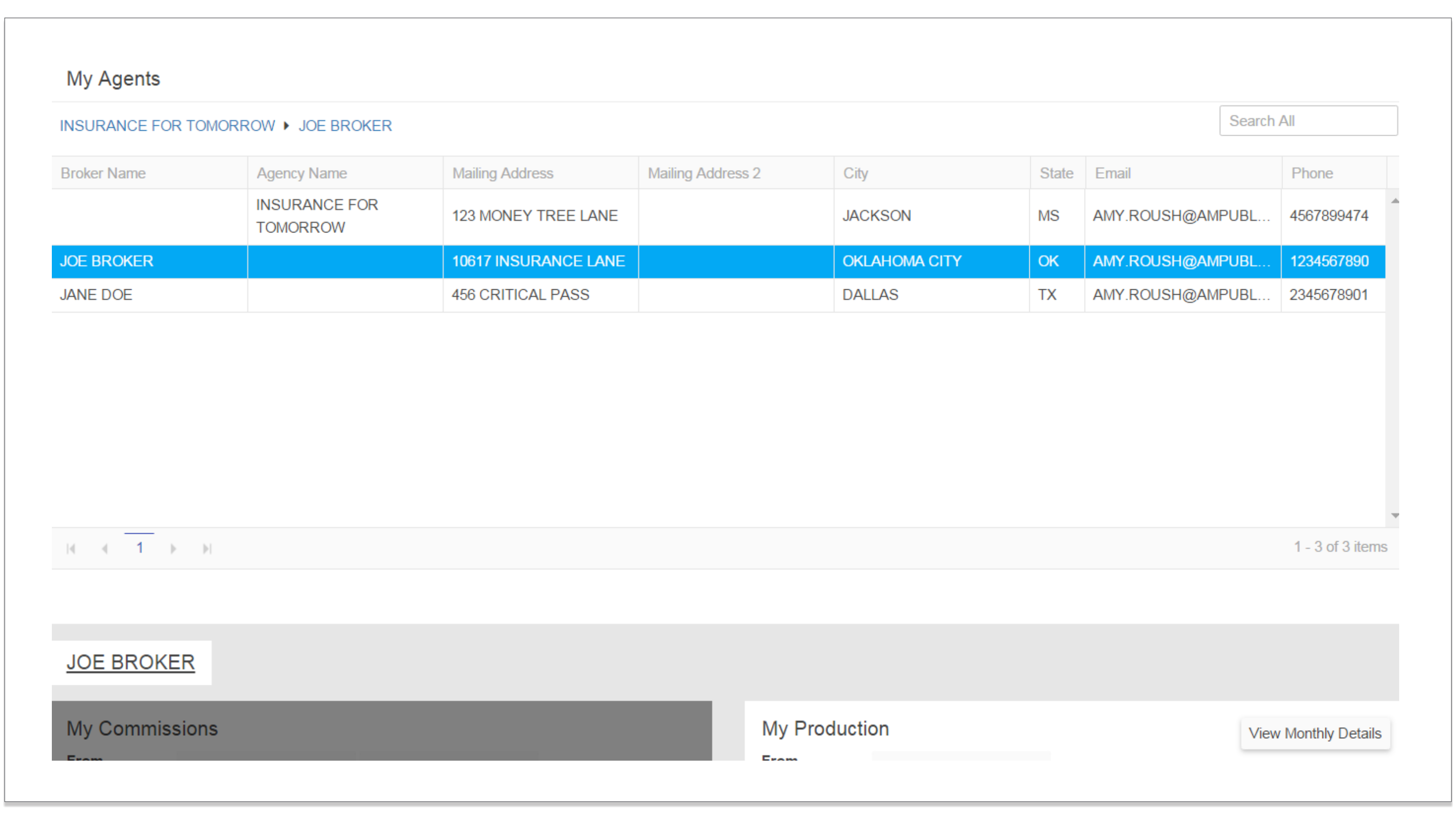
Using Your Dashboard

At the top of the Dashboard, you'll see links to:

- Contact Us
- QPG (Quote Proposal Generator)
- Help
- My Account

My Agents (May not be available if no downline exists)

Below the top navigation, you'll find **My Agents**, which lists the agents in your agency's downline. Your agency's commission details display in a chart just below the **My Agents** list**.** Clicking on the name of an agent in your downline populates the charts with his/her commissions (if not paid to an agency) and production data. You can sort your downline agents list by any of the fields by clicking on the column header. And return to the default agency view by clicking on your agency's name in the secondary navigation/breadcrumb trail under the **My Agents** header.



