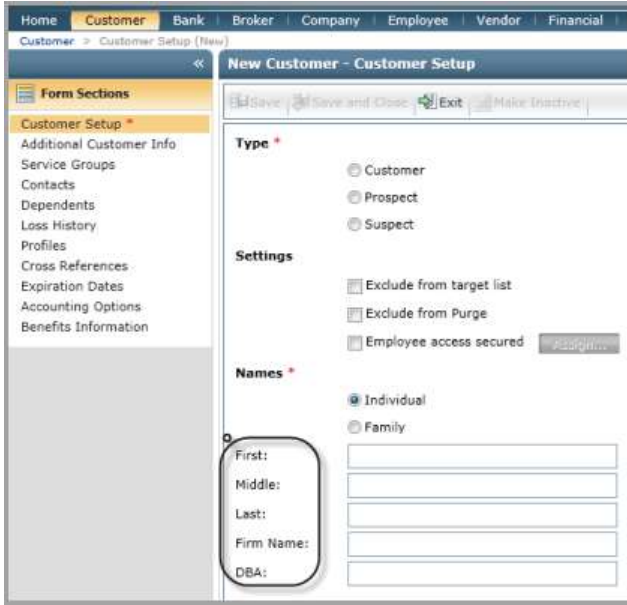


My Agency Reports



Client/Customer

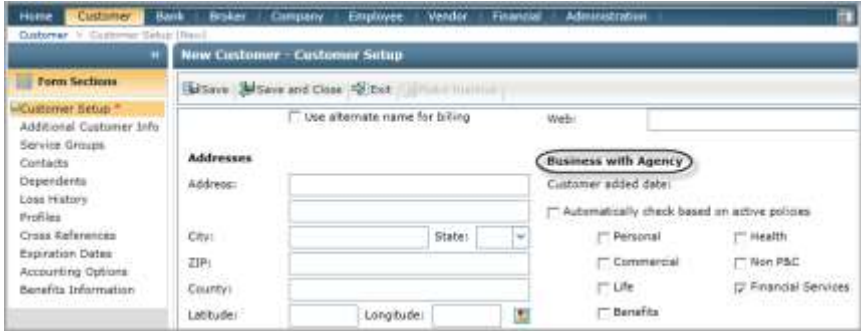
My Agency Reports uses information entered in AMS360 to provide a client count in a Summary View. The count is based on the criteria used to create the report. Use the following information to see how the fields in AMS360 correspond to fields in My Agency Reports.

Customer

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	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	
Customer	Firm Name	Customer Firm Name	
Customer	First Name	Customer First Name	
Customer	Middle Name	Customer Middle Name	
Customer	Last Name	Customer Last Name	

11/25/15

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Customer Number	Customer Number	
Customer	Customer Type	Customer Type: Customer, Prospect, or Suspect	
Customer	Active	Indicator denoting active	

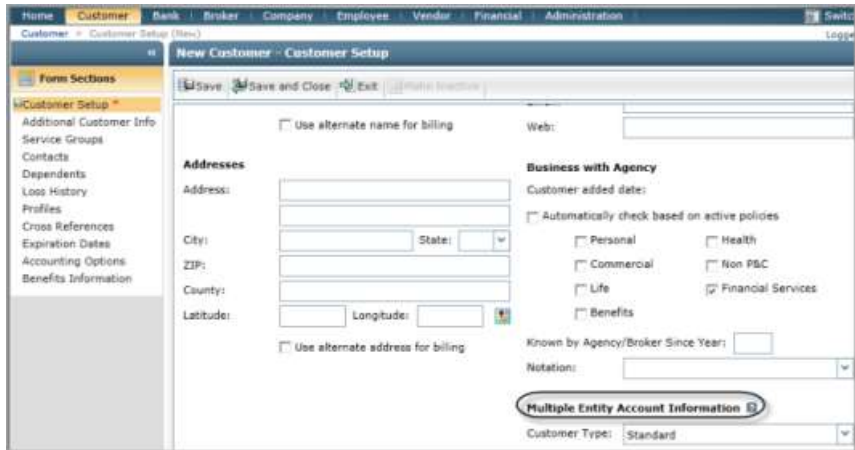
Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Personal Lines Business	Business with Agency – Personal Lines	
Customer	Commercial Lines Business	Business with Agency – Commercial Lines	
Customer	Non P&C Business	Business with Agency – Non P&C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

