

Expiration Report: Account Rounding

HIRAM COHEN & SON
INSURANCE SINCE 1919 **100 Years**

M [redacted]

In Force Coverages Tracking

Account	Service Tier	Residential	Inland Marine	Auto/Cycle	Umbrella	Excess Liability	Flood	Excess Flood	Work Comp	Travel
AT [redacted]	C [redacted]	B Level Account	●	●	●	●				
BE [redacted]	S [redacted]	A Level Account	●	●	●	●	●		●	
CC [redacted]	D [redacted]	A Level Account	●	●	●	●				
CC [redacted]	L [redacted]	B Level Account	●	●	●	●				
CC [redacted]	R [redacted]	A Level Account	●	●	●	●				
DA [redacted]	R [redacted]	A Level Account	●	●	●	●				●
GA [redacted]	S [redacted]	A Level Account	●	●	●	●	●		●	
GC [redacted]	L [redacted]	B Level Account	●	●	●	●				
GF [redacted]	E [redacted]	B Level Account	●	●	●	●				
GF [redacted]	H [redacted]	A Level Account	●	●	●	●				
GF [redacted]	R [redacted]	C Level Account	●	●	●	●				
GF [redacted]	S [redacted]	B Level Account	●	●	●	●				
HI [redacted]	D [redacted]	A Level Account	●	●	●	●				
KZ [redacted]	W [redacted]	B Level Account		●						
LI [redacted]	L [redacted]	A Level Account	●	●	●	●	●			
PE [redacted]	T [redacted]	A Level Account	●	●	●	●			●	
PC [redacted]	D [redacted]	A Level Account	●	●	●	●	●	●	●	
PL [redacted]	D [redacted]	A Level Account	●	●	●	●	●			
PL [redacted]	D [redacted]	D Level Account	●	●	●	●				
RA [redacted]	L [redacted]	B Level Account	●	●	●	●		●		
SH [redacted]	C [redacted]	A Level Account	●	●	●	●				
SH [redacted]	M [redacted]	A Level Account	●	●	●	●	●			
SI [redacted]	D [redacted]	A Level Account	●	●	●	●				
SI [redacted]	A [redacted]	C Level Account	●	●	●	●				
S1 [redacted]	S [redacted]	A Level Account	●	●	●	●				
TE [redacted]	T [redacted]		●							
VA [redacted]	D [redacted]	A Level Account	●	●	●	●			●	
WI [redacted]	K [redacted]	A Level Account	●	●	●	●	●			

Based on Expiration Report, but with Book of Biz criteria

Columns are looking for Line Types in-force for that client

Coverages Cross Sold by the AE (CSR) are visually distinct

6/12/2019 12:11 PM

Account Exec: M [redacted]

Page 1 of 1

Special thanks to Hiram Cohen Insurance for allowing me to use their requested report and the screen shots captured during its creation in this sample of a summary columnized report output.

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System Configuration

Agency Defined Categories - Account Level

Account Level Service Tier

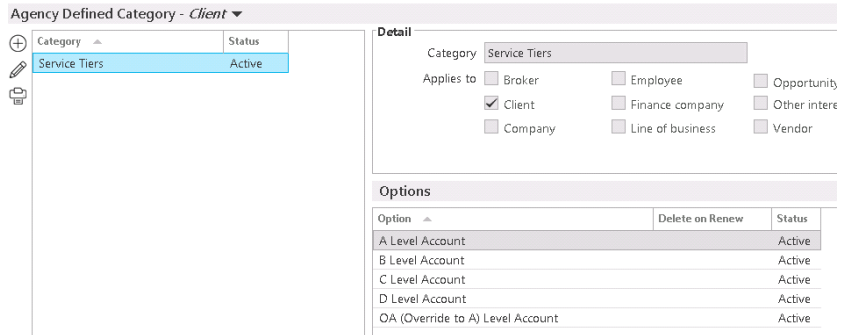
Service Tiers are used to determine how various agency provided services will be delivered to the Account.

