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.

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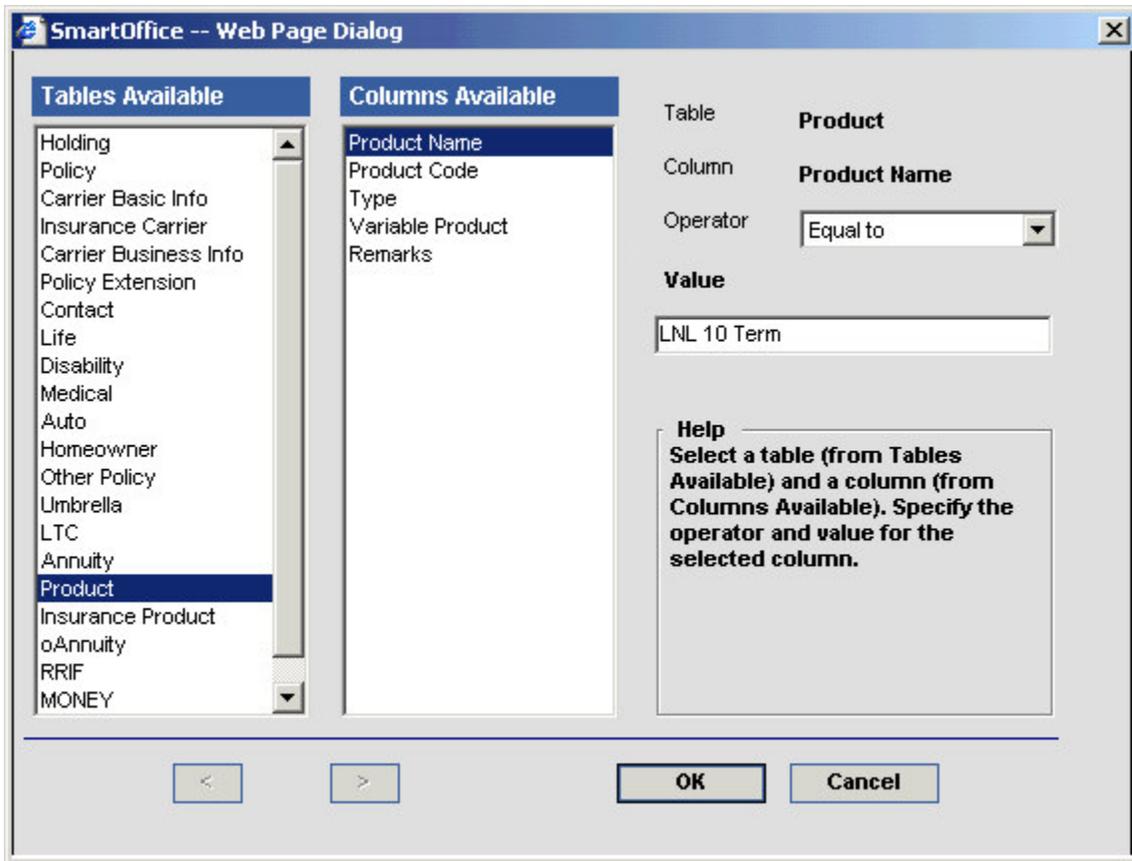
Figure 2: The Filter Criteria screen (filter criteria for one ten-year term policy selected)

