

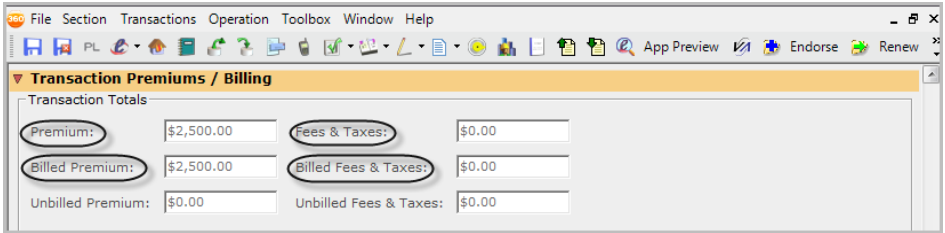
# My Agency Reports

## Book of Business

My Agency Reports uses information entered in AMS360 to create a report with the specified criteria. The following table identifies where the information is entered and how it corresponds to the report you are creating.

### Premium, Revenue, and Commission Summary (Totals and/or Percentages)

When using criteria that reports premium, revenue, and commission totals, the information reported corresponds to the following areas of AMS360:

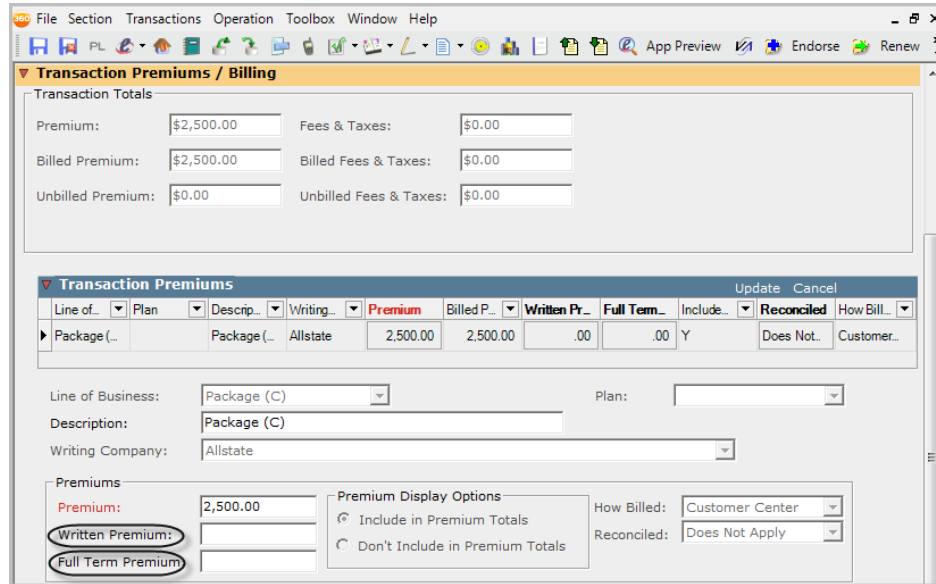
Reporting Table	Reporting Column	Description	Where the information is entered in AMS360
<b>Premium</b>	Premium	Transaction Premium	
<b>Premium</b>	Billed Premium	Billed Transaction Premium	
<b>Premium</b>	Non-Premium	Transaction Fee and Taxes	
<b>Premium</b>	Billed Non-Premium	Billed Transaction Fees and Taxes	

7/23/20

Reporting Table	Reporting Column	Description	Where the information is entered in AMS360
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<b>Premium</b>	Written Premium	Written Transaction Premium	
----------------	-----------------	-----------------------------	--

<b>Premium</b>	Full-Term Premium	Full Term Transaction Premium	
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**Transaction Premiums / Billing**

Transaction Totals

Premium: \$2,500.00    Fees & Taxes: \$0.00  
 Billed Premium: \$2,500.00    Billed Fees & Taxes: \$0.00  
 Unbilled Premium: \$0.00    Unbilled Fees & Taxes: \$0.00

Line of...	Plan	Descrip...	Writing...	Premium	Billed P...	Written Pr...	Full Term...	Include...	Reconciled	How Bill...
Package (...)		Package (...)	Allstate	2,500.00	2,500.00	.00	.00	Y	Does Not...	Customer...

Line of Business: Package (C)    Plan: [ ]

Description: Package (C)

Writing Company: Allstate

Premiums

Premium: 2,500.00

**Written Premium:** [ ]

**Full Term Premium:** [ ]

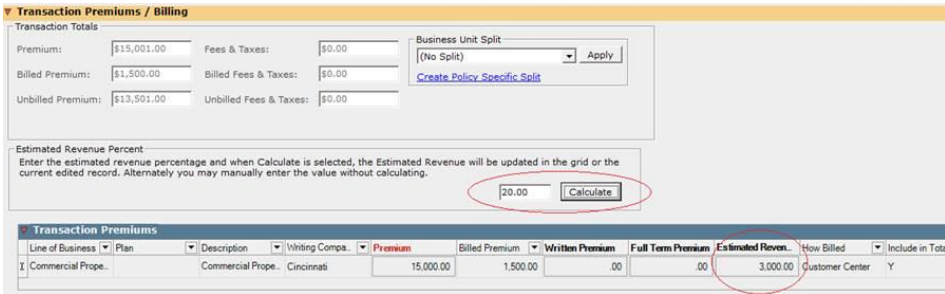
Premium Display Options

Include in Premium Totals

Don't Include in Premium Totals

How Billed: Customer Center

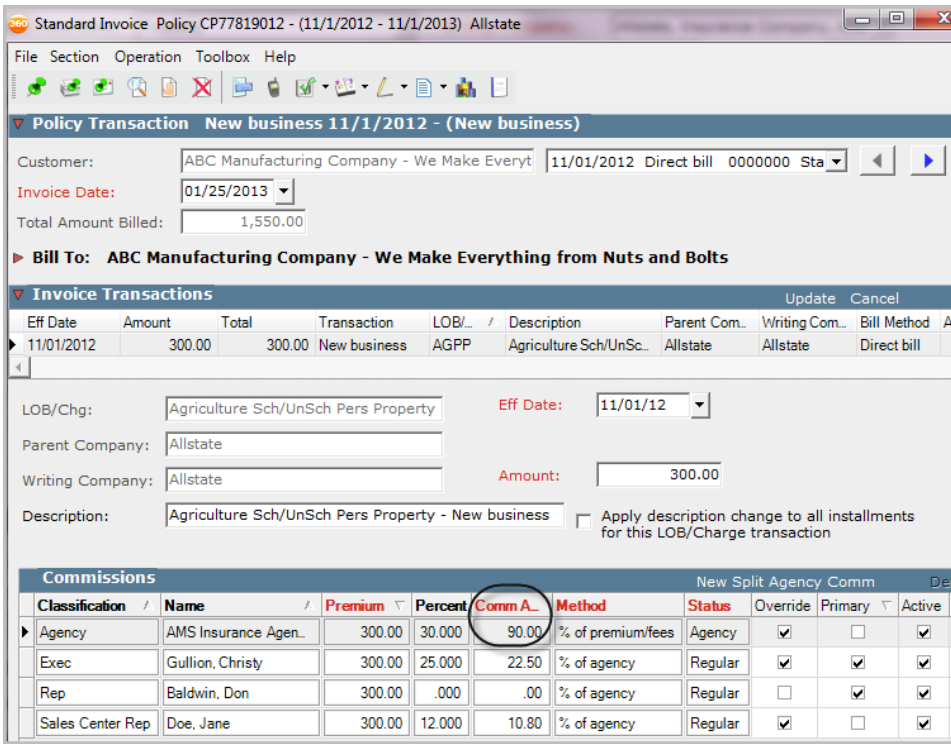
Reconciled: Does Not Apply

Reporting Table	Reporting Column	Description	Where the information is entered in AMS360																						
Premium	Annualized Premium	Policy Annualized Premium: calculated using 365/number of days in term multiplied by the policy premium	<b>Calculated from policy premiums. For example, a six month policy with a premium of \$1,000 will have an annualized premium of \$2,000.</b>																						
Premium	Revenue	Revenue: Total Agency Commission (Billed Agency Commission + Unbilled Agency Commission) + Agency Fee amount	<b>Calculated</b>																						
Premium	Revenue	Revenue: Total Agency Commission (Billed Agency Commission + Unbilled Agency Commission) + Agency Fee amount	<b>Calculated</b>																						
Premium	Estimated Revenue Amount	Estimated Revenue for the transaction	 <p><b>Transaction Premiums / Billing</b></p> <p>Transaction Totals</p> <p>Premium: \$15,001.00 Fees &amp; Taxes: \$0.00 Business Unit Split: (No Split) Apply</p> <p>Billed Premium: \$1,500.00 Billed Fees &amp; Taxes: \$0.00 Create Policy Specific Split</p> <p>Unbilled Premium: \$13,501.00 Unbilled Fees &amp; Taxes: \$0.00</p> <p>Estimated Revenue Percent</p> <p>Enter the estimated revenue percentage and when Calculate is selected, the Estimated Revenue will be updated in the grid or the current edited record. Alternately you may manually enter the value without calculating.</p> <p>20.00 Calculate</p> <p><b>Transaction Premiums</b></p> <table border="1"> <thead> <tr> <th>Line of Business</th> <th>Plan</th> <th>Description</th> <th>Writing Compa.</th> <th>Premium</th> <th>Billed Premium</th> <th>Written Premium</th> <th>Full Term Premium</th> <th>Estimated Revenue</th> <th>How Billed</th> <th>Include in Total</th> </tr> </thead> <tbody> <tr> <td>X Commercial Prope.</td> <td></td> <td>Commercial Prope...</td> <td>Cincinnati</td> <td>15,000.00</td> <td>1,500.00</td> <td>.00</td> <td>.00</td> <td>3,000.00</td> <td>Customer Center</td> <td>Y</td> </tr> </tbody> </table>	Line of Business	Plan	Description	Writing Compa.	Premium	Billed Premium	Written Premium	Full Term Premium	Estimated Revenue	How Billed	Include in Total	X Commercial Prope.		Commercial Prope...	Cincinnati	15,000.00	1,500.00	.00	.00	3,000.00	Customer Center	Y
Line of Business	Plan	Description	Writing Compa.	Premium	Billed Premium	Written Premium	Full Term Premium	Estimated Revenue	How Billed	Include in Total															
X Commercial Prope.		Commercial Prope...	Cincinnati	15,000.00	1,500.00	.00	.00	3,000.00	Customer Center	Y															
Premium	Estimated Revenue Percent	Estimated Revenue Percent for the transaction																							