Accounts are assigned a service tier graded based on their total account premium:

- A = 25k+
- B = 9k - 25k
- C = 4k - 9k
- D = less than 4k

An “override” of the tier ranking for an account that should receive services that their premium alone would not justify is also available:

- OA (Override to A)



Agency Defined Category - Client

Category	Status
Service Tiers	Active

Detail

Category: Service Tiers

Applies to:

- Broker
- Employee
- Opportunity
- Client
- Finance company
- Other interest
- Company
- Line of business
- Vendor

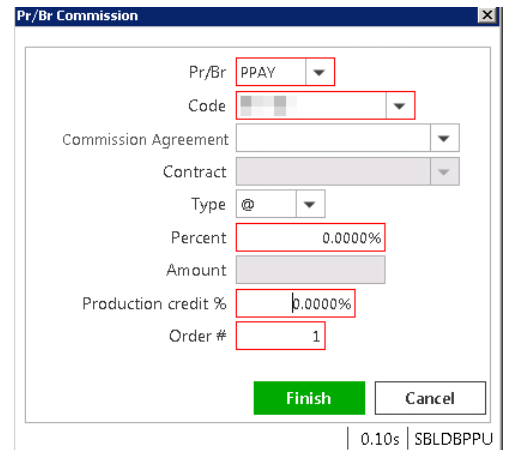
Options

Option	Delete on Renew	Status
A Level Account		Active
B Level Account		Active
C Level Account		Active
D Level Account		Active
OA (Override to A) Level Account		Active

Cross Sale by Non-Producers

Any line of business sold by a non-producer is to be indicated by entering the employee receiving credit for the sale as an additional Pr/Br (after the normal entry of the Producer for that Account) on that line of business with the following key values:

- Pr/Br = PPAY
- Percent = 0.00%
- Production Credit = 0.00%



Pr/Br Commission

Pr/Br: PPAY

Code: []

Commission Agreement: []

Contract: []

Type: @

Percent: 0.0000%

Amount: []

Production credit %: 0.0000%

Order #: 1

Finish Cancel

0.10s | SBLDBPPU

PL Account Rounding Report Setup

This report is based on the Epic Expiration Report

Key Criteria

It should be run using the standard “as of now” Book of Business criteria settings:

- **Effective Date = Open thru Today**
(When setup for P&C Quickview reports, 999 days is as far as you can go.)

Include selections Exclude selections

All dates Open Open
 Range From Through
 System date - 999 Days

- **Expiration Date = Tomorrow thru Open**

Include selections Exclude selections

All dates Open Open
 Range From Through
 System date + 999 Days

When setting for Quickview, a 3rd date criteria to exclude based on expiration date equal to today can be added

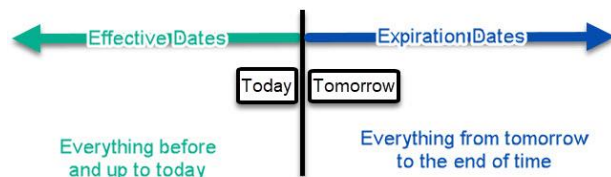
Include selections Exclude selections

All dates Open Open
 Range From Through
 System date + 0 Days

- **Line Status = Active Line Statuses**

Selected		
Code	Description	Status
NEW	New Business	Active
BOR	New to Agency on BOR	Active
REI	Reinstatement	Active
REN	Renewal	Active
REW	Rewrite	Active

Book of Business - Current Book Dates



Current Book of Business = Policies that are already effective but not yet expired

Criteria	
Criteria	Selection
Region	All
Agency	All
Branch	All
Department	All
Profit Center	All
Account Lookup Code	All
Client Type	Both
Policy Type	All
Line Type	All
Line Bill Mode	Both
Line Expiration Date	System Date + 999 days
Issuing Company	All
Line Premium Payable Compa...	All
Line Premium Payable Broker	All
Line Producer	All
Line Commissionable Broker	All
Line Status	Selected
Account Status	Both
Prospective/Contracted	Both
Lines per Policy	All lines
Policies	All policies
Account Agency Defined Opti...	All
Renewed Policies	Include renewed expired polici...
Parameter Page	Include parameter page
Policy Expiration Date	Exclude System Date
Service Summary Stage	Selected
Line Effective Date	System Date - 999 days
Service Summary Action	All
Client Service Rep	All

