AGENCY KPI

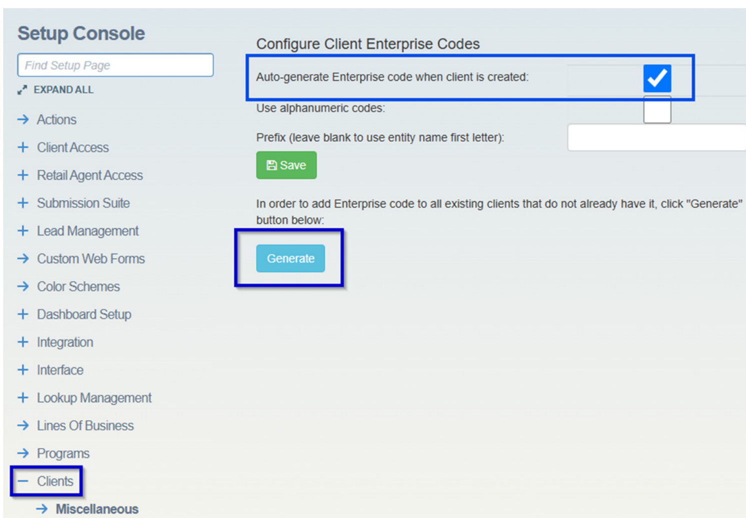
# Nexsure Loader Instructions

*****If you do not see the below reports in your profile, please contact Nexsure support to get these added.***

## Preliminary Setup: Configuring Client Enterprise Codes

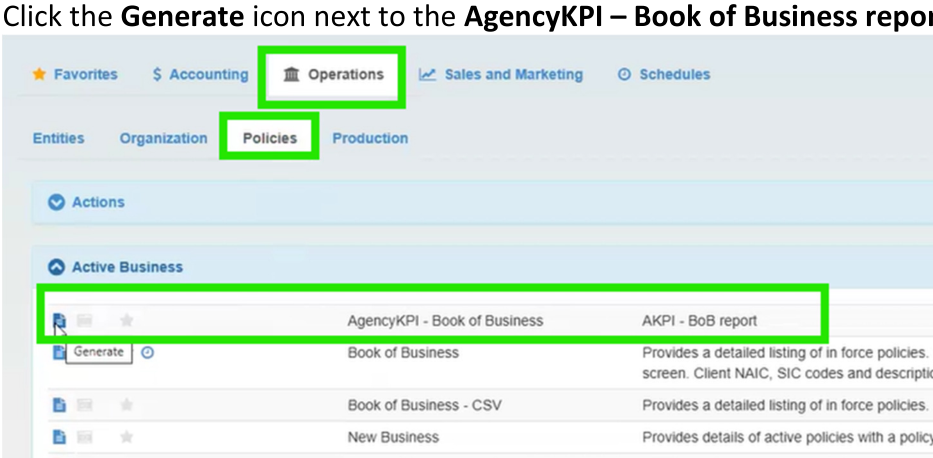
Before running reports, ensure that all Client Enterprise Codes are properly configured in Nexsure. This is a one-time setup:

1.) Navigate to **Organization > Setup**
2.) Click on **Clients**
3.) Select the checkbox **"Auto-generate Enterprise code when client is created"** checkbox.
4.) Click **Generate** to assign enterprise code to all existing clients.




## BOOK OF BUSINESS REPORT

1.) Navigate to **Organization > Reports**
2.) Click the **Operations** tab, then select the **Policies** Tab
3.) Open the **Active Business** section
4.) Click the **Generate** icon next to the **AgencyKPI – Book of Business report**



5.) Click on **Run Now**. When the Excel file opens, choose a location on your computer to save.
6.) Drag & drop the downloaded report into AgencyKPI's Upload Portal.

## PRODUCTION REPORT

7.) Navigate to **Organization > Reports**
8.) Click the **Operations** tab, then select the **Production** tab
9.) Open the **Invoicing** Section
10.) Click the **Generate** icon next to the **AgencyKPI – Production Report**


11.) Click on **Run Now**. When the Excel files opens, choose a location on your computer to save.
12.) Drag & drop the downloaded report into 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