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INTRODUCTION

The MetLife Agency Business Management System is an online application intended for use by MetLife Agents, Unit Managers, Agency Managers, and Sales Executives worldwide. It will be used to set goals, track sales, recruitment, and training activities, and generate reports. This multi-lingual application is able to track activities at different levels including agent, unit, agency, country, sub-region, region and corporate.

TERMS AND DEFINITIONS

This section lists terms and definitions commonly used in the Business Management System for your reference:

- **New Client** – A client who does not hold existing insurance products.
- **Existing Client** – A client who holds existing insurance products.
- **Sales Activities** – Each of the following sales activities must be tracked separately for new clients and existing clients:
  - **New Contact** – A face-to-face or telephone contact of a client to schedule a sales appointment to discuss insurance products.
  - **First Appts** – A face-to-face meeting with a client to discuss insurance needs and wants, and completion of a fact-finding process.
  - **Closing Appts** – A meeting where a solution to the client’s insurance needs is presented in order to complete the sale and the client is asked to sign the application.
  - **Apps Taken** – OL and PA applications that have been signed by a client and forwarded to the administrative office for processing
  - **Premiums** – Annualized OL and PA premium submitted
  - **Referrals** – Additional contacts gained from a client.

QUICK START

The Quick Start section will help you navigate quickly through the system. Once Logged In, you can set Quotas and View/Fill Reports.

LOGGING INTO THE SYSTEM

To log in to the Business Management System as a Unit Manager please do the following:

1. Double-click on the Internet Explorer icon located directly on the desktop. This will open a web browser:
2. Enter web address [http://bms.metlife.com](http://bms.metlife.com) in the address line and press Enter.

3. On the login screen, select your language.
4. Enter your country, login, and password. Click the Login button.
5. Click *Forget Password* if you have forgotten your password.
Click Support if you need help.

Within the application, the two key features that will be utilized most frequently by Unit Managers are:

- Quota Setting
- View/Fill Report.

The opening screen is the Sales Activity Performance screen. This screen will allow you to review reports as well as access other features of the application. The Sales Activity Performance screen allows the Unit Manager to review the Sales Activities for his agents, a specific agent or a combination of agents.

The Sales Activity performance data can be viewed in three different ways:

- New Client
- Existing Client
- All Clients.

Use the drop down box to select the desired view. The default view is All Clients.

**FORGET PASSWORD**

If you have forgotten your password this screen allows you to retrieve it.
On this screen, simply enter your country, login, and email address. Hit the Continue button when you have filled in this information.

An email will be sent to the email address you provided.

If your email address is not on file with the system, you will be required to have your System Administrator reset your password.
SUPPORT

If you require help with the system, you may click the Support link on the login screen.

The Support screen will allow you to retrieve contact information from your region.

Select your country from the drop down list. The support information for the selected country will be displayed.
QUOTA SETTING

The first time you use this application and throughout the year if necessary, you will need to set quotas for your agents’ sales activities. Sales activity quotas are to be established for New Clients and Existing Clients. To do this, follow the instructions below.

1. Click the Quota Setting button in the menu at the top of any screen.
2. Once in the Quota Setting Screen, select the client type from the drop down box: New Client or Existing Client
3. Fill in quotas for the client type selected for your agents.
4. Click the Update button
5. Select the other client type from the drop down box
6. Fill in quotas for the client type selected for your agents.
7. Click the Update button
8. To include an agent in the Performance Report, a report that shows the activity performance of your agents, make sure the “Is Included” checkbox next to their name is checked. To exclude an agent in the Performance Report, uncheck this box.
9. Click the Update button when you are finished.
1. To view a report of your agents’ Sales Activity performance, click the Performance button in the menu at the top of any screen.

2. The default view of the Sales Activity Performance Report is All Clients. This view shows the combined performance of all the agents (whose names were checked on the Quota Setting screen) in your unit.

3. To view the unit agents’ performance for New or Existing Clients, select the client type from the drop down box and click the Refresh button.

4. To view one agent’s performance, click the agent number on the Hierarchy Tree on the left side of the screen and select the client type from the drop down box. Click the Refresh button to ensure the correct data is being displayed.

**NOTE:** To expand the Hierarchy Tree click the “+” sign next to each item on the tree.

   a. To select multiple entities, the user should click on the first item and then press the CTRL key on the keyboard while clicking on any additional items. Items selected will have a gray highlight around them

   b. Once all the desired items have been highlighted, the user should click the Get Report button above The Hierarchy Tree. The cumulative information will now display to the right.