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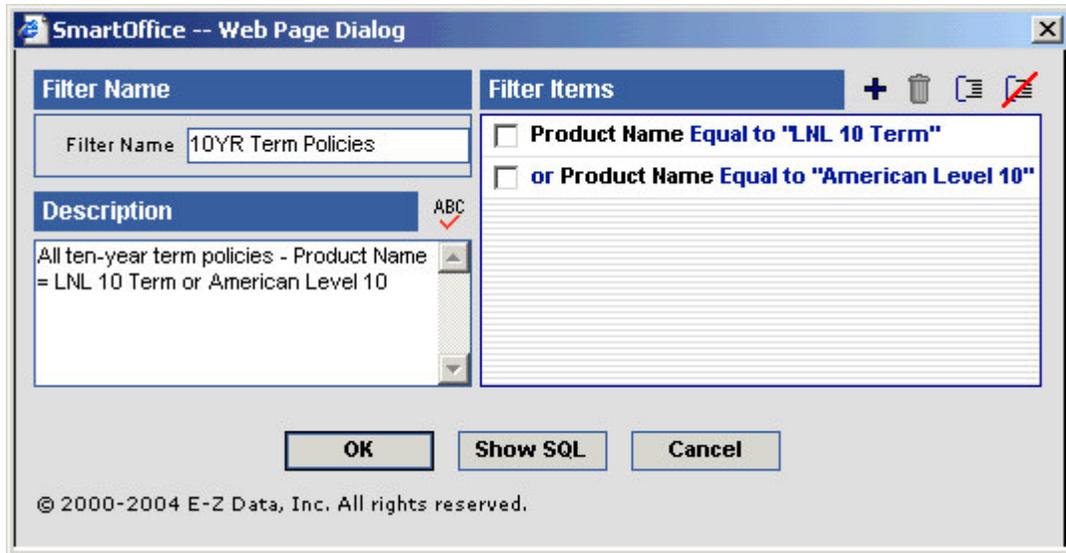
Figure 3: The Filter Setup screen (Multiple sets of filter criteria in the Filter Items section with filter operator set to or).

- 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.
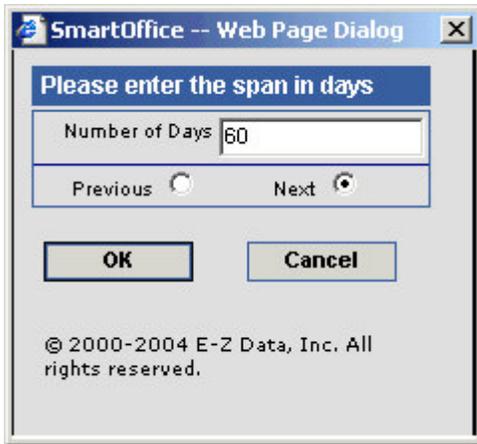
Figure 4: The Date Span screen.

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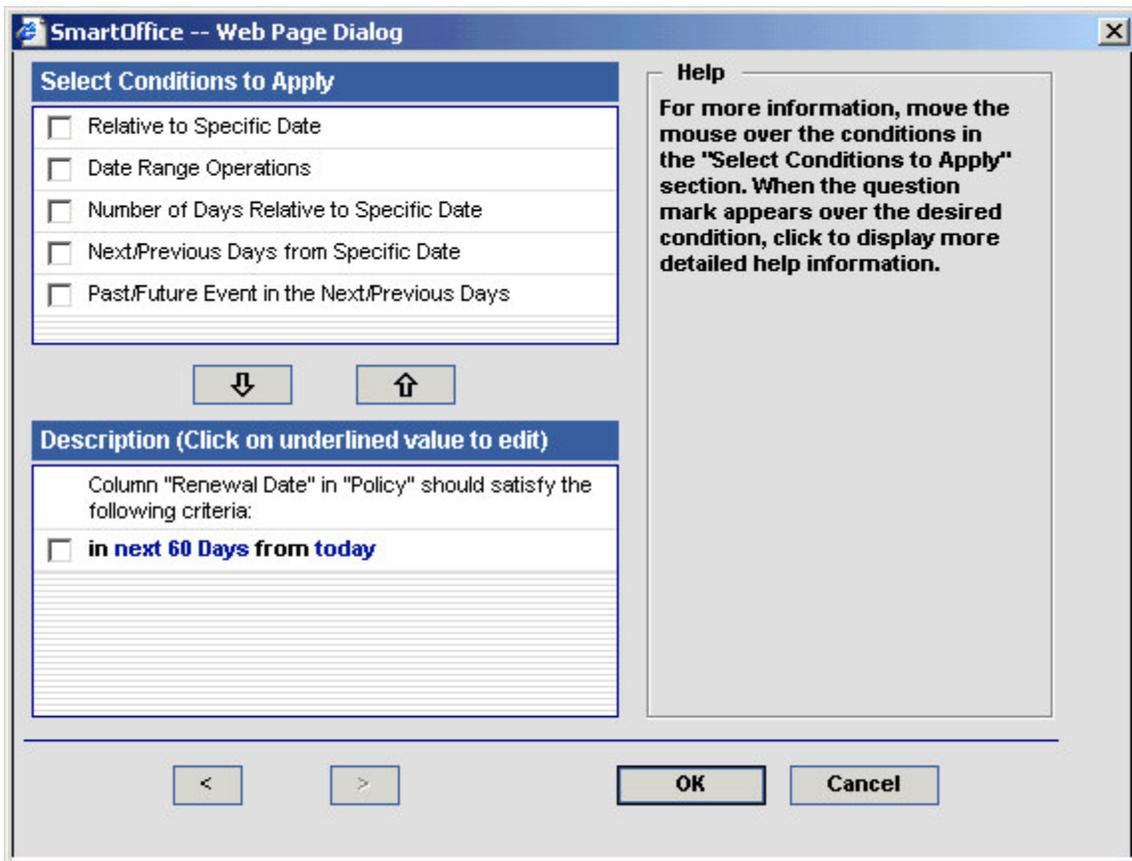
Figure 5: The Advanced Date Operations screen with defined description.