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
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<b>Commission</b>	Total Commission	Total of all Billed Commissions for a <i>policy</i>	<b>Calculated</b>
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<b>Commission</b>	Billed Commissions	Total of all Commissions billed (from invoice)	
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**Standard Invoice Policy CP77819012 - (11/1/2012 - 11/1/2013) Allstate**

File Section Operation Toolbox Help

**Policy Transaction New business 11/1/2012 - (New business)**

Customer: ABC Manufacturing Company - We Make Everyt 11/01/2012 Direct bill 0000000 Sta

Invoice Date: 01/25/2013

Total Amount Billed: 1,550.00

**Bill To: ABC Manufacturing Company - We Make Everything from Nuts and Bolts**

**Invoice Transactions**

Eff Date	Amount	Total	Transaction	LOB/	Description	Parent Com.	Writing Com.	Bill Method
11/01/2012	300.00	300.00	New business	AGPP	Agriculture Sch/UnSc.	Allstate	Allstate	Direct bill

LOB/Chg: Agriculture Sch/UnSch Pers Property Eff Date: 11/01/12

Parent Company: Allstate

Writing Company: Allstate Amount: 300.00

Description: Agriculture Sch/UnSch Pers Property - New business  Apply description change to all installments for this LOB/Charge transaction

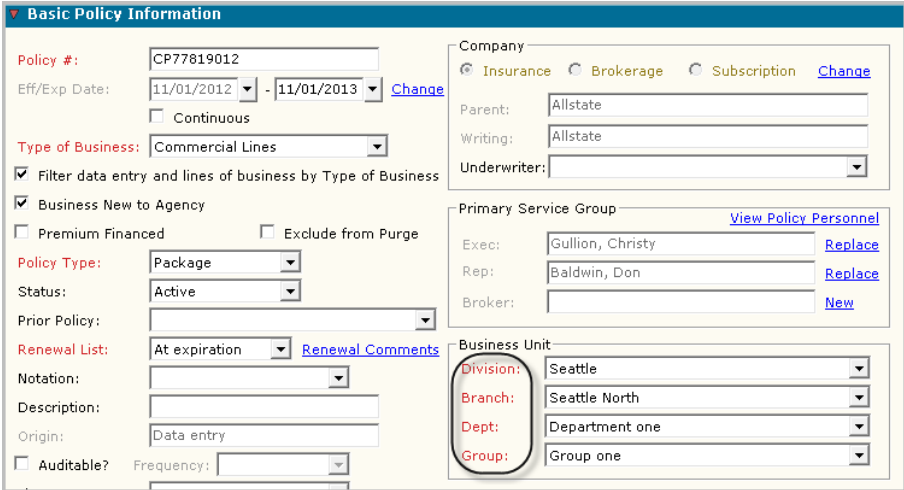
**Commissions**

Classification	Name	Premium	Percent	Comm A	Method	Status	Override	Primary	Active
Agency	AMS Insurance Agen..	300.00	30.000	90.00	% of premium/fees	Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Exec	Gullion, Christy	300.00	25.000	22.50	% of agency	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rep	Baldwin, Don	300.00	.000	.00	% of agency	Regular	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Center Rep	Doe, Jane	300.00	12.000	10.80	% of agency	Regular	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

<b>Commission</b>	Unbilled Commissions	Total of all Unbilled Commissions for a policy	<b>Calculated</b>
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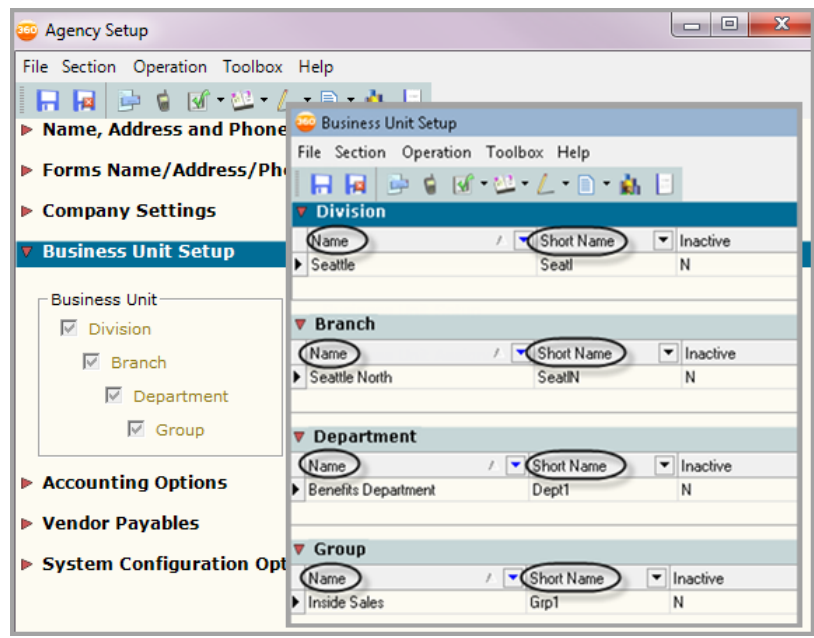


## **Business Unit**

Reporting Table	Reporting Column	Description	Where the data is entered in AMS360
<b>Business Unit</b>	Division Name Division Short Name	Business Unit associated with Policy - Division	
<b>Business Unit</b>	Branch Name Branch Short Name	Business Unit associated with Policy - Branch	
<b>Business Unit</b>	Department Name Department Short Name	Business Unit associated with Policy - Department	
<b>Business Unit</b>	Group Name Group Short Name	Business Unit associated with Policy - Group	
<b>Business Unit</b>	Division Name		
<b>Business Unit</b>	Division Short Name		
<b>Business Unit</b>	Branch Name		
<b>Business Unit</b>	Branch Short Name		
<b>Business Unit</b>	Department Name		

Reporting Table	Reporting Column	Description	Where the data is entered in AMS360
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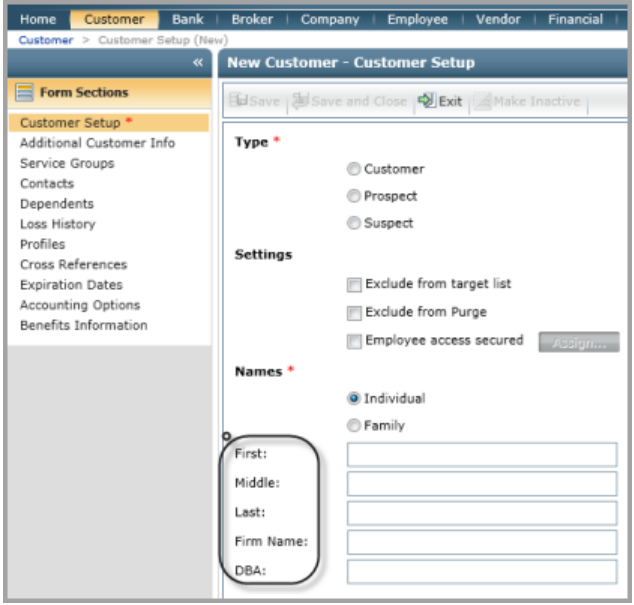
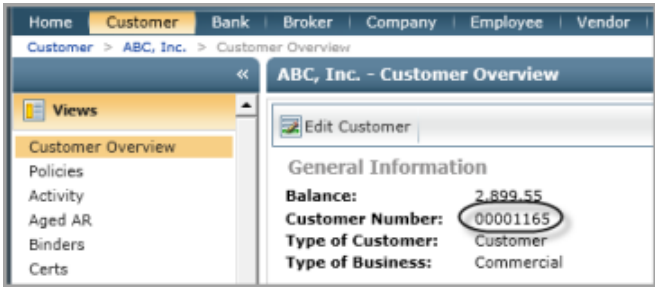
<b>Business Unit</b>	Department Short Name		
<b>Business Unit</b>	Group Name		
<b>Business Unit</b>	Group Short Name	Customer Firm Name	

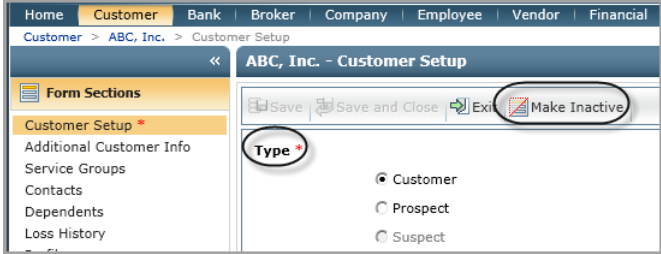
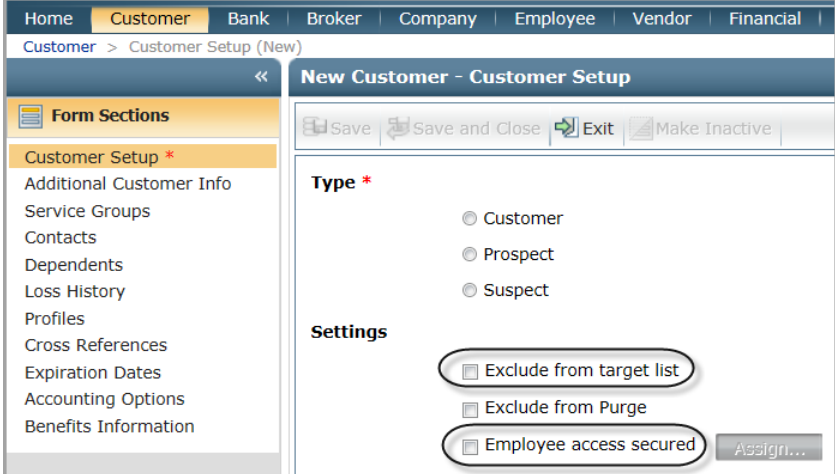
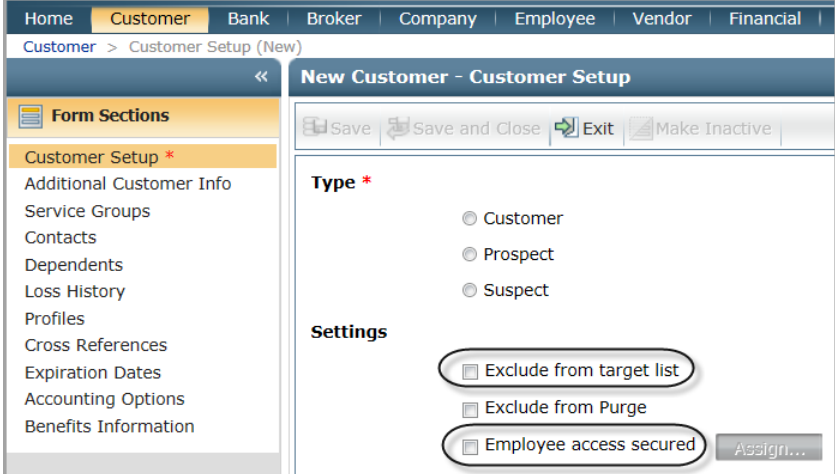