**NOTE:** Steps 5-8 are optional and are not required to view a report.

5. To view a report of performance within a certain time frame, use the Search By Date feature just above the Performance Report table.

   **NOTE:** By default, the Performance Report table shows a weekly view of the current month’s performance.

6. Click the calendar button to the right of the From and To fields and select a From (beginning) date and a To (ending) date.

7. Select a Unit of Time in which to display the results in the report.

   a. Daily – Shows the activity of the selected agent or agents on a daily basis.

   b. Weekly – Shows the activity of the selected agent or agents on a weekly basis.

   c. Monthly – Shows the activity of the selected agent or agents on a monthly basis.

   d. Quarterly – Shows the activity of the selected agent or agents on a quarterly, or 3 month, basis.

   e. Semi-Annually – Shows the activity of the selected agent or agents on a 6 month basis (January-June).

   f. Annually – Shows the activity of the selected agent or agents on a yearly basis.

8. Click the Refresh button to display the results.
NOTE: For more information about logging in as a Unit Manager, please refer to the LOG IN AS UNIT MANAGER section of the USER VIEW in this manual on page 12.

QUICK ANSWERS

The Quick Answers section is designed to answer frequently asked questions.

LOG IN QUESTIONS

WHEN DO I NEED TO CHOOSE A COUNTRY?
You are only required to select a country if you are an Agent, Unit Manager, or Agency Manager. Sales Executives are not required to select a country.

WHEN DO I NEED TO CHOOSE A LANGUAGE?
All users need to select a language before logging in.

WHAT IF I FORGOT MY PASSWORD?
If you have forgotten your password, simply click the Forget Password link below the Login Clear buttons on the login screen.

HOW DO I LOG OUT?
If you wish to log out of the system, click the Logout button on the right side of the Menu Bar at the top of any screen.
NOTE: The system will automatically log you out if you are inactive for 30 minutes.

UNIT MANAGER QUESTIONS

HOW DO I VIEW INDIVIDUAL AGENT REPORTS?
To view an individual agent's report, click on the agent's number in The Hierarchy Tree on the left side of the screen.

Within The Hierarchy Tree, click the “+” sign next to the item to expand it. To collapse a section, click the “-” sign next to it.
HOW DO I VIEW MULTIPLE AGENT REPORTS?
To view multiple agents’ reports, use The Hierarchy Tree and click on the first item. Then press the CTRL key on your keyboard while clicking on any additional items. Items selected will have a gray highlight around them. Once all the desired items have been highlighted, click on the Get Report button above the Hierarchy Tree. The cumulative information will now display to the right.

WHY IS THE DATE I ENTERED CHANGING WHEN I SELECT “WEEKLY/MONTHLY/SEMIANNUALLY/ANNUALLY” AS MY UNIT OF TIME IN THE SEARCH BY DATE FEATURE?
The date automatically changes to the beginning of the time period when “Weekly/Monthly/SemiAnnually/Annually” is selected as a Unit Of Time because the application requires whole weeks/months/periods/years to calculate a correct view.

WHY CAN’T I SEE PERFORMANCE FOR A PARTICULAR AGENT?
There are two possible reasons why you cannot view performance for a particular agent.

The first reason may be that the agent has not been included in the Performance table. This will prevent the Agent from seeing their data on their own My Performance screen.

If an agent has not been included, the agent number in the Hierarchy Tree will be grayed out.

To include an agent, go to the Quota Setting screen. To view the Quota Setting screen, click on the Quota setting button on the Menu Bar from any screen.

On the Quota Setting screen, locate the agent within the table using the Hierarchy Tree. There may be multiple pages for each unit, so be sure to check the Page Number dropdown list on the right side of the screen.

Verify the checkbox in the Is Included column next to the agent is checked. If it is not, check it and click the Update button. This should make the agent’s number in the Hierarchy Tree from a grayed out version to black and clickable version.

The second reason may be that the agent has not entered any data into the system. To resolve this issue, speak with the agent about why he or she has not entered data.

HOW DO I GET PASSWORDS FOR MY AGENTS?
To get IDs and passwords for your agents, contact your designated administrator with the request.

HOW DO I GIVE ACCESS TO MY AGENTS?
To get IDs and passwords for your agents, contact your designated administrator with the request.
WHEN AND WHERE DO I SET QUOTAS?
You should set quotas the first time you use the Business Management System. This will allow your agents to begin tracking their performance immediately. Additionally, you should set quotas according to the standards required by your company. You should also set quotas for any new agents. Quotas for agent Sales Activities are to be established by client type: New Client or Existing Client.

To set quotas for your agents, use the Quota Setting screen. To view this screen, click on the Quota Setting button on the Menu Bar from any screen.