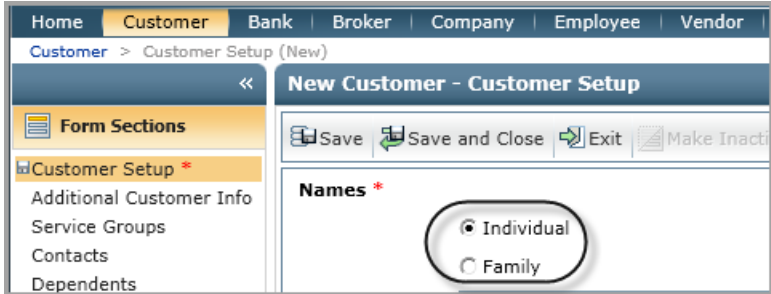

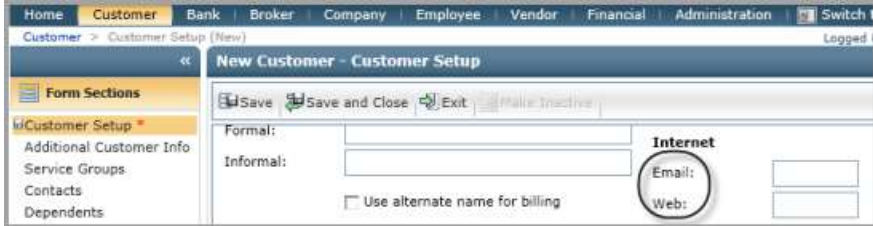

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
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Customer	Target List Exclude	Exclude customer from marketing's target list	
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Customer	Multiple Entity Group	Multiple Entity customers share policy coverage with the policy detail entered and tracked via the Master customer	
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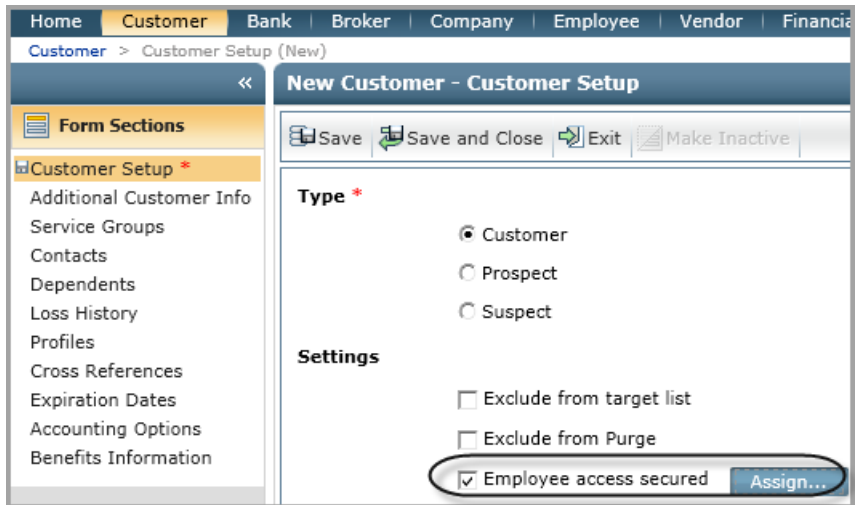


Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Individual/Family	Individual name or Multiple first names (Family) for personal lines of business	
Customer	Address Line 1	Customer Address Line 1	
Customer	Address Line 2	Customer Address Line 2	
Customer	Email	Customer Email	
Customer	Website	Customer Website	
Customer	Known Since		

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
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Customer	Added	Customer added date	
-----------------	-------	---------------------	--

Customer	Secured Customer	Employee access secured	
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Home Customer Bank Broker Company Employee Vendor Financial

Customer > Customer Setup (New)

New Customer - Customer Setup

Save Save and Close Exit Make Inactive

Form Sections

- Customer Setup *
- Additional Customer Info
- Service Groups
- Contacts
- Dependents
- Loss History
- Profiles
- Cross References
- Expiration Dates
- Accounting Options
- Benefits Information

