Reports in Depth: Expiration, Book of Business & Production

SESSION HANDOUT

Applied Client Network
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Prepared for Applied Client Network

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Target Audience:

	Accountant/Bookkeeper		Producer
	CSR		Trainer
	Carrier		Vendor
X	IT Manager/Systems Coordinator		ALL
	Operations	X	Other: Administrative
X	Principal/Owner		

Seminar Type: Reports

Seminar Level: Intermediate: An Intermediate level class takes the concepts originated from a basic level course, and adds more layers or parallel concepts. For functional courses, these classes will require the participant or attendee to have some basis to work from as they are learning new facets of the agency management system or software program.

Class Description: This session will take a look at three of the most important entries in the “Reports – Management” Type area: Expiration Report, Book of Business Report, and Production Report. In particular, this session will compare and contrast the Book of Business and the Production reports, including a discussion of possible uses and the appropriateness of each.

Learning Outcomes:

- Discover the difference between Book of Business and Production reports
- Distinguish which report to use in which situation
- Identify the different criteria in these reports

Assumptions: This seminar is based on the following
TAM Version 12

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Expiration Report - Expiration Report

Criteria	Settings		Notes
Agency	All Agencies / Selected Agencies		(1)
Branch	All Branches / Selected Branches		(1)
Department	All Departments / Selected Departments		(1)
Customers	✖	All Customers	
		Selected Customers	
Range of Customers		Specific Values	
		Range of Values	
	✖	All Values	
Customer Codes	✖	All Codes	
		Selected Codes	
Customer Service Reps	✖	All CSRs	
		Selected CSRs	
Issuing Companies	✖	All Issuing Companies	
		Selected Issuing Companies	
Billing Companies	✖	All Billing Companies	
		Selected Billing Companies	
Producer	✖	All Producers	
		Selected Producers	
Policy Type	✖	All Policy Types	
		Selected Policy Types	
Policy Status		All Policy Statuses	(2)
	✖	Selected Statuses	
Bill Mode	✖	All Bill Modes	(3)
		Agency Bill	
		Broker Bill	
		Direct Bill	
		Lienholder Bill	
Expiration Date		All Dates	
	✖	Range of Dates	

Lines of Business	✖	All Lines	
		Personal Lines	
		Commercial Lines	
		Life Lines	
Premium Amount	✖	All Amounts	
		Range of Amounts	
		Premiums Over Amount	
Risks per Policy		All Risks	
	✖	One Risk per Policy	
Sort Option		Agency	(4)
		Billing Company	
		Branch	
		Broker (Broker Bill Only)	
	✖	CSR	
		Customer	
		Customer Code	
		Expiration Date	
		Issuing Company	
		Personal / Commercial	
		Policy Number	
		Policy Status	
		Policy Type	
		Producer	
Page Break on Sort	✖	Yes	(5)
		No	
Add Activity Record	✖	No	(6)
		Yes, WHO = CSR on Policy	
		Yes, WHO = Producer on Policy	
		Yes, WHO = Operator on Policy	
		Yes, WHO = No Default	
Extra Criteria	None		

Report Description

This report produces a list of policies whose expiration dates are approaching. It is usually run at least once a month for policies expiring in a future month. The agency renewal procedure(s) are then initiated for those policies.

Timing

Once a month as part of the Month-End reports.

Notes

1. The Agency, Branch, and Department should be selected appropriately.

2. An Expiration report should be run to show active accounts. A separate report may be run to show lost business that the agency would like to solicit. Running a single report for both of these purposes is not advised.

3. The Bill Mode and Personal / Commercial criteria can be used in combination to exclude all personal lines direct bill policies from appearing on the report. If this is done, running a separate report for just personal lines direct bill is advised.

4. Sort by whomever is responsible for initiating the renewal procedure. CSR is just the most common.

5. Page Break on the Sort to facilitate distribution to the individuals responsible for initiating the renewal procedure.

6. An Activity can be created for each policy that would appear on the expirations report. This makes it possible to use such activities as the trigger for customized automatic renewal processes that have been put into place. If no such automatic processes have been set up, using this feature is not recommended.