- Click **OK**.
- The criteria selected in the **Advanced Date Operator** screen will be reflected in the **Filter Setup** screen.
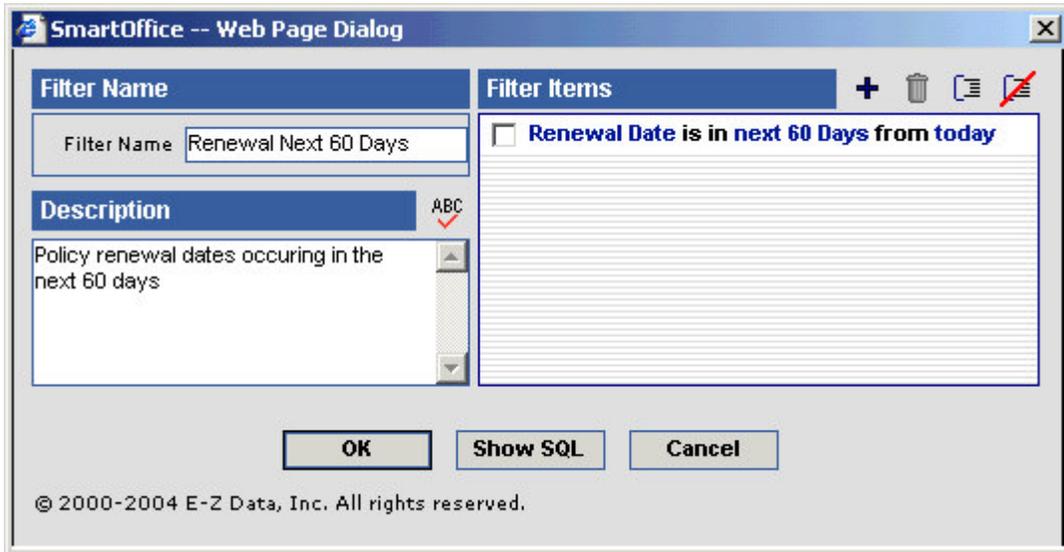
Figure 6: The Filter Setup screen with date span criteria.

