

Standard Report List & Info

Monday, April 10, 2023 9:56 AM

ACRISURE STANDARD REPORTS

1. Account_Client List
1. Lost Business Activity
1.0 Acrisure Standard Basic Book of Business
1.0 Activities Report - Open & Entered - PDF & Excel
1.0 Expirations by Policy Producer Using relative Date
1.0 Expirations by Policy Servicer Using relative Date
1.0 Generate Activity Code by Policy Expiration Date
1.0 In Process Policies
1.0 New Business Report
1.0 Potentially Missed Expirations
1.0 PR/BR Commission Review by Policy
1.0 Prospective Policy - audit
1.0 Verify PR/BR Commission Agreements
1.0 Missed and Upcoming Renewals

Layout Tips

Click on blank area while in Output Builder and click ESC on keyboard to open total layout info (bottom left)

Minor sort carries over to Excel format, but not major sort

Criteria Tips

EB catch all active Eff/Exp Date

Open days through +0 days

+0 days through open days

P&C catch all active Eff/Exp Date

Open days through +0 days

+1 days through open days

Optional Criteria Option to use for audits - Client Condition of Policy

1DS Data Output Notes

EB Serv 1 - Servicing Role 13

EB Serv 2 - Servicing Role 14

EB Prod 1 - Servicing Role 11

A BOB with PrBr or ADC data will show more than a BOB without it due to listing policies multiple times if there is more than one PrBr or ADC listed

Scheduling a Report

Tuesday, July 11, 2023 3:44 PM

1. Open report you want to schedule in EPIC.
*If you need to make any changes to the report itself, update it , save and then close before reopening to schedule. See Step #17 for addtl info on the reasoning for this.
2. Click delivery options.
3. Click the + icon.
4. Select recipient.
5. Choose their email address from the dropdown.
6. Delete out Printer section.
7. Select Attach as "Microsoft Excel Workbook."

Example:

Add Recipient ×

Delivery Options

Recipient:

Printer:

Email: Attach as:

Fax #: Ext:

Marketing

☐ Receive copy of Marketing Distribution Log Via

0.24s | RECIPADD

8. If you are finished adding recipients click finish; otherwise click add and repeat steps 4-7 until you have added the last recipient.
9. Add a subject line. Monthly [Name of Report]
Example: Monthly Policy ADC Report
10. Type in message.
Example: Attached is the Monthly Policy ADC Report.

Email/Fax Detail

Subject:

Message:

Attached is the Monthly Policy ADC Report.

Taylor Montgomery
EPIC Onboarding Analyst

100 Ottawa Avenue, SW
Grand Rapids, MI 49503
Email: TaMontgomery@Acrisure.com
Direct: (616) 265-1280

11. Select yourself in the From email field.

Email/Fax Options Change Sender

From email:

Signature:

Cover page:

Language:

12. Under the scheduling section, select the schedule radio dial.
13. Select the day and time you want to schedule it for.
14. Select "Monthly" for the reoccurrence field.
Example:

Scheduling

☐ Now

☒ Schedule

8/1/2023



7:00 AM

Recurrence

Monthly



15. Click Actions.
16. Click "Generate Report"
17. When exiting out of the report, do not save changes. Click no. *Note: This is so the delivery options don't save and you can run the report manually as needed without sending to everyone.

Save Changes



Do you wish to save changes? Saving changes will not affect any previously scheduled reports.