Expiration Report - Missed Expirations

Criteria		Settings	Notes
Agency	All Agencies / Selected Agencies		(1)
Branch	All Branches / Selected Branches		(1)
Department	All Departments / Selected Departments		(1)
Customers	✖	All Customers	
		Selected Customers	
Range of Customers		Specific Values	
		Range of Values	
	✖	All Values	
Customer Codes	✖	All Codes	
		Selected Codes	
Customer Service Reps	✖	All CSRs	
		Selected CSRs	
Issuing Companies	✖	All Issuing Companies	
		Selected Issuing Companies	
Billing Companies	✖	All Billing Companies	
		Selected Billing Companies	
Producer	✖	All Producers	
		Selected Producers	
Policy Type	✖	All Policy Types	
		Selected Policy Types	
Policy Status		All Policy Statuses	(2)
	✖	Selected Statuses	
Bill Mode	✖	All Bill Modes	
		Agency Bill	
		Broker Bill	
		Direct Bill	
		Lienholder Bill	
Expiration Date		All Dates	(3)
	✖	Range of Dates	

Lines of Business	✖	All Lines	
		Personal Lines	
		Commercial Lines	
		Life Lines	
Premium Amount	✖	All Amounts	
		Range of Amounts	
		Premiums Over Amount	
Risks per Policy	✖	All Risks	
		One Risk per Policy	
Sort Option		Agency	(4)
		Billing Company	
		Branch	
		Broker (Broker Bill Only)	
	✖	CSR	
		Customer	
		Customer Code	
		Expiration Date	
		Issuing Company	
		Personal / Commercial	
		Policy Number	
		Policy Status	
		Policy Type	
		Producer	
Page Break on Sort	✖	Yes	(5)
		No	
Add Activity Record	✖	No	
		Yes, WHO = CSR on Policy	
		Yes, WHO = Producer on Policy	
		Yes, WHO = Operator on Policy	
		Yes, WHO = No Default	
Extra Criteria	None		

Report Description

This report produces a list of policies whose expiration dates have already gone past but still have a Status indicating the policy is active. This report should be run at least once a month.

Any policies that appear on this report should be looked into immediately.

Timing

Once a month as part of the Month-End reports.

Notes

1. The Agency, Branch, and Department should be selected appropriately.

2. This criteria should be set to show only those Statuses that indicate an active policy.

3. The Expiration Date range should be set to include everything from 01/01/1960 thru last week.

4. If applicable, Sort by whomever is responsible for having allowed this item to either slip through the cracks or neglected to update the system properly. In either case, regular appearances of the same individual on this report should be a factor in any employee evaluation.

5. Page Break on the Sort to facilitate distribution to the responsible parties.

Book of Business Report

Criteria	Settings		Notes
Agency	All Agencies / Selected Agencies		(1)
Branch	All Branches / Selected Branches		(1)
Department	All Departments / Selected Departments		(1)
Customers	✖	All Customers	
		Selected Customers	
Customer Codes	✖	All Customer Codes	
		Selected Customer Codes	
Customer Service Reps	✖	All CSRs	
		Selected CSRs	
Companies	✖	All Companies	
		Selected Companies	
Producer	✖	All Producers	
		Selected Producers	
Policy Type	✖	All Policy Types	
		Selected Policy Types	
Policy Status		All Policy Statuses	(2)
	✖	Selected Policy Statuses	
Bill Mode	✖	All Bill Modes	
		Agency Bill	
		Broker Bill	
		Direct Bill	
		Lienholder Bill	
Date First Written	✖	All Dates	
		A Range of Dates	
Active Policy Range	✖	All Dates	(3)
		A Range of Dates	
Expiration Date	✖	All Expiration Dates	(4)
		Exclude Dates Prior to Month	

Lines of Business	✖	All Lines of Business	
		Personal Lines	
		Commercial Lines	
		Life Lines	
Annualization		Do Not Annualize	(5)
	✖	Ann. Terms over 31 Days	
		Annualize All	
Commission	✖	Agency Commission	
		Producer 1 Commission	
		Producer 2 Commission	
		Producer 3 Commission	
		Broker Commission	
Risks		All Risks	(6)
	✖	First Risk Only	
Sort Option		Agency	(7)
		Billing Company	
		Issuing Company	
		Billing, Issuing Company	
		Master, Billing, Issuing Company	
		Broker (Broker Bill Only)	
		Branch	
		CSR	
	✖	Customer	
		Cust/Conglomerate Conglomerates	
		Department	
		Expiration Month	
		Lines of Business	
		Policy Status	
		Policy Type	
		Producer	
		Policy Type Group	
		Operator ID	
		First Written Month	

