

THOMSON REUTERS™ ODEN POLICY TERMINATOR

BATCH PRINTING

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BATCH PRINTING

From the **Main Menu**, select **Batch/PO Log**.

Batch Processing	
Job Options Clear Options Save Preferences Preference Library	
Batch Description:	62 - 3/25/2021
Date Range:	 TODAY To  TODAY ☒ Mail Date ☐ Effective Date ☐ Generation Date
Generate:	☐ Batch Print ☐ Batch Report ☐ PO Log ☐ Address Export ☐ PDF Export
Batch Display Date:	3/25/2021
Options Selected: New Option Set	
Limiting Conditions: Show Limits	
Sorting: Show Sorts	
General Options	
Include Voided Notices:	☐
Keep Notice Copies Together:	☐
Only include notices not previously printed:	☐
Advanced Filter: 	Not Selected ▼

1. In the **Job Options** section enter the following items:
 - a. Enter a **Batch Description**. This is a descriptor that allows you to discriminate between the particular Batch/PO Log requests you create. This example is for a Daily Batch Print.
 - b. Select a **Date Range**. In this example the date range is from Today to Today. This searches the data base and finds every notice that has a mail date of today.
 - c. **Generate** - Select the type of batch print for this request. For this example select **Batch Print**.
 - d. Select the **Batch Display Date**, if applicable. This applies only to a Post Office Log.
2. **Limiting Conditions**. You can limit what is printed by limiting your selections.

Limiting Conditions: [Clear/Hide Limits](#)

Applicable State	▲
Branch	
Carrier	
Copy Type	
Insurance Type	
Mail Type	
Mailing State	
Notice Type	
Operator Name	
Policy Type	
Producer Number	
Underwriter Name	
OMR Friendly	▼

3. Select **Show Limits**.

- a. **Applicable State** – Will print only those notices that have a particular state chosen.
- b. **Branch** – Only those notices produced for a particular branch.
- c. **Carrier** – Only those notices produced for a particular insurance company.
- d. **Copy Type** – Only those notices going to a particular recipient.
- e. **Insurance Type** – Personal or Commercial.
- f. **Mail Type** – Only those notices that have been selected to be mailed in a particular manner. (Standard, Mail Certificate, Certified, etc.)
- g. **Mailing State** – Only those notices where the mailing addresses include particular state(s).
- h. **Notice Type** – Only specified notice types. (Cancellations or Nonrenewals, etc.)
- i. **Operator Name** – Only those notices created by a particular operator.
- j. **Policy Type** – Only those notices done for a particular policy type such as Auto or Package.
- k. **Producer Number** – Only those notices with a particular producer number.
- l. **Underwriter Name** – Only those notices assigned to a particular underwriter.

4. When you are done select **Clear/Hide Limits**.

5. Continue to the next section Copy/Type.

BATCH PRINTING - SELECTING COPY TYPE

[Batch Printing \(page 1\)](#)

1. Select **Copy Type** from the Limiting Conditions list.

Limiting Conditions: [Clear/Hide Limits](#)

Applicable State
 Branch
 Carrier
 Insurance Type
 Mail Type
 Mailing State
 Notice Type
 Operator Name
 Policy Type
 Producer Number
 Underwriter Name
 OMR Friendly

Copy Types:	Batch Print	Clear/Hide
Named Insured	☐	
Mortgagee/Lienholder	☐	
Certificate Holder	☐	
Additional Insured	☐	
Other Party of Interest	☐	
Extra Notice	☐	
Producer	☐	
CC List	n/a	
All/None	☐	

2. Select **All/None**. For this example, print all notices with a mail date of today.

3. You can sort the items in the batch by several criteria, if you wish.

Sorting: [Clear/Hide Sorts](#)

Sort 1: [Clear](#)

Not Selected ▼

Ascending: ☒ Descending: ☐

4. If you select more than one sort item, the program will sort by the first item selected, then the second item, etc.
5. Continue to Other Options.

BATCH PRINTING - OTHER OPTIONS

Other Options includes several sections of more print options, **General Options**, **Batch Print Options**, and **Home Office Options**.