Yes

No

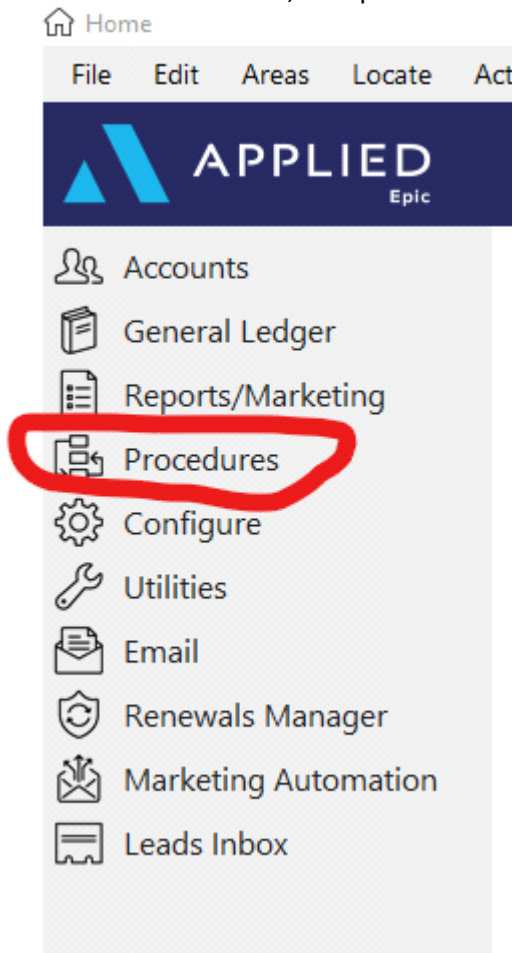
Cancel

Canceling Scheduled Reports

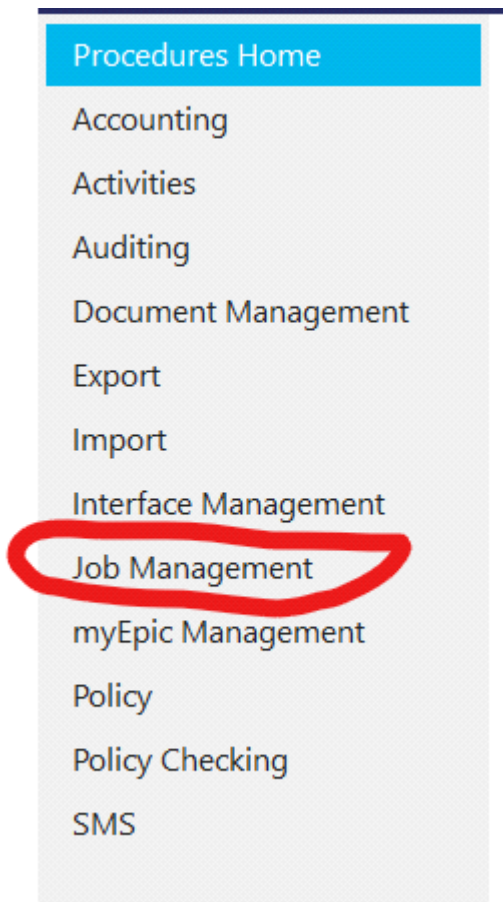
Tuesday, July 11, 2023

3:33 PM

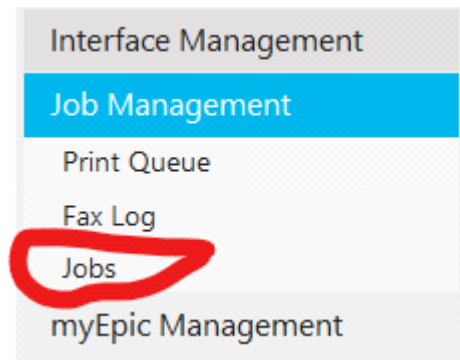
1. From EPIC home screen, click procedures.



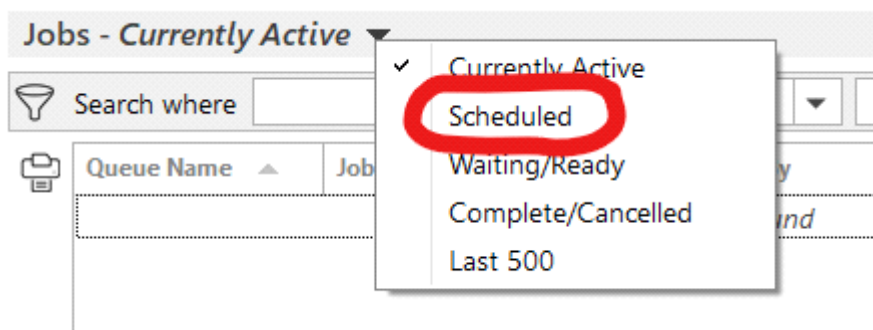
2. Click Job Management.