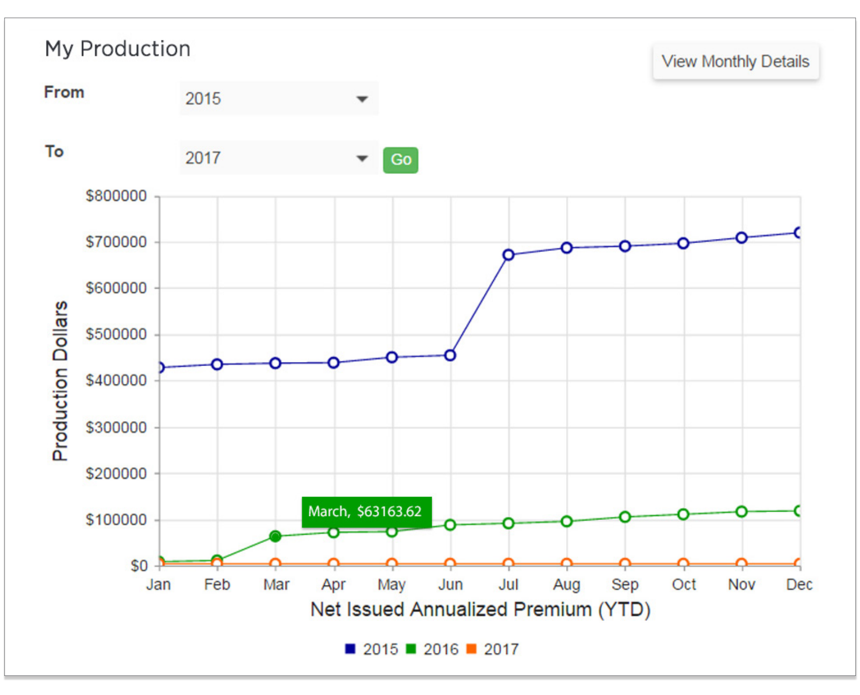
My Commission

Below My Agents, you'll find **My Commissions**. The default view of your dashboard displays your agency's commission details. Clicking on the name of an agent in your downline populates his/her commission details, if it's not paid directly to an agency. There are two ways you can view commissions: use the calendar drop down to set your date range and display a graph or select your payment period from **Download Commission Details** and generate a PDF or Excel document. Hover over any column in the graph to see the dollar amount of commission earned by your agency or specific agent for that period. If commissions are paid to an agency, nothing will display in the graph or **Commission Details** report for the selected downline agent.

My Production

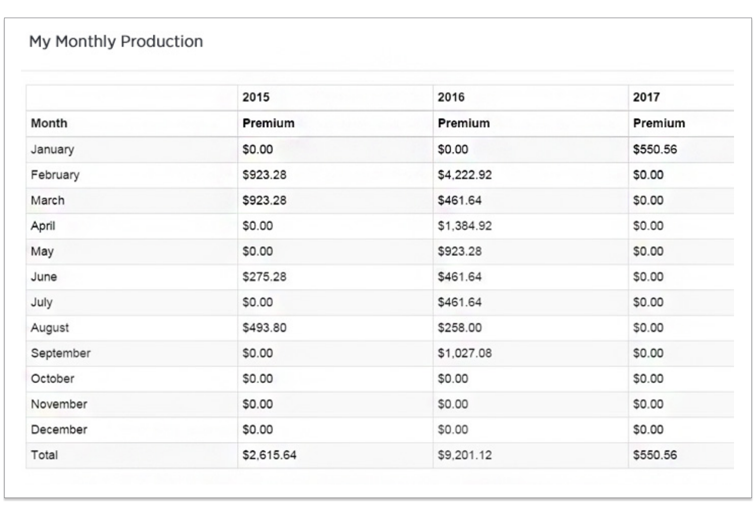
Next to My Commissions, you'll find **My Production**. This graph displays the selected downline agent's year-to-date net issued annualized premium by month and year. There are several interactive tools to help you navigate your agent's production data, including:

- Calendar drop downs to set the date range and display agent's production
- Multi-year date range displays year-to-date comparisons
- Hover over any point on the graph to see the exact dollar value
- Click on the date(s) in legend to hide or show that year's production



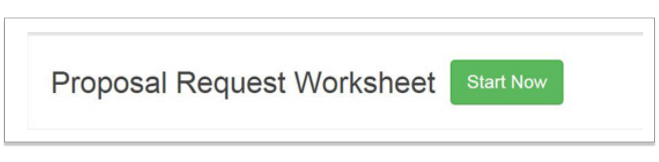
View Monthly Details

In the top right of the **My Production** table, you'll find the **View Monthly Details** button. Set the "From" and "To" date ranges in the drop down menus and click on the **View Monthly Details** tab to see a side-by-side table view of the selected downline agent's monthly production premium dollars.



Proposal Request Worksheet

Just below My Production is the **Proposal Request Worksheet**. Clicking the Start Now button will open a fillable PDF you can download to your desktop, complete and email to sales@ampublic.com. This form has all the information we'll need to begin a custom quote for your group.

