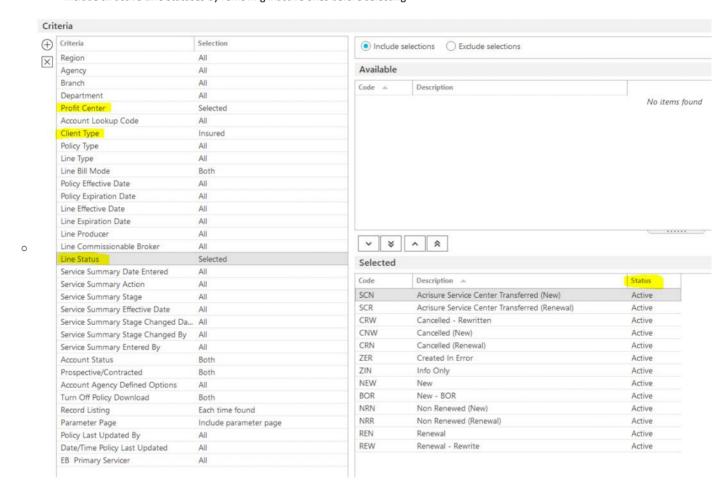
Policy List Reports (EB & P&C)

Tuesday, July 9, 2024 4:47 PM

- EB Version:
- Save a default Policy List Report in your My Reports and name it "*EB Post System Update Policy List Report"
 - o Update Criteria:
 - o Add 2 fields
 - Policy Last Updated By
 - Date/Time Policy Last Updated
 - o Update Profit Center and Client Type
 - o Include all active Line Statuses by removing inactive ones before selecting



o Update Layout:

- Uncheck Print option for the layout with the description of "Policy List Report"
- o Open the other layout to update
- o Delete extra PDF fields
- o Delete SSR fields in Details section
- o Delete Pr/Br Code fields
- Update policy number to Main policy number
- O Update ICO and PPE to name instead of code
- o Add Issuing Location after PPE
- o Add in Policy level Code & Name for EB Primary Servicer
- o Add in Account level Code & Name for EB Primary Servicer
- o Match what is shown below in Details section in the second row (after servicing roles)
- o Remove Major sort



o Update Delivery Options

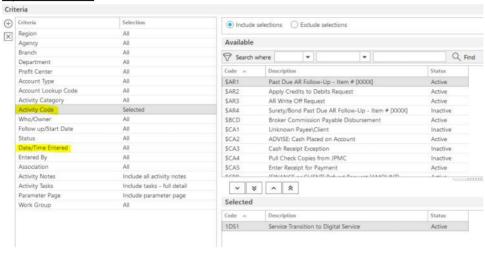
- Save to Disk
- Save as Excel
- o Choose main Platform Model folder
- o Name: Policy List Report_Post Platform Model Update_*Project Name and Date*
- P&C Version:
- Create a new report off of the EB policy list report in My Reports and name it "*P&C Post System Update Policy List Report"
 - Update Layout:
 - o The Policy and Activity level Code/Names will need to be updated to reflect the P&C Primary Servicer 1
 - o All other criteria can remain as is.

Activity Report

Tuesday, August 20, 2024 1:53 PM

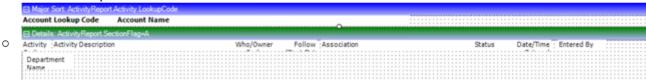
Save a default Activity Report to your My Reports and name it "*Post System Update - Activity Report"

o Update Criteria:



o Update Layout:

- o Delete extra PDF fields
- Add department name



o <u>Update Delivery Options</u>

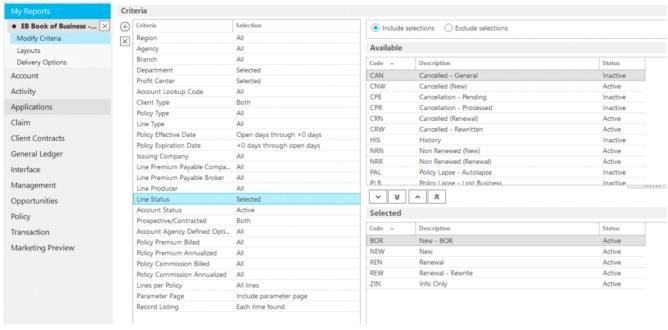
- o Save to Disk
- Save as Excel
- o Choose main Platform Model folder
- o Name: Activity Report_Post Import Platform Model_Project Name and Date

EB Book of Business Report

Tuesday, August 20, 2024 1:54 PM

• Save a default Book of Business - Line book Report in your My Reports and name it "EB Book of Business - Line Book"

• Update book criteria



- Under Layouts set all to "No" for print except for the Complete Detail layout
- Update Layout:
 - o Delete all footer data for PDFs
 - Delete major sort
 - Remove current premium/commission fields from the detail section
 - o Remove PrBr Code after Line Status
 - o Update ICO and PPE to name instead of code
 - o Add in:
 - Main Policy Number (after account name)
 - Issuing Location
 - Policy Premium Annualized
 - Policy Commission Annualized
 - Policy Premium Billed
 - Policy Commission Billed
 - Line Premium Estimated
 - Line Commission Estimated
 - Dept Name
 - Profit Center Code
 - Profit Center Name
 - EB AM servicer role name