3. Click Jobs

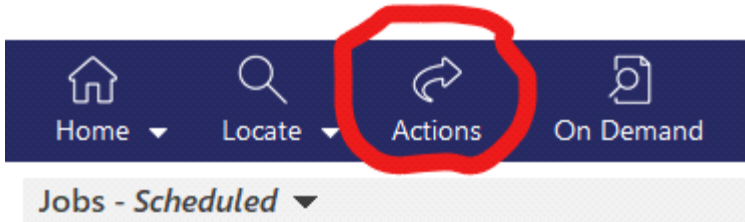


4. Where it says Jobs-Currently Active, click the dropdown and select Scheduled.

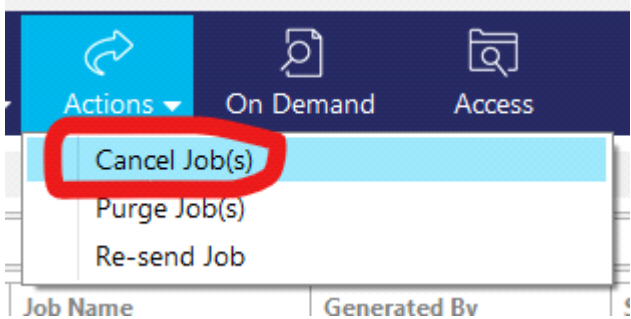


5. Select the scheduled report that you want to cancel.

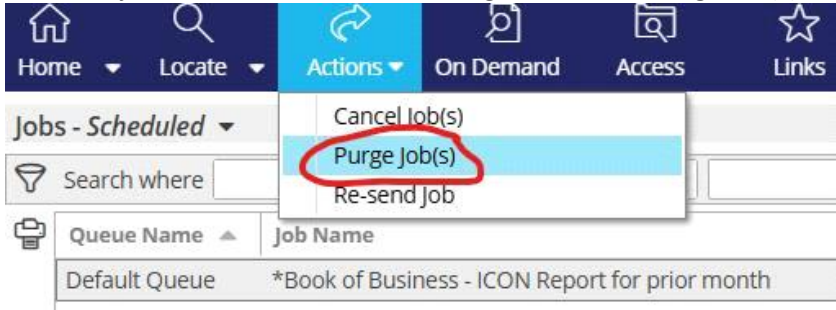
6. Click on Actions.



7. Click Cancel Job(s).



8. Once the job is cancelled, click Actions again and then Purge Job(s)



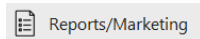
Configuring Report Output

Tuesday, July 25, 2023 8:26 AM

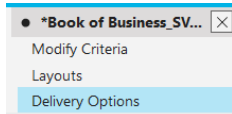
****Do this step first before running a report. This should only need to be done once to a report unless you want to make changes to the output at a later time**

CONFIGURING REPORT OUTPUT

1. Open the **Reports/Marketing** screen from Home



1. In the **My Reports** section, double-click on the report you want to configure
2. Click on **Delivery Options** on the left navigation panel



3. Under Report Recipients, double-click the item listed to open it

Report Recipients						
+	Acct Type	Name	Method(s)	Printer	Email/Fax	Notification
✎		<Current User>	Save To Disk			Desktop Alert
✕						

5. Choose your delivery method (Email to yourself or save to a folder on your computer)

Email

- Clear out anything listed in the **Printer** box
- Choose your email address in the **Email** dropdown
- Choose Excel in the **Attach as** dropdown
- Click **Finish**

