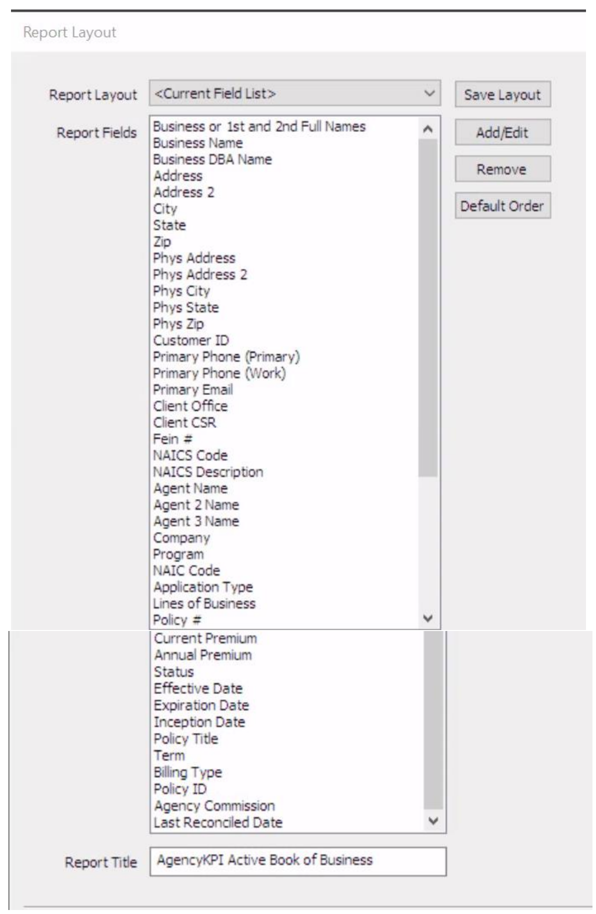
Hawksoft Loader Instructions

Report #1: ADVANCED REPORT – Active Book of Business

1.) Click on the Reports Menu and select Advanced Reports.
2.) Click on **New Report**
3.) Policy Type Filter screen will appear.
    a. **All Policy Types** should be selected
    b. Report By: **Policy**
    c. Click Next
4.) Report Generator Filters screen will appear.
    a. Filter 1: **Status***
    b. Select **All Active**
    c. Click Next twice
5.) Report Layout Screen will appear.
    a. Click on Add/Edit Button
    b. Make sure the following fields are selected:
        - Insureds' Names (1^{st} and 2^{nd})
            - Business or 1^{st} and 2^{nd} Full Names
        - Business Name
        - Business DBA Name
        - Mailing Address Fields (enabled by default)
        - Physical Address of Client
        - Customer ID
        - Phone Fields
            - Phone-Primary
                - Primary Phone
                - Primary Phone (Work)
        - Email Fields
            - Email - Primary
                - Primary Email
        - Client Office
        - Client CSR
        - FEIN
        - NAICS Code
        - NAICS Description
        - Agent Name
        - Agent 2 Name
        - Agent 3 Name
        - Company (enabled by default)
        - Program
        - NAIC Code
        - Application Type
        - Line of Business
        - Policy # (enabled by default)
        - Current Premium (enabled by default)
        - Annual Premium



- Status
- Effective Date (enabled by default)
- Expiration Date
- Inception Date (enabled by default)
- Policy Title
- Term
- Bill Type
- Policy ID
- Commission
    - Agency Commission
    - Last Reconciled Date

6.) Click OK
7.) Click on the Default Order button.
8.) In the Report Title: AgencyKPI Active Book of Business
9.) Click on Save Layout > Click OK
10.) Click Finish
11.) File Export > Report
12.) Change File type to CSV
13.) Change File Name to AKPI Month Year
14.) Save the Report to your computer and drag and drop in AgencyKPI's loader page.
15.) For efficiency, you can choose to save this report as a Memorized Report. This will save the template and filters selected above and allow you to run this report on a recurring basis.
    a. Within Hawksoft, click on File
    b. Save Memorized Report
    c. After you've saved your report, the next time you open Advanced Reports your new report will appear in the *Memorized Reports*

Report #2: COMMISSION REPORT

*****Please verify that all commission statements with an "Agent Paid Date" that fall within the date range selected on this report are reconciled and posted.***

16.) Click on the Accounting Tab:
    a. Commission Report
    b. Report
    c. Summarize By: **Do Not Summarize**
    d. Filter by **Agent Paid Date**
    e. Choose date range as a 12 Month Move timeframe.
17.) File > Export report to CSV and drag and drop in AgencyKPI's loader page.

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

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