Managing In-Force

Procedure/Function	Where Accomplished	How Accomplished
Editing Benefit Tracking Screens	Policy or Investment Tracking Modules	Pull up an active policy (or add a new policy) for the line of insurance for which you wish to edit the benefit tracking screens. Access the Third and Fourth tabs and single click on the field label to highlight the field. Key in your new field label and hit the TAB key. The field change will be represented in that field for every policy record of that line of insurance or investment.
Printing Client Coverage Reports	Reports	Access the Client for which you wish to print a summary of the policies they currently have. Once displayed, access the Reports module and select IM (or BM). Finally, select the desired report. You will be prompted to print the report for “the current record.” Single click YES and the report will be printed.
Printing Investment Portfolio Reports	Reports	Access the Client for which you wish to print a summary of the investments they currently have. Once displayed, access the Reports module and select IM (or BM). Finally, select the desired report. You will be prompted to print the report for “the current record.” Single click YES and the report will be printed.
Running Policy Renewal Reports	Reports	Access Reports. Select POLICIES. Create a new query. Be sure to run the query on Month of Effective Date or Month of Renewal Date (not “Renewal Date” or Effective Date"). This will give you a print out of all policies renewing in a particular month.
Printing Policy Renewal Letters	Word Manager	Access Word Manager and Create a Policy merge letter to send to your clients whose policies are about to renew. Create a new query. Be sure to run the query on Month of Effective Date or Month of Renewal Date (not “Renewal Date” or Effective Date"). This will give you a print out of all policies renewing in a particular month.
Tracking Claims	Policy Notes	Access the Policy on which a claim has been made. Once displayed, single click on the NOTE icon found on the tool bar. Enter the specifics of the claim in the note area and save your new note.
Tracking Investment Transactions	Investments Module	Access the correct client in either the IM or BM. Single click the INVESTMENTS button and access the Second tab. Enter the individual investment transactions (Buys, Sells and Dividend Reinvestments) to track the Return of the investment or the entire portfolio.