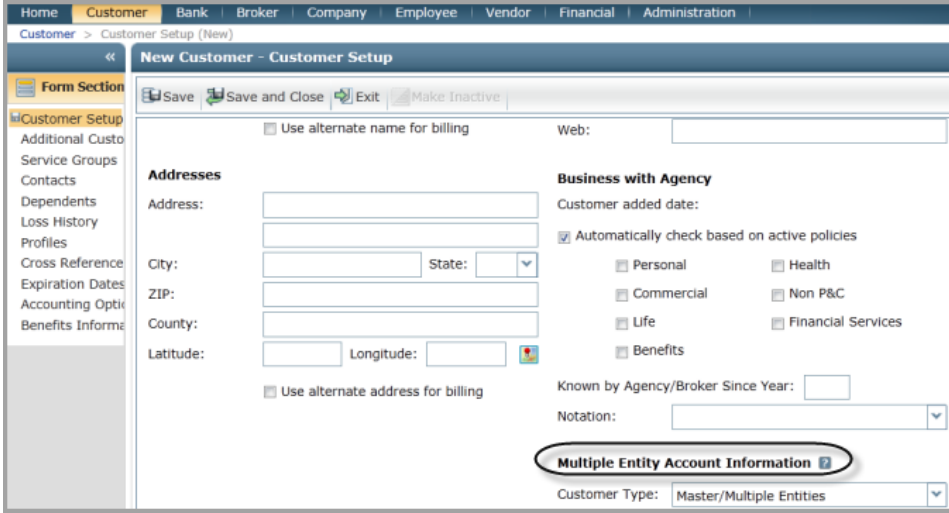



**Customer**



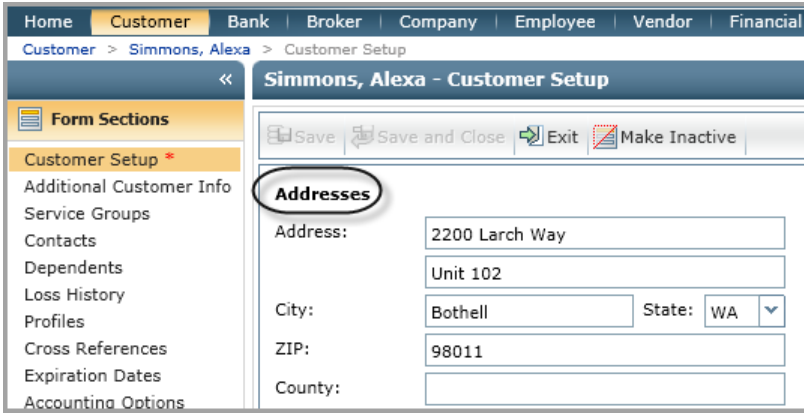
Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
<b>Customer</b>	Formatted Name	Formatted Name is Firm Name; if no Firm name is entered, then Formatted Name will be a combination of Last Name, First Name Middle Name	
<b>Customer</b>	Firm Name	Customer Firm Name	
<b>Customer</b>	First Name	Customer First Name	
<b>Customer</b>	Middle Name	Customer Middle Name	
<b>Customer</b>	Last Name	Customer Last Name	
<b>Customer</b>	Customer Number	Customer Number	
<b>Customer</b>	Customer Type	Customer Type: Customer, Prospect, or Suspect	

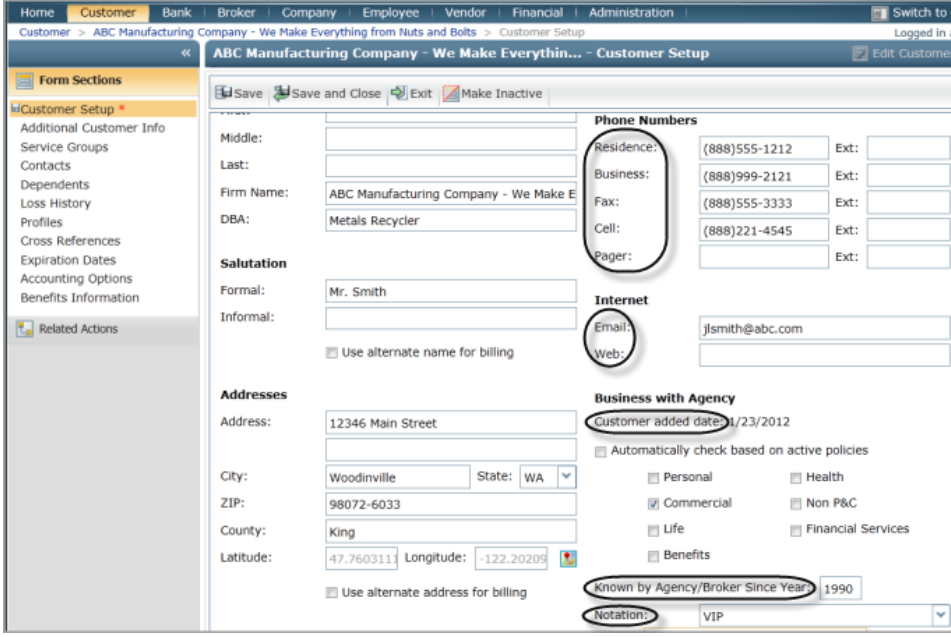
Where the Customer information is entered in AMS360			
Reporting Table	Reporting Column	Description	
Customer	Active	Indicator denoting active or inactive	
Customer	Target List Exclude	Exclude customer from marketing's target list	
Customer	Secured Customer	Employee access secured	

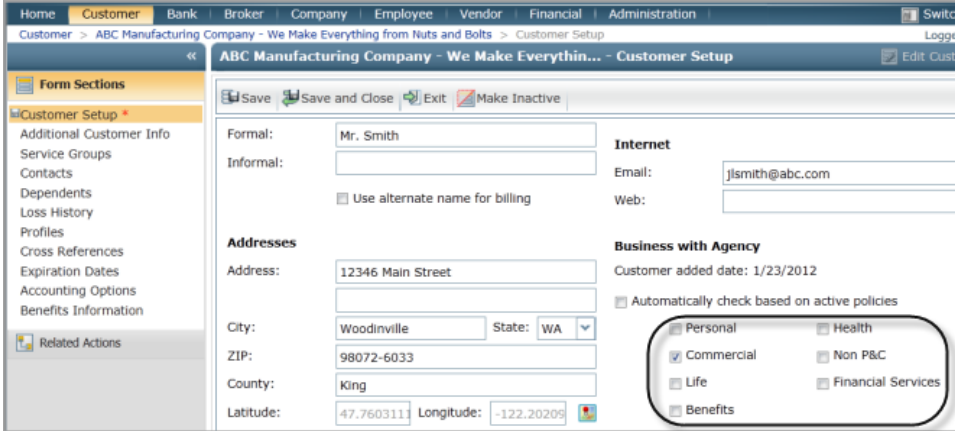
Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
<b>Customer</b>	Multiple Entity Group	Multiple Entity customers share policy coverage with the policy detail entered and tracked via the Master customer	
<b>Customer</b>	Individual/Family	Individual name or Multiple first names (Family) for personal lines of business	

**Where the Customer information is entered in AMS360**

Reporting Table	Reporting Column	Description
<b>Customer</b>	Address Line 1	Customer Address Line 1
<b>Customer</b>	Address Line 2	Customer Address Line 2
<b>Customer</b>	City	Customer City
<b>Customer</b>	State	Customer State
<b>Customer</b>	Zip Code	Customer Zip Code
<b>Customer</b>	Residence Phone	Customer Residence Phone
<b>Customer</b>	Business Phone	Customer Business Phone
<b>Customer</b>	Fax Phone	Customer Fax
<b>Customer</b>	Mobile Phone	Customer Cell
<b>Customer</b>	Pager Phone	Customer Pager
<b>Customer</b>	Email	Customer Email
<b>Customer</b>	Website	Customer Web
<b>Customer</b>	Added	Known by Agency/Broker Since Year



Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Known Since	Customer added date	
Customer	Notation	Notation	

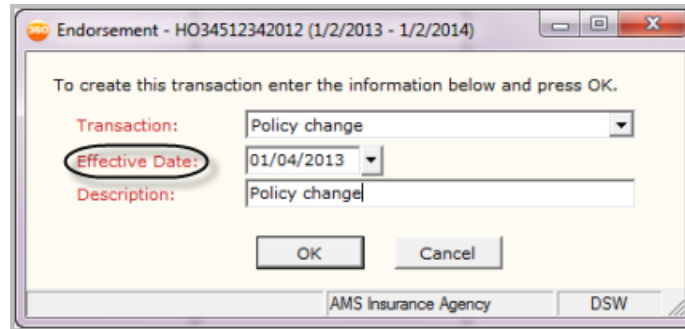
Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Personal Lines Business	Business with Agency – Personal Lines	
Customer	Commercial Lines Business	Business with Agency – Commercial Lines	
Customer	Non P&C Business	Business with Agency – Non P&C Business	
Customer	Benefits	Business with Agency – Benefits	
Customer	Life	Business with Agency – Life	
Customer	Health	Business with Agency – Health	
Customer	Financial Services	Business with Agency – Financial Services	



## Transaction

Reporting Table	Reporting Column	Description	Where the Transaction information is entered in AMS360
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<b>Transaction</b>	Effective Date	Transaction Effective Date	
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Endorsement - HO34512342012 (1/2/2013 - 1/2/2014)

To create this transaction enter the information below and press OK.