- **General Options** - This section applies to unique situations and is rarely used.
 - **Include Voided Notices** – Will include voided notices in the batch.
 - **Keep Notice Copies Together** – Will print all recipients of the same notice in order. Only include notices not previously printed – Will include only notices that haven't already been printed.
- **Batch Print Options** - This section applies to all notices that are notices to be sent to a folding machine.
 - **Batch Printing for Folding** – Identifies the batch as one to be sent to a folding machine.
 - **Max Page Count** – Identifies the maximum copies of any individual notice.
 - **Flip Images 180 Degrees** – Allow the image to be turned in order to automatically stuff envelopes.
 - **Include Cover Sheet** – Will print a cover sheet between each specified request.
 - **Include Mailing Sheet** – Will print a mailing sheet for each notice.

General Options

Include Voided Notices:	☐
Keep Notice Copies Together:	☐
Only include notices not previously printed:	☐

Batch Print Options

ELIOS Export	☐
Include OMR	☐
Batch Print for Folding?	☐
Max Page Count:	1
Flip Images 180 Degrees?	☐
Include Cover Sheet?	☐
Include End Sheet?	☐
Include Mailing Sheet	☐

Home Office/Branch Office Options

Copies:	Batch Print
Generated Copies	☐
Required Copies	☒
Home Office	☐
Branch Office	☐

Advanced Filter:  Not Selected ▼

- **Home Office/Branch Office Options** - This section allows batch printing of just Home/Branch office copies.
 - **Copies** – Batch Print.
 - **Generated Copies** – Will batch print only home/branch office copies that have been generated.
 - **Original Copies** – These are the required copies.
 - **Home Office** – Select only home office copies.
 - **Branch Office** – Select only branch office copies.

Advanced Filter – Filters policies and notices outside and in addition to the Limiting Conditions.

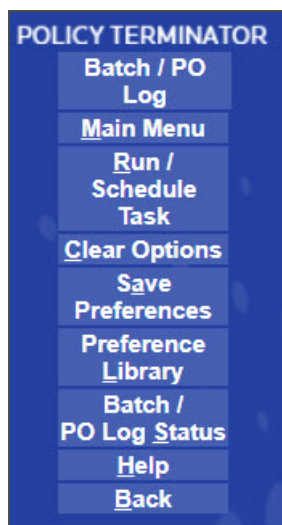
Continue to Batch Printing Notices.

BATCH PRINTING - PRINTING NOTICES

[Batch Printing \(page 1\)](#)

Now that you have made all your selections you can print the notices.

1. Select **Save Preferences** on the side menu if you will use these selections often. This saves your selections in the **Preference Library**. The next time you need to produce the same batch print you can access it from the **Preference Library**.



2. From the side menu bar, select **Run/Schedule Task**.

3. Policy Terminator builds a Batch Print in a pdf format containing all the selected notices. If the Batch Print File(s) field does not turn green and allow you to open the pdf file, select the **Batch/PO Log Status** button on the side menu or click the **Refresh Button** at the top of the page.

Batch/PO Log Status

[Refresh](#)

Task Type:	Batch/PO Log	Delete
Batch/PO Log Description:	62 - 3/25/2021	
Options Selected:	Print a batch of notices WHERE the mailing date is between TODAY and TODAY, copy type options selected.	
Schedule Type:	Run Immediately	
Batch Print File(s):	BatchPrint8125566.pdf	
Created By:	Admin Admin	Created On: 3/25/2021
Status:	Scheduled for processing	

Task Type:	Batch/PO Log	Delete
Batch/PO Log Description:	4 - 4/23/2020	
Options Selected:	Print a batch of notices, print a post office log WHERE the generation date is between TODAY+5 and TODAY.	
Schedule Type:	Run Immediately	
Batch Print File(s):	BatchPrint7514054.pdf	
PO Log File(s):	POLog7514054.pdf	
Created By:	sitescope monitor	Created On: 4/23/2020
System Scheduled to Delete Batch/PO Log On:	4/24/2020 8:16:35 AM	
Status:		

CREATING A BATCH POST OFFICE LOG

From the **Main Menu**, select **Batch/PO Log**.

