

AGENCY KPI

NasaEclipse Report Instructions

Accounting Report

1. In NasaEclipse, go to the Reports tab.
2. Click the three dots to the left of the "AgencyKPI Export Template Report"

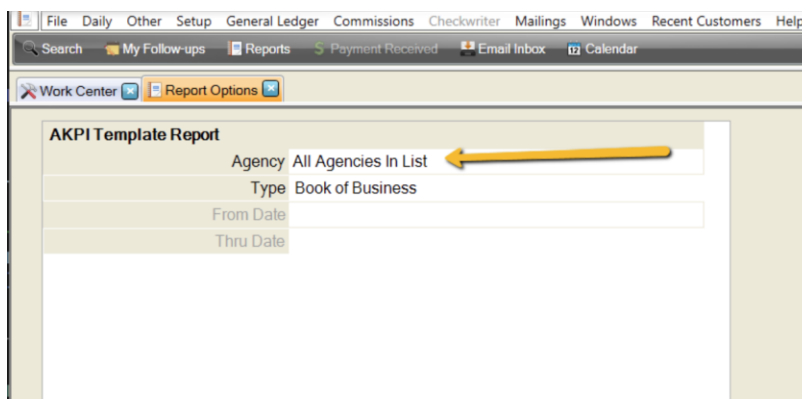


3. In the TYPE dropdown, select Accounting.
4. Add your from / thru dates and select Create.
 - a. ***Each month run a 12MM (last 12 months) of production to capture all activity on prior billed dates.***
 - b. ***For initial data load, we recommend loading prior two years production plus current YTD depending on your network or broker's preferences.***
5. A dialog box will appear asking to SAVE the report. Choose a location and save.
6. Drag and drop this report into AgencyKPI's loader page.

Book of Business Report

7. Go to the Reports tab.
8. Click the three dots to the left of the "Agency KPI Export Template Report"
9. In the TYPE dropdown, select Book of Business and create the report.
10. A dialog box will appear asking to Save the Report. Choose a location and save.
11. Drag and drop this report in AgencyKPI's loader page.

NOTE: For both reports, make sure all the necessary agencies are selected in the Agency Dropdown filter.



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

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