Transaction: Policy change

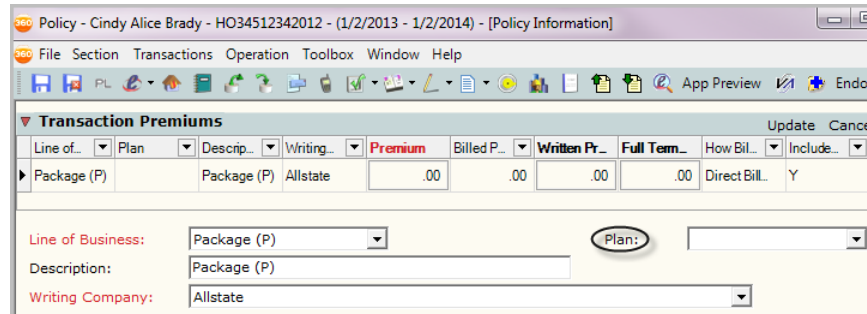
Effective Date: 01/04/2013

Description: Policy change

OK Cancel

AMS Insurance Agency DSW

<b>Transaction</b>	Plan Type	Plan Type	
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Policy - Cindy Alice Brady - HO34512342012 - (1/2/2013 - 1/2/2014) - [Policy Information]

File Section Transactions Operation Toolbox Window Help

Transaction Premiums

Line of..	Plan	Descrip..	Writing..	Premium	Billed P..	Written Pr..	Full Term..	How Bil..	Include..
Package (P)		Package (P)	Allstate	.00	.00	.00	.00	Direct Bil..	Y

Line of Business: Package (P) Plan: [ ]

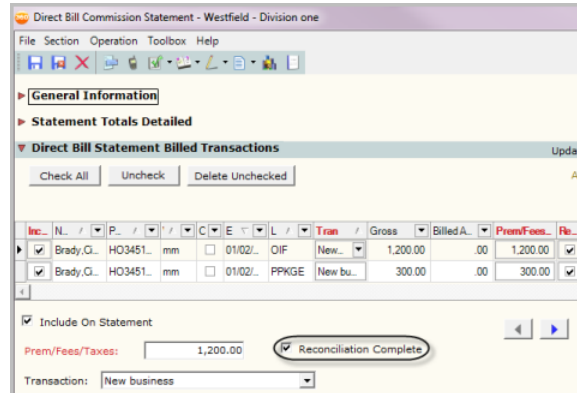
Description: Package (P)

Writing Company: Allstate



Reporting Table	Reporting Column	Description	Where the Transaction information is entered in AMS360
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<b>Transaction</b>	Reconciled	Reconciliation Complete – Yes/No/Does Not Apply
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Direct Bill Commission Statement - Westfield - Division one

File Section Operation Toolbox Help

General Information

Statement Totals Detailed

Direct Bill Statement Billed Transactions Update

Check All Uncheck Delete Unchecked

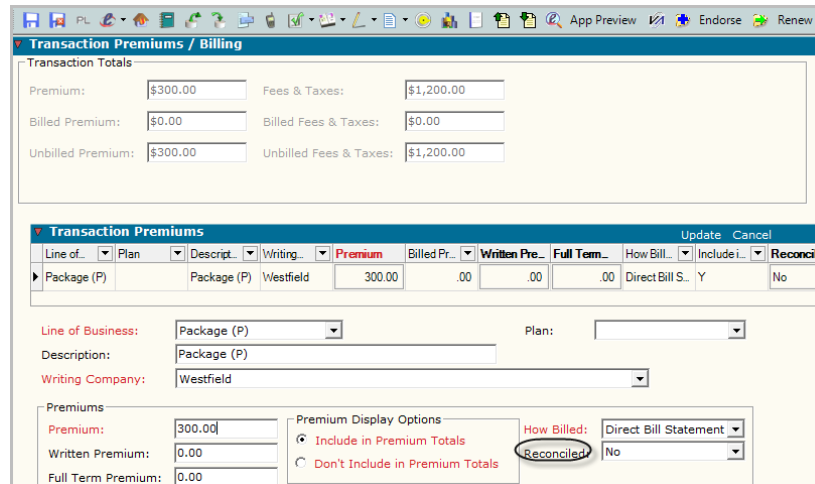
Inc.	N.	P.	C	E	L	Tran	Gross	Billed A.	Prem/Fees	Re...	
<input checked="" type="checkbox"/>	Brady.C.	HO3451.	mm	<input type="checkbox"/>	01/02/.	OIF	New..	1,200.00	.00	1,200.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Brady.C.	HO3451.	mm	<input type="checkbox"/>	01/02/.	FPKGE	New bu..	300.00	.00	300.00	<input checked="" type="checkbox"/>

Include On Statement

Prem/Fees/Taxes: 1,200.00  Reconciliation Complete

Transaction: New business

OR



Transaction Premiums / Billing

Transaction Totals

Premium:	\$300.00	Fees & Taxes:	\$1,200.00
Billed Premium:	\$0.00	Billed Fees & Taxes:	\$0.00
Unbilled Premium:	\$300.00	Unbilled Fees & Taxes:	\$1,200.00

Transaction Premiums Update Cancel

Line of..	Plan	Descript..	Writing..	Premium	Billed Pr..	Written Pre..	Full Term..	How Bill..	Include I..	Reconciled
Package (P)		Package (P)	Westfield	300.00	.00	.00	.00	Direct Bill S..	Y	No

Line of Business: Package (P) Plan: [ ]

Description: Package (P)

Writing Company: Westfield

Premiums

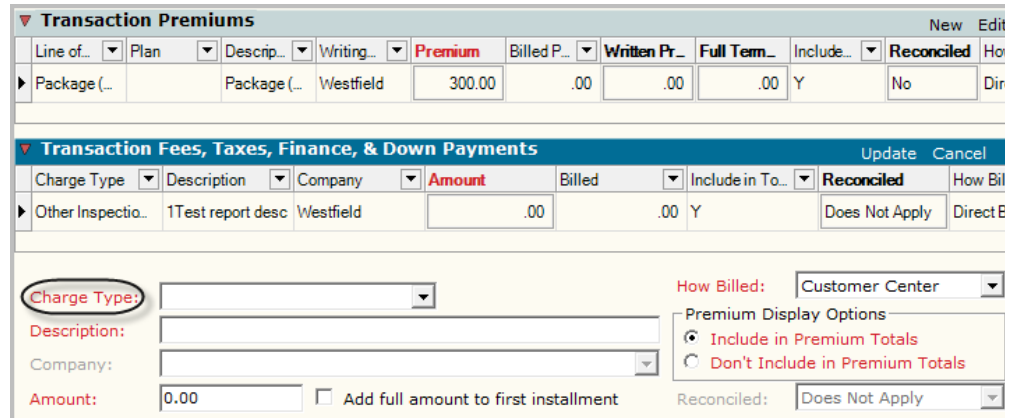
Premium:	300.00	Premium Display Options
Written Premium:	0.00	
Full Term Premium:	0.00	

Include in Premium Totals  Don't Include in Premium Totals

How Billed: Direct Bill Statement  Reconciled

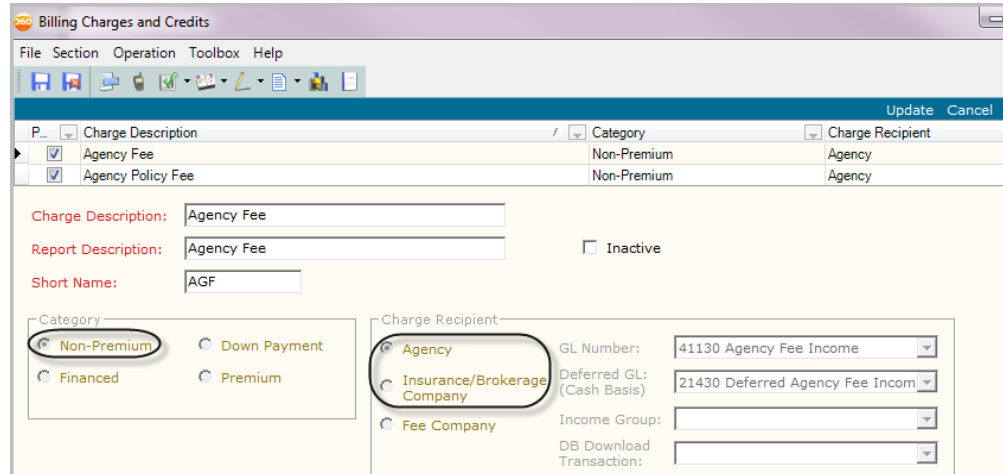
Reporting Table	Reporting Column	Description	Where the Transaction information is entered in AMS360
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<b>Transaction</b>	Fee Type	Non-Premium (Charge Type)
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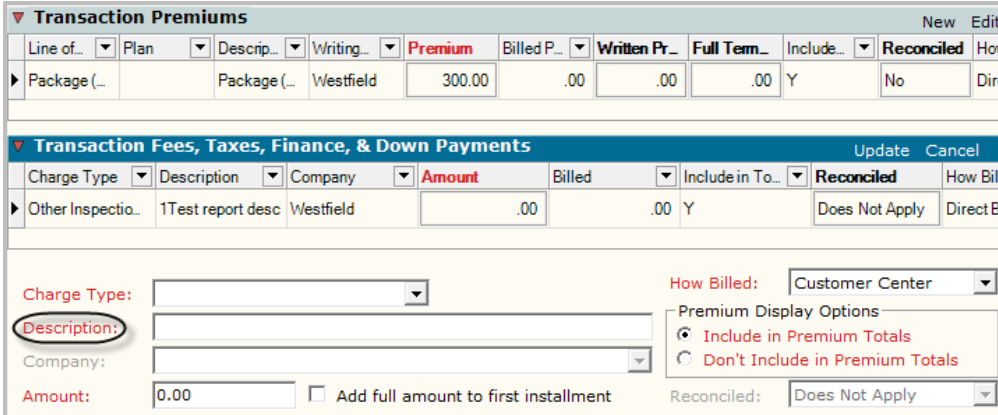
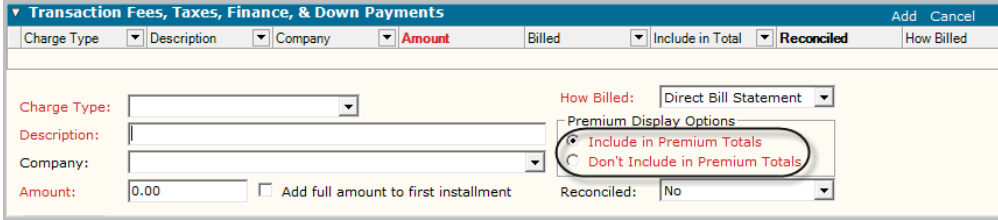
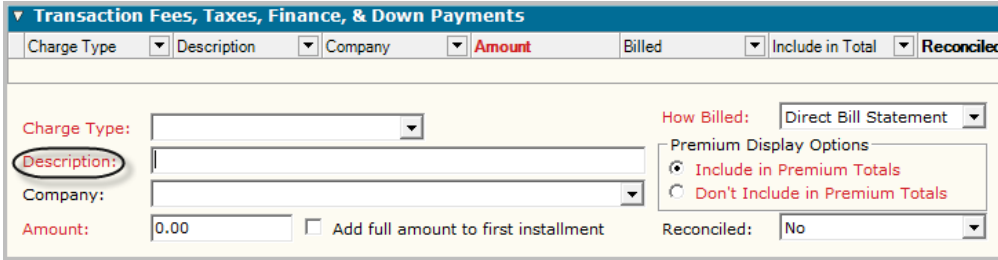


The screenshot shows the 'Transaction Premiums' and 'Transaction Fees, Taxes, Finance, & Down Payments' sections. The 'Transaction Premiums' table has columns for Line of..., Plan, Descrip..., Writing..., Premium, Billed P..., Written Pr..., Full Term..., Include..., and Reconciled. A row shows 'Package (...)' with a Premium of 300.00. The 'Transaction Fees...' section has columns for Charge Type, Description, Company, Amount, Billed, Include in To..., Reconciled, and How Bil. A row shows '1Test report desc' with an Amount of .00. Below these tables are input fields for 'Charge Type', 'Description', 'Company', and 'Amount' (set to 0.00). There are also options for 'How Billed' (set to Customer Center), 'Premium Display Options' (radio buttons for 'Include in Premium Totals' and 'Don't Include in Premium Totals'), and 'Reconciled' (set to Does Not Apply).

