

AGENCY KPI

Epic Instructions

Book of Business - Line Book Report

Login to Epic, and from the home screen:

1. Select "Reports/Marketing" in the left navigation
2. Select "Policy" (hover over and left click once); a list of default ("canned") reports will come into view
3. Highlight "Book of Business – Line Book,"
4. Click "Actions," choose "copy report to" a separate window will open.
5. In the Copy Report window:
 - a. Tick the box beside "My Reports"
 - b. In the "Name" field, type "AKPI BoB - Line Book Report".
 - c. Feel free to make any comments in the comment box you may want about this report.
 - d. Click Finish
6. Navigate to "My Reports" on the left menu, find your AKPI BoB - Line Book Report.
7. Double click on the report or highlight and click the edit pencil. The "Criteria" page will open

From the Criteria Page:

8. Click through each criterion and set as follows *(For this section, if an item needs to be moved from "Available" to "Selected" (large sections on right side of page), click on the item in the "Available" box and use the arrows between boxes to move from "Available" to "Selected")*:
 - a. Region - ALL
 - b. Agency - ALL
 - c. Branch - ALL
 - d. Department – ALL
 - e. Profit Center - ALL
 - f. Account Lookup Code – ALL
 - g. Client Type – All
 - h. Policy Type – ALL
 - i. Line Type – ALL
 - j. Policy Effective Date – select Fixed Date Range, from - check open (leave blank), through uncheck open and enter *the last day of the last month*.
 - k. Policy Expiration Date – select Fixed Date Range, from – uncheck open and enter *the last day of the last month*, through check open (leave blank)
 - l. Issuing Company - ALL
 - m. Line Premium Payable Company – ALL
 - n. Line Premium Payable Broker – ALL
 - o. Line Producer – ALL
 - p. Line Status – The status's the agency is "working on", in force, etc. should be listed in the "Selected" box. Include any Line Status types you want to get NAICS/SIC coded.
 - q. Account Status – Active (Inactive can be included if agency wants to get NAIC/SIC code data on those accounts as well)
 - r. Prospective/Contracted – Contracted (*NOTE: if you selected inactive accounts in line Q then you will need to select both in this step*)
 - s. Account Agency Defined Options – ALL
 - t. Policy Premium Billed – ALL
 - u. Policy Premium Annualized – ALL
 - v. Lines Per Policy – All Lines
 - w. Parameter Page – Include Parameter Page
 - x. Record Listing – Each Time Found
9. In the far-left column under "AKPI BoB - Line Book Report" click "Layouts"

10. Highlight the "Complete Detail" layout and make sure the Print tick box is checked under the Detail section at the bottom. Untick the check box for all other layouts in the list.
11. With the "Complete Detail" layout highlighted, click the pencil edit button  (Double-clicking "Complete Detail" will accomplish the same thing)
12. The "Output Builder" screen will open

From the Output Builder Screen:

13. Click on the blue bar labeled "Details". This will turn the bar green and give you two small white boxes in the middle of the bar. Hover over the bottom white box until you see this icon 
 - a. Click and hold to drag the arrow down to increase the size of the "Details" box
 - b. Make this as big as you would like, there are several items to add to this box
 - c. *NOTE: It does not matter where you put the additional fields below as long as it is in the "Details" box.*
14. At the top of the left column, double-click "Book of Business – Line Book"
15. In the left column, click and hold "Line Premium Estimated" and drag and drop it into the "Details" box.
16. Highlight, then drag and drop the "Line Commission Estimated" into the "Details" box.
17. Double click the "Policy" folder, highlight each of the following fields and drag and drop them individually into the details section.
 - a. Main Policy Number
 - b. Branch Name
 - c. Department Name
 - d. Policy Premium Estimated
 - e. Policy Commission Estimated
 - f. Policy Premium Billed
 - g. Policy Commission Billed
 - h. Policy Premium Annualized
 - i. Policy Commission Annualized
18. In the upper left corner, click the "back arrow" 
19. Double click "Line" folder. Highlight each of the following fields and drag & drop them into details section:
 - a. Profit Center Name
 - b. ICO Name
 - c. Premium Payable Name
 - d. Agency First Written
20. Double click the "First Producer" folder. Highlight, drag and drop, "Producer Name" field into the Details section.
21. In the upper left corner, click the "back arrow" *twice*
22. Double-click the "Client" folder, highlight each of the following fields & drag and drop them into the details section:
 - a. Account Phone
 - b. Date Entered
23. Double-click "Primary Contact" folder.
24. Select "Primary Email Address" and drag and drop it into the "Details" box.
25. In the upper left corner, select the "back arrow" 
26. Double-click "Main Business Contact" folder, then double-click the "Main Business Contact Address" folder.
27. Highlight and drag and drop the following into the "Details" box:
 - a. Main Bus. Contact Address Line 1
 - b. Main Bus. Contact City
 - c. Main Bus. Contact State/Province
 - d. Main Bus. Contact Postal Code
28. In the upper left corner, click the "back arrow" 
29. Double-click "Main Business Contact **Business** Info". Highlight each of the following fields and drag and drop them individually into the details section.
 - a. Main Bus. Contact FEIN
 - b. Main Bus. Contact NAICS
 - c. Main Bus. Contact SIC
30. In the upper left corner, click the "back arrow" *three* times. 
31. Double Click on the "Servicing Roles" folder. Click into the primary **Account Manager** subfolder and select "Name". Drag and drop the field into the details section of the layout. You will use the back arrow each time to go to the next folder in the list.

32. In the upper left corner, select “File” and click “Save All”. You will not get any message confirming saved. Once it allows you to click File again, click “Exit”
33. You will be returned to the Layout list.
34. Click on Delivery Options in the left navigation pane.
35. In the upper left of the page, click the edit pencil
36. When the “Edit Recipient” box opens:
 - a. Delete “local default printer” from the Printer box
 - b. Tick the “Save to Disk” check box
 - c. Select “Microsoft Excel Workbook” in the “Save As” box
 - d. Click the magnifying glass beside the “Location” box and select where you want the report to save when generated.
 - i. Enter the file name (ex. AKPI BoB - Line Book Report)
 - ii. Click save
37. On the Edit Recipient screen, click “Finish”
38. On the top toolbar click “Actions,” then click “Generate Report”
39. This may take a few moments—you will see a “Processing Job” progress window during this time.
40. A pop-up window will open to name or re-name the file and choose the location for it. Confirm or change the location and file name as needed. Then click Save.

NOTE: Make sure “Save as type” selection is “Microsoft Excel Workbook files *.xlsx)
41. If you would like to open the file to view, that will be the next option. This is not necessary but can be opened if you wish to see it.

***** The default Book of Business Premium/Commission is set to use Line Estimated. If you wish to make a change to this, please reach out to the AgencyKPI Help Desk.**

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

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