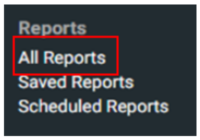
EZLynx Report Instructions

POLICY MASTER – BOOK OF BUSINESS

1.) Hover over the **Reports** icon. 

2.) Click **All Reports**. 

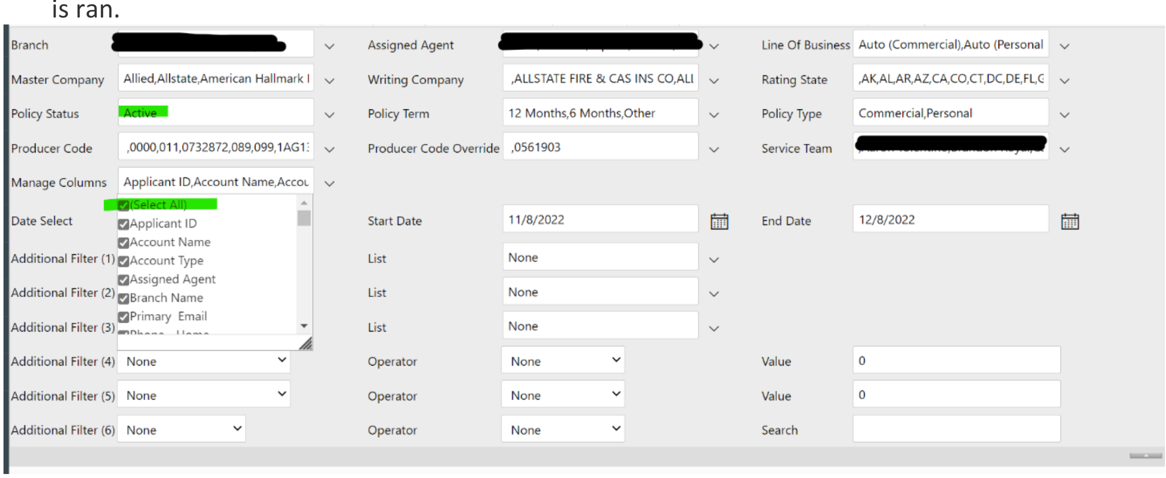
3.) Scroll down to the **Book of Business** category and click on the card titled "***Policy Master.***"

4.) A new tab will open in your browser. In the top portion, make the below changes to the report criteria:

   a. All dropdowns should be set to ALL. Make sure the **Manage Columns** dropdown is checked to ***Select All.***

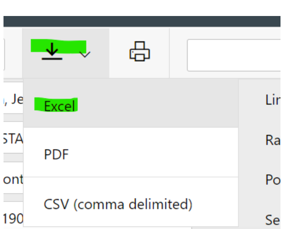
   b. **Policy Status** dropdown should be set on the default of **Active**.

   c. **Date Select** will be set to **No Data Filter**. The report is already built to show active policies as of the date the report is ran.



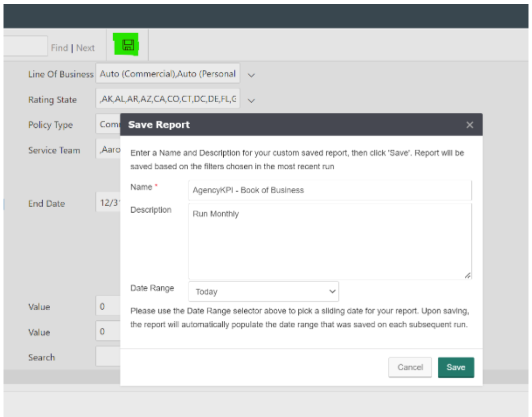
5.) Click on the **View Report** Button.

6.) Once data has generated, you can download the report as an excel by clicking on the Export Dropdown icon.



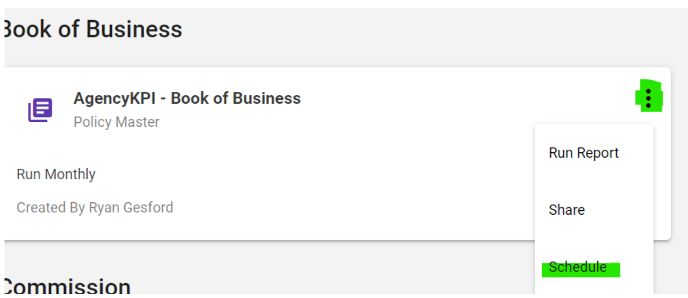
7.) Save the Report to your computer and drag and drop in AgencyKPI's loader page.

8.) For efficiency, you also can choose to save and schedule this same report to run monthly. Click on the Save Disk icon and complete the criteria below. Click Save.

