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In this session we are looking at how we produce Customer Statements for the Insurance Customers.

Of course each and every Policy is linked to a Receivable or Debtor Account and this can be reached from the Insurance Account and also from the Policy Master if we want to produce an ad hoc Statement.

In other words, a single Statement for a particular Account.

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On the linked Financial Account we have a Statement Option, which includes an Option to produce an ad hoc Statement for a Period of our choice.

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From any Policy Record on this Account we can also go through to the AR Debtor Account where we can use the Statement Option to produce an ad hoc Statement.

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Slide 17

Besides the fact that on any AR Debtor Account we can perform a Matching and we can also produce ad hoc Statements, we have the bulk Options where we can deal with the Insurance Customers as a Group.



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On Demand Matching includes Options to work with a specific Account Code or Search for an Account, or to Facilitate.

The Facilitate Option of course will look for Accounts where there is Matching that is Outstanding and that we should Perform before we Produce Statements.

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We are not going to look at this in any detail here, because it works exactly the same as when we use it in the Debtors Application.

We are just showing here that we have Options specifically for the Insurance Customers.







When we Enter the Option to Produce bulk Statements, i.e. for a Group of Accounts, then we also get the prompting about the matching in case we need to do some Matching.

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And this of course leads to the Option to initiate or to Produce Statements in bulk, i.e. for all Selected Accounts.

Now this works again exactly the same as in the Debtors Application.

In this case, we have a Data Selector specifically for Insurance, which will select only the Insurance Accounts.

In other words if we want to do the Insurance Statements separately, we can do it from here. We can also do it by including it with all the other Customer Statements in the Debtors Application.

But, if we want to do the Insurance Customer Statements separately, as a Group, then we can do it from here.

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There is an added advantage in doing the Insurance Customer Statements and Matching here, in the Insurance Application, because it Groups and looks only at the Insurance Accounts. Also when we do the Matching, when we use Facilitate, it will only show Insurance Accounts and not other Debtor Accounts that we have in the rest of our System.