

# QuickStart Guide

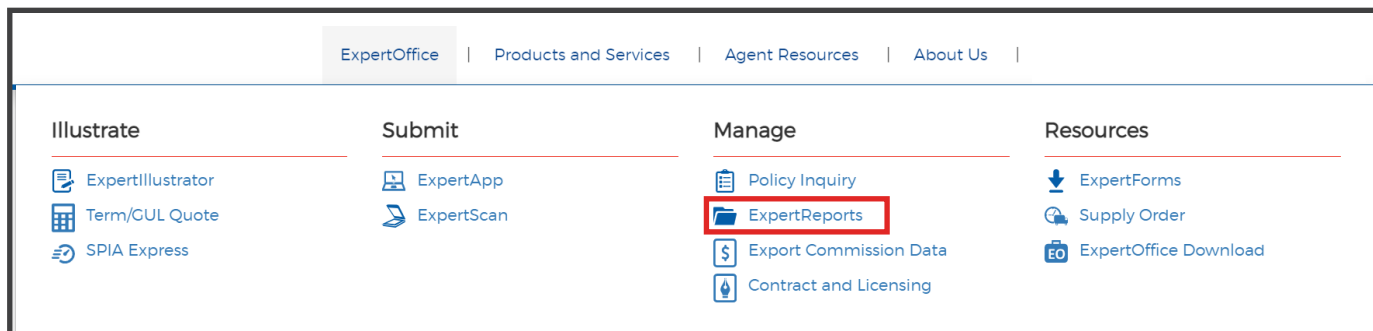
ExpertReports



Agent repository for reports, commission statements, administration and underwriting notices, client statements and other correspondence related to your business.

## 1 Accessing ExpertReports from the IMG Website

From the IMG website portal drop-down menu <https://img.anicoweb.com> select ExpertOffice > **ExpertReports**.



## 2 ExpertReports within the ExpertOffice App Download

To download the ExpertOffice App, visit [expertoffice.anicoweb.com](http://expertoffice.anicoweb.com).

### 3 Dashboard

The ExpertReports default screen has different search filter options to locate correspondence.

Select a **Quick Search button** for all available reports in the selected category.

your | ExpertReports

Quick Search

Book of Business Commission Stmt Semi Annual Stmt Annual Stmt Lapse Notice Underwriting Req

Report Category: All Reports

Policy Number: Enter Policy Number

Period: All Available

Search Type: Personal (selected), Hierarchy, Downline

click Downline to get downline agent list

Search Reset

Other search/filtering options include a drop down **Report Category**, Date Period, or the agent can input a specific Policy Number. Under the Search Type section there are options to filter your reports by Personal, Hierarchy and Downline.

your | ExpertReports

Quick Search

Book of Business Commission Stmt Semi Annual Stmt Annual Stmt Lapse Notice Underwriting Req

Report Category: All Reports

- All Reports
- Annual Statements
- Annuity Policy Service
- Confirmation
- Commissions
- Contract
- Health Policy Service
- Policy Term Conversion Notices
- Inactive
- Life/Annuity Claims
- Life Policy Service
- Miscellaneous
- MLM Memos
- New Business
- Policy Termination
- Production
- Quarterly Statements
- Semi-Annual Statements

Policy Number: Enter Policy Number







Search Type: Personal (selected), Hierarchy, Downline

click Downline to get downline agent list

Reset

## 4 Report List

The search will generate a Report List. The reports are listed by date. Select the **Download icon** to save the file to your computer or device.

Report Name	Date	Type	Download
DIP LETTER	01/09/2019	Hierarchy	
NIA FORM	12/13/2018	Hierarchy	
POLICY DELIVERY LTR	12/13/2018	Hierarchy	
UND REQUIREMENT LTRS	11/20/2018	Hierarchy	
NIA FORM	10/30/2018	Hierarchy	
POLICY DELIVERY LTR	10/30/2018	Hierarchy	



IMG Field Support Center 888-501-4043 | <https://img.anicoweb.com>

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