Edit Recipient

Delivery Options [Change Notification Settings](#)

Recipient: <Current User> ☐ Notify Only

Printer:

Email: ahirschmann@acrisure.com Attach as: Microsoft Excel Workbook

Fax #: Ext:

☐ Save to Disk

Save As: Microsoft Excel Workbook

Location: C:\Users\AHirschmann\OneDrive - acrisurellc.com\Desktop\Reports\SVC Reports\Book of t

Marketing ☐ Receive copy of Marketing Distribution Log Via:

Finish Cancel

0.10s | RECIPIENT

- Add a **Subject** for the email that will be sent when the report is generated
- Make sure the **From email** box shows your email address
- Optional - Select your **Signature** from the dropdown
- Optional - Add a **message** to the body of the email
- Click **Save** at the top of the screen and you can close out of the report by clicking the **X** next to its name on the left navigation panel

*Note: You can also email to others from here by updating the email details each time you generate the report, but I find it's better to email to yourself and then you can forward it from there and/or save to your computer

Email/Fax Detail

Subject: Book of Business Report

Message:

Ashley Hirschmann
Epic/Onboarding Analyst

Agency Lic# 6006281
ahirschmann@acrisure.com
Direct: (616) 265-1422

Service Team: aacustomerservice@acrisure.com | (800) 793-0882

Email/Fax Options [Change Sender](#)

From email: ahirschmann@acrisure.com

Signature: Signature [Refresh](#)

Cover page: [Preview](#)

Language:

Scheduling

☒ Now

☐ Schedule

Recurrence:

OR

Save to Disk (Computer Folder)

- Clear out anything listed in the **Printer** box
- Check the box next to **Save to Disk**
- Choose Excel in the **Save as** dropdown

- Click on the magnifying glass to the right of the **Location** box
- Choose where you want the report to be saved when it's run and adjust the name if you want
- Click **Finish**

Edit Recipient

Delivery Options
Change Notification Settings

Recipient <Current User>
☐ Notify Only

Printer
Email
Fax #
Attach as
Ext

☒ Save to Disk
Save As Microsoft Excel Workbook
Location C:\Users\AHirschmann\OneDrive - acrisurellc.com\Desktop\Reports\SVC Reports\Book of f

Marketing
☐ Receive copy of Marketing Distribution Log
Via

Finish Cancel

0.10s | RECEIPT

Now the report is ready to run. Instructions on running a report are [HERE](#)

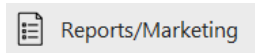
Running a Report

Tuesday, July 25, 2023 8:19 AM

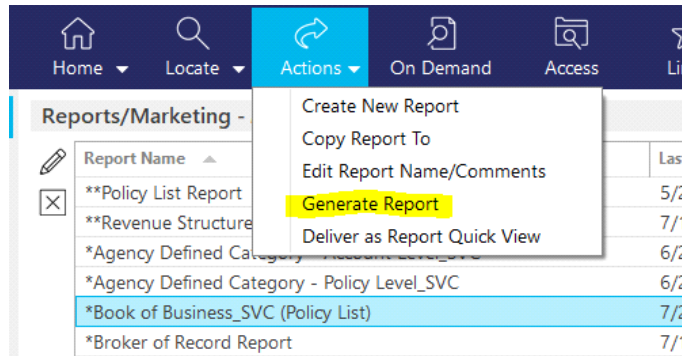
***Make sure you have configured the Report Output before generating the report. Instructions for that are [HERE](#)**

RUNNING A REPORT

1. Open the **Reports/Marketing** screen from Home



2. In the **My Reports** section, click once to highlight the report you want to run
3. Click **Actions / Generate Report**



4. A different screen will pop up depending on the output option you chose during configuration.

Save to Disk

- The Save screen will show the folder you chose during configuration but you can change the location and name of the report if desired
- Click **Save**
- Another screen will pop up asking if you want to open the file now and you can click yes to view it or no to just send it to the folder you selected

