

AGENCY KPI

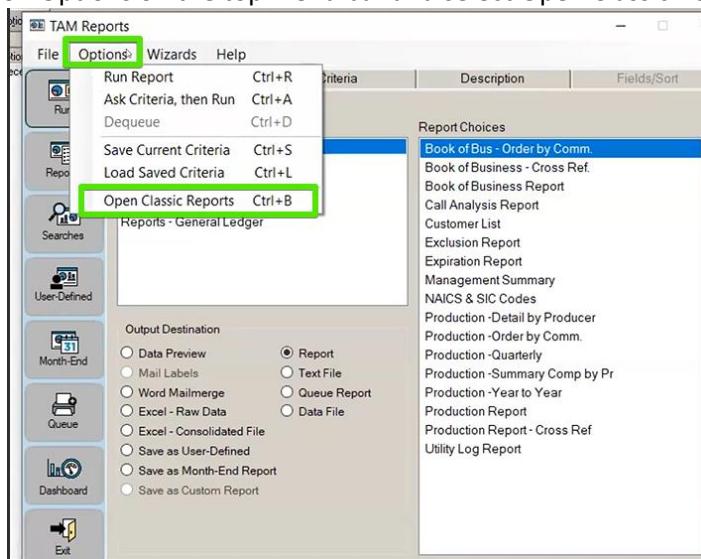
TAM Instructions

Report #1 - To export Excel raw data (Production Report) In New Reports

1. Go to reports
2. Select the following from the Report Selection Tab:
 - a. Report Type: Reports – Management
 - b. Report Choices: **Production Report**
 - c. Output Destination: Excel – Raw Data
3. In the Criteria tab ensure that:
 - a. Date selection for Accounting Month select 12 Month Move timeframe.
 - b. Major sort is Billing company, with Subtotal by Sort/No Page Break
 - c. Minor sorts are set to none
 - d. Output option is set to Complete
 - e. All other Criteria Setting are set to All
4. Click Run. Save this spreadsheet and drag and drop to your AKPI loader.

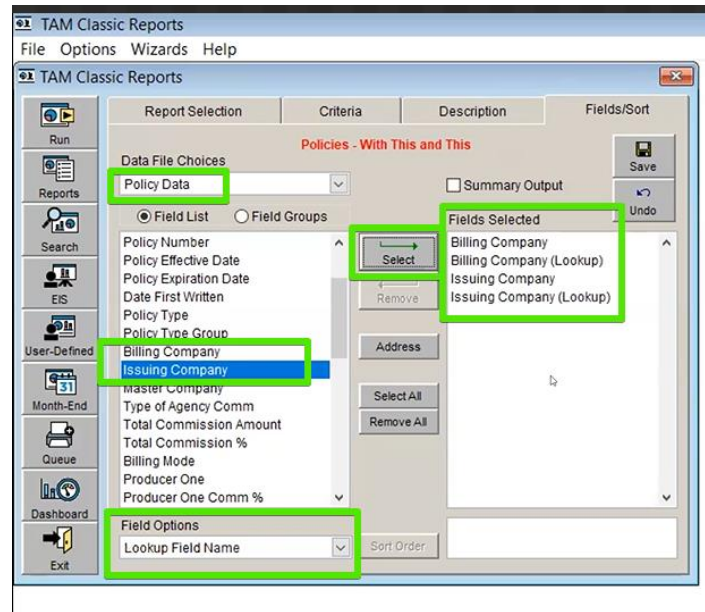
Report #2 – To export Carrier Names in Classic Reports

5. Go to reports
6. Click on Options on the top menu bar and select Open Classic Reports.



7. Once in Classic reports, click the **Search** button on the left side of window.
 - a. From the “Report Selections” tab make these selections:
 - i. Report Type: Search – Customer
 - ii. Report Choice: Policies – With This and This
 - b. From the Criteria Tab make these Selections:
 - i. Record Listings, select Modify Criteria and choose “List Each Time Found”.
 - ii. Everything else should be set to “All”
 - c. From the Field/Sort tab make these selections from the left column
 - i. Click on “Billing Company” and choose Field Option as Lookup Field Name

- ii. Click on “Billing Company” and choose Field Option as Field Value
- iii. Click on “Issuing Company” and choose Field Option as Lookup Field Name
- iv. Click on “Issuing Company” and choose Field Option as Field Value



- d. Go back to the first tab – “Report Selections” and in “Output Destination” choose “Save as a User-Defined” and in the top left corner of window click “Run”
 - i. In the pop-up window, you will be able to name this report, as well as makes notes about this report, click “OK.” You will see message, “Report Saved Successfully.”
 - ii. Go back to the Report Selection Tab, choose “Excel Raw Data,” and “Run”
 - iii. An Excel Spreadsheet Files Window will open – choose “Send Output to a Temporary File” and OK
 - iv. “Ok to create new file?” choose “Yes”
 - v. Copy Complete window will open “Load Excel Now?” choose “Yes”
 - vi. Save this spreadsheet and drag and drop to your AKPI loader

NOTE: You only need to ‘Save as a User Defined’ report once. In future months, you can access this report in “User Defined” on the left column. You will only need to change the dates.

Reports #3 - #6 -To export FLDS, INS, POLICY and CINFO DBF files

- 8. Open Windows file explorer and select the drive that holds the TAM files, most commonly it is the “H:” drive
- 9. Create a new folder and name it “Backup”
- 10. Open the “TAM” folder
- 11. Select the “FLDS” DBF file (just select, do not open)
- 12. Select “Copy to” from the menu at the top of the window
- 13. Select the “Backup” folder just created, and click “Copy”
- 14. Go back and select the “INS” DBF file (just select, do not open)
- 15. Select “Copy to” from the menu at the top of the window
- 16. Select the “Backup” folder just created, and click “Copy”
- 17. Go back and select the “CINFO” DBF file (just select, do not open)
- 18. Select “Copy to” from the menu at the top of the window
- 19. Select the “Backup” folder just created, and click “Copy”

20. Go back and select the "POLICY" DBF file (just select, do not open)
21. Select "Copy to" from the menu at the top of the window
22. Select the "Backup" folder just created, and click "Copy"
23. Once these files are in the "Backup" folder, they are ready to be uploaded

Your reports are now ready to load, login to AgencyKPI <https://onboarding.agencykpi.com>

If you need any assistance, please contact help@agencykpi.com