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Client Code			Policy/Line	Effective	Expiration	Status	ICO	PPE				Premium	Commissi	on Pr	remium	Commission
□ Details																
Account Lookup	C Account Name	Main Policy Nu	Policy/Line	Line Effectiv I	Line Expirati	Line Sta	ICO Name	-		suing ocation .	Policy Premium A	Policy .Commission	Policy Premium Ri	Policy i .Commission.Bi	Line Premium Esti	Line Commission
Department Name	Profit Center Code	r Profit (Name	Center N	ame												

- Update Delivery Options
 - Save to Disk
 - o Save as Excel
 - o Choose main KPI folder
 - o Name: Platform database code Book of Business Date



EB Book of Business - Line Book PrBr Detail

Thursday, August 22, 2024 2:49 PM

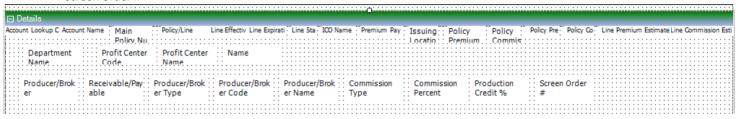
Create a new report off of the "EB Book of Business - Line Book" and name it "EB Book of Business - Line Book PrBr Detail"

Leave Criteria as is

Update Layout:

Add the following Pr/Br fields:

- Producer/Broker
- o Receivable/Payable
- Producer/Broker Type
- o Producer/Broker Code
- Producer/Broker Name
- Commission Type
- o Commission Percent
- o Production Credit %
- o Screen Order #



Update Delivery Options so the file saves in the Audit Reports Folder with the name: "Platform Code EB Book of Business with PrBr Detail_"

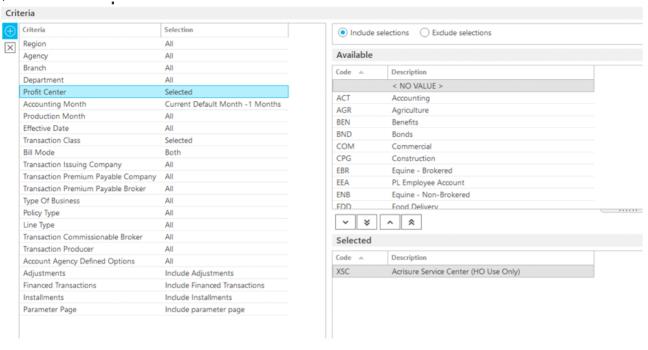
KPI Production Report

Tuesday, August 20, 2024

1.54 PM

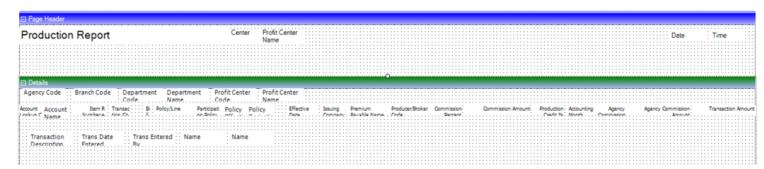
• Save a default Production Report in your My Reports and name it "KPI Production Report"

Update criteria



Update Layout:

- Uncheck Print option for Summary Layout option
- Open Complete Detail Layout and add in:
 - Agency Code
 - o Branch Code
 - o Dept Code
 - Dept Name
 - o Profit Center Code
 - o Profit Center Name
- Add "Billed from" Account Name after lookup code
- Add policy effective and expiration dates after the policy number
- Change ICO and PPE to name instead of code
- Below the other fields, add in:
 - o Transaction description
 - o Trans date entered
 - Trans entered by
- Add EB servicer 1 & P&C servicer 1
- Remove minor sort for item number



• Update Delivery Options

- o Save to Disk
- Save as Excel
- o Choose main KPI folder
- o Name: Platform database code Production Report_Date

P&C Book of Business - Line Book PrBr Detail

Thursday, August 22, 2024 2:49 PM

Create a new report off of the "EB Book of Business - Line Book PrBr Detail" and name it "P&C Book of Business - Line Book PrBr Detail"

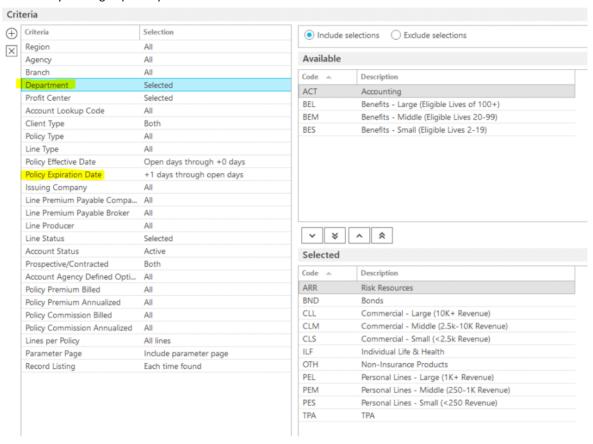
Update Criteria:

Department

Include everything except for Accounting and Benefits

Policy Expiration Date - Relative Date Range

o +1 days through open days



Update Layout:

o Update servicing role name to P&C Primary Servicer

Update Delivery Options so the file saves in the Audit Reports Folder with the name: "Platform Code P&C Book of Business with PrBr Detail_"