

REPORTING DATABASE TRAINING DOCUMENT

To access the database, log into the agent home page through <http://www.mendota-insurance.com>

Once you login, the agent home page will appear as shown below. Click on the Reports tab on the top menu bar to access a list of all available reports.

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Reports

The following list is a brief description of each available report. For further instructions on how to generate a report, please see the [Reporting Help](#) document.

- [Summary Reports](#) - Summary of an agency's products and state progress. You may select to run the following types of summary reports: monthly summary, yearly summary, transaction summary, production summary, PIF summary and accident year summary.
- [Internet Reports](#) - Track internet business activity within your agency. You may select to run the following types of reports: the Upload Summary and the Auto Activity Details.
- [Report Builder](#) - Custom build your report and select specific criteria.

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The following list is a brief description of each report from the top menu bar. For further instructions of how to generate the report, proceed to the desired section within the instructions.

- [Summary Reports](#)– summary of an agencies products and state progress. You may select to run the following types of summary reports: monthly summary, yearly summary, transaction summary, production summary, PIF summary and accident year summary.
- [Internet Reports](#)– contains two types of reports, the Upload Summary and the Auto Activity Details. Both reports track internet business activity within your agency.
- [Report Builder](#)– custom build your report and select specific criteria.

Summary Reports

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Summary Reports

SUMMARY REPORTS - SELECTION CRITERIA

Program: All Programs	Product: All Products	State: All States
Include Standard Auto: <input type="checkbox"/>	Report: Monthly Summary	Territory Manager: All Territory Managers

Run Report

- Monthly Summary
- Yearly Summary
- Transaction Summary
- Production Summary
- PIF Summary
- Accident Year

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Your agency is automatically selected when you login. If you are a home office with branches, a selection box will be available to view each branch individually.

You can select the program, product, state and report; then click Run Report to get the results.

The Report drop-down contains the following reports:

- Monthly Summary—default report, summary of agents products and states, yearly comparison by month
- Yearly Summary – summary of agents products and states
- Transaction Summary – summary of agents transactions broken down by month; compares years
- Production Summary— summary broken down by product, bottom of the report shows the totals
- PIF Summary - summary of policies in force count and premium
- Accident Year—summary of accident year loss ratios

A screen, similar to the one below, will appear when a report is run. The report information will remain at the top of the page and the results below. You can redefine your search from this page.

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SUMMARY REPORTS - SELECTION CRITERIA

Program: <input type="text" value="All Programs"/>	Product: <input type="text" value="All Products"/>	State: <input type="text" value="Texas"/>
Include Standard Auto: <input type="checkbox"/>	Report: <input type="text" value="Monthly Summary"/>	Territory Manager: <input type="text" value="All Territory Managers"/>

Reset
Run Report
Create CSV File

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD as of Curr. Month
Written Premium 2008	1,556,214	1,930,206	1,395,605										4,882,025
Written Premium 2007	1,232,348	1,470,198	1,649,339	1,355,519	1,312,248	1,415,093	1,405,409	1,452,703	960,825	1,368,967	1,141,503	907,822	4,351,885
% Change	26.28%	31.29%	-15.38%										12.18%
Written Premium (w//Fees) 2008	1,557,879	1,932,656	1,397,155										4,887,690
Written Premium (w//Fees) 2007	1,233,938	1,471,998	1,651,589	1,356,894	1,313,888	1,416,933	1,406,634	1,454,328	961,900	1,370,867	1,143,543	908,972	4,357,525
% Change	26.25%	31.29%	-15.41%										12.17%

Internet Reports

The Internet reports consist of 2 reporting options:

- Upload Summary Report
- Auto Activity Details

To run an Internet Activity report, click Reports from the top menu bar and then click on Internet Reports from the sub menu that appears, the following screen will appear.

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INTERNET REPORTS - SELECTION CRITERIA

<p style="text-align: center; margin: 0;">Report Beginning Date</p> <div style="text-align: center; margin-bottom: 5px;"> <input type="button" value="←"/> June 2008 <input type="button" value="→"/> </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> <tr> <td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> </tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> </table>	Sun	Mon	Tue	Wed	Thu	Fri	Sat	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	<p style="text-align: center; margin: 0;">Report Ending Date</p> <div style="text-align: center; margin-bottom: 5px;"> <input type="button" value="←"/> June 2008 <input type="button" value="→"/> </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> <tr> <td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> </tr> <tr> <td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td> </tr> </table>	Sun	Mon	Tue	Wed	Thu	Fri	Sat	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	<p style="text-align: center; margin: 0;">Include Deletes: <input type="checkbox"/></p> <p style="text-align: center; margin: 0;">Include Cancelled Agents: <input type="checkbox"/></p> <p style="text-align: center; margin: 0;">Agent: <input style="width: 100%;" type="text"/></p> <p style="text-align: center; margin: 0;">State: <input type="text" value="All States"/></p> <p style="text-align: center; margin: 0;">Territory Manager: <input type="text" value="All Territory Managers"/></p> <p style="text-align: center; margin: 0;">Report: <input type="text" value="Upload Count - Summary"/></p>
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Reset
Run Report

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Select a beginning date and an ending date, report type, and state if applicable; then, click run report. If you have more than one agency code or write in more than one state, you can choose the specific criteria by selecting from the agent and state drop down boxes. The reports will look similar to the examples below, depending on the report type chosen.

