My Agency Reports and AMS360 Classic Reports Comparison

You have several options for reporting your AMS360 data: Classic Reports, available in AMS360, provide reports you create using selection criteria and produced in a set format. My Agency Reports provides data that you can easily manipulate to form your own reports. You can hide, filter, and sort report data and then create summaries with various totals. My Agency Reports currently contains the reports listed in the following table. The table also includes the equivalent report in AMS360 Classic Reports.

My Agency Report	Classic Report
Active Clients*	Customer List*
Book of Business	Policy Book of Business*
Cancellation*	Cancellation*
Customer Aged Accounts Receivable*	Customer Aged Accounts Receivable*
Customer Analysis*	Customer List*
Customer Net Balance*	Not available
Download Detail*	Download Detail
Download Direct Bill Statement*	Download Direct Bill Statement
Download Session Log*	Download Session Log
Finance Company Accounts Receivable*	Not available
General Ledger*	General Ledger
Lost Business	Not available
New Business	Not available
Policy Expiration*	Expiration/Renewal*
Production Report	Production Report
Retention	Not available
Transaction*	Transaction
Unbilled Policies	Unbilled Policies*
X – Date*	X – Date*

*Generated in real-time. All others generated from a snapshot of your data created overnight.

While the report names may be the same or similar, they may not provide equivalent information and not the same detail. The following table compares the information contained in the reports.

Active Clients

My Agency Report	Classic Report
Clients marked as Active or those with an In-force policy as of the date used to generate the reports.	Customer List – Although this can be run for customers marked as Active, It doesn't report Inactive customers with an in-force policy.

Book of Business

My Agency Report	Classic Report
The Book of Business report gives details on in-force policies at a given point in time. The report gives the option to view the report based on Original or Current Primary personnel, the annualized premium, and the commission associated with in-force business. Unlike the Classic report, this report: • Provides unbilled agency commission for partially billed Premium or Non-Premium, so you get the full revenue. (Exception - Direct Bill Entry. • Reports policies as in-force if they are canceled or have a non-renewal transaction after the in-force date. • Doesn't offer Exec and Rep commission information. This information is currently available through AMS360 Production Analysis.	Policy Book of Business – reports on in-force policies at a given point in time the report is run for. Unlike the one in My Agency Reports the Classic report doesn't :

Cancellation

My Agency Report	Classic Report
This report provides information about policy cancellations. The Business with Agency filter provides combinations of different types of business. They are: • PL = Personal Lines • CL = Commercial Lines • NonPC = Non P&C • Benefits = Benefits • Life = Life • Hlth = Health • FS = Financial Services	Similar information, but in a static format. The Classic report contains some of the same types of policies, but must run a separate report for each one.

Customer Analysis

My Agency Report	Classic Report
The Customer Analysis report is based on information entered in the Customer data entry form. This report evaluates business based on active or inactive customers, and monitors growth based on active customers. You can also look at customers entered on or after a certain date.	The closest equivalent is the Customer List. However, this report provides just a list of customers, without the evaluation done by the report in My Agency Reports.

Customer Net Balance Report

My Agency Report	Classic Report
This report is a summary customer AR report. It shows you what you owe customers and what customers owe you in one total. To determine the amount reported, My Agency Report's uses all in-effect invoices (based on later of invoice or effective date), receipts, journal entries, and disbursements for the "As of Date" you choose. No advanced or future invoices are included in this report.	No Equivalent

Download Detail Report

My Agency Report	Classic Report
In this report, policies are evaluated and must meet certain criteria to appear on the report. (See Help for a list of the criteria.)	Same as My Agency Reports.

Download Direct Bill Statement

My Agency Report	Classic Report
In this report, policies are evaluated and must meet certain criteria to appear on the report. (See Help for a list of the criteria.)	Same as My Agency Reports

Download Session Log

My Agency Report	Classic Report
In this report, policies are evaluated and must meet certain criteria to appear on the report. (See Help for a list of the criteria.)	Same as My Agency Reports

Finance Company Accounts Receivable

My Agency Report	Classic Report
The Finance Company Aged Accounts Receivable report allows you to view aged invoices for Finance Companies only. When you create the report you can choose custom aging categories.	No Equivalent

General Ledger

My Agency Report	Classic Report
Includes transactions posted to the General Ledger for the date(s) specified. Summary by Sub-ledger includes running balances.	No running balances, otherwise same.

Lost Business

My Agency Report	Classic Report
In this report, policies are evaluated and must meet certain criteria to appear on the report. (See Help for a list of the criteria.)	No Equivalent.

New Business

My Agency Report	Classic Report
The New Business report annualizes the data to fully assess the impact of new business	No Equivalent.

Policy Expiration

My Agency Report	Classic Report
The Policy Expiration report lists policies expiring within a specific time frame. You can include renewed and/or rewritten and/or expired policies in the results.	Expiration/Renewal – similar information to the My Agency Reports report.

Production Analysis

My Agency Report	Classic Report
The Production Analysis report allows you to: • Shows trends of revenue and expenses. • Evaluate which producers and lines of business from most profitable to least. • Evaluate your agency against best practices by the International Institute of Business Analysis (IIBAB). • Get customer/policy details for the income postings to the General Ledger. • Sort by various entities to look for strengths and weaknesses. • Get all the analyses you need using one set of data from your agency's database. • Review premium, revenue, and gross profits all in one place, using advanced drilldown capabilities and tailored filtering.	Production Analysis

Retention

My Agency Report	Classic Report
The Retention report shows in-force policies with the same line of business in-force a year ago. A policy is considered retained as long as the two policies have the same line of business, even if the company on the two policies is different.	No Equivalent.

Transaction

My Agency Report	Classic Report
The Unbilled Policies report helps you identify policy transactions that are not fully billed. This can include Direct Bill Statement and Direct Bill Entry.	Unbilled Policy - This report identifies Customer Center policy premium and non premium transactions not yet billed via the Customer Center.

Unbilled Policy

My Agency Report	Classic Report
The Unbilled Policies report helps you identify policy transactions that are not fully billed. This can include Direct Bill Statement and Direct Bill Entry.	Unbilled Policy - This report identifies Customer Center policy premium and non premium transactions not yet billed via the Customer Center.

X – Date

My Agency Report	Classic Report
The X-Date report gives information about expiring policies for business not currently placed with your agency. X-Date records are reported when the X-Date is in the report date range and data matches other filter sections.	X – Date – similar information to the My Agency Reports report. This is a listing of expiration dates for policies you currently *do not have* for your customer. This report includes only X-date information entered in Customer Setup.

Other Differences

Filtering
My Agency Reports allows you to filter a report after it's run; unlike Classic Reports. This means you can run a report once and change your view of the data many times to find the information you're looking for. Filters are also designed to be more comprehensive, allowing you to filter on all available data; and with a greater flexibility.

Summary Views
You can create and save multiple summary views in your report templates in My Agency Reports. This allows you to create quick check summarizations and reports more quickly instead of having to download and merge data in Excel.