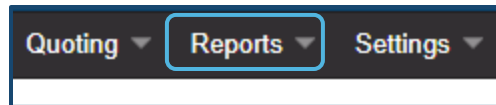




IPFS offers many reports to help you track and organize your accounts. Reports are visible to users who have been granted access by their Web Admin.



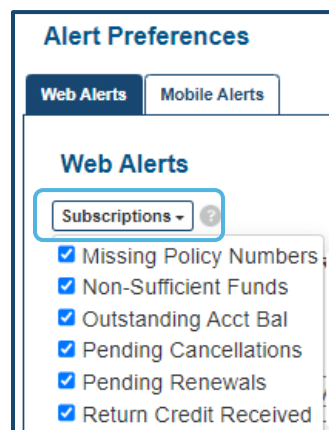
Available Reports

- Account Status** – includes the status of the account, amount due, account balance and due date.
- AutoPay ACH Consent** – track the status of insured autopay consent requests.
- Cancelled Accounts with Balance Due** – lists cancelled accounts with a balance greater than zero.
- Daily Production** – lists all quotes that were accepted during the selected period.
- eSign** – shows all quotes that were electronically sent to IPFS for processing during the selected period.
- Fee List** – (if enabled) lists initial fees based on acceptance date. Does not include fee adjustments.
- Entity Funding** – details funding for the location and markets.
- Funding** – details all funding transactions for the location and markets, including future fundings.
- Missing Policy Numbers** –accounts without a policy number that are Delinquent or within 14 days of Cancel.
- Non-Sufficient Funds** – identifies accounts with an NSF for the selected period.
- Outstanding Account Balance** – recap of accounts in late, cancelled, or current status.
- Pending Cancellations** – accounts that are going to cancel in the selected period.
- Pending Renewals** – any account that is due to renew in the selected period.
- Payment Due Date** – accounts that are due within the next five days, including current day.
- Production Breakdown** –accounts booked broken down by premium finance or TotalPay.
- Quote List** – all quotes that were completed in the selected period.
- Return Credit Received** – any credits paid to the provider including unearned commission or return premium.

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