

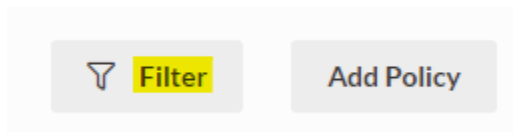
How to Create a New Policy Report

Organize your data the way you'd like to view it. Add or remove fields to include only the information that matters most to you. Plus, you can tailor the layout to prioritize the data that's most relevant - here's how:

1. Navigate to **Business > Life Policies**



2. In the top right corner, click **Filter**



3. Use the Operation and Value options to determine how the selected Field will be filtered. Multiple filters can be selected. Click **Apply**

Filter
✕

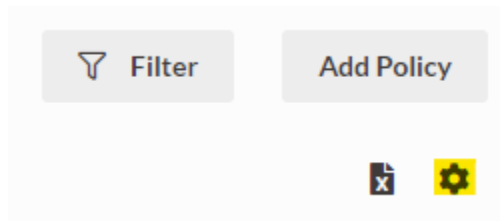
Field	Operation	Value	
Insured Age	Greater than	80	✕
			✕

- Activity Status
- Activity Status Date
- Activity Status User
- Agent(s)
- Anniversary Date
- Annualized Premium
- Annualized Premium Guideline Status

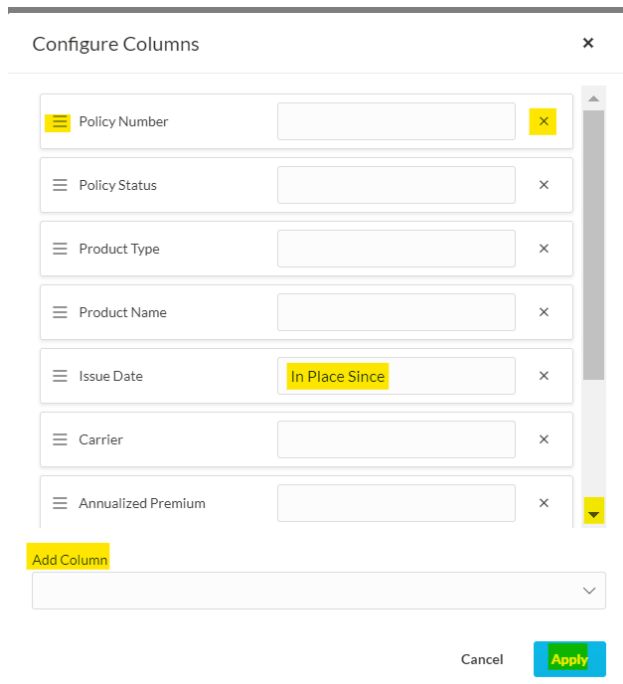
Cancel
Apply

08/15/1980	All American	\$6,000.00	Matthew Smith	\$500,000.00
--	MassMutual	\$120,000.00	Mary Williams	\$1,000,000.00


4. Click the gear icon above the top right corner of the table to **Configure Columns**



5. Add, remove, reorder, and/or rename columns in the table. Click **Apply**



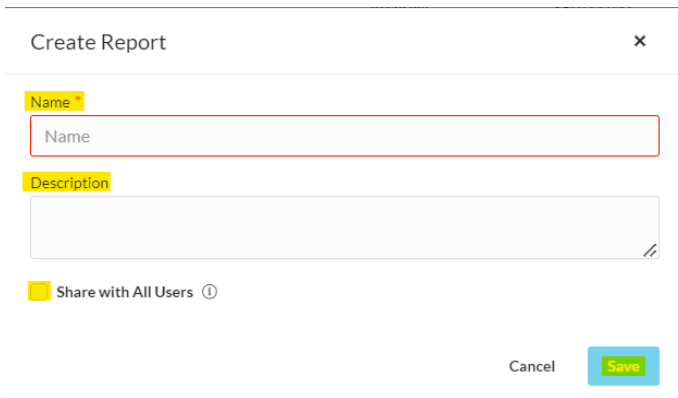
Click a column header at the top of the table to sort by ascending or descending

<input type="checkbox"/>	Policy Number	Policy Status	Death Benefit 
--------------------------	---------------	---------------	---

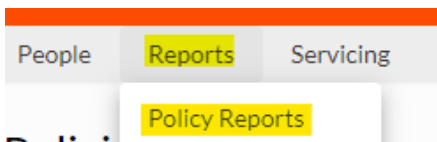
6. Once ready to finalize the report, click **Save As** in the top left corner



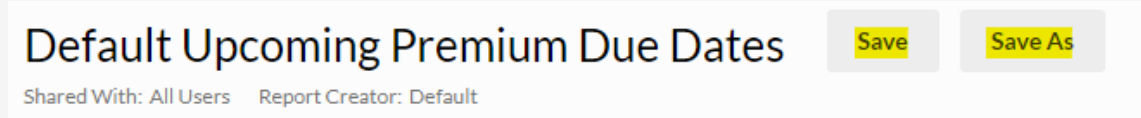
7. Enter a **Name**, and it's optional to enter a **Description**, along with selecting **Share with All Users** (otherwise will only be accessible by you). Click **Save**

A screenshot of a "Create Report" dialog box. It has a title bar with "Create Report" and a close button. Below the title bar, there are three sections: "Name" with a text input field containing "Name"; "Description" with a larger text area; and "Share with All Users" with a checked checkbox and an information icon. At the bottom right, there are "Cancel" and "Save" buttons.

8. The report can then be found under **Reports > Policy Reports**



Click into an existing policy report and use the Save button to save new changes. Use the Save As button to create a brand new, separate report.



For additional questions, please refer to our [Help Center](#) or reach out to your Customer Success Manager