When the Charge Type is set up in Billing Charges and Credits as Non-Premium as in the following example:

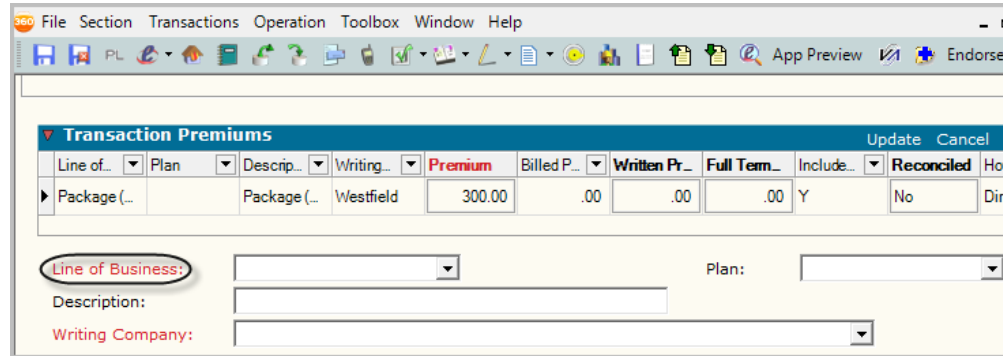


The screenshot shows the 'Billing Charges and Credits' setup window. It has a menu bar (File, Section, Operation, Toolbox, Help) and a toolbar. Below is a table with columns: P\_ (checkbox), Charge Description, Category, and Charge Recipient. Two rows are shown: 'Agency Fee' (checked, Non-Premium, Agency) and 'Agency Policy Fee' (checked, Non-Premium, Agency). Below the table are input fields for 'Charge Description' (Agency Fee), 'Report Description' (Agency Fee), and 'Short Name' (AGF). There is an 'Inactive' checkbox. At the bottom, there are two sections: 'Category' with radio buttons for 'Non-Premium' (selected), 'Financed', 'Down Payment', and 'Premium'; and 'Charge Recipient' with radio buttons for 'Agency' (selected), 'Insurance/Brokerage Company', and 'Fee Company'. To the right of 'Charge Recipient' are dropdown menus for 'GL Number' (41130 Agency Fee Income), 'Deferred GL: (Cash Basis)' (21430 Deferred Agency Fee Incom), 'Income Group', and 'DB Download Transaction'.

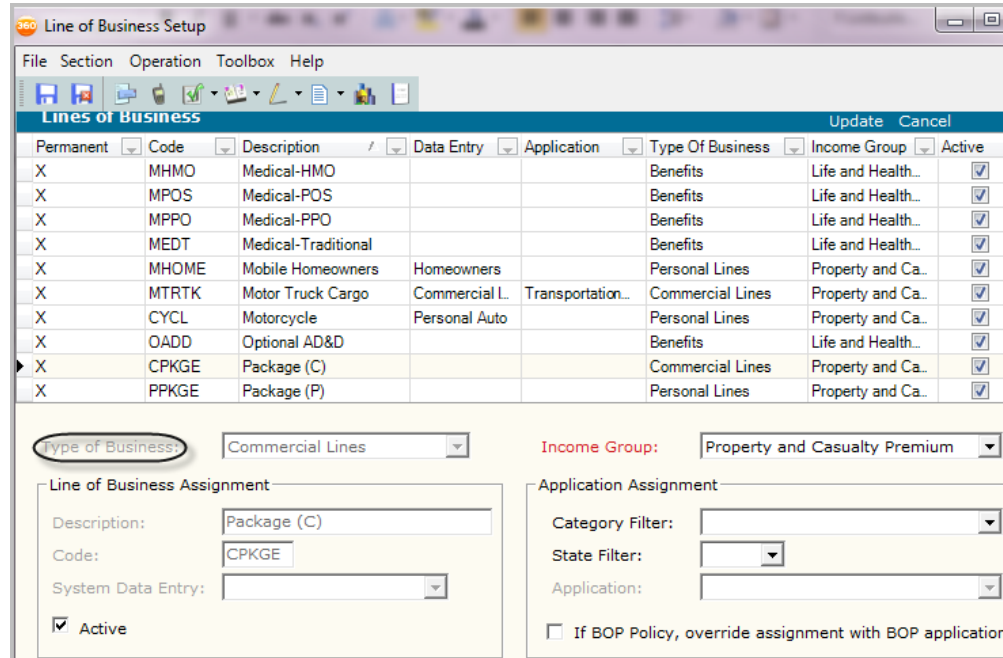
Reporting Table	Reporting Column	Description	Where the Transaction information is entered in AMS360
Transaction	Non-Premium	Non-Premium (Charge Type - Description)	 <p>The screenshot shows the 'Transaction Premiums' and 'Transaction Fees, Taxes, Finance, &amp; Down Payments' sections. The 'Description' field in the 'Transaction Fees' section is circled in red.</p>
Transaction	Include Premium	Indicates if the Premium should or should not be included in premium totals	 <p>The screenshot shows the 'Transaction Fees, Taxes, Finance, &amp; Down Payments' section. The 'Include in Premium Totals' radio button is selected and circled in red.</p> <p>In Reporting:  Y = Include in Premium Totals  N = Don't include in Premium Totals</p>
Transaction	Line of Business	Line of Business Description	 <p>The screenshot shows the 'Transaction Fees, Taxes, Finance, &amp; Down Payments' section. The 'Description' field is circled in red.</p>

Reporting Table	Reporting Column	Description	Where the Transaction information is entered in AMS360
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<b>Transaction</b>	Line of Business Short Name
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<b>Transaction</b>	Type of Business	Type of Business: Benefits Commercial Lines Financial Services Health Life Non Property & Casualty Personal Lines
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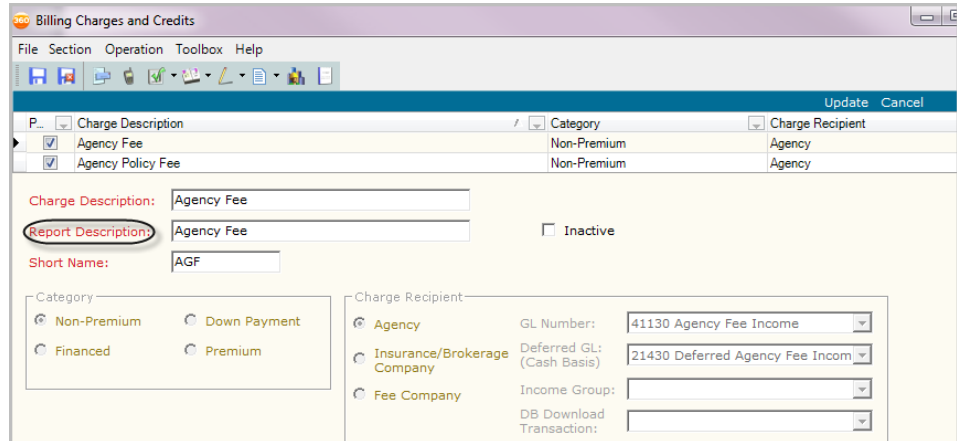


This value is implied based on the Line of Business selected for the policy transaction. The setup is shown in this screen shot above.

## Fee

Reporting Table	Reporting Column	Description	Where the Fee information is entered in AMS360
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<b>Fee</b>	Fee	Billing Charges and Credits: Report Description
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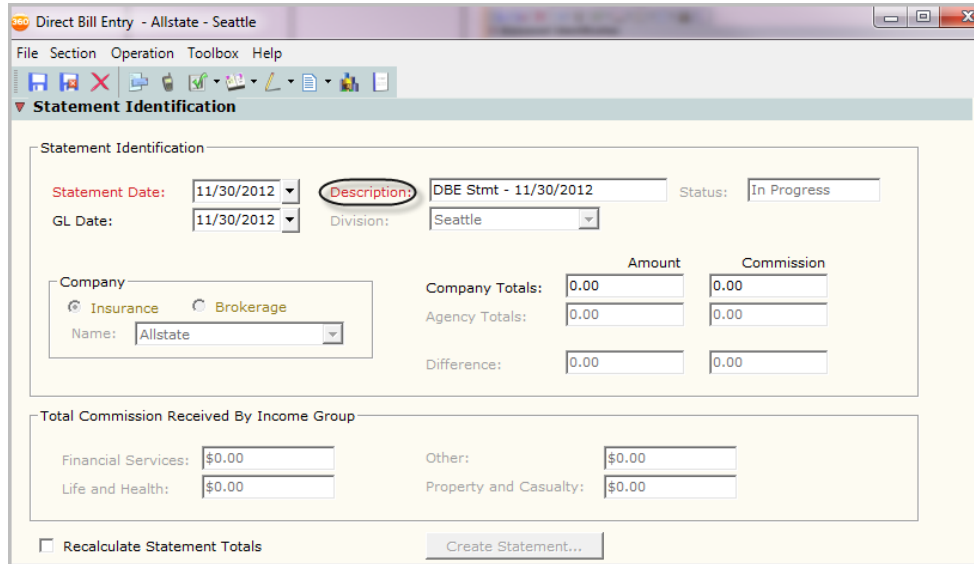




## Direct Bill Entry

Reporting Table	Reporting Column	Description	Where the Direct Bill Entry information is entered in AMS360
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<b>Direct Bill Entry</b>	Description	Direct Bill Entry Description
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**Statement Identification**

Statement Date: 11/30/2012 **Description:** DBE Stmt - 11/30/2012 Status: In Progress  
 GL Date: 11/30/2012 Division: Seattle