Main Report Columns

Cross Sell Column	Line Type Code	Line Type Description
Auto	AUTO	Automobile
	CLAS	Classic Auto
	CYCL	Motorcycle
	PNOA	Personal Non-Owned Auto
Flood	PFLO	Personal Flood
Excess Flood	XFLD	Excess Flood
Residential	FIRE	Dwelling Fire
	HOME	Homeowners
	MHOM	Mobile Home
Inland Marine	INLM	Inland Marine / Personal Article
Trvl Accident	PASS	Passport
Umbrella	PUMB	Personal Umbrella
Excess	PXUM	Personal Excess Umbrella
Watercraft	BOAT	Watercraft
Work Comp	WCOM	Worker's Compensation

Formula & Totals

Notes:

- The data field "Line_ProducerBroker_PrBrName1" must be placed in the detail band for it to be used in detail level formulas. It can not be accessed from within the formula builder otherwise.
- The intent on the output report is twofold:
 1. Show if we have that coverage type for the client or a blank if we do not
 2. If the AE sold the coverage, show that we have the coverage with different wording or formatting
- The "OR" function inside the IF's is used even when it was not necessary for purposes of consistency and speeding up formula revisions.
- While not necessary for simple reports, on a report with a lot of formula or total fields it is strongly recommended that you at least make notes of the name with a short description of what that field is intended to do. This will allow you to use the "Fields" selector to access and edit that item later without needing to locate it on the layout screen.

Residential Column

- **Formula1 - Detail - Got Residential?**
IF(OR({ExpirationReport.Line.LineTypeCode}="FIRE",
{ExpirationReport.Line.LineTypeCode}="HOME",{ExpirationReport.Line.LineTypeCode}="MHOM"), 1 , 0)
- **Formula2 - Detail - Got Residential & Sold by AE?**
IF(AND({Formula1}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} =
{ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total1 - Major Sort: Client Lookup Code - Got Residential?**
Formula = None • Total Field = Formula1 • Total Type = Sum
- **Total2 - Major Sort: Client Lookup Code - Got Residential & Sold by AE?**
Formula = None • Total Field = Formula2 • Total Type = Sum
- **Formula3 - Major Sort: Client Lookup Code - Got Residential not Sold by AE**
IF(AND({Total2}=0,{Total1}>0), "In Force" , "")
- **Formula4 - Major Sort: Client Lookup Code - Got Residential & Sold by AE**
IF({Total2}>0,"AE Sold" , "")



Auto/Cycle Column

- **Formula5 - Detail - Got Auto?**
IF(OR({ExpirationReport.Line.LineTypeCode}="AUTO",
{ExpirationReport.Line.LineTypeCode}="CLAS",{ExpirationReport.Line.LineTypeCode}="CYCL",{Expiration
Report.Line.LineTypeCode}="PNOA"), 1 , 0)
- **Formula6 - Detail - Got Auto & Sold by AE?**
IF(AND({Formula5}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} =
{ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total3 - Major Sort: Client Lookup Code - Got Auto?**
Formula = None • Total Field = Formula5 • Total Type = Sum
- **Total4 - Major Sort: Client Lookup Code - Got Auto & Sold by AE?**
Formula = None • Total Field = Formula6 • Total Type = Sum
- **Formula7 - Major Sort: Client Lookup Code - Got Auto not Sold by AE**
IF(AND({Total4}=0,{Total3}>0), "In Force" , "")
- **Formula8 - Major Sort: Client Lookup Code - Got Auto & Sold by AE**
IF({Total4}>0,"AE Sold" , "")

