debtor Account
Type
d debtor
1: Main Settings
2: Currency Management
LOCAL R
Financials: -
Current Month
Balance YTD
Physicals: -
Qty Current
Qty Ytd
Sales: -
Sales Current
Sales YTD
Ageing: -
Current
30+
60+
90+
120+
Unallocated Receipts
Synchronize With Crm ?
Date Event Drill
Receipts
Invoices
Matching
CRM Connect
CRM Other
Statement(s)
Save

Slide 74


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened 07/11/2007
CRM # 00451
Notes
Queries: -
CRM Events
Tasks
Diary Entries
Actions: -
New CRM Event
New Task
New Diary Entry
New Policy
Set Up CRM Account
Set Up AR Debtor Account
>>> Policies Type Status End Date AR Account
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
4 17 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 75


IES Navigator Client v8.03 : My IES : [mode-Z]
Help Submit Quit Functions Commands
Insurance Customer Account
Cust Key 7
Account Name Johannes Kerkorrel
Account State Active
Date Opened
CRM #
Notes
Queries: -
Actions: -
CRM Events
Tasks
Diary Entries
New CRM Event
New Task
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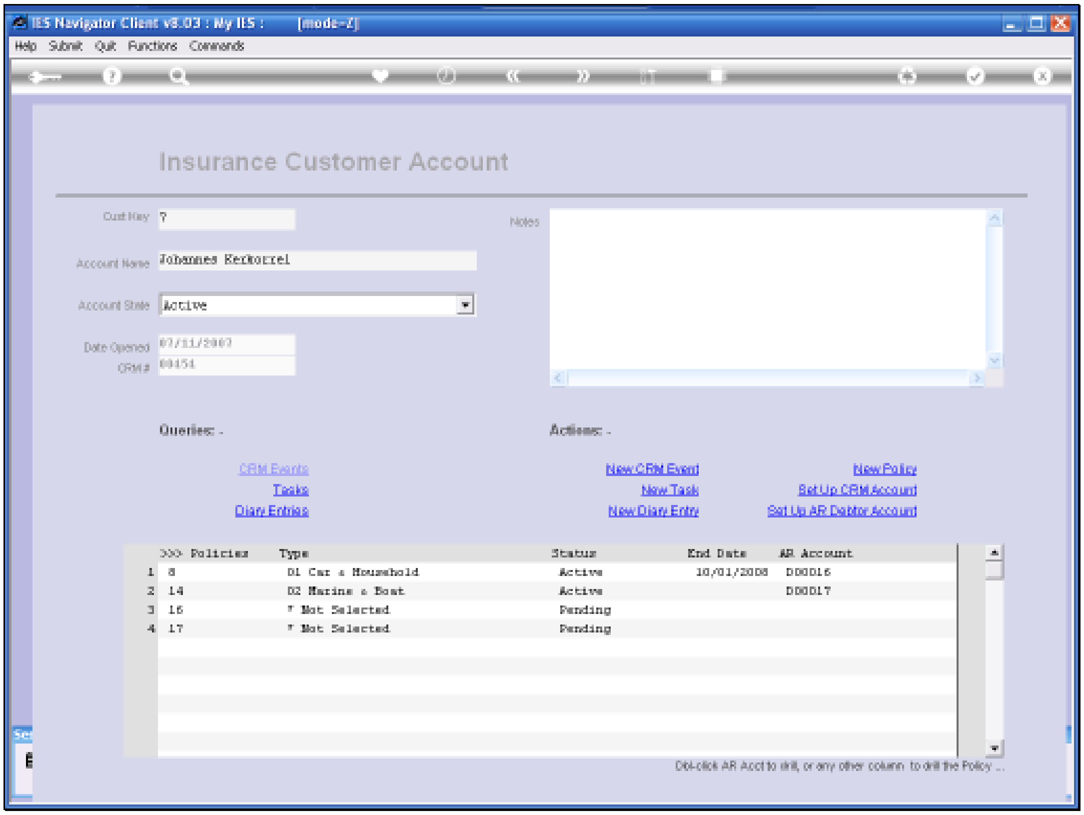
1 8 01 Car & Household Active 10/01/2008 D00016
2 14 02 Marine & Boat Active D00017
3 16 * Not Selected Pending
4 17 * Not Selected Pending
Dbl-click AR Acct to drill, or any other column to drill the Policy ...

Slide 76



Slide 77

So we see that the Management or Maintenance of Insurance Customer Accounts is quite easy and straightforward and flexible.