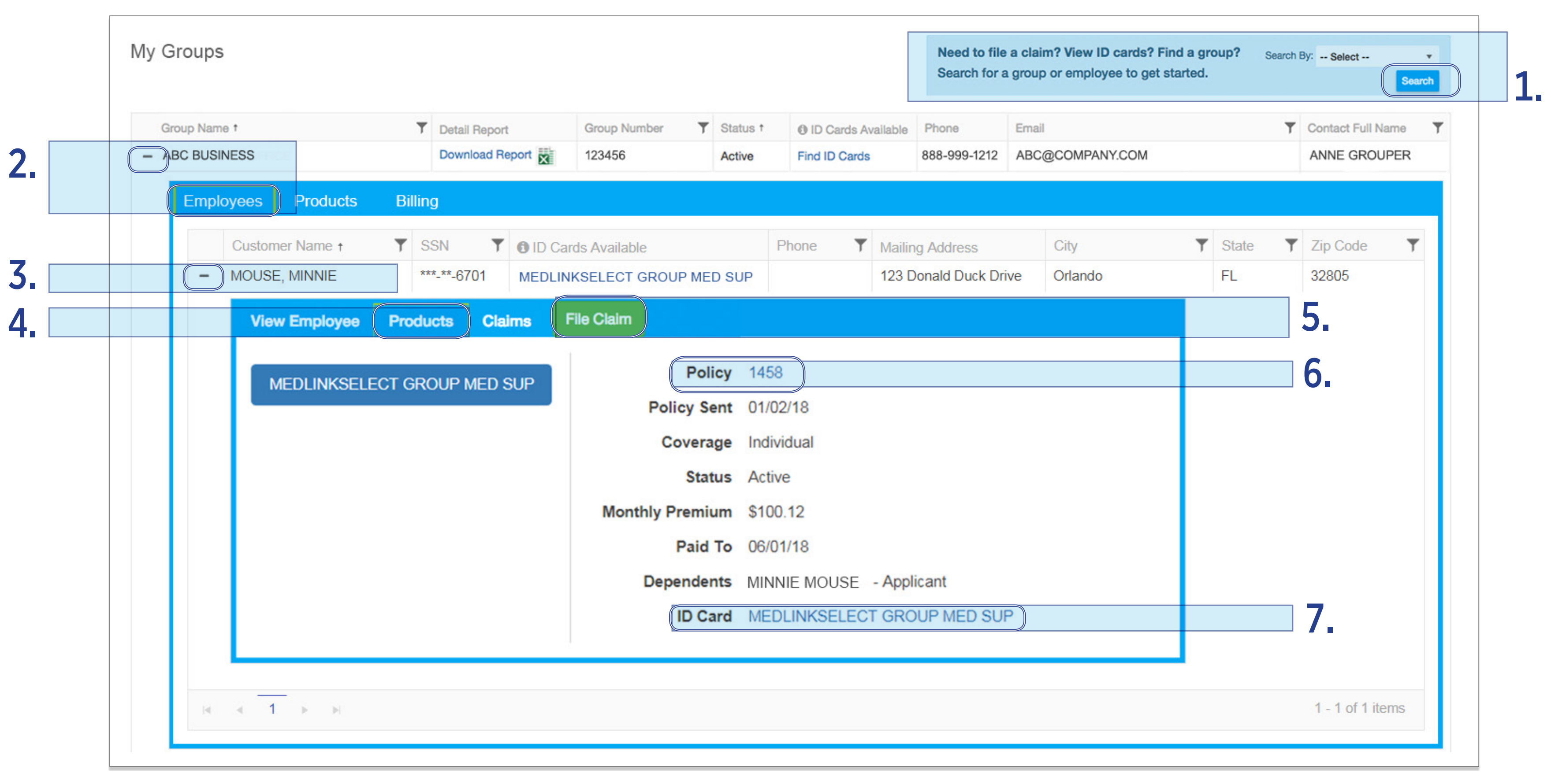


My Groups (Depending on access, may not be available)

Next, you'll find **My Groups.** This portion of the dashboard shows a collapsed view of all the groups managed by your agency (by default) or the downline agent you selected.

View Employee Details

1. **Quick Search for Employees** by entering name or SSN.
2. Click the (**+**) to **expand the Group** and **review the Employee details list**.
3. Click the (**+**) to **expand an Employee** and review his/her **specific details**.
4. Select the Products tab to view the **Employee's ID Card(s) and Policy Certificate.**
5. Click the File a Claim button to **upload claim documents and submit a claim** on the employee's behalf.
6. Click the Policy Number to **download Policy Certificate**.
7. Click Product Name to **download ID Card**.



View Group Details

1. Click the **Download Report** link to access the **Group Detail Report**.
2. Select the **Products tab** to view all **active products for the Group.**
3. Select the **Billing tab** for **view only access** of the **Group billing.**
4. **Open Invoices** table displays unpaid invoices.
5. **Submitted Invoices** table displays invoices the Group has reviewed and submitted but APL is awaiting payment.
6. The **Paid Invoices** table displays previously paid invoices**.**
7. **View/Download paid invoices** by clicking the PDF or Excel icon.