

Inventory Report

Generating an Inventory Report

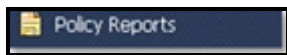
In the AIM+ Management Console, an Inventory report can be created. This report details all policy inventory records for a selected underwriter and indicates the status of each record.

Steps

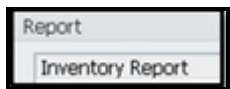
1. Access the **AIM+ Management Console** from the **AIM+ Desktop**.



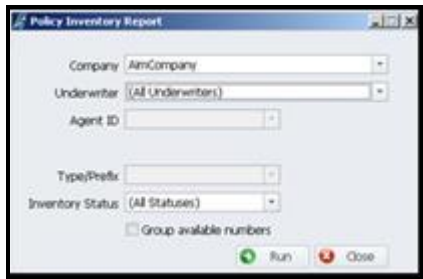
2. Select the **Policy Reports** module.



3. Select **Inventory Report** from the Reports list.



4. Select the **Company**, **Underwriter**, and **Agent ID** from each of the dropdown lists and click **Run**.

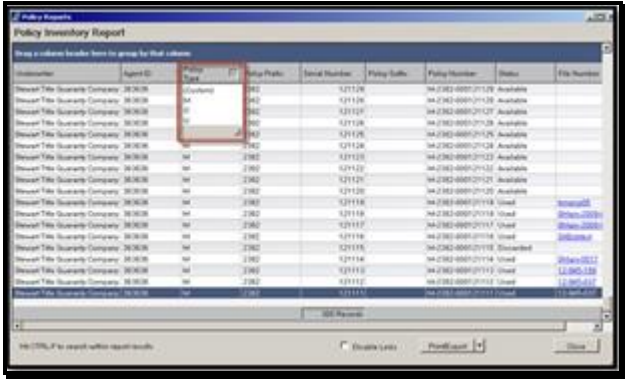


Note: A Report can be created for a specific Type/Prefix and Inventory Status

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Printing an Inventory Report

If you want to sort or filter by any of the columns you can click on the column headers or use the arrow that appears to filter by a specific data range.

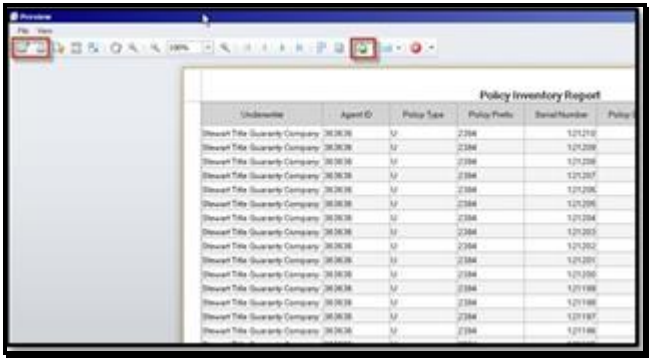


Note: You can also drag a column header to the top to group by that data. Example Policy Prefix.

You can print or export a report by clicking Print/Export, the report at the bottom of the report.

Steps

- Clicking on the printer icons at the top will print the report.
- Clicking on the Excel document icon will let you export/save it down as a pdf, excel, html or text file.



To close, X out on the top left of the preview pane and you can re-run a different report.

Tips: If the Policy Reporting Module does not appear as an option, the admin user who has the company options access can give you access. You can also call customer care at 877- 800-3132.