Company: Allstate

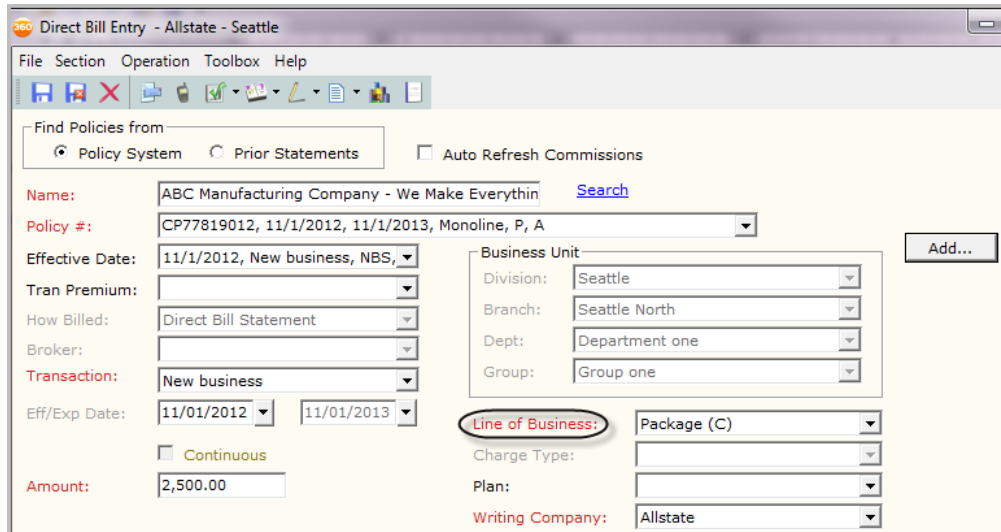
	Amount	Commission
Company Totals:	0.00	0.00
Agency Totals:	0.00	0.00
Difference:	0.00	0.00

**Total Commission Received By Income Group**

Financial Services:	\$0.00	Other:	\$0.00
Life and Health:	\$0.00	Property and Casualty:	\$0.00

Recalculate Statement Totals Create Statement...

<b>Direct Bill Entry</b>	Line of Business	Line of Business for Direct Bill Entry
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**Find Policies from**

Policy System  Prior Statements  Auto Refresh Commissions

Name: ABC Manufacturing Company - We Make Everythin [Search](#)  
 Policy #: CP77819012, 11/1/2012, 11/1/2013, Monoline, P, A

Effective Date: 11/1/2012, New business, NBS, Add...  
 Tran Premium:   
 How Billed: Direct Bill Statement  
 Broker:   
 Transaction: New business  
 Eff/Exp Date: 11/01/2012 11/01/2013  
 Continuous  
 Amount: 2,500.00

**Business Unit**

Division: Seattle  
 Branch: Seattle North  
 Dept: Department one  
 Group: Group one

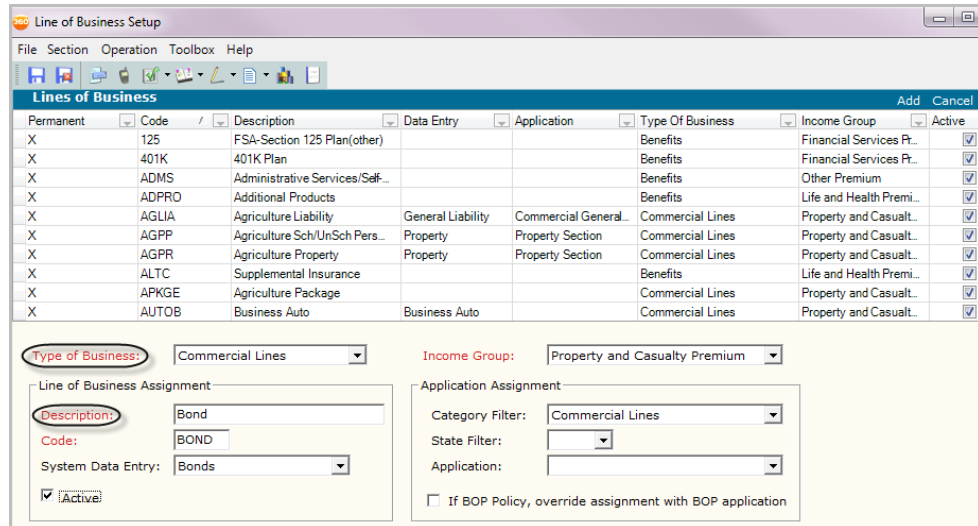
**Line of Business:** Package (C)  
 Charge Type:   
 Plan:   
 Writing Company: Allstate

## Line of Business

**Reporting Table      Reporting Column      Description      Where the Line of Business information is entered in AMS360**

**Line of Business**      Type of Business      Group data by Type of Business from the Line of Business Setup

**Line of Business**      Line of Business      Group data by Line of Business from the Line of Business Setup



The screenshot shows the 'Line of Business Setup' window. At the top is a menu bar with 'File', 'Section', 'Operation', 'Toolbox', and 'Help'. Below the menu is a toolbar with various icons. The main area contains a table titled 'Lines of Business' with columns: Permanent, Code, Description, Data Entry, Application, Type Of Business, Income Group, and Active. The table lists various lines of business such as 'FSA-Section 125 Plan(other)', '401K Plan', 'Administrative Services/Self...', 'Additional Products', 'Agriculture Liability', 'Agriculture Sch/UnSch Pers...', 'Agriculture Property', 'Supplemental Insurance', 'Agriculture Package', and 'Business Auto'. Below the table are configuration options for the selected line. The 'Type of Business' dropdown is set to 'Commercial Lines' and the 'Income Group' dropdown is set to 'Property and Casualty Premium'. The 'Line of Business Assignment' section shows 'Description' set to 'Bond', 'Code' set to 'BOND', and 'System Data Entry' set to 'Bonds'. The 'Application Assignment' section shows 'Category Filter' set to 'Commercial Lines', 'State Filter' and 'Application' dropdowns, and a checkbox for 'If BOP Policy, override assignment with BOP application' which is currently unchecked.

Permanent	Code	Description	Data Entry	Application	Type Of Business	Income Group	Active
X	125	FSA-Section 125 Plan(other)			Benefits	Financial Services Pt...	<input checked="" type="checkbox"/>
X	401K	401K Plan			Benefits	Financial Services Pt...	<input checked="" type="checkbox"/>
X	ADMS	Administrative Services/Self...			Benefits	Other Premium	<input checked="" type="checkbox"/>
X	ADPRO	Additional Products			Benefits	Life and Health Premi...	<input checked="" type="checkbox"/>
X	AGLIA	Agriculture Liability	General Liability	Commercial General...	Commercial Lines	Property and Casuallt...	<input checked="" type="checkbox"/>
X	AGPP	Agriculture Sch/UnSch Pers...	Property	Property Section	Commercial Lines	Property and Casuallt...	<input checked="" type="checkbox"/>
X	AGPR	Agriculture Property	Property	Property Section	Commercial Lines	Property and Casuallt...	<input checked="" type="checkbox"/>
X	ALTC	Supplemental Insurance			Benefits	Life and Health Premi...	<input checked="" type="checkbox"/>
X	APKGE	Agriculture Package			Commercial Lines	Property and Casuallt...	<input checked="" type="checkbox"/>
X	AUTOB	Business Auto	Business Auto		Commercial Lines	Property and Casuallt...	<input checked="" type="checkbox"/>

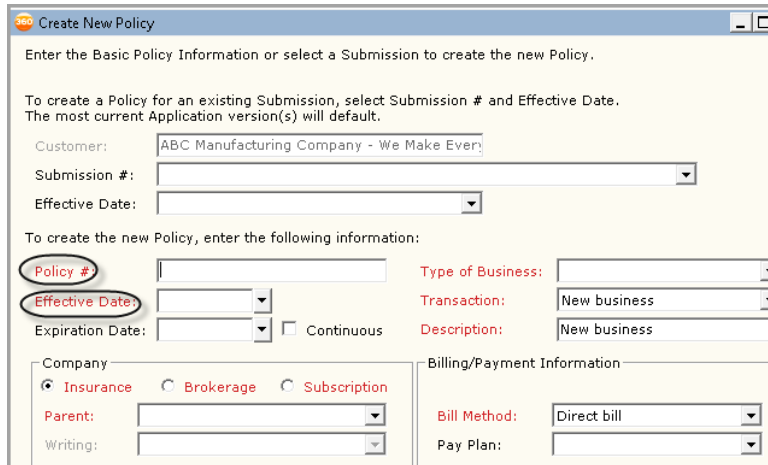




## Policy

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
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<b>Policy</b>	Policy #	Policy Number
<b>Policy</b>	Effective Date	Policy Effective Date



**Create New Policy**

Enter the Basic Policy Information or select a Submission to create the new Policy.

To create a Policy for an existing Submission, select Submission # and Effective Date. The most current Application version(s) will default.

Customer: [ABC Manufacturing Company - We Make Ever]

Submission #: [ ]

Effective Date: [ ]

To create the new Policy, enter the following information:

**Policy #:** [ ]      **Type of Business:** [ ]

**Effective Date:** [ ]      **Transaction:** [New business]

Expiration Date: [ ]       Continuous      **Description:** [New business]

**Company**

Insurance     Brokerage     Subscription

**Parent:** [ ]

**Writing:** [ ]

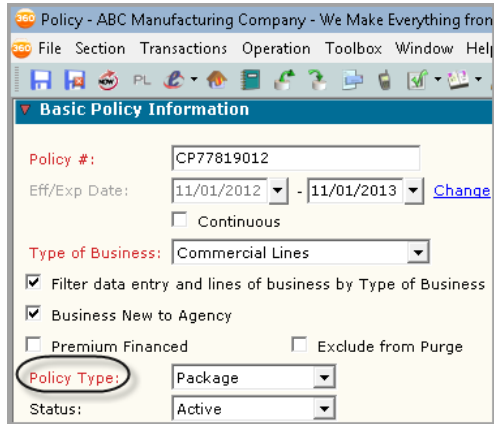
**Billing/Payment Information**

**Bill Method:** [Direct bill]

**Pay Plan:** [ ]

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
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<b>Policy</b>	Policy Type	<p>Displays "Package" or "BOP" when Policy Type = Package or Business Owners Package.</p> <p>When Policy Type = Monoline and multiple lines of business have been entered, the first Line of Business displays. If no Line of Business exists, then "Monoline" displays.</p>	
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Policy - ABC Manufacturing Company - We Make Everything from

File Section Transactions Operation Toolbox Window Help

**Basic Policy Information**

Policy #: CP77819012

Eff/Exp Date: 11/01/2012 - 11/01/2013 [Change](#)

