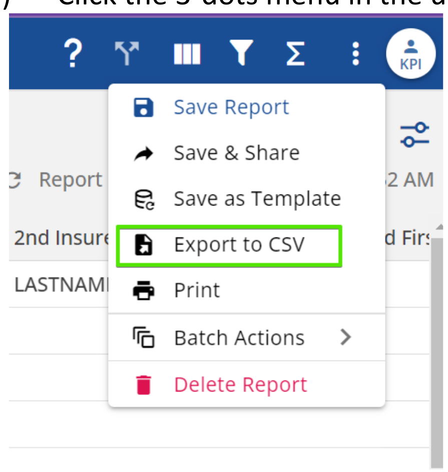
AGENCY KPI

Hawksoft 6 Loader Instructions

ACTIVE CLIENTS REPORT

1.) Go to the Reports menu, select Quick Reports.
2.) Select New Report button
3.) Select the Client option > Active Clients
4.) In the Report Title type: **AKPI Active Clients**
5.) Run Report
6.) Select the Column Options from the upper-right.
7.) Click on Add All link in the bottom right.
8.) Click Apply and the newly columns will automatically appear with the data
9.) For efficiency, you can choose to save this report as a Template. This will save the template and filters selected above and allow you to run this report on a recurring basis.
    a. From the report window, select the 3-dots menu > Save as Template
    b. Template Title: **AKPI Active Clients** > Save Template
    c. After you've saved your report, the next time you open Quick Reports your new report will appear in the Report Templates
10.) Click the 3-dots menu in the upper-right > Export to CSV



11.) Change File Name to AKPI Active Clients Current Date > Check the box for "Export for third party (include client IDs) > Download CSV.
12.) Locate the Downloads folder on the PC through File Explorer > Drag & drop in AgencyKPI's Upload Portal.

ACTIVE POICIES REPORT

13.) Go to the Reports menu, select Quick Reports.
14.) Select New Report button
15.) Select the Policy option > Active Clients

16.) In the Report Title type: **AKPI Active Policies**
17.) Run Report
18.) Select the Column Options from the upper-right.
19.) Click on **Add All** link in the bottom right.
20.) Click Apply and the newly columns will automatically appear with the data
21.) For efficiency, you can choose to save this report as a Template. This will save the template and filters selected above and allow you to run this report on a recurring basis.
   a. From the report window, select the 3-dots menu > Save as Template
   b. Template Title: **AKPI Active Policies** > Save Template
   c. After you've saved your report, the next time you open Quick Reports your new report will appear in the Report Templates
22.) Click the 3-dots menu in the upper-right > Export to CSV
23.) Change File Name to AKPI Active Policies Current Date > Check the box for "Export for third party (include client IDs) > Download CSV.
24.) Locate the Downloads folder on the PC through File Explorer > Drag & drop in AgencyKPI's Upload Portal.

COMMISSIONS REPORT

25.) Go to the Commissions menu, select Commission Processing & Reporting
26.) Select Reports icon
27.) Select the New Report button
28.) Select the **Agent** icon. If this icon is not available, select **Agency**.
29.) Select the **Agent (or Agency) Commission Paid Report by Reporting Date** option
30.) Edit the Date Range to include the Last 12 Months of Production. Depending on how long your agency has been live on Hawksoft 6 will determine the Start Date.
31.) Run Report
32.) Select the Column Options from the upper-right.
33.) Click on **Add All** link in the bottom right.
34.) Click Apply and the newly columns will automatically appear with the data
35.) For efficiency, you can choose to save this report as a Template. This will save the template and filters selected above and allow you to run this report on a recurring basis.
   a. From the report window, select the 3-dots menu > Save as Template
   b. Template Title: **AKPI Commissions Report** > Save Template
   c. After you've saved your report, the next time you open Commission Reports your new report will appear in the Report Templates
36.) Click the 3-dots menu in the upper-right > Export to CSV
37.) Change File Name to AKPI Commissions *Date Range* > Check the box for "Export for third party (include client IDs) > Download CSV.
38.) Locate the Downloads folder on the PC through File Explorer > Drag & drop in AgencyKPI's Upload Portal.

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

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