



## IT'S ALL ABOUT THE AGENTS

*INS PRO has a number of reports that can assist you in managing your agents, and even better, helping them manage their insureds:*

### Expiration Report by Agent PA056

Is a useful tool in the renewal process to identify to the agent what **policies** are **due to renew and may need updates on the upcoming anniversary**. It is also a useful underwriting tool for the company for updating policies during the renewal process.

### List of Policies by Agent AR071

Generates a **list of policies billed by Insured's Name** for a mailing date range selected that can be sent to agents.

### Direct Bill Premium Report PA052

Lists written premium by policy for Direct Bill Agents in a specified period. It can be run in Summary mode or Detail mode.

### Losses by Agent Report LA058

Prints loss information in Agent, Claim, Major Class order. Can be run for a date range in Summary mode, Detail mode, or Total.

### Policy Quoting Report PW990

Shows activity by agent and line, printing totals for both In House Quotes and Web (online) Quotes. This report can be run in Summary mode or Detail mode.

### Agent Experience Report MI050

Presents a variety of information designed to analyze an agent's performance. May be run for date range for one month, one quarter, six months or one year. Selection for one agent, up to twenty agents at a time, a range of agents or all agents.

### Commission Statements AR068

Included in the 5.0 INS PRO Update, this report has been updated to create a **unique CSV (Comma Separated Values) file per agent number**.