Inland Marine Column

- **Formula9 - Detail - Got Inland Marine?**
IF(OR({ExpirationReport.Line.LineTypeCode}="INLM"), 1 , 0)
- **Formula10 - Detail - Got Inland Marine & Sold by AE?**
IF(AND({Formula9}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} =
{ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total5 - Major Sort: Client Lookup Code - Got Inland Marine?**
Formula = None • Total Field = Formula9 • Total Type = Sum
- **Total6 - Major Sort: Client Lookup Code - Got Inland Marine & Sold by AE?**
Formula = None • Total Field = Formula10 • Total Type = Sum
- **Formula11 - Major Sort: Client Lookup Code - Got Inland Marine not Sold by AE**
IF(AND({Total6}=0,{Total5}>0), "In Force" , "")
- **Formula12 - Major Sort: Client Lookup Code - Got Inland Marine & Sold by AE**
IF({Total6}>0,"AE Sold" , "")

Umbrella Column

- **Formula13 - Detail - Got Umbrella?**
IF(OR({ExpirationReport.Line.LineTypeCode}="PUMB"), 1 , 0)
- **Formula14 - Detail - Got Umbrella & Sold by AE?**
IF(AND({Formula13}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} =
{ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total7 - Major Sort: Client Lookup Code - Got Umbrella?**
Formula = None • Total Field = Formula13 • Total Type = Sum
- **Total8 - Major Sort: Client Lookup Code - Got Umbrella & Sold by AE?**
Formula = None • Total Field = Formula14 • Total Type = Sum
- **Formula15 - Major Sort: Client Lookup Code - Got Umbrella not Sold by AE**
IF(AND({Total8}=0,{Total7}>0), "In Force" , "")
- **Formula16 - Major Sort: Client Lookup Code - Got Umbrella & Sold by AE**
IF({Total8}>0,"AE Sold" , "")



Excess Liability Column

- **Formula17 - Detail - Got Excess Liability?**
IF(OR({ExpirationReport.Line.LineTypeCode}="PXUM"), 1 ,0)
- **Formula18 - Detail - Got Excess Liability & Sold by AE?**
IF(AND({Formula17}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} = {ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total9 - Major Sort: Client Lookup Code - Got Excess Liability?**
Formula = None • Total Field = Formula17 • Total Type = Sum
- **Total10 - Major Sort: Client Lookup Code - Got Excess Liability & Sold by AE?**
Formula = None • Total Field = Formula14 • Total Type = Sum
- **Formula19 - Major Sort: Client Lookup Code - Got Excess Liability not Sold by AE**
IF(AND({Total8}=0,{Total7}>0), "In Force" , "")
- **Formula20 - Major Sort: Client Lookup Code - Got Excess Liability & Sold by AE**
IF({Total8}>0,"AE Sold" , "")

Flood Column

- **Formula21 - Detail - Got Flood?**
IF(OR({ExpirationReport.Line.LineTypeCode}="PFLO"), 1 ,0)
- **Formula22 - Detail - Got Flood & Sold by AE?**
IF(AND({Formula21}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} = {ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total11 - Major Sort: Client Lookup Code - Got Flood?**
Formula = None • Total Field = Formula21 • Total Type = Sum
- **Total12 - Major Sort: Client Lookup Code - Got Flood & Sold by AE?**
Formula = None • Total Field = Formula22 • Total Type = Sum
- **Formula23 - Major Sort: Client Lookup Code - Got Flood not Sold by AE**
IF(AND({Total12}=0,{Total11}>0), "In Force" , "")
- **Formula24 - Major Sort: Client Lookup Code - Got Flood & Sold by AE**
IF({Total12}>0,"AE Sold" , "")