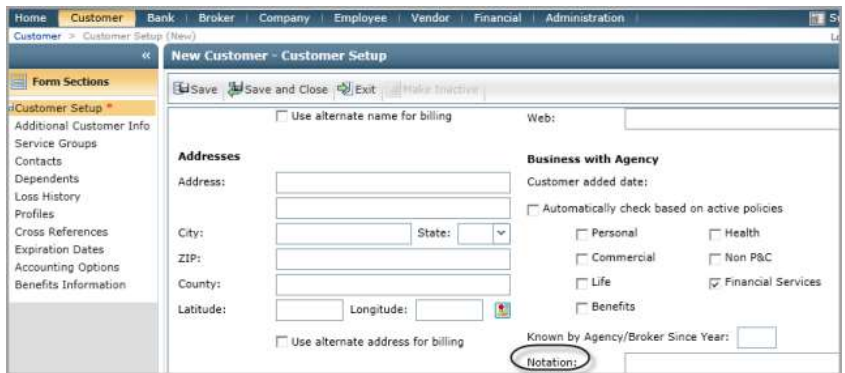
Type *

- Customer
- Prospect
- Suspect

Settings

- Exclude from target list
- Exclude from Purge
- Employee access secured Assign...

Customer	Notation Description	Notation	
-----------------	----------------------	----------	--



Home Customer Bank Broker Company Employee Vendor Financial Administration

Customer > Customer Setup (New)

New Customer - Customer Setup

Save Save and Close Exit Make Inactive

Form Sections

- Customer Setup *
- Additional Customer Info
- Service Groups
- Contacts
- Dependents
- Loss History
- Profiles
- Cross References
- Expiration Dates
- Accounting Options
- Benefits Information

Use alternate name for billing

Web:

Addresses

Address:

City: State:

ZIP:

County:

Latitude: Longitude:

Use alternate address for billing

Business with Agency


Customer added date:


Automatically check based on active policies

- Personal Health
- Commercial Non P&C
- Life Financial Services
- Benefits

Known by Agency/Broker Since Year:

Notation:

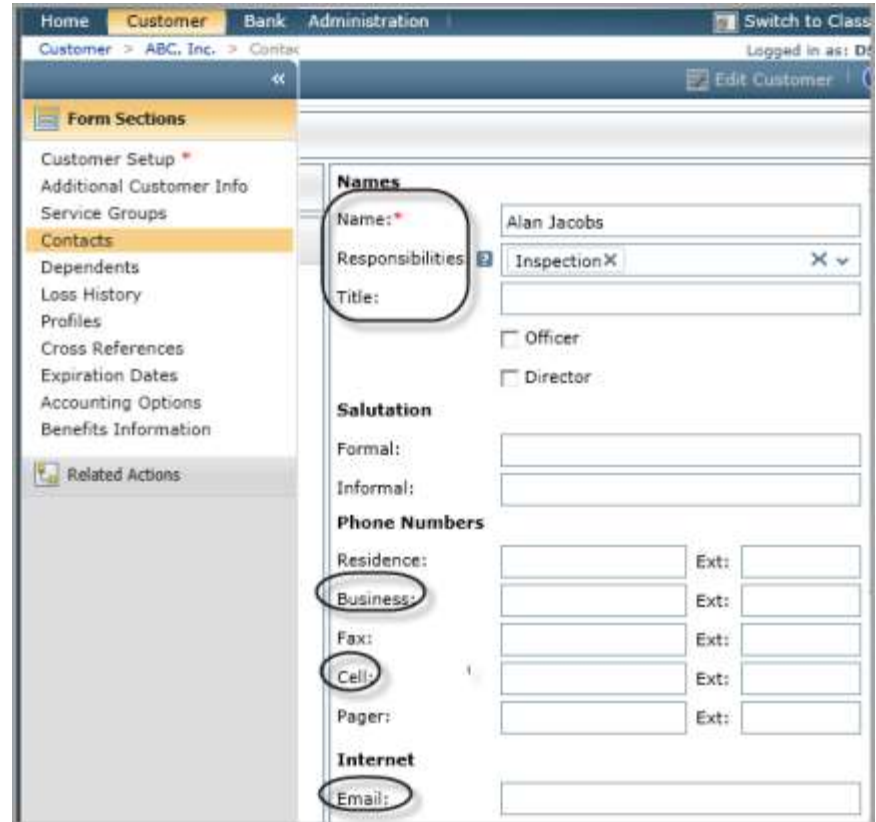
Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Business Phone	Customer Business Phone	
Customer	Fax Phone	Customer Fax	
Customer	Mobile Phone	Customer Cell	
Customer	Pager Phone	Customer Pager	
Customer	Residence Phone	Customer Residence Phone	

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer	Exec Formatted Name	Customer Executive name is Firm Name; if no Firm name is entered, then Customer Executive name will be a combination of Last Name, First Name Middle Name	
Customer	Csr Formatted Name	Customer Service Representative name is Firm Name; if no Firm name is entered, then Customer Service Representative name will be a combination of Last Name, First Name Middle Name	
Customer	Broker Formatted Name	Customer Broker name is Firm Name. If no Firm name is entered, then the Customer Broker name will be a combination of Last Name, First Name Middle Name.	