Page Break		Page Break on Sort	
	✖	Do Not Page Break by Sort	
Output		Complete Report	(8)
	✖	Summary Report	
		Summary by Commission Volume	
		Summary by Premium Volume	
		Net Agency Commission	
Extra Criteria	None		

Report Description

This report is designed to produce statistics relating to the agency's book of business. The information on this report is gathered from the Billing Screens, not from transaction or invoice data.

The ability to run this report and produce meaningful numbers is vital. Unfortunately, many agencies cannot do this due to poor utilization and maintenance of the policy Billing Screens.

The "Complete Report" output option of this report provides a lot of detail. It represents a significant security risk and as a result access to this report should be tightly controlled.

Timing

At least once a month along with the other Month-End reports. These reports cannot be created retroactively.

Notes

1. The Agency, Branch, and Department should be selected appropriately.

2. Status allows the separation of active vs. inactive accounts. A Book of Business report should be run to show either active accounts or lost business, never both at the same time. Depending on how well the field is used at the policy level, Status can also be used to run more tightly focused reports like new business vs. renewal business, cancelled for non pay vs. cancelled at the customers request, etc.

3. If the Active Policy Range overlaps with the policy term at any point, the policy will not be excluded from the report by this criteria.

   So assume that you had a policy with an effective date of 01/01/2005 and an expiration date of 01/01/2006. The following table gives some examples of how this criteria appears to behave:

02/01/2005 to 02/28/2005	The policy was effective during this one month, so it would be included
09/01/2004 to 03/01/2005	The policy was effective during the later months of this range, so it would be included
01/01/2004 to 12/31/2004	The policy was never effective in this time frame, so it would be excluded

   This criteria seems to be very useful for running a Book of Business report to track business that was lost during a limited period of time in the past. Without the Active

Policy Range criteria, a Lost Business version of the book of business will return all of the business that you lost for as long as you've been tracking that information in TAM.

4. If this report is being run to show only current policies, the expiration date criteria should be used to limit the inclusion of policies based on their expiration date.

   Assuming that you are confident in all of your active policies that renewed all the way up to the month immediately preceding the current calendar month, then you should set this criterion to be equal to your current calendar month. If you are less than confident, you may want to go backwards by one extra month to allow for a little "leeway" – even though the need for any such leeway is VERY bad.

5. Annualization is calculated using the following formula:
   Premium / (Expiration Date – Effective Date) * 365
   Note that TAM does not automatically annualize the effects of transactions (such as +EN and –EN) on either the Premium field or the book of business report.

   Your decision on using annualization should have been made at the agency procedures level. If the rule at your agency is to make the premiums on your billing screens equal to the "Estimated Full Term Premium" (where the "full term" is defined as the period of time indicated by the effective and expiration dates on the same policy\billing screen), then (you have chosen wisely) and will want to use "Ann. Terms over 31 Days" for most of the normal uses of this report. If your agency procedure is to enter annualized information on the billing screen, you must use "Do not annualize" on this report.

   Ann. Terms over 31 Days is recommended.
   "Annualize All" is NOT recommended.

6. Running this report for "First Risk Only" or "All Risks" is still advised if agency procedure requires that premiums only be input on the first subsection of package policies. But it won't be the end of the world if the "First Risk Only" criteria is missed by such agencies.

   If the Premium on the first subsection of package policies is left at zero and instead the premiums are being input on the individual subsections then the "First Risk Only" option should not be used. In this case "All Risks" should be used.

   This criteria becomes critically important for those agencies that enter the Premium for the entire package on the first section, and then the broken out premiums on each appropriate subsection as well. For such agencies, the "First Risk Only" option should be used.

   Be aware of what your download carriers are doing to the premium amounts on your billing screens. Encompass for example downloads the full amount of a personal package onto the PPKG line and then downloads the sub section premiums as well. You may have no choice but to use this criteria or to exclude specific policy types in order to combat the effects such download practices can have on your data.

