## Fast-Class File

SmartOffice

## Volume 25: Ten - Year Term Renewals

One way of building a dynamic report that will find all ten-year term policies with a renewal date occurring in the next 60 days is to create a dynamic report using two filters: one that will find all ten-year term policies in your system based on plan name, and one dated filter that will find the ten-year anniversary of the policy dates of the ten-year term policies.

To build a filter that will search for all ten-year term policies in your system based on plan name –

- Select **Marketing** in the main menu.
- Select **Filters**.
- Use the **Category** drop-down field in the **Search Filter** screen to select the **Policy** category.

earch Filters	•	
ocur en rinter a	*	
Filter Name		
Category	All	-
	Household	
	Investment Position	
Searc	Investment Transactions	
	Leads	
© 2000-2004	Opportunity	
	Pending Case	
	Pending Case - Interested Parties	
	Policy	
	Policy - Interested Parties	
	Policy- Rider	
	Product Marketing	-

Figure 1: The Category drop-down field on the Search Filters screen (Policy Category selected).

- Click the Add button on the Search Filter screen.
- In the Filter Setup screen, click the Add button in the Filter Items section.
- In the Filter Criteria screen, select the Product table in the Tables Available section and the Product Name column in the Columns Available section.
- Select the Equal to operator in the Operator field drop down.
- Type the name of one of the ten-year term products in your system.



ables Available	Columns Available	Table	Product
Holding	Product Name	Column	
olicy	Product Code	Column	Product Name
arrier Basic Info	Туре	Onevetev	
isurance Carrier	Variable Product	Operator	Equal to 💌
arrier Business Info	Remarks		
olicy Extension		Value	
ontact		Lun in m	
ife		LNL 10 Terr	n
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ther Policy mbrella TC nnuity roduct surance Product Annuity RIF IONEY		Columns operator selected	Available). Specify the and value for the column.

Figure 2: The Filter Criteria screen (filter criteria for one ten-year term policy selected)

- Click OK.
- The criteria selected in the **Filter Criteria** screen will be reflected in the **Filter Setup** screen.
- Click the **Add** button again and add criteria for each ten-year term product in the system.

SmartOffice will add a filter operator for each new set of criteria added to the **Filter Setup** screen. By default, the filter operator will be set to **and**. The **and** operator will find records meeting both sets of criteria – the **or** operator will find records meeting either set of criteria. When filtering on one field, as in the case with this filter, use the **or** operator.

• Change the filter operator to **or** by clicking on the filter operator.



Filter Name 10YR Term Policies	Product Name Equal to "LNL 10 Term"     or Product Name Equal to "American Leve
escription	ABC
I ten-year term policies - Product LNL 10 Term or American Level <sup>.</sup>	Name A

Figure 3: The Filter Setup screen (Multiple sets of filter criteria in the Filter Items section with filter operator set to or).

- Give the filter a name. Add description if necessary.
- Click **OK**.

To build a filter that will search for the renewal dates for ten-year policies occurring in the next sixty days –

- Select **Marketing** in the main menu.
- Select Filters.
- Use the **Category** drop-down field in the **Search Filter** screen to select the **Policy** category.
- Click the Add button on the Search Filter screen.
- In the Filter Setup screen, click the Add button in the Filter Items section.
- In the Filter Criteria screen, select the Policy table in the Tables Available section and the Renewal Date column in the Columns Available section.
- Select the **Advanced** operator in the **Operator** field drop down.
- Select the Next/Previous Days from Specific Date condition in the Select Conditions to Apply section.
- Click the **Down Arrow (Add)** button to add the condition to the **Description** section.
- Click the next/previous days hypertext link of the description.
- Enter 60 in the Number of Days field and select the Next option in the Date Span screen.



Number of Days	60
Previous C	Next 🔎
ОК	Cancel

Figure 4: The Date Span screen.

- Click OK.
- The selection will be displayed in the **Description** section of the **Advanced Date Operator** screen.
- Ensure that the second setting of the description is set to **Today**.

🚰 SmartOffice Web Page Dialog	×
Select Conditions to Apply	Help
Relative to Specific Date	For more information, move the mouse over the conditions in
Date Range Operations	the "Select Conditions to Apply" section. When the question
Number of Days Relative to Specific Date	mark appears over the desired
Next/Previous Days from Specific Date	detailed help information.
Past/Future Event in the Next/Previous Days	
「」 	
Description (Click on underlined value to edit)	
Column "Renewal Date" in "Policy" should satisfy the following criteria:	
🔲 in next 60 Days from today	
< >	OK Cancel

Figure 5: The Advanced Date Operations screen with defined description.



- Click **OK**.
- The criteria selected in the **Advanced Date Operator** screen will be reflected in the **Filter Setup** screen.

Filter Name		Filter Items	+ 🗊 🗇 🎽
Filter Name Renewal Next 60 Days		🔲 Renewal Date is in next 60 Da	ays from today
Description	ABC		
Policy renewal dates occuring in the next 60 days			
<b>OK</b> © 2000-2004 E-Z Data, Inc. All right	ts rese	Show SQL Cancel	

Figure 6: The Filter Setup screen with date span criteria.