- 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 *and* have a renewal date occurring in the next 60 days.
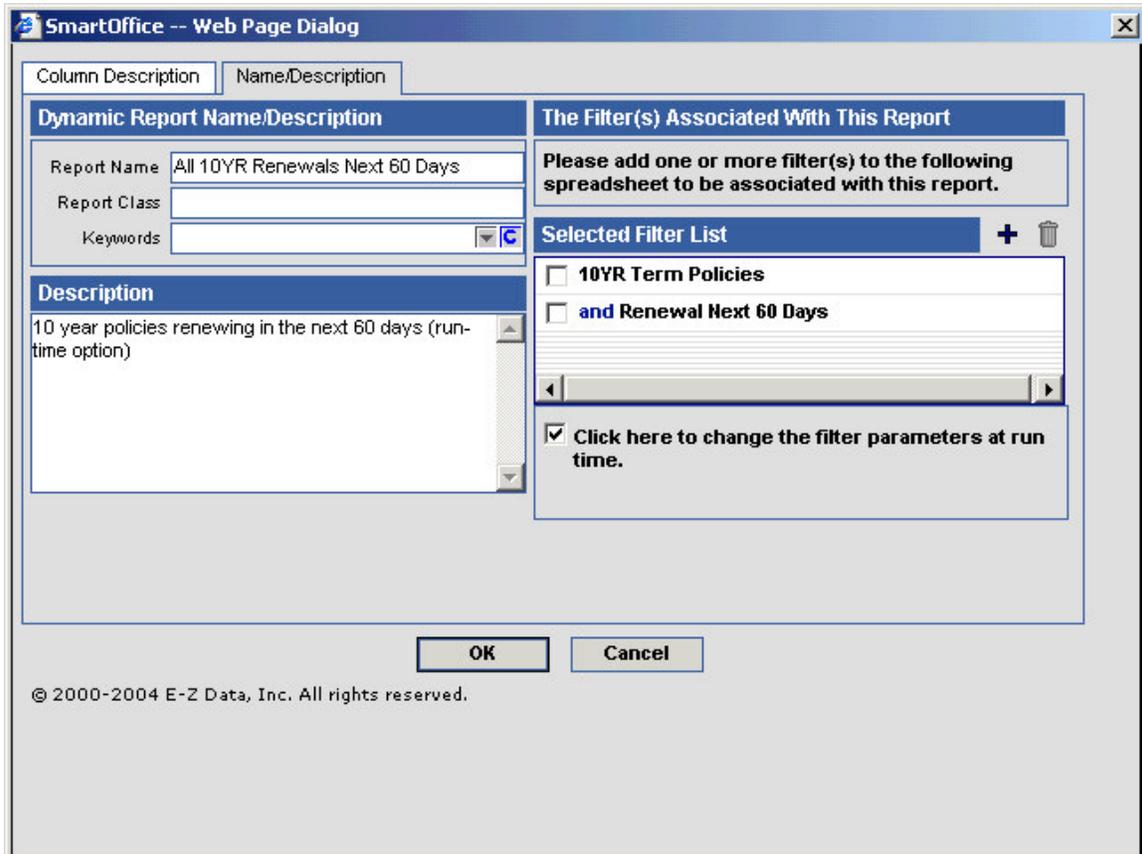
Figure 7: The Name/Description tab of the Dynamic Report Setup screen with filters added (filter operator set to and).

- 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.
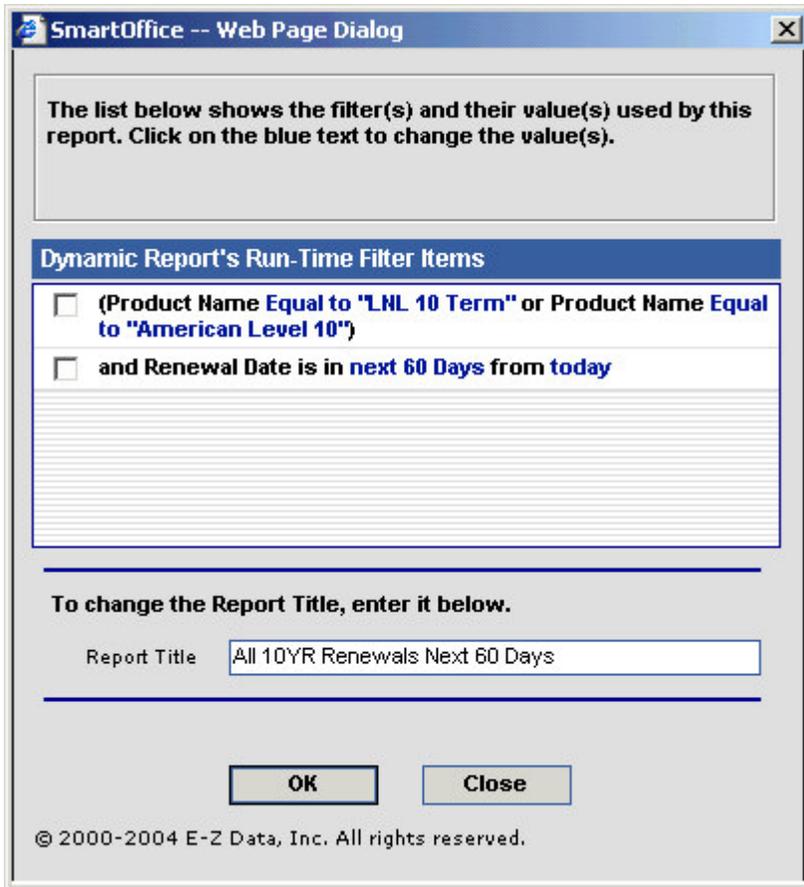
Figure 9: Dynamic Report Run-Time Filter Items screen.

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

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