7. The Sort Option selected should match the intended purpose of the report. Sorting by "Customer" is fine for a straight Book of Business run, but the other sorts are extremely useful in providing insights into the nature and distribution of the agency's business. Please note that if using the Output options of "Summary by Commission" or "Summary by Premium", what you wish to evaluate should be reflected in the sort option selected (ie. Producer, Client, Company, etc.).

8. "Complete Report" or "Net Agency Commission" should be used for conducting quality control of some sort. Selecting "Summary by Commission" or "Summary by Premium" will order the output from highest to lowest based upon the option chosen, these options are highly recommended.

Book of Business Report – Commission Ranking

Criteria	Settings		Notes
Agency	All Agencies / Selected Agencies		(1)
Branch	All Branches / Selected Branches		(1)
Department	All Departments / Selected Departments		(1)
Customers	✖	All Customers	
		Selected Customers	
Customer Codes	✖	All Customer Codes	
		Selected Customer Codes	
Customer Service Reps	✖	All CSRs	
		Selected CSRs	
Companies	✖	All Companies	
		Selected Companies	
Producer	✖	All Producers	
		Selected Producers	
Policy Type	✖	All Policy Types	
		Selected Policy Types	
Policy Status		All Policy Statuses	(2)
	✖	Selected Policy Statuses	
Bill Mode	✖	All Bill Modes	
		Agency Bill	
		Broker Bill	
		Direct Bill	
		Lienholder Bill	
Date First Written	✖	All Dates	
		A Range of Dates	
Active Policy Range	✖	All Dates	(3)
		A Range of Dates	
Expiration Date	✖	All Expiration Dates	(4)
		Exclude Dates Prior to Month	

Lines of Business	✖	All Lines	
		Personal Lines	
		Commercial Lines	
		Life Lines	
Annualization		Do Not Annualize	
	✖	Ann. Terms over 31 Days	(5)
		Annualize All	
Commission	✖	Agency Commission	
		Producer 1 Commission	
		Producer 2 Commission	
		Producer 3 Commission	
		Broker Commission	
Risks		All Risks	(6)
	✖	First Risk Only	
Sort Option		Agency	
		Billing Company	
		Issuing Company	
		Billing, Issuing Company	
		Master, Billing, Issuing Company	
		Broker (Broker Bill Only)	
		Branch	
		CSR	
		Customer	
		Cust/Conglomerate Conglomerates	(7)
		Department	
		Expiration Month	
		Lines of Business	
		Policy Status	
		Policy Type	
		Producer	
		Policy Type Group	
		Operator ID	
		First Written Month	

Page Break		Page Break on Sort	
	✖	Do Not Page Break by Sort	
Output		Complete Report	(8)
		Summary Report	
	✖	Summary by Commission Volume	
		Summary by Premium Volume	
		Net Agency Commission	
Extra Criteria	None		

Report Description

This report will give you a summarized list that is sorted from the highest to the lowest total commission. This information is gathered from the Billing Screens, not from transaction or invoice data.

Many agencies cannot use this report due to poor utilization and maintenance of the policy Billing Screens.

Timing

Run as desired. These reports cannot be created retroactively.

Notes

1. The Agency, Branch, and Department should be selected appropriately.

2. Status allows the separation of active vs. inactive accounts. A Book of Business report should be run to show either active accounts or lost business, never both at the same time. Depending on how well the field is used at the policy level, Status can also be used to run more tightly focused reports like new business vs. renewal business, cancelled for non pay vs. cancelled at the customers request, etc.

3. If the Active Policy Range overlaps with the policy term at any point, the policy will not be excluded from the report by this criteria.

   So assume that you had a policy with an effective date of 01/01/2005 and an expiration date of 01/01/2006. The following table gives some examples of how this criteria appears to behave:

02/01/2005 to 02/28/2005	The policy was effective during this one month, so it would be included
09/01/2004 to 03/01/2005	The policy was effective during the later months of this range, so it would be included
01/01/2004 to 12/31/2004	The policy was never effective in this time frame, so it would be excluded

4. If this report is being run to show only current policies, this criteria can be used to limit the inclusion of policies based on their expiration date.

   If the quality of the data on the Billing Screens is questionable and the Policy Status field cannot be relied upon, this criteria should be used to eliminate non-active policies from the report.