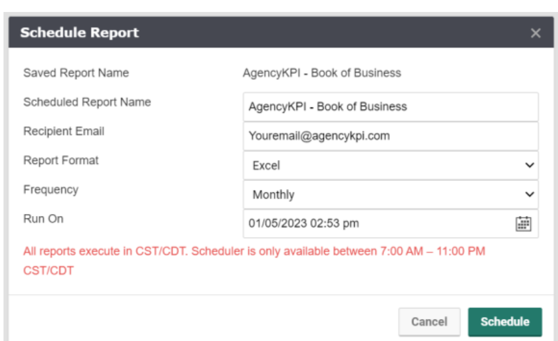


9.) Hover on the Reports Icon and click on **Saved Reports**. You should now see this report listed here.

10.) Click on the three dots icon and click **Schedule**. *NOTE: Depending on your EzLynx package level, you may or may not have access to the report Schedule feature.*



11.) Complete the Schedule Report Criteria based on your network's or agency's preferred frequency requirements. Monthly is recommended. Click **Schedule**.



COMMISSION DETAIL 2.0

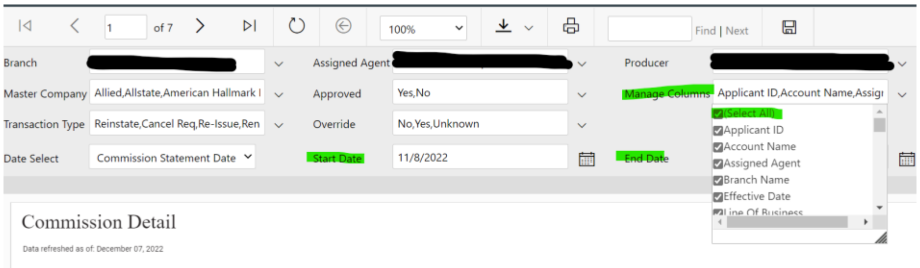
*****Make sure all commission statements with a statement date that falls within the date range selected on this report are Approved and Closed.***

12.) Go back into the **All Reports** section and click on the **Commission Detail 2.0** card.

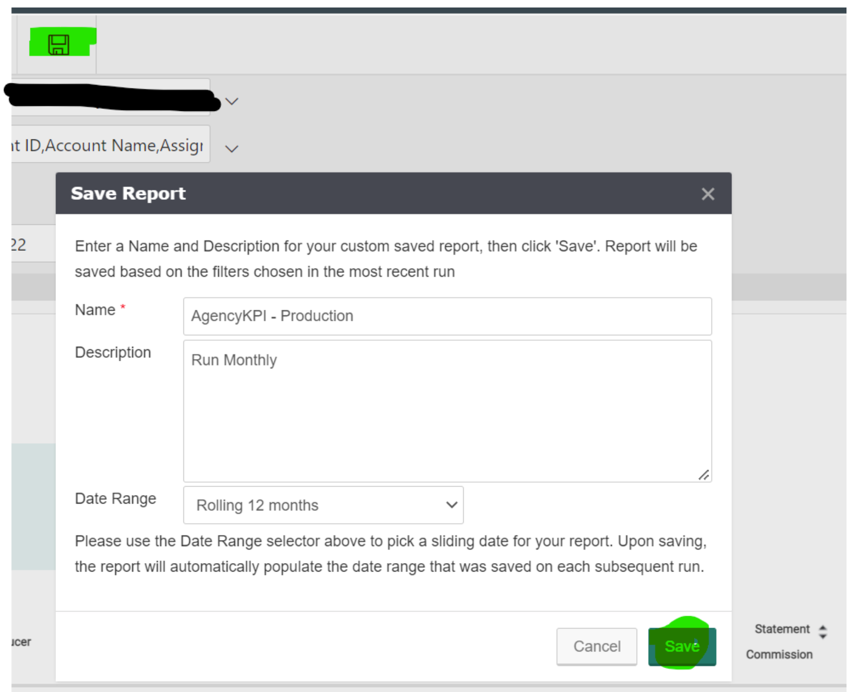
13.) A new tab will open. In the top portion, make the below changes to the report criteria:

a. All dropdowns should be set to ALL. Make sure the **Manage Columns** dropdown is checked to ***Select All***.

b. **Date Select** will be set to **Commission Statement Date**. Enter your Start and End date as a 12 months move timeframe.



14.) Click on the **View Report** Button
15.) Once data has been generated, you can download the report as an excel by clicking on the Export Dropdown icon.
16.) Save the report to your computer and drag and drop in AgencyKPI's loader page.
17.) You can save and schedule this report in EZlynx similar to steps 8-11. Set your timeframe to Rolling 12 months to capture the reconciled data.



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

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