Continuous

Type of Business: Commercial Lines

Filter data entry and lines of business by Type of Business

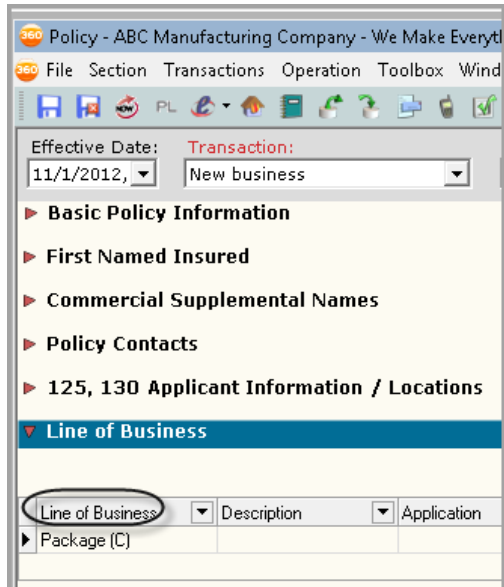
Business New to Agency

Premium Financed  Exclude from Purge

**Policy Type:** Package

Status: Active

OR



Policy - ABC Manufacturing Company - We Make Everytl

File Section Transactions Operation Toolbox Wind

Effective Date: 11/1/2012, Transaction: New business

**Basic Policy Information**

**First Named Insured**

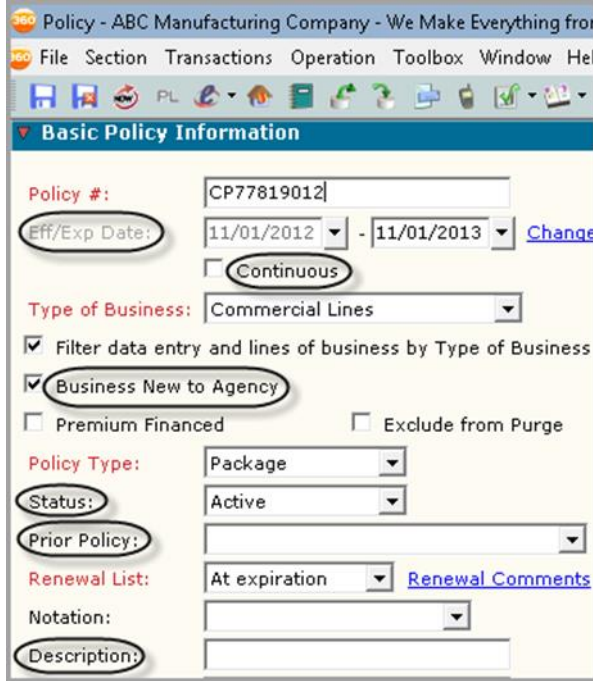
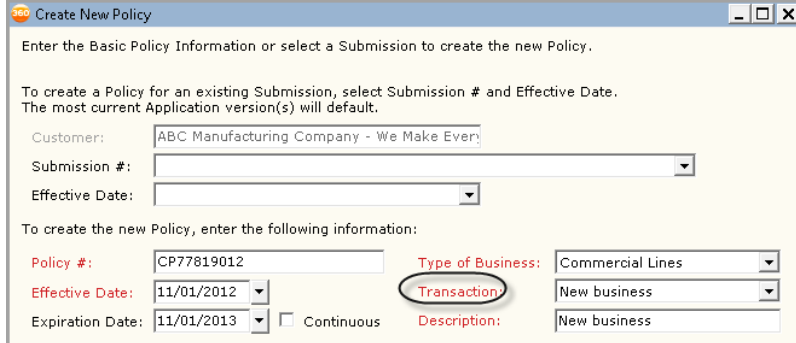
**Commercial Supplemental Names**

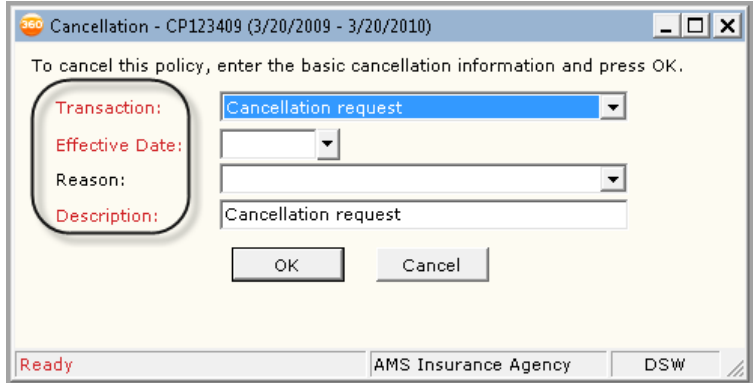
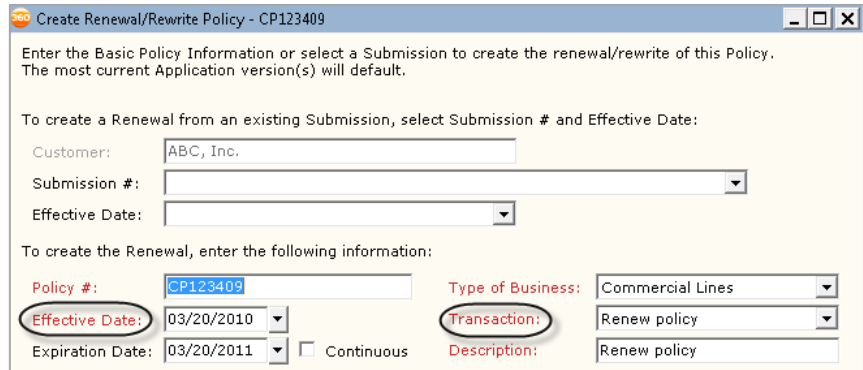
**Policy Contacts**

**125, 130 Applicant Information / Locations**

**Line of Business**

Line of Business	Description	Application
Package (C)		

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
<b>Policy</b>	Policy Description	Basic policy information Description	
<b>Policy</b>	Status	Policy Status	
<b>Policy</b>	Expiration Date	Policy Expiration Date	
<b>Policy</b>	Is Continuous	Indicator to denote whether policy is continuous	
<b>Policy</b>	Prior Policy #	Prior Policy Number	
<b>Policy</b>	New Business to Agency	Indicator to denote whether this Business is new to this agency	
<b>Policy</b>	Original Transaction	Transaction type when policy is first created	

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
<b>Policy</b>	Canceled Policy	Indicator denoting whether the policy has been cancelled (Yes/No)  Canceled Policy = 'Yes' when the latest policy transaction is Cancellation Confirmation	
<b>Policy</b>	Canceled Reason	Reason for Cancellation	
<b>Policy</b>	Canceled Date	Effective Date of the Cancellation	
<b>Policy</b>	Non-Renewal	Non-Renewal = Yes when the latest policy transaction is NRA, "Non-renewal notified Agency" or RWX, "Non-renewal notified PolHolder"	
<b>Policy</b>	Non-Renewal Date	Non-Renewal Date is the transaction effective date for NRA or RWX when one of these transactions is the latest policy transaction	

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
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<b>Policy</b>	Billed DBE Premium	Billed DBE Premium is from DB Entry Billed.  This is the amount that was billed on Direct Bill Entry statements.	
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**Basic Policy Information**

Policy #: CP54566514

Eff/Exp Date: 06/28/2015 - 06/28/2016 [Change](#)

Continuous

Type of Business: Commercial Lines

Filter data entry and lines of business by Type of Business

Business New to Agency

Premium Financed  Exclude from Purge

Policy Type: Monoline

Status: Active

Prior Policy: CP54566514, 6/28/2014, 6/28/2015, †

Renewal List: At expiration [Renewal Comments](#)

Notation: [dropdown]

Description: [text box]

Origin: Data entry

Auditable? Frequency: [dropdown]

Signature on App: [dropdown]

**Billing/Payment**

Bill Method: Direct bill Number of Payments: [input]

Pay Plan: [dropdown]

Payment Method: [dropdown]

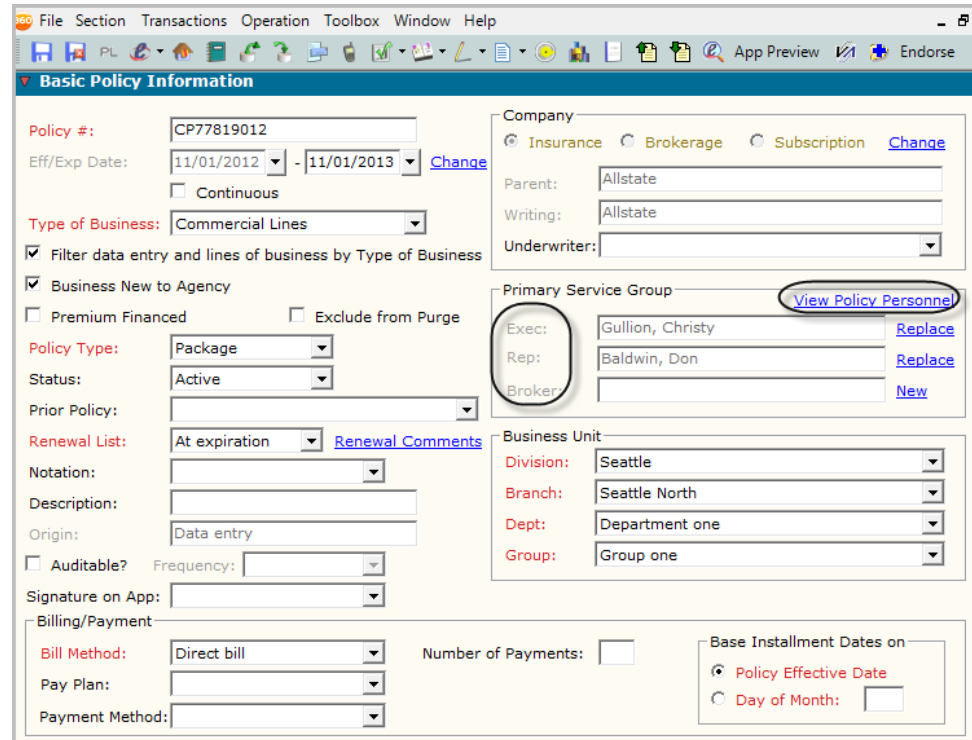
Base Installment Dates on  
 Policy Effective Date  
 Day of Month: [input]

**Policy Premium Totals**

Premium:	\$0.00	Fees & Taxes:	\$0.00	<b>DB Entry Billed:</b>	<b>\$2,600.00</b>
Billed Premium:	\$0.00	Billed Fees & Taxes:	\$0.00	Cost of Insurance:	\$0.00
Unbilled Premium:	\$0.00	Unbilled Fees & Taxes:	\$0.00	Full Term Premium:	\$0.00

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
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<b>Policy</b>	Primary Exec	Policy/Original Exec is the Primary Exec on the first invoice
<b>Policy</b>	Primary Rep	Primary Rep on a policy
<b>Policy</b>	Original Exec	The first Exec on a policy
<b>Policy</b>	Original Rep	Policy/Original Rep is the Primary Rep on the first invoice
<b>Policy</b>	Current Broker	Broker
<b>Policy</b>	Original Broker	The Broker on the first invoice

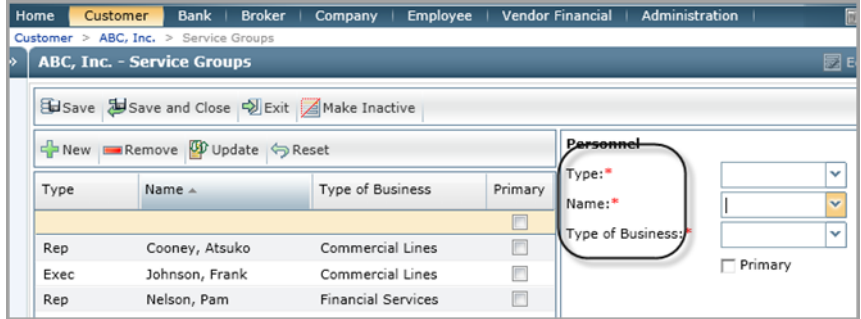


When Original Exec is different from Primary Exec, an Exec change occurred after the policy was billed. When Original Rep is different from Primary Rep, a Rep change occurred after the policy was billed.