5. Annualization is calculated using the following formula:
   Premium / (Expiration Date – Effective Date) * 365

   Note that TAM does not automatically annualize the effects of transactions (such as +EN and –EN) on either the Premium field or the book of business.

   "Annualize All" is not recommended.

6. Running this report for "First Risk Only" is advised if agency procedure requires that premiums only be input on the first subsection of package policies.

If the Premium on the first subsection of package policies is left at zero and instead the premiums are being input on the individual subsections then the “First Risk Only” option should not be used. In this case “All Risks” should be used.

If the Premium for the entire package is input on the first section, and then the broken out premiums are put into each appropriate subsection as well, it is critical that the “First Risk Only” option be used.

7. The Sort by selection should match the intended purpose of the report. The wide variety of Sort Option selections available make it a very useful report when ranking a group by their contribution to agency commission is desired. For example, if the goal is to evaluate producers by their total agency commission volume, “Sort Option” should be set to Producer.

8. *In order for this to be a Commission Ranking report*, the Output option of “Summary by Commission Volume” must be selected. This will cause the results to be listed from the highest to the lowest commission volume by the “Sort Option” grouping (see note 6).

Production Report - Pre Month-End Client Transaction Review

Criteria	Settings		Notes
Agency	All Agencies / Selected Agencies		(1)
Branch	All Branches / Selected Branches		(1)
Department	All Departments / Selected Departments		(1)
Customers	✖	All Customers	
		Selected Customers	
Range of Customers		Specific Values	
		Range of Values	
	✖	All Values	
Date Selection		All Items	
	✖	Accounting Month – Range	
		Effective Date – Range	
		Transaction Date - Range	
Policy Type	✖	All Policy Types	
		Selected Policy Types	
Policy Type Group	✖	All Policy Type Groups	
		Selected Policy Type Groups	
Policy Status	✖	All Policy Statuses	
		Selected Policy Statuses	
Binder Bill	✖	Include Binder Bill Items	
		Exclude Binder Bill Items	
Lines of Business	✖	All Lines	
		Personal Lines	
		Commercial Lines	
		Life Lines	
Bill Mode	✖	All Bill Modes	(2)
		Selected Bill Modes	
Issuing Companies	✖	All Issuing Companies	
		Selected Issuing Companies	

Billing Companies	✖	All Billing Companies	
		Selected Billing Companies	
Producer	✖	All Producers	
		Selected Producers	
Transaction Type	✖	All Transaction Types	
		Selected Transaction Types	
Customer Codes	✖	All Codes	
		Selected Codes	
Territory	✖	All Territories	
		Selected Territories	
Adjustments	✖	Include All Adjustments	
		Include Agency Adj. Only	
		Exclude Adjustments	
Amount	✖	All Amounts	
		Range of Amounts	
Commission	✖	All Amounts	
		Range of Amounts	

Major Sort		Agency	(3)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
	✖	Customer/Don't Consol Conglom	
		Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
		None	
	✖	Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
		No Subtotal or Page Break	

Minor Sort 1		Agency	(3)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
		Transaction	
	✖	Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
		None	
		Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
	✖	No Subtotal or Page Break	

Minor Sort 2		Agency	(3)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
	✖	Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
		None	
		Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
	✖	No Subtotal or Page Break	

Minor Sort 3		Agency	
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
		Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
	✖	None	
		Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
		No Subtotal or Page Break	
Output	✖	Complete	
		Summary	
		Net Agency Commission	
		Summary by Commission Volume	
		Summary by Premium Volume	
Extra Criteria	None		

Report Description

This report is run prior to initiating Month-End. It is a last chance to review and catch common invoicing errors like:
Duplicate billings
reverse and re-bill commission and billing company inaccuracies
zero commission billings
etc.

Timing

This report should be run just prior to closing a month to allow time for the review process and allow the correcting entries to hit the current accounting month prior to its being closed.

Notes

1. The Agency, Branch, and Department criteria should be based on what you are reviewing.

2. When “All Bill Modes” is chosen, an additional prompt of “Show Direct Bill Production Items?” appears

   Answering “Yes” to this prompt will result in the report including Direct Bill invoiced items.