Excess Flood Column

- **Formula25 - Detail - Got Excess Flood?**
IF(OR({ExpirationReport.Line.LineTypeCode}="XFLD"), 1 ,0)
- **Formula26 - Detail - Got Excess Flood & Sold by AE?**
IF(AND({Formula25}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} = {ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total13 - Major Sort: Client Lookup Code - Got Excess Flood?**
Formula = None • Total Field = Formula25 • Total Type = Sum
- **Total14 - Major Sort: Client Lookup Code - Got Excess Flood & Sold by AE?**
Formula = None • Total Field = Formula26 • Total Type = Sum
- **Formula27 - Major Sort: Client Lookup Code - Got Excess Flood not Sold by AE**
IF(AND({Total14}=0,{Total13}>0), "In Force" , "")
- **Formula28 - Major Sort: Client Lookup Code - Got Excess Flood & Sold by AE**
IF({Total14}>0,"AE Sold" , "")

Work Comp Column

- **Formula29 - Detail - Got Work Comp?**
IF(OR({ExpirationReport.Line.LineTypeCode}="WCOM"), 1 ,0)
- **Formula30 - Detail - Got Work Comp & Sold by AE?**
IF(AND({Formula29}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} = {ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total15 - Major Sort: Client Lookup Code - Got Work Comp?**
Formula = None • Total Field = Formula29 • Total Type = Sum
- **Total16 - Major Sort: Client Lookup Code - Got Work Comp & Sold by AE?**
Formula = None • Total Field = Formula30 • Total Type = Sum
- **Formula31 - Major Sort: Client Lookup Code - Got Work Comp not Sold by AE**
IF(AND({Total16}=0,{Total15}>0), "In Force" , "")
- **Formula32 - Major Sort: Client Lookup Code - Got Work Comp & Sold by AE**
IF({Total16}>0,"AE Sold" , "")

Travel Column

- **Formula33 - Detail - Got Travel?**
IF(OR({ExpirationReport.Line.LineTypeCode}="PASS"), 1 ,0)
- **Formula34 - Detail - Got Travel & Sold by AE?**
IF(AND({Formula33}=1, {ExpirationReport_Line_ProducerBroker_PrBrName1} = {ExpirationReport.ServiceRoles.ServicingRole1.Name}), 1 , 0)
- **Total17 - Major Sort: Client Lookup Code - Got Travel?**
Formula = None • Total Field = Formula33 • Total Type = Sum
- **Total18 - Major Sort: Client Lookup Code - Got Travel & Sold by AE?**
Formula = None • Total Field = Formula34 • Total Type = Sum
- **Formula35 - Major Sort: Client Lookup Code - Got Travel not Sold by AE**
IF(AND({Total18}=0,{Total17}>0), "In Force" , "")
- **Formula36 - Major Sort: Client Lookup Code - Got Travel & Sold by AE**
IF({Total18}>0,"AE Sold" , "")

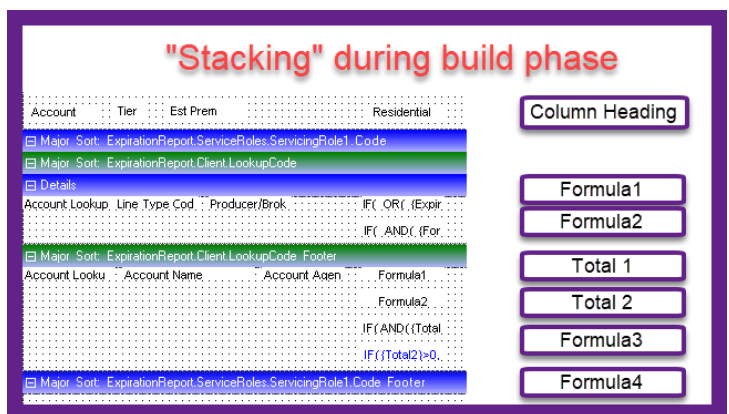
Build Notes:

Expiration Report

- The expiration report was used as the basis for this report instead of a book of business or policy list so that the layout could be included to go along with any other quality assurance reports built using the expiration report with the same “active book of business” criteria.
- So: reports that check for SSR Stages still in process on in force policy errors, blank prem & comm fields, primary policy assignment, primary email address entry, etc. that use that criteria set and started with the expiration report can be run together if so desired.
- It’s worth noting that building different quality assurance reports using the same starting base report in this way can yield multiple benefits. So instead of using Policy List for one, then Book of Business - Line Book for another and then Expiration report for some more it’s better to pick one and stick with it when you can.
- At the time of this writing (Epic 2018 mu5) the Expiration report has been “beefed up” by Applied in recent releases to make it - in my opinion - the 1st choice to consider for reporting of this type.