Contacts

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
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Contacts	Contact Name		
Contacts	Contact Title		
Contacts	Contact Responsibility	The Contact Responsibility determines how the Contact flows to other areas	
Contacts	Email	Contact Email	
Contacts	Mobile Phone	Contact Cell Phone	
Contacts	Bus Phone	Contact Business Phone	



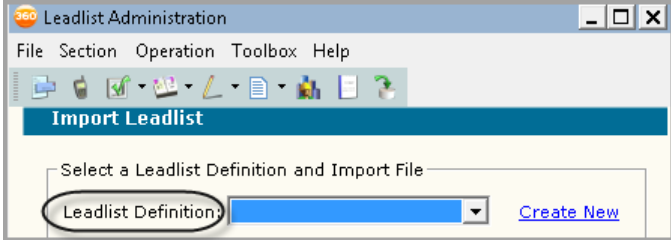
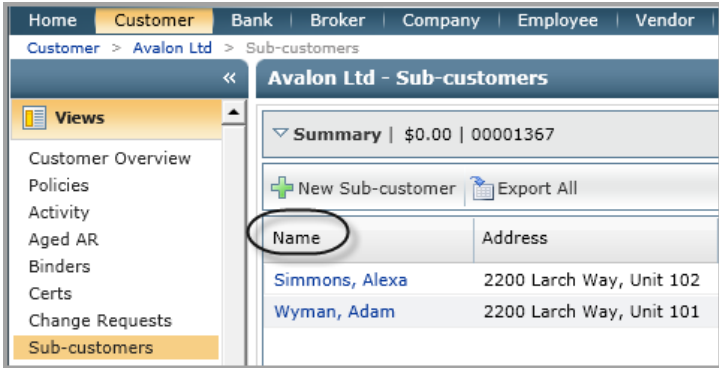
The screenshot shows the 'Customer Contact' form in AMS360. The 'Names' section is highlighted with a red circle and contains the following fields:

- Name: Alan Jacobs
- Responsibilities: Inspection X
- Title: (empty)

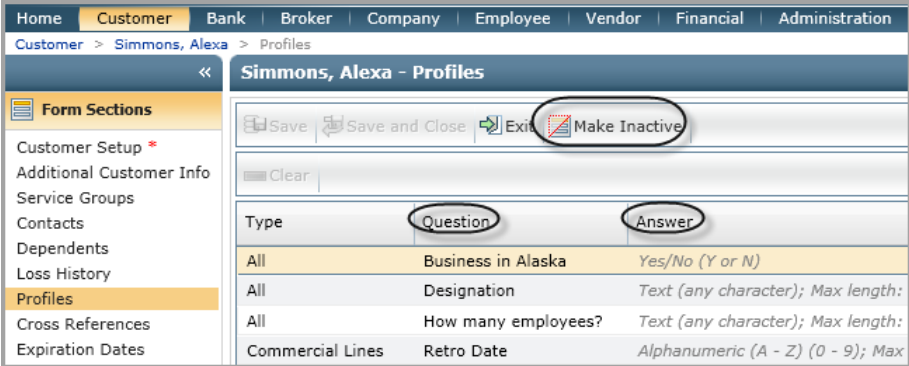
Other sections include:

- Salutation:** Formal: (empty), Informal: (empty)
- Phone Numbers:**
 - Residence: (empty) Ext: (empty)
 - Business: (empty) Ext: (empty)
 - Fax: (empty) Ext: (empty)
 - Cell: (empty) Ext: (empty)
 - Pager: (empty) Ext: (empty)
- Internet:** Email: (empty)