Upload Summary Report

If you select to run the Upload Summary, the results will look similar to the next screen. A home office agency with numerous branches will also list all branches and their internet activity.

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Internet Reports														
State:		Territory Manager:		Date Range: 6/5/2008 - 6/6/2008		Include Deleted: No		Include Cancelled Agents: No		Agent: All Agents				
Agent #	Agency Name	Auto Quotes	Auto Uploads	Auto Endorsements	Motorcycle Uploads	Watercraft Uploads	RV Quotes	RV Uploads	Rewrite Uploads	Auto Detail	RV Detail			
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
		0	0	0	0	0	0	0	0					
Totals:	9	0	0	0	0	0	0	0	0					
				Create CSV File		Return to Selection Criteria								

Once you see a high level overview of the quotes, uploads, and endorsements, you may click on the agent code to view the auto details as shown on the following page.

Mendota																
MAX																
State: IA Date Range: 6/5/2008 - 6/6/2008 Include Deleted: N Agent: 820140010																
Agent Name	Agent #	Quote #	Policy #	Insured	Policy Creation Date	Policy Effective Date	Upload Date	Quote Amount	Upload Amount	Tier	Credit Score	IFS Score	Previous Insurer	Prior BI	PD	Deleted
		3094278			06/05/2008	06/05/2008		1405	0	11	615	1J	Workmens Auto Ins	MIN	Y	N
		3095681			06/06/2008	06/06/2008		668	0	13	599	1K	NONE		Y	N
Totals:								Quotes \$2,073 (2)	Uploads \$0 (0)							
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Auto Activity Details

If you choose to run the Auto Activity Detail report from the selection screen, a report similar to the one below will appear. This report bypasses the Upload Summary and breaks it down from the start.

Mendota																
MAX																
State: IA Date Range: 6/5/2008 - 6/6/2008 Include Deleted: N Agent: 820140010																
Agent Name	Agent #	Quote #	Policy #	Insured	Policy Creation Date	Policy Effective Date	Upload Date	Quote Amount	Upload Amount	Tier	Credit Score	IFS Score	Previous Insurer	Prior BI	PD	Deleted
		3094278			06/05/2008	06/05/2008		1405	0	11	615	1J	Workmens Auto Ins	MIN	Y	N
		3095681			06/06/2008	06/06/2008		668	0	13	599	1K	NONE		Y	N
Totals:								Quotes \$2,073 (2)	Uploads \$0 (0)							
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Report Builder

The report builder allows you to customize your own report based on the selections below.

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REPORT BUILDER
COLUMN(S) - Select up to 10
[Click To Clear Column Selections](#)

	Month	YTD	Month (PY)	YTD (PY)	R3 Month	R12 Month	R24 Month
Calendar Year Loss & ALAE Ratio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calendar Year Loss Ratio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claim Count	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Earned Premium	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Earned Premium (W/Fees)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incurred Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incurred Losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incurred Losses & Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inforce Policy Count	<input type="checkbox"/>		<input type="checkbox"/>				
Inforce Policy Count % Chg	<input type="checkbox"/>		<input type="checkbox"/>				
Inforce Premium	<input type="checkbox"/>		<input type="checkbox"/>				
Inforce Premium % Chg	<input type="checkbox"/>		<input type="checkbox"/>				
Loss Frequency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NB Policy Count	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NB Policy Count % Chg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Business WP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Business WP % Chg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written Premium	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written Premium % Chg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written Premium (W/Fees)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DATA SELECTION
[Click To Clear Data Selections](#)

Month-End: <input type="text" value="03/31/2008"/> Report will include policies processed as of the date selected.	Program: <input type="text" value="Both"/>
Include Columns For: <input type="checkbox"/> Program <input type="checkbox"/> Product <input type="checkbox"/> States <input type="checkbox"/> Territory	Business Type: <input type="text" value="Both"/>

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Columns - You can select up to 10 items from this section. If you move your cursor over the checkbox, a bubble box will appear with an explanation of the term. See above.

Data Selection - The month-end drop down box will default to the last month. The drop down for Program defaults to both (which would include Mendota Specialty Auto & Mendota). If an agent writes standard and non-standard business, they will see a drop-down box for Business Type. The Include Columns will give a breakdown by each item selected.

- To run the report, click Run Report.
- To reset the Report Builder, click Reset.

Help Function - If you would like to see a definition of terms on the Report Builder page, move your cursor over the checkboxes in the Columns section – a bubble box will appear with a definition of the term. See the yellow bubble box above for an example.

The report results can be sorted by clicking on the desired column name. To begin a new report, click on Return to Selection Criteria. You will be directed back to the report builder page where you can edit your selections. All criteria previously selected will remain. To manipulate and customize the data, click the Create CSV File button. This will export the information to excel.

If you have any technical issues with the reporting database, please contact Technical Support at 1-800-341-2680 or contact your Agency Manager.