

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.

The screenshot shows the 'Setup Console' interface. On the left is a sidebar with a search bar and a list of setup categories: Actions, Client Access, Retail Agent Access, Submission Suite, Lead Management, Custom Web Forms, Color Schemes, Dashboard Setup, Integration, Interface, Lookup Management, Lines Of Business, Programs, Clients (highlighted with a blue box), and Miscellaneous. The main area is titled 'Configure Client Enterprise Codes'. It contains a checkbox 'Auto-generate Enterprise code when client is created:' which is checked (highlighted with a blue box). Below it is a section for 'Use alphanumeric codes:' with a 'Prefix (leave blank to use entity name first letter):' field and a 'Save' button. At the bottom, there is a 'Generate' button (highlighted with a blue box) and a note: 'In order to add Enterprise code to all existing clients that do not already have it, click "Generate" button below.'

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

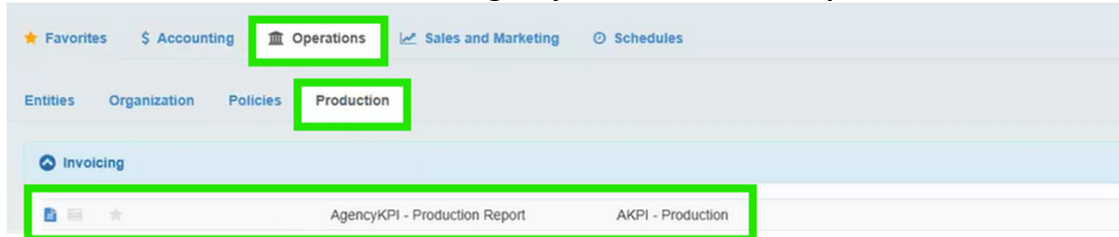
The screenshot shows the 'Operations' tab selected in the top navigation bar. Below it, the 'Policies' sub-tab is selected. The 'Active Business' section is expanded, showing a list of reports. The first report, 'AgencyKPI - Book of Business', is highlighted with a green box. It has a 'Generate' icon (a document with a plus sign) next to it. The table lists the following reports:

Report Name	Description
AgencyKPI - Book of Business	AKPI - BoB report
Book of Business	Provides a detailed listing of in force policies. E screen. Client NAIC, SIC codes and description
Book of Business - CSV	Provides a detailed listing of in force policies.
New Business	Provides details of active policies with a policy
Renewal Premium Analysis	Provides a list of renewed policies and compar

- 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