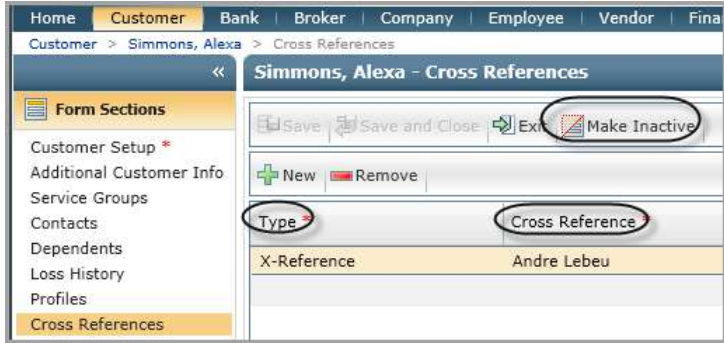
Lead List and Master Customer

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Lead List	Lead List Description	Lead List definition name	
Master Customer	Master Customer	Master Customer Name is Firm Name. If no Firm name is entered, then Master Customer name will be a combination of Last Name, First Name Middle Name.	

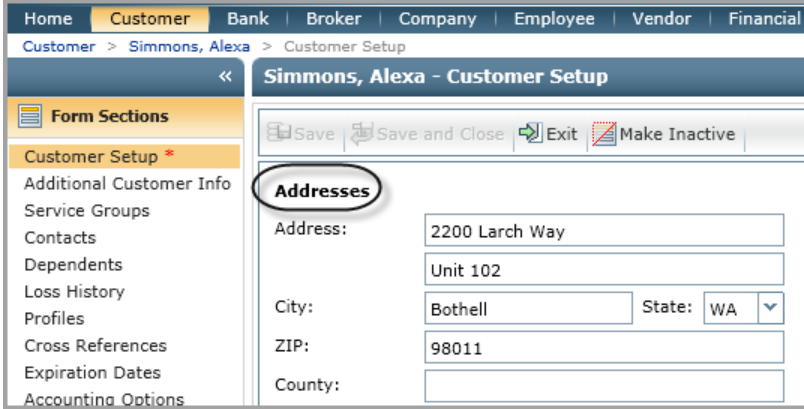
Profile Questions

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Profile Ques/Ans	Profile Question	Customer Profile Question	
Profile Ques/Ans	Profile Answer	Customer Profile Answer	
Profile Ques/Ans	Profile QA	Customer Profile Question and Answer	
Profile Ques/Ans	Active	Indicator denoting active Profile Questions	

Reference

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Reference	Cross Reference	Cross Reference Description	
Reference	X-Ref Type	Cross Reference Type	
Reference	X-Ref Summary	Cross Reference Type and Description	
Reference	Active	Indicator denoting active Cross References	

Customer Location

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Customer Location	State	Customer Location State	
Customer Location	City	Customer Location City	
Customer Location	County	Customer Location County	
Customer Location	Zip Code	Customer Location Zip Code	


Time*

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Time	Calendar Month	Month Number (1-12)	<p>*Most dates and times are tracked invisibly by the system. The only visible date in AMS360 is the date the customer was added to the system.</p>
Time	Calendar Week	Week Number (1-52)	
Time	Calendar Year	Year (4 digits)	
Time	Day Ago Date	The date one day before the Added Date	
Time	Day Date	Date of Added Date	
Time	Day Name	Weekday name of Added Date	

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Time	Day Of Month	Day of month of the Added Date (numeric)	
Time	Day Of Week	Day of week of the Added Date (numeric)	
Time	Day Of Year	Day of year of the Added Date (numeric)	
Time	Fiscal Quarter	Fiscal quarter of the Added Date (numeric)	
Time	Fiscal Year	Fiscal year of the Added Date (4 digits)	
Time	Month Ago Date	The date one month before the Added Date	
Time	Month Name	Month name of the Added Date	
Time	Quarter Ago Date	The date one quarter before the Added Date	
Time	Week Ago Date	The date one week before the Added Date	
Time	Year Ago Date	The date one year before the Added Date	
Time	Year Quarter	The year and quarter of the Added Date (IE: 2012/Q1)	
Time	Year Month	The year and month of the Added Date (IE: 2012/06)	
Time	Fiscal Month	Fiscal month of the Added Date (4 digits)	

Policy

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
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Policy	Effective Date	Policy Effective Date	
Policy	Policy #	Policy Number	

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 Every

Submission #: [Dropdown]

Effective Date: [Dropdown]

To create the new Policy, enter the following information:

Policy #: [Text] Type of Business: [Dropdown]