1. In the **Job Options** section enter the following items:
 - a. Enter a **Batch Description**. This is a descriptor that allows you to discriminate between the particular Batch/PO Log requests you create. This example is for a Daily PO Log.
 - b. Select a **Date Range**. In this example the date range is from Today to Today. This searches the data base and finds every notice that has a mail date of today.
 - c. **Generate** - Select the type of batch print for this request. For this example select **PO Log**.
 - d. Select the **Batch Display Date** that appears on the *Post Office Log*. Usually the current date.
2. **Limiting Conditions**. You can limit what is printed by limiting your selections.

Limiting Conditions: [Clear/Hide Limits](#)

Applicable State	▲
Branch	
Carrier	
Copy Type	
Insurance Type	
Mail Type	
Mailing State	
Notice Type	
Operator Name	
Policy Type	
Producer Number	
Underwriter Name	
OMR Friendly	▼

3. Select **Show Limits**.

- a. **Applicable State** – Will print only those notices that have a particular state chosen.
- b. **Branch** – Only those notices produced for a particular branch.
- c. **Carrier** – Only those notices produced for a particular insurance company.
- d. **Copy Type** – Only those notices going to a particular recipient.
- e. **Insurance Type** – Personal or Commercial.
- f. **Mail Type** – Only those notices that have been selected to be mailed in a particular manner. (Standard, Mail Certificate, Certified, etc.)
- g. **Mailing State** – Only those notices where the mailing addresses include particular state(s).
- h. **Notice Type** – Only specified notice types. (Cancellations or Nonrenewals, etc.)
- i. **Operator Name** – Only those notices created by a particular operator.
- j. **Policy Type** – Only those notices done for a particular policy type such as Auto or Package.
- k. **Producer Number** – Only those notices with a particular producer number.
- l. **Underwriter Name** – Only those notices assigned to a particular underwriter.

4. When you are done select **Clear/Hide Limits**.

5. Select **Copy Type** from the Limiting Conditions list. Select all copy types except Producer.

6. You can sort the items on the Post Office Log by several criteria, if you wish. If you select more than one sort item, the program sorts by the first item selected, then the second item, etc.

7. **General Options** - This section applies to unique situations and is rarely used.

- **Include Voided Notices** – Will include voided notices in the batch.
- **Keep Notice Copies Together** – Will print all recipients of the same notice in order.
- **Only include notices not previously printed** – Will include only notices on the Post Office Log that haven't already been printed.

8. PO Log Options

Sorting: [Clear/Hide Sorts](#)

Sort 1: [Clear](#) Not Selected
 Ascending: ☒ Descending: ☐

General Options

Include Voided Notices: ☐

Keep Notice Copies Together: ☐

Only include notices not previously printed: ☐

PO Log Options

Carrier: Do not print

Branch Address: Do not print

Include Misc Line: ☐

Advanced Filter:  Not Selected

- **Carrier** – Prints the name of the selected carrier at the top of the Post Office Log.
- **Branch Address** – Prints the name of the selected branch at the top of the Post Office Log
- **Include Misc Line** – Prints the Miscellaneous Line on the Post Office Log.

9. **Advanced Filter** - Filters policies and notices outside and in addition to the Limiting Conditions.

10. Now that you have made all your selections you can produce the Post Office Log. If the selections you have made are going to be a standard Post Office Log used often, on the side menu, select **Save Preferences** or the top of the screen. This saves your selections in the **Preference Library**. The next time you need to produce the same Post Office Log, you can access it from the Preference Library.

11. On the side menu, select **Run/Schedule Task**.

Policy Terminator will build a Post Office Log in a pdf format containing all the selected notices. If the PO Log File (s) field doesn't turn green and allow you to open the pdf file, select the **Batch/PO Log Status** button until it does.

The Post Office Log displays in Adobe Acrobat and you can print using the Adobe Acrobat tool bar.