

## Managing Agents

Procedure/Function	Where Accomplished	How Accomplished
Tracking Quotes Prepared for Sub-Agents	Quote Manager	Single click on the Quote Manager icon found on the tool bar. Enter the quotes as they are processed and the agent (along with the other pertinent information) it was processed for. Reports can then be run to show the quote production overhead versus the production of the agents you are running quotes for.
Tracking Agent Production versus Overhead	Quote Manager and Reports	Track Quotes as detailed above. Run the Agent production reports from the Reports module. Choose REPORT and POLICIES to run the production report. Cross-reference with the quote tracking report to find cost versus production.
Processing Agent Licenses and Appointments with Carriers	Job Manager and/or Agent Manager	Licenses and Carrier Appointments are tracked through the Agent Manager. By using the Job Manager, you can create a Job made up of the tasks required to process an agent license for a particular state or an Appointment with a particular carrier. Once the situation comes about, attach the job to the desired agent record and allow AGENCY EXPERT to automate the step-by-step processing of the license or carrier appointment.
Mass Mailings to Prospective or Active Agents	Word Manager	Access the Word Manager and Either create a new document (either a merge or non-merge document) or load a previously created document. Once the desired document is displayed, single click on FILE then PRINT MAIL MERGE. Create your query (search) and the document will be printed for each record found through your query of the database.
Agent Recruitment Campaigns	Job Manager	Access Job Manager and create a new job which lists the tasks you wish to perform for each prospect in your marketing campaign. Once the job has been created, access the TARGETS tab and select the prospects you wish to market to through your campaign by way of a query. Once the prospects are displayed, select the desired prospects and your campaign will be underway.