Effective Date: [Dropdown] Transaction: New business

Expiration Date: [Dropdown] Continuous Description: New business

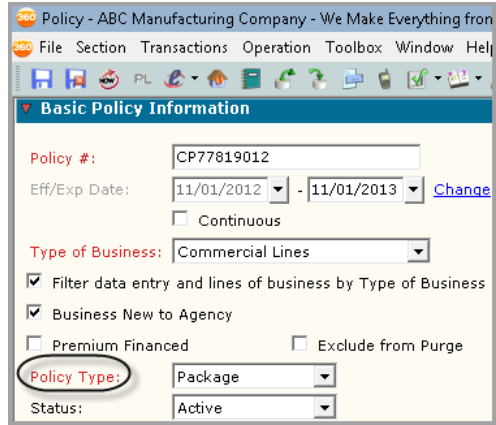
Company: Insurance Brokerage Subscription

Parent: [Dropdown] Billing/Payment Information: Bill Method: Direct bill

Writing: [Dropdown] Pay Plan: [Dropdown]

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
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Policy	Policy Type	<p>Displays "Package" or "BOP" when Policy Type = Package or BOP</p> <p>When Policy Type = Monoline, the first Line of Business will display; if no Line of Business exists, then "Monoline" displays</p>
---------------	-------------	---



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

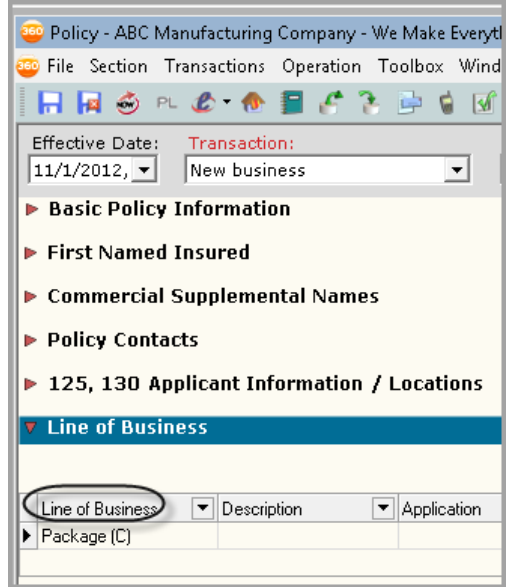
Business New to Agency

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**

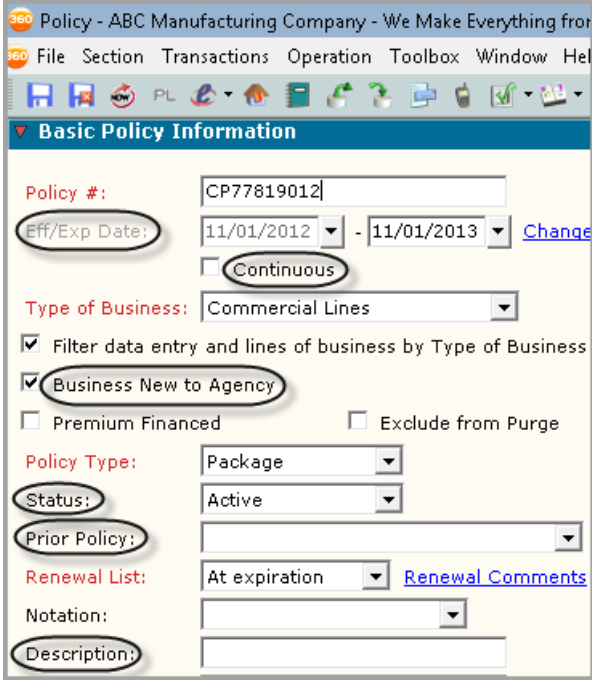
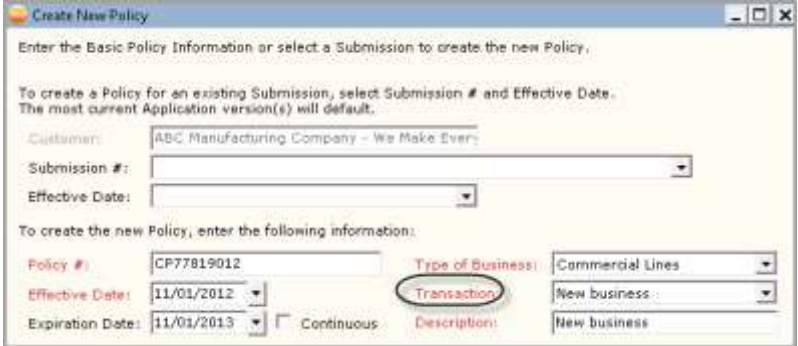
▶ **Commercial Supplemental Names**