- Give the filter a name. Add description if necessary.
- Click **OK**.

The filter criteria in both filters could be easily added together in one filter. However, since the criteria in both filters can be used to mine data that may be useful – to generate a list of all ten-year term products regardless of renewal date or to generate a list of all policies (ten-year term or otherwise) with a renewal date occurring in the next 60 days – the criteria has been separated into two filters.

To create a dynamic report that will find all ten-year term policies with a renewal date occurring in the next 60 days -

- Select Marketing in the main menu.
- Select Dynamic Reports.
- Use the **Category** drop-down field in the **Search Dynamic Reports** screen to select the **Policy** category.
- Click the **Add** button.
- Select columns for display in the report on the **Column Description** tab of the **Dynamic Report Setup** screen.
- After defining column definition, click the **Name/Description** tab to add filters to the dynamic report and to give it a name.
- Click the Add button in the Selected Filter List section of the Name/Description tab.
- Perform a search for the filters to find all ten-year term policies and policy renewal dates occurring in the next 60 days.



When multiple filters are added to a dynamic report, SmartOffice will automatically add a filter operator, similar to the filter operator added when adding multiple sets of criteria to a filter. Just like the filter operator in the **Filter Setup** screen, the default filter operator will be set to **and**. The **and** operator will find records meeting the criteria of both filters – the **or** operator will find records meeting the criteria either filter.

• Ensure that the filter operator is set to **and** so that this report will find all polices that are ten-year term policies <u>and</u> have a renewal date occurring in the next 60 days.

SmartOffice Web Page Dialog Column Description Name/Description		×
Dynamic Report Name/Description	The Filter(s) Associated With This Report	
Report Name All 10YR Renewals Next 60 Days Report Class	Please add one or more filter(s) to the following spreadsheet to be associated with this report.	
Keywords 🔽 🔽	Selected Filter List 🗕 🕇 📋	
Description 10 year policies renewing in the next 60 days (run- time option)	<ul> <li>☐ 10YR Term Policies</li> <li>☐ and Renewal Next 60 Days</li> <li>✓ Click here to change the filter parameters at run time.</li> </ul>	
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Figure 7: The Name/Description tab of the Dynamic Report Setup screen with filters added (filter operator set to and).

• To enable the option to make changes to filter parameters at run time, select the **Change Filter Parameters** option below the **Selected Filter List** summary.





Figure 8: The Change Filter Parameters option in the Dynamic Report Setup screen.

With the option to make change to filter parameters at run time selected, you will have the option to adjust (in this case) the number of days in the span searching for policy renewal dates and the names of the policies in the **Product Name** field. You will not be able to make changes to columns selected to search on or the nature of the advanced date filter. Only the parameters of the selected columns and date operators can be changed.

- Give the dynamic report a name. Add description if necessary.
- Click **OK**.

To run the new dynamic report to find all ten-year term policies with a renewal date occurring in the next 60 days –

- Select Marketing in the main menu.
- Select Dynamic Reports.
- Use the **Category** drop-down field in the **Search Dynamic Reports** screen to select the **Policy** category.
- Search for the dynamic report
- In the **Dynamic Report Summary** screen, tag the dynamic report then click the **Run** button in the toolbar or double-click the name of the dynamic report in the summary screen.
- If the option to adjust filter parameters at run time has been selected, you will be prompted to adjust filter parameters. Use the hypertext links of each filter item to adjust filter parameters.



SmartOffice	Web Page Dialog
The list below a report. Click on	shows the filter(s) and their value(s) used by this the blue text to change the value(s).
Dynamic Repor	t's Run-Time Filter Items
(Product N to "Americ	ame Equal to "LNL 10 Term" or Product Name Equa an Level 10")
📋 and Renew	al Date is in next 60 Days from today
To change the	Report Title, enter it below.
Report Title	All 10YR Renewals Next 60 Days
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Figure 9: Dynamic Report Run-Time Filter Items screen.

• After making adjustments to the run-time filter options, click **OK** to display results of the dynamic report.

II 10YR Renewals Nex Summary	t 60 Days				<b>£</b> . (	0 🛛 🗶 📔	₿ <b>₿ 🖷 †1</b>
Contact Name	Туре	Policy #	Product Name	Renewal Date	Plan Type	Policy Date	Annual
Adcock, Martin	Life	903412341	LNL 10 Term	09/30/2004	Term	09/30/1994	1,450.00
🗖 Sollert, James	Life	98798798	American Level 10	11/08/2004	Term	11/08/1994	562.00
🗖 Alexander, Sherman	Life	4521F78S32	American Level 10	10/18/2004	Term	10/18/1994	628.32
Chung, Harold	Life	230659	American Level 10	11/01/2004	Term	11/01/1994	100.00
🗖 Adams, Margaret	Life	A56842	American Level 10	10/27/2004	Term	10/27/1994	1,800.00
Ackerman, Joseph	Life	62595	American Level 10	10/19/2004	Term	10/19/1994	1,100.00

Figure 10: Dynamic report results showing all ten-year term policies with a renewal date occurring in the next 60 days.

