

TBW – Important Releases and Changes

Dear Valued Client:

Rival Insurance Technology is pleased to announce the release of the following enhancements and new features to TBW:

Filter Expiry Report by Account Rep Manager

The Expiry Report can now be filtered by Account Rep Manager. This option will be useful when you want to capture policies transferred from one producer to another.

To view this enhancement, click **Reports, Expiry Report**. In the Expiry Report form, enter report criteria. In the Producer section:

1. Ensure **Transaction** is selected.
 - The Account Rep Manager filter is not available when **Folder** is selected.
2. Select **Account Rep Manager** in the Producer Type drop-down list.
 - Report results will be based on the person who is the Account Rep Manager on the date the report is generated.
 - The **Level** menu will be unavailable when Account Rep Manager is selected.
3. Select All or a specific Account Rep Manager in the Producer Code drop-down list.

The screenshot shows the 'Expiry Report' form with the following fields:

- Agency Code: All
- Branch Code: All
- Department Code: All
- Class of Business: All
- Transaction (selected) / Folder
- Producer Type: A - Account Rep Manager (selected)
- Level: (disabled)
- Producer Code: P or U - Producer/Underwriter, C - CSR, A - Account Rep Manager (selected)
- Policy Category: All

Enter additional report criteria as needed and click **View** to generate the report.

Report results will display in the Document Window. As you know, the Account Representative and the effective date for their assignment to the policy can be viewed in the **Account Rep** and **AcctRep Eff Date** columns.

Print WebConnect **The Broker's Desktop**

Expiry Report
 Reporting Date: April 20, 2023
 Created By: Lainey Russell

Acct No	Company	Pol Num	Producer	Account Rep	AcctRep Eff Date	Sub
TESTJ01	AAA Insurance Company	TestHome1234	LR	Lainey Russell	11/2/2021	
TESTC06	AAA Insurance Company	TEN1234	LR	Lainey Russell	11/2/2021	
TESTC05	AAA Insurance Company	Test 1188		Lainey Russell	1/18/2021	
TESTB01	ABA Insurance Company	TestSK112233	LR	Lainey Russell	12/21/2020	
TESTJ01	AAA Insurance Company	Test 1199		Lainey Russell	11/2/2020	
COMM001	AAA Insurance Company	TestCommPlan123123	LR	Lainey Russell	11/18/2020	

Note that TBW Users may wish to run the Expiry Report twice, once as the Producer and again as the Account Rep Manager. This will ensure all their policies are captured – their existing policies, as well as any policies that have been transferred or assigned to them recently (e.g. when another producer left the organization).

Please share this information with the appropriate TBW users in your office(s). If you have any questions, please contact our Client Services Team at clientservices@rivalit.com or 1-888-291-3588.

Thank you for using TBW.

Yours sincerely,

Rival Insurance Technology