<b>Policy</b>	Policy Sub-Type	Flag that indicates if the row is for a policy, submission, or an accounting policy (generated when processing a direct bill statement).
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**Accounting policy is generated when the policy processed on a Direct Bill Entry statement is not associated with an existing policy. Accounting policies are not displayed in AMS360.**

- Valid values are:
- A=Accounting
  - P=Policy
  - S=Submission

Reporting Table	Reporting Column	Description	Where the Policy information is entered in AMS360
<b>Policy</b>	Additional Exec 1	First Additional Executive	
<b>Policy</b>	Additional Exec 2	Second Additional Executive	
<b>Policy</b>	Additional Rep 1	First Additional Rep	
<b>Policy</b>	Additional Rep 2	Second Additional Rep	



## Lost Business Date

Reporting Table	Reporting Column	Description	How the Day, Month, Week, and other Dates are calculated in AMS360
<b>Lost Business Date</b>	Calendar Month	Month Number (1-12)	<b>Calculated from the expiration, non-renewal, or cancellation date of a policy where no other active policy exists that contains the line of business.</b>
<b>Lost Business Date</b>	Calendar Week	Week Number (1-52)	
<b>Lost Business Date</b>	Calendar Year	Year (4 digits)	
<b>Lost Business Date</b>	Day Ago Date	The date one day before the Fee or Line of Business was lost	
<b>Lost Business Date</b>	Day Date	Date when the Fee or Line of Business was lost	
<b>Lost Business Date</b>	Day Name	Weekday name of the date the Fee or Line of Business was lost	
<b>Lost Business Date</b>	Day Of Month	Day of month when the Fee or Line of Business was lost (numeric)	
<b>Lost Business Date</b>	Day Of Week	Day of week when the Fee or Line of Business was lost (numeric)	

Reporting Table	Reporting Column	Description	How the Day, Month, Week, and other Dates are calculated in AMS360
<b>Lost Business Date</b>	Day Of Year	Day of year when the Fee or Line of Business was lost (numeric)	<b>Calculated from the expiration, non-renewal or cancellation date of a policy where no other active policy exists that contains the line of business.</b>
<b>Lost Business Date</b>	Fiscal Year	Fiscal year when the Fee or Line of Business was lost (4 digits)	
<b>Lost Business Date</b>	Fiscal Quarter	Fiscal quarter when the Fee or Line of Business was lost (numeric)	
<b>Lost Business Date</b>	Fiscal Month	Fiscal month when the Fee or Line of Business was lost (numeric)	
<b>Lost Business Date</b>	Month Ago Date	The date one month before the Fee or Line of Business was lost	
<b>Lost Business Date</b>	Month Name	Month name when the Fee or Line of Business was lost	
<b>Lost Business Date</b>	Quarter Ago Date	The date one quarter before the Fee or Line of Business was lost	
<b>Lost Business Date</b>	Week Ago Date	The date one week before the Fee or Line of Business was lost	

Reporting Table	Reporting Column	Description	How the Day, Month, Week, and other Dates are calculated in AMS360
<b>Lost Business Date</b>	Year Ago Date	The date one year before the Fee or Line of Business was lost	<b>Calculated from the expiration, non-renewal or cancellation date of a policy where no other active policy exists that contains the line of business.</b>
<b>Lost Business Date</b>	Year Quarter	The year and quarter when the Fee or Line of Business was lost (IE: 2012/Q1)	
<b>Lost Business Date</b>	Year Month	The year and month when the Fee or Line of Business was lost (IE: 2012/06)	
<b>Lost Business Date</b>	Calendar Month	Month Number (1-12)	
<b>Customer Lost Date</b>	Calendar Week	Week Number (1-52)	<b>Calculated from the expiration, non-renewal, or cancellation date of the last policy for the customer where no other active policies exist.</b>
<b>Customer Lost Date</b>	Calendar Year	Year (4 digits)	
<b>Customer Lost Date</b>	Day Ago Date	The date one day before the Customer was completely lost	
<b>Customer Lost Date</b>	Day Date	Date when the Customer was completely lost	
<b>Customer Lost Date</b>	Day Name	Weekday name of the date the Customer was completely lost	<b>Calculated from the expiration, non-renewal, or cancellation date of the last policy for the customer where no other active policies exist.</b>

Reporting Table	Reporting Column	Description	How the Day, Month, Week, and other Dates are calculated in AMS360
<b>Customer Lost Date</b>	Day Of Month	Day of month when the Customer was completely lost (numeric)	
<b>Customer Lost Date</b>	Day Of Week	Day of week when the Customer was completely lost (numeric)	
<b>Customer Lost Date</b>	Day Of Year	Day of year when the Customer was completely lost (numeric)	
<b>Customer Lost Date</b>	Day Of Year	Day of year when the Customer was completely lost (numeric)	
<b>Customer Lost Date</b>	Fiscal Year	Fiscal year when the Customer was completely lost (4 digits)	
<b>Customer Lost Date</b>	Fiscal Quarter	Fiscal quarter when the Customer was completely lost (numeric)	
<b>Customer Lost Date</b>	Fiscal Month	Fiscal month when the Customer was completely lost (numeric)	
<b>Customer Lost Date</b>	Month Ago Date	The date one month before the Customer was completely lost	<b>Calculated from the expiration, non-renewal, or cancellation date of the last policy for the customer where no other active policies exist.</b>

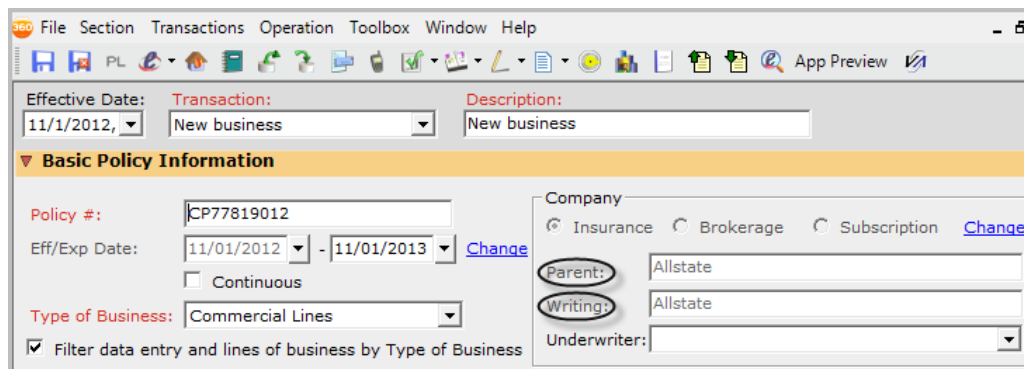
Reporting Table	Reporting Column	Description	How the Day, Month, Week, and other Dates are calculated in AMS360
<b>Customer Lost Date</b>	Month Name	Month name when the Customer was completely lost	
<b>Customer Lost Date</b>	Quarter Ago Date	The date one quarter before the Customer was completely lost	
<b>Customer Lost Date</b>	Week Ago Date	The date one week before the Customer was completely lost	
<b>Customer Lost Date</b>	Year Ago Date	The date one year before the Customer was completely lost	
<b>Customer Lost Date</b>	Year Quarter	The year and quarter when the Customer was completely lost (IE: 2012/Q1)	
<b>Customer Lost Date</b>	Year Quarter	The year and quarter when the Customer was completely lost (IE: 2012/Q1)	



**Company**

Reporting Table	Reporting Column	Description	Where the Company information is entered in AMS360
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<b>Company</b>	Name	Company Name
<b>Company</b>	Short Name	Company Short Name
<b>Company</b>	NAIC	Company NAIC
<b>Company</b>	Company Type	Company Type (Parent Company Type)



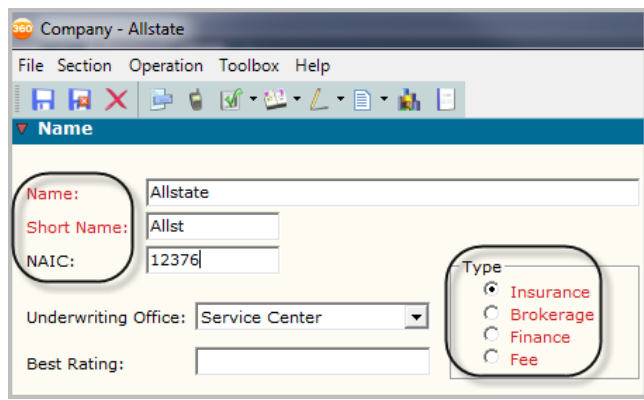
AMS360 File Section Transactions Operation Toolbox Window Help

Effective Date: 11/1/2012, Transaction: New business, Description: New business

**Basic Policy Information**

Policy #: CP77819012  
 Eff/Exp Date: 11/01/2012 - 11/01/2013  
 Type of Business: Commercial Lines  
 Filter data entry and lines of business by Type of Business

Company: Insurance, Brokerage, Subscription  
 Parent: Allstate  
 Writing: Allstate  
 Underwriter:



AMS360 Company - Allstate

File Section Operation Toolbox Help

**Name**

Name: Allstate  
 Short Name: Allst  
 NAIC: 12376  
 Underwriting Office: Service Center  
 Best Rating:

Type: Insurance, Brokerage, Finance, Fee

<b>Writing Company</b>	Writing Co. Name	Writing Company Name
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Reporting Table	Reporting Column	Description	Where the Company information is entered in AMS360
<b>Writing Company</b>	Writing Co. Short Name	Writing Company Short Name	