Stacking related formulas and totals during the build process

- When building a report like this I find it useful to expand out the bands if I’m building multiple formulas and totals that will all be part of a single displayed data point or column and then “stack” all of those that are related vertically.
- In the final report, these “stacks” will have their individual components rendered transparent for those that are just doing preliminary IF’s or Totals, and colored for those that will actually appear on the final report.
- Having all the things that go into a single column on this report makes selecting them to then use copy and paste to get started on the next needed column much easier and faster.
- Once you have all the formulas and totals for the first column nailed down, the rest is just not messing up when updating the copies of those fields for the next column.

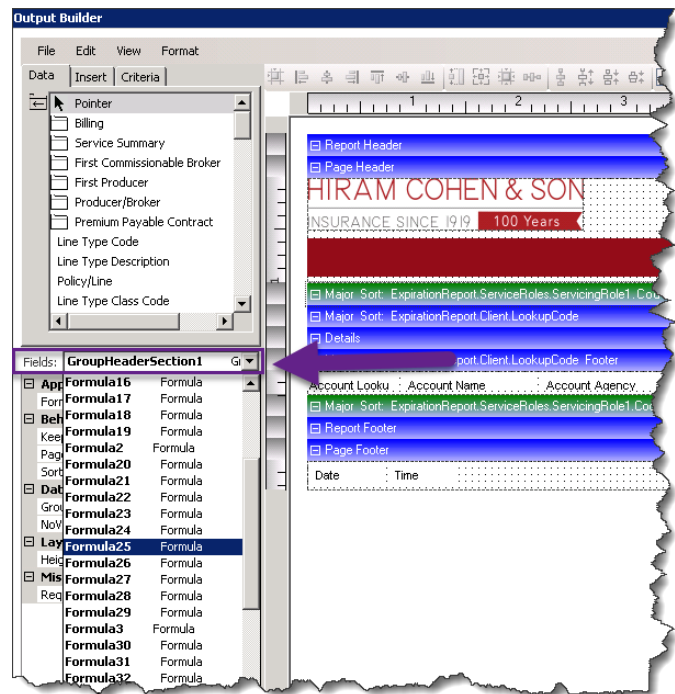


Detail Duplication

- On this particular report, everything in the detail band will be made transparent and the detail band set to zero. There are also no totals beyond the Account Level footers to display only one row per account.
- The Pr/Br field is being used in this report, so if report totals and details were included that would require more formatting work since including the Pr/Br name will cause each line to duplicate when more than one Pr is present on a single line.

Editing Formulas & Totals

- If you have solid notes that you can refer back to so that each of the Formula and Total fields on your report can be identified, you can use the field chooser to select and edit that item without having to locate it on the report.
- On a report like this where the majority of the formulas and totals are transparent and stacked behind other fields, using the fields list in this way becomes very important.



Report Progression Screenshots

- Formulas and totals built but stacking is still in place. Prior to starting to try to make it look nice:

Report Header

Page Header

HIRAM COHEN & SON		In Force Coverage									
INSURANCE SINCE 1919 100 Years		Account Exec Name									
Account	Service Tier	Residential	Inland Marine	Auo/Cycle	Umbrella	Excess Liability	Flood	Excess Flood	Work Comp	Travel	
Major Sort: ExpirationReport.ServiceRoles.ServicingRole1.Code											
Major Sort: ExpirationReport.Client.LookupCode											
Details											
Account Lookup	Line Type Cod	Producer/Brok	IF(OR(	IF(OR(	IF(OR(	IF(OR(	IF(OR(	IF(OR(	IF(OR(	IF(OR(	IF(OR(
			IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(
Major Sort: ExpirationReport.Client.LookupCode Footer											
Account Looku	Account Name	Account Agency	Formula	Formula	Formula	Formula	Formula	Formula	Formula	Formula	Formula
			Formula	Formula	Formula	Formula	Formula	Formula	Formula	Formula	Formula
			IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(	IF(AND(
			IF(}Total	IF(}Total	IF(}Total	IF(}Total	IF(}Total	IF(}Total	IF(}Total	IF(}Total	IF(}Total

- All details made transparent and detail band set to height 0. Footer total fields set to transparent. All footer total rows sized and stacked to be exactly on top of each other.

Report Header

Page Header

HIRAM COHEN & SON		In Force Coverages Tra									
INSURANCE SINCE 1919 100 Years		Account Exec Name									
Account	Service Tier	Residential	Inland Marine	Auo/Cycle	Umbrella	Excess Liability	Flood	Excess Flood	Work Comp	Travel	
Major Sort: ExpirationReport.ServiceRoles.ServicingRole1.Code											
Major Sort: ExpirationReport.Client.LookupCode											
Details											
Major Sort: ExpirationReport.Client.LookupCode Footer											
Account Looku	Account Name	Account Agency									
Major Sort: ExpirationReport.ServiceRoles.ServicingRole1.Code Footer											

- Final stage. Column headings in page header set to white. Filled rectangle put over column headings. All non output rows set to 0.

Report Header

Page Header

HIRAM COHEN & SON		In Force Coverages Tracking									
INSURANCE SINCE 1919 100 Years		Account Exec Name									
Account	Service Tier	Residential	Inland Marine	Auo/Cycle	Umbrella	Excess Liability	Flood	Excess Flood	Work Comp	Travel	
Major Sort: ExpirationReport.ServiceRoles.ServicingRole1.Code											
Major Sort: ExpirationReport.Client.LookupCode											
Details											
Major Sort: ExpirationReport.Client.LookupCode Footer											
Account Looku	Account Name	Account Agency									
Major Sort: ExpirationReport.ServiceRoles.ServicingRole1.Code Footer											
Report Footer											
Page Footer											
Date	Time	Account Exec: Name							Page	PageNumber	

- Sample pdf output of draft 1:

HIRAM COHEN & SON

INSURANCE SINCE 1919 **100 Years**

Michael [Redacted]

In Force Coverages Tracking

Account	Service Tier	Residential	Inland Marine	Auto/Cycle	Umbrella	Excess Liability	Flood	Excess Flood	Work Comp	Travel
AL [Redacted]	C [Redacted]	B Level Account	In Force	In Force	In Force	In Force				
BE [Redacted]	S [Redacted]	A Level Account	In Force	In Force	In Force		In Force		In Force	
CO [Redacted]	D [Redacted]	A Level Account	In Force	In Force	In Force		In Force			
CO [Redacted]	L [Redacted]	B Level Account	In Force	In Force	In Force					
CO [Redacted]	R [Redacted]	A Level Account	In Force	In Force	In Force		In Force			
DA [Redacted]	R [Redacted]	A Level Account	In Force	In Force	In Force				In Force	
GE [Redacted]	S [Redacted]	A Level Account	In Force	In Force	In Force	In Force				
GE [Redacted]	L [Redacted]	B Level Account	In Force	In Force	In Force					
GE [Redacted]	E [Redacted]	B Level Account	In Force	In Force	In Force					
GE [Redacted]	H [Redacted]	A Level Account	In Force	In Force	In Force	In Force				
GE [Redacted]	R [Redacted]	C Level Account	In Force	In Force	In Force				In Force	
GE [Redacted]	S [Redacted]	B Level Account	In Force	In Force	In Force					
HI [Redacted]	D [Redacted]	A Level Account	In Force	In Force					In Force	
KA [Redacted]	V [Redacted]	B Level Account		In Force						
LI [Redacted]	L [Redacted]	A Level Account	In Force	In Force	In Force		In Force			
PE [Redacted]	T [Redacted]	A Level Account	In Force	In Force	In Force				In Force	
PO [Redacted]	D [Redacted]	A Level Account	In Force	In Force	In Force		In Force	In Force	In Force	
PU [Redacted]	D [Redacted]	A Level Account	In Force	In Force	In Force		In Force			
PU [Redacted]	D [Redacted]	D Level Account	In Force	In Force						
RA [Redacted]	L [Redacted]	B Level Account	In Force	In Force		In Force		In Force		
SH [Redacted]	C [Redacted]	A Level Account	In Force	In Force	In Force					
SH [Redacted]	M [Redacted]	A Level Account					In Force			
SI [Redacted]	D [Redacted]	A Level Account	In Force	In Force	In Force					
SI [Redacted]	A [Redacted]	C Level Account	In Force							
SI [Redacted]	S [Redacted]	A Level Account		In Force						
TE [Redacted]	T [Redacted]		AE Sold							
VA [Redacted]	D [Redacted]	A Level Account	In Force	In Force	In Force					
WA [Redacted]	K [Redacted]	A Level Account	In Force	In Force	In Force					