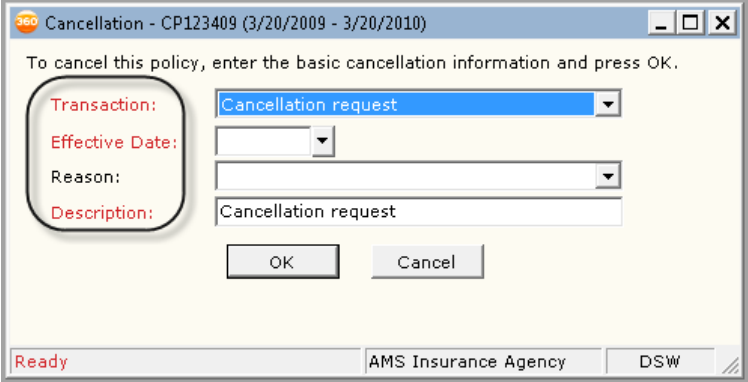
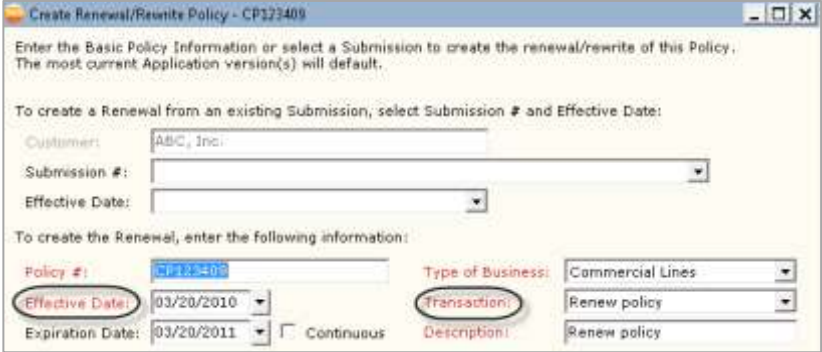
▶ **Policy Contacts**

▶ **125, 130 Applicant Information / Locations**

Line of Business

Line of Business	Description	Application
▶ Package (C)		

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Policy	Policy Description	Basic policy information Description	 <p>The screenshot shows the 'Basic Policy Information' form in AMS360. Fields are circled in red: Policy # (CP77819012), Eff/Exp Date (11/01/2012 - 11/01/2013), Continuous checkbox, Business New to Agency checkbox, Status (Active), Prior Policy, Description, and Transaction (circled in green).</p>
Policy	Status	Policy Status	
Policy	Expiration Date	Policy Expiration Date	
Policy	Is Continuous	Indicator to denote whether policy is continuous	
Policy	Prior Policy #	Prior Policy Number	
Policy	New Business to Agency	Indicator to denote whether this Business is new to this agency	
Policy	Original Transaction	Transaction type when policy is first created	 <p>The screenshot shows the 'Create New Policy' form. Fields are circled in red: Policy # (CP77819012), Effective Date (11/01/2012), Expiration Date (11/01/2013), Transaction (circled in green), and Description (New business).</p>

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

Description:

Origin: Data entry

Auditable? Frequency:

Signature on App:

Billing/Payment

Bill Method: Direct bill Number of Payments:

Pay Plan:

Payment Method:

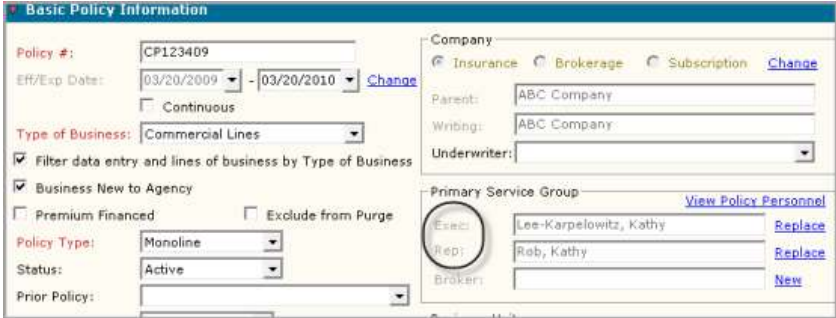
Base Installment Dates on

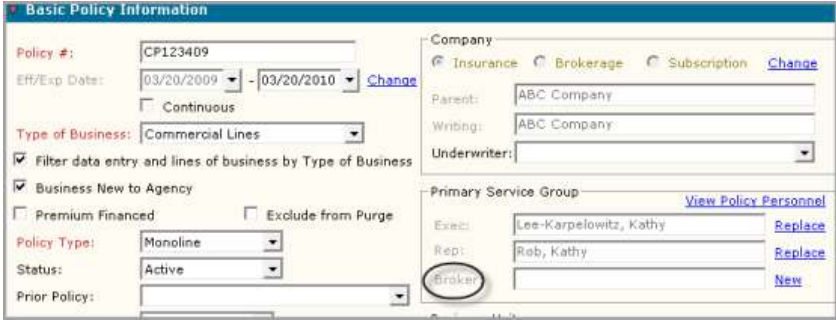
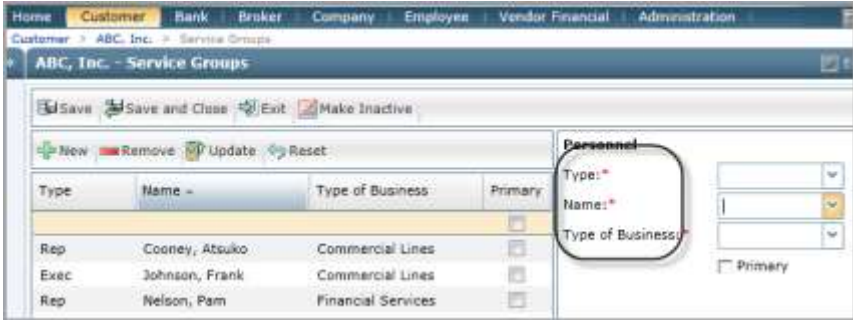
Policy Effective Date

Day of Month:

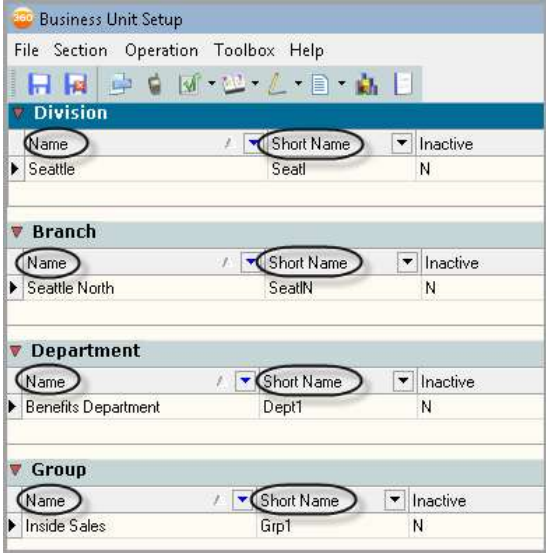
Policy Premium Totals

Premium:	\$0.00	Fees & Taxes:	\$0.00	DB Entry Billed:	\$2,600.00
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 Customer information is entered in AMS360
Policy	Primary Exec	Policy /Original Exec is the Primary Exec on the first invoice	 <p>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.</p>
Policy	Primary Rep	Primary Rep on a policy	
Policy	Original Rep	Policy/Original Rep is the Primary Rep on the first invoice	
Policy	Original Exec	The first Exec on a policy	
Policy	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)	<p>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.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • A=Accounting • P=Policy • S=Submission

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Policy	Current Broker	Broker	
Policy	Original Broker	The Broker on the first invoice	
Policy	Additional Exec 1	First Additional Executive	
Policy	Additional Exec 2	Second Additional Executive	
Policy	Additional Rep 1	First Additional Representative	
Policy	Additional Rep 2	Second Additional Representative	

Business Unit

Reporting Table	Reporting Column	Description	Where the Customer information is entered in AMS360
Business Unit	Division Name		
Business Unit	Division Short Name		
Business Unit	Branch Name		
Business Unit	Branch Short Name		
Business Unit	Department Name		
Business Unit	Department Short Name		
Business Unit	Group Name		
Business Unit	Group Short Name		