   Answering “No” results in the user receiving a further prompt of “Show only Direct Bill Paid Items?”. Answering “Yes” to this prompt will result in the report including only Direct Bill paid items (COM’s)

3. Sorting by Customer, then by Policy, then by Transaction is done to organize the items so that the most common mistakes will be easier to spot when doing a quick scan.

Production Report – Order by Commission

Criteria	Settings		Notes
Agency	All Agencies / Selected Agencies		(1)
Branch	All Branches / Selected Branches		(1)
Department	All Departments / Selected Departments		(1)
Customers	✖	All Customers	
		Selected Customers	
Range of Customers		Specific Values	
		Range of Values	
	✖	All Values	
Date Selection		All Items	(2)
	✖	Accounting Month – Range	
		Effective Date – Range	
		Transaction Date - Range	
Policy Type	✖	All Policy Types	
		Selected Policy Types	
Policy Type Group	✖	All Policy Type Groups	
		Selected Policy Type Groups	
Policy Status	✖	All Policy Statuses	
		Selected Policy Statuses	
Binder Bill	✖	Include Binder Bill Items	
		Exclude Binder Bill Items	
Lines of Business	✖	All Lines	
		Personal Lines	
		Commercial Lines	
		Life Lines	
Bill Mode	✖	All Bill Modes	
		Selected Bill Modes	
Issuing Companies	✖	All Issuing Companies	
		Selected Issuing Companies	

Billing Companies	✖	All Billing Companies	
		Selected Billing Companies	
Producer	✖	All Producers	
		Selected Producers	
Transaction Type	✖	All Transaction Types	
		Selected Transaction Types	
Customer Codes	✖	All Codes	
		Selected Codes	
Territory	✖	All Territories	
		Selected Territories	
Adjustments	✖	Include All Adjustments	
		Include Agency Adj. Only	
		Exclude Adjustments	
Amount	✖	All Amounts	
		Range of Amounts	
Commission	✖	All Amounts	
		Range of Amounts	

Major Sort		Agency	(3)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
		Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
		None	
	✖	Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
		No Subtotal or Page Break	

Minor Sort 1		Agency	(4)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
		Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
	✖	None	
		Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
		No Subtotal or Page Break	

Minor Sort 2		Agency	(4)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
		Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
	✖	None	
		Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
		No Subtotal or Page Break	

Minor Sort 3		Agency	(4)
		Branch	
		Department	
		Customer / Consolidate Conglom.	
		Customer/Don't Consol Conglom	
		Transaction	
		Policy Type	
		Policy Type Group	
		Producer Only	
		Producer and Territory	
		Billing Company	
		Issuing Company	
		Master Company	
		Customer Service Rep	
		Operator ID	
		Broker (Broker Bill Only)	
		Month	
		Customer Code	
		Lines of Business	
		Policy Status	
		Bill Mode	
		State	
	✖	None	
		Subtotal by Sort/No Page Break	
		Subtotal and Page Break on Sort	
		No Subtotal or Page Break	
Output		Complete	(5)
		Summary	
		Net Agency Commission	
	✖	Summary by Commission Volume	
		Summary by Premium Volume	
Extra Criteria	None		

Report Description

Please note that this is a specific criteria setting of the "Production Report", it is not the "Production – Order by Comm. Report".

This report will give you a list that is sorted from the highest to the lowest summarized total commission. This information is gathered from Invoice / Transactions, not from the policy Billing Screens.

Often, this report is used to evaluate the production numbers for an entire year. The Sort Option is set to who or what is being evaluated, like CSR, Producer, or Company.

Timing

As needed.

Notes

1. The Agency, Branch, and Department should be selected appropriately.

2. If this report is being used for evaluation purposes, the Range of Months should be set to cover either an entire month, quarter, half year, or year. Month and year are the two most commonly used options..

3. The Major Sort Option should match the intended purpose of the report. The wide variety of Sort Options available make this a very useful report when ranking something or someone by their contribution to agency commissions.

4. When using the Output option of "Summary by Commission Volume", the Minor Sort Options do not apply. Selecting them will have no effect on the report output.

In order to have the results of this report displayed in order by commission volume, the "Summary by Commission Volume" criteria must be selected. It is the addition of this option as of version 7.1 that made the separate report titled "Production - Summary by Commission" obsolete.