

AGENCY KPI

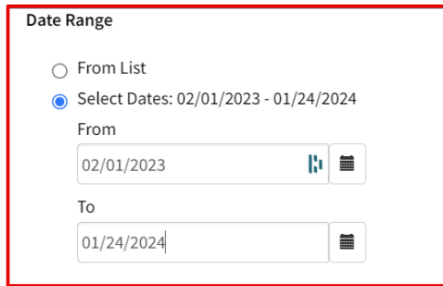
AMS360 Report Instructions:

Book of Business Report:

1. Within the AMS360 system, go to My Agency Reports > Under Report Templates, scroll down to “Book of Business,” click to open.
2. Enter the in-force date as last date of the prior month > click thru each: Business Unit, Company, Personnel and Lines of Business and just double check that they default to ALL. No other modifications are needed.
3. Click Run Report, this will generate to the left of your screen under “My Reports,” open by clicking the XLS link.
4. File > Save as “AKPI Book of Business MMY” to a folder on your system. The report is now ready to drag and drop into the loader.

Production Analysis Report:

1. Within the AMS360 system, go to My Agency Reports > Under Report Templates, scroll down to “Production Analysis,” click to open.
2. In Date Range check “Select Dates.” In “From/To” enter dates for 12 month move with the to date being the last month > click thru each: Business Unit, Company, Personnel and Lines of Business double check that they default to ALL. No other modifications needed.



3. Click Run Report, this will generate to the left of your screen under “My Reports,” open by clicking the XLS link.
4. File > Save as “AKPI Production Analysis” to a folder on your system. The report is now ready to drag and drop into the loader

Customer Analysis Report:

1. Within the AMS360 system, go to My Agency Reports > Under Report Templates, scroll down to “Customer Analysis,” click to open.
2. No modifications need to be made to this report – make sure to set the date range with a start date of 01/01/1900, click run report, this will generate to the left of your screen under “My Reports.” (Double check Business Unit and Personnel is set to all)
3. Open the report by clicking the name.
4. Click “Actions” in the upper right corner, and in the drop down select “export report.”
5. In the pop-up window, export options:
 - a. Excel – Editable report
 - b. Columns – all columns
 - c. Filters – Full data set
 - d. Then export
6. The file will download, open > File > Save as “AKPI Customer Analysis MMY” to a folder on your system. The report is now ready to drag and drop into the loader.

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

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