

MONTHLY COMMISSION STATEMENT

A monthly commission statement will generate if there has been a policy with a financial transaction during that month. To access the statement:

Drop down the “Reports” menu on your landing page and select, “Dashboard.”

The screenshot shows a navigation menu on the left with the 'Reports' menu expanded and 'Dashboard' highlighted. A red arrow points to the 'Dashboard' option. To the right, there are search forms for 'Policy and Quote Search', 'Billing', and 'Claim'. The 'Policy and Quote Search' form has fields for 'Quote Number' and 'Insured Name' with search buttons. The 'Billing' form has a 'Policy Number' field with a search button. The 'Claim' form has fields for 'Claim Number' and 'Date Of Loss' with a search button. Below these is an 'Open Tasks' section with a search bar, date range selectors, and a table with columns: Details, Insured 1, Insured 2, Policy/Quote, DtLossNumber, Notes, Type, Due On, Due Days. The table currently shows 'No items to display'.

Check the box for “Commission Statement” and enter the first and last day of the month for which you need the statement. Click on the “Generate” button.

The screenshot shows the 'Report Dashboard' form. The 'Generate' button is highlighted with a red box. The 'Commission Statement' checkbox is checked, and a red arrow points to it. The 'From' date is set to '05/01/2021' and the 'To' date is set to '05/31/2021', both highlighted with red boxes. The 'Output Format' is set to 'PDF'. The table below shows the following data:

Name	Department	Frequency
<input checked="" type="checkbox"/> Commission Statement ⓘ	Accounting	Monthly
<input type="checkbox"/> Producer Business Summary Report ⓘ	Accounting	As Of

The report will generate on the right side of the screen.

The screenshot shows the 'Report Dashboard' form with the 'Generate' button highlighted. The 'Commission Statement' checkbox is checked. The 'From' date is '05/01/2021' and the 'To' date is '05/31/2021'. The 'Output Format' is 'PDF'. On the right side, there is a '6/17/2021 Dashboard Reports' section with a table showing the generated report:

Completed Time	Report
05/17/2021 10:00 AM	PDF Commission Statement

A red arrow points to the 'PDF Commission Statement' report.