

How to Generate Commission Statements

On the Home screen under the Reports dropdown select Dashboard

The screenshot shows the Home screen navigation menu on the left, with 'Reports' highlighted in blue and 'Dashboard' selected under it. To the right, there are search fields for 'Policy' (Quote Number, Insured Name) and 'Billing' (Account Number). A 'Claim' section is also visible at the bottom.

Check the box next to Commission Statement and enter the date range desired.

The screenshot shows the 'Report Dashboard' with filters for 'Commission Statement'. The 'From' date is 02/01/2020 and the 'To' date is 02/29/2020. The 'Frequency' is set to 'Monthly'. The 'Output Format' is 'PDF'. The '3/24/2020 Dashboard Reports' section shows 0 Completed and 0 Failed reports.

Users can use the Select Dates drop down to quickly select dates for Last Month, Last Year, etc.

The screenshot shows the 'Report Dashboard' with filters for 'Last Year'. The 'From' date is 01/01/2019 and the 'To' date is 12/31/2019. The 'Frequency' is set to 'Monthly'. The 'Output Format' is 'PDF'. The '3/24/2020 Dashboard Reports' section shows 0 Completed and 0 Failed reports.

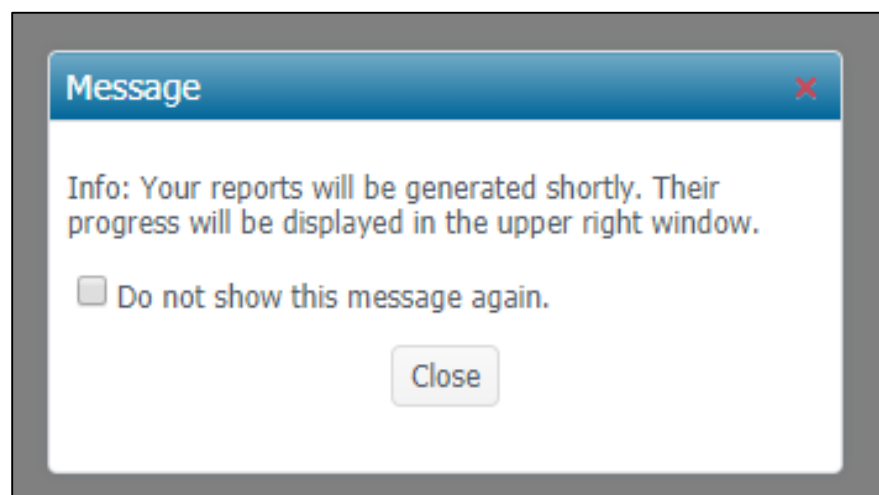
The Commission Statement will default to generate as a PDF. The Commission Statement can be generated as a PDF, an Excel document, or both. To change the type of document, select the Output Format dropdown and select the desired format.

The screenshot shows the 'Report Dashboard' interface. At the top, there are four buttons: 'Generate', 'Create Filter', 'Load Filter', and 'Clear'. Below these are two filter sections: 'Name' with a checkbox and 'Department' with a dropdown arrow. The main form area contains several fields: 'Commission Statement' (checked), 'Accounting' (selected), and 'Monthly' (selected). Below these are date and selection fields: 'From:' (01/01/2019), 'To:' (12/31/2019), 'Mailer Page:' (Yes), 'Adjustments:' (Yes), 'Company:' (All), and 'Output Format:' (PDF). The 'Output Format:' dropdown is open, showing options: 'Select a value', 'PDF' (highlighted in blue), 'EXCEL', and 'BOTH'.

Once the desired dates and format has been entered - select Generate

This screenshot shows the same 'Report Dashboard' interface, but with different values. The 'Generate' button at the top left is highlighted with a red rectangle. The 'From:' date is now 02/01/2020 and the 'To:' date is 02/29/2020. The 'Accounting' section is still selected, but the 'Monthly' option is no longer selected. The 'Output Format:' is now set to 'BOTH'. All other fields remain the same as in the previous screenshot.

The below message will appear - users can close out of the message or indicate if they would no longer like to receive this message when generating the Commission Statement and then close out of the message.



The Commission Statement will display in the right hand corner under completed. Select the report to open the document.

Report Dashboard

Generate

Create Filter

Load Filter

Clear

<input type="checkbox"/>	Name	Department	Frequency
<input checked="" type="checkbox"/>	Commission Statement ⓘ	Accounting	Monthly

From: 02/01/2020

Last Month ▼

To: 02/29/2020

Last Month ▼

Mailer Page: Yes ▼

Adjustments: Yes ▼

Company: All ▼

Output Format: BOTH ▼

3/24/2020 Dashboard Reports

2 Completed

Time	Report
7:59:17 AM	New! Commission Statement
7:59:17 AM	New! Commission Statement

0 Failed

Time	Report
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