Not crazy about all the "In Force" columns. I think I'll go back and just put in X's.



Test Account to make sure the blue color "AE Sold" when a Pr/Br with the same name as Service Role 1 formula and logic were working



- Sample Output of Draft 2. Didn't like all the "In Force" columns, so...
 - Made a copy of the layout and then updated the column output on that copy
 - Used this website to lookup possible webding and wingding characters that might be useful in place of words on the report: <https://www.thespreadsheetguru.com/blog/wingdings-webdings-font-icon-cheat-sheet-printable>
 - Settled on circles for "normal" in force and squares when the report detects the AE as a Pr/Br
 - Updated Formulas 3, 7, 11, 15, 19, 23, 27, 31 & 35 to replace "In Force" Arial Font with "n" Webdings font.
 - Updated Formulas 4, 8, 12, 16, 20, 24, 28, 32 & 36 to replace "AE Sold" Arial Font with "g" Webdings font.
 - Note that by using the "Editing Formulas & Totals" via the Field selector, this revision took a total of 5 minutes.

HIRAM COHEN & SON

INSURANCE SINCE 1919 **100 Years**

MIRAMONTE

In Force Coverages Tracking

Account	Service Tier	Residential	Inland Marine	Auto/Cycle	Umbrella	Excess Liability	Flood	Excess Flood	Work Comp	Travel
AL	B Level Account	●	●	●	●					
BE	A Level Account	●	●	●	●		●		●	
CC	A Level Account	●	●	●	●		●			
CO	B Level Account	●	●	●	●					
CO	A Level Account	●	●	●	●		●			
DA	A Level Account	●	●	●	●					●
GE	A Level Account	●	●		●	●			●	
GO	B Level Account	●	●	●	●					
GR	B Level Account	●	●	●	●					
GR	A Level Account	●	●	●	●	●				●
GR	C Level Account	●	●		●					●
GR	B Level Account	●	●		●					
HI	A Level Account	●	●						●	
KA	B Level Account		●							
LI	A Level Account	●	●	●			●			
PE	A Level Account	●	●	●	●				●	
PC	A Level Account	●	●	●	●		●	●	●	
PL	A Level Account	●	●	●	●		●			
PL	D Level Account	●	●							
RA	B Level Account	●	●		●			●		
SH	A Level Account	●	●	●	●					
SH	A Level Account						●			
SI	A Level Account	●	●	●	●					
SI	C Level Account	●								
ST	A Level Account		●							
TE	Trail	■								
VA	A Level Account	●	●	●	●				●	
WA	A Level Account	●	●	●	●		●			

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Account Exec: MIRAMONTE

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