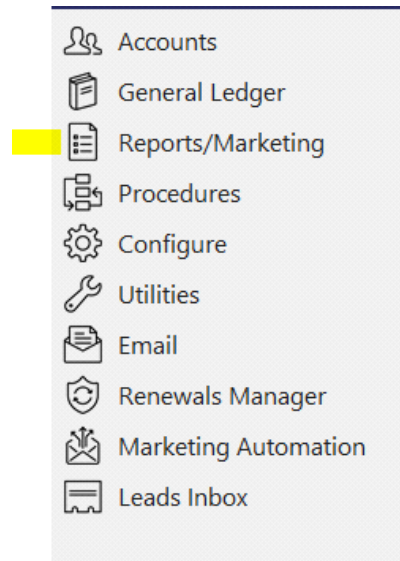
Email

- A success screen will pop up informing you that the report was submitted
- Note: No options to adjust the email are given so make sure you have it configured properly in the Delivery Options section of the report before generating the report

Adding Report to Other User's My Reports List

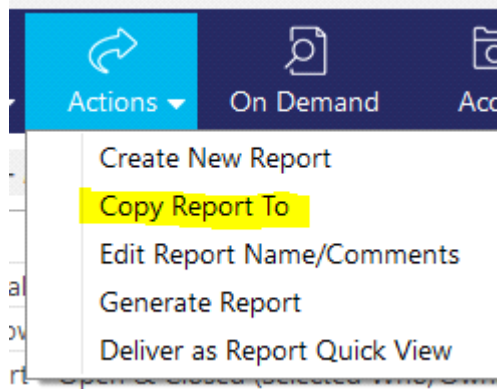
Wednesday, October 4, 2023 2:45 PM

From the Home Screen, click on **Reports/Marketing**



Click once on the report you want to send to someone else's My Reports list to highlight it

Click **Actions > Copy Report To**



Check the box next to **Other Users' My Reports**

Update **Name** and **Comments** if desired

Check the box next to the User(s) you want to send a copy of the report to

Click **Finish**

Create copies in

☐ Main Group - Policy☒ Other Users' My Reports

Details

Language English (United States of America) ▼

Name Book of Business

Comments Line Book - Will show all lines of a package

Select Users

Full Name ▼	User Code
<input type="checkbox"/> Dominic Davis	DDAVIS1
<input type="checkbox"/> Derek Batt	DBATT2
<input type="checkbox"/> Danny Smith	DSMITH3
<input type="checkbox"/> Dana Jenkins	DJENKINS
<input type="checkbox"/> Christa Tracey	CTRACEY
<input type="checkbox"/> Chris Zerhusen	CZERHUSEN
<input type="checkbox"/> Chase Lemons	CLEMONS
<input type="checkbox"/> Charity Schweiger	CSCHWEIGER
<input checked="" type="checkbox"/> Catherine (Katie) Jones	CJONES5
<input type="checkbox"/> Brian Lelio	BLELIO
<input type="checkbox"/> BreAnna Spelhaug	BSPELHAUG
<input type="checkbox"/> Bethany Lueb	BLUEB
<input type="checkbox"/> Antonio Islas	AISLAS
<input type="checkbox"/> Angie Garcia	AGARCIA4
<input type="checkbox"/> Ana Conroy	ACONROY
<input type="checkbox"/> Amber Sheffield	ASHEFFIELD1
<input type="checkbox"/> Amanda Nicole Miller	AMILLER3
<input type="checkbox"/> Alan Rabideau	ARABIDEAU
<input type="checkbox"/> *Venus Tondreau	VTONDREAU
<input type="checkbox"/> *Tyler Frye	TFRYE
<input type="checkbox"/> *Tina Brockett	TBROCKETT
<input type="checkbox"/> *Timothy McBride	TMCBRIDE
<input type="checkbox"/> *Teresa Cronin	TCRONIN

Finish

Cancel

0.44s | COPYRPT