For more detailed instructions, please see the Quota Setting sub-section within the Log In As Unit Manager section.

WHY CAN’T I SET QUOTAS?
The settings in your Internet Explorer browser may be incorrectly configured. To correct this, please follow the instructions below.

Internet Explorer 6 and below:

1. On the Menu Bar, click the Tools option and select Internet Options.

2. In the middle of the General Tab, click the settings button within the Temporary Internet files section.
3. At the top of the Settings screen, click the radio button next to Automatically under Check for newer versions of stored pages.
4. Click the OK buttons on the Settings and Internet Options windows to save these changes.

Internet Explorer 7:

1. On the Menu Bar, click the Tools option, and select Internet Options.

2. If the Menu Bar is not visible, click the Tools button on the right side of the Internet Explorer window and select Internet Options.
3. In the Internet Options window that opens, on the General Tab click the Settings button under the Browsing History section.
4. At the top of the Settings screen, click the radio button next to Automatically under “Check for newer versions of stored pages.”

5. Click the OK button on the Settings and Internet Options windows to save these changes.

WHERE SHOULD I LOOK FOR DEFINITIONS FOR THE FIELDS WITHIN A SCREEN?
To look for definitions for fields on a screen you may check two different places.

The first is look on the screen for the **Activity Definition** button. This button will open a new window that will contain definitions for relevant terms within that screen.

The second place to look is the section within this manual related to your screen.

CAN I VIEW REPORTS FROM MULTIPLE UNITS?
No. Reports from different units can not be combined into the same report.
The User View section is a detailed description of each section of the application the user will encounter. It is broken down mostly by screen. Each sub-section of the User View has a screen shot and description. It also includes step-by-step instructions on how to input data into each screen.

**LOG IN AS A UNIT MANAGER**

**THE HIERARCHY TREE DETAILS**

The Hierarchy Tree varies from user to user, although its function remains the same. It allows unit managers to see the reporting structure and it permits them to select entities within the tree and display the results on the right side of the screen. When the screen is first opened, the tree is collapsed. Click the “+” sign next to the item to expand it. To collapse a section, click the “-” sign next to it.

To select an item, the user should click on the agency, unit, or agent. The selected item will now have a gray highlight. The information for that selection will be display to the right.

To select multiple entities, the user should click on the first item and then press the CTRL key on the keyboard while clicking on any additional items. Items selected will have a gray highlight around them. Once all the desired items have been highlighted, the user should click on the Get Report button above the Hierarchy Tree. The cumulative information will now display to the right.

In the Unit Manager view of The Hierarchy Tree, there are seven different categories.
The agents whose names are grayed out are those who do not have the “Is Included” checkbox checked in the Quota Setting Screen.

**PERFORMANCE SCREEN DETAILS**

The Sales Activity Performance screen is the opening screen for Unit Managers. This screen displays the performance details for agents within the manager’s unit. The Sales Activity Performance screen has three views: New Client, Existing Client and All Clients.

The Menu Bar is displayed at the top of the screen. It allows the user to switch screens based on the desired task. Each manager will see Performance, Recruitment, Field Training, Quota Setting and Printable Reports options on this bar. To make a selection, simply click the desired selection. The user’s current location is highlighted.
Below the Menu Bar on the right side, the Search By Date and Client Type feature is displayed. This feature, which is repeated throughout the application, allows the user to search for a report within specified dates and client type.

To use the Select Date feature, the manager needs to select two dates to search within. The user should click the calendar icons next to the From and To text boxes, use the popup calendar to select the dates, and pick a Unit Of Time from the dropdown menu at the right.

A Unit of Time can be Daily, Weekly, Monthly, Quarterly, Semi-Annually, or Annually. Daily shows the activity of the selected agent or agents on a daily basis. Weekly shows the activity of the selected agent or agents on a weekly basis. Monthly shows the activity of the selected agent or agents on a monthly basis. Quarterly shows the activity of the selected agent or agents on a quarterly, or 3 month, basis. Semi-Annually shows the activity of the selected agent or agents on a 6 month basis (January-June). Annually shows the activity of the selected agent or agents on a yearly basis.

**NOTE:** The date automatically changes to the beginning of the time period when “Weekly/Monthly/SemiAnnually/Annually” is selected as a Unit Of Time because the application requires whole weeks/months/periods/years to calculate a correct view.

To use the Select Client Type feature, the manager can select a specific view of the data from the drop down box. The options are: New Client, Existing Client and All Clients. The default view is All Clients.

When the user is finished making their selections he or she should then click the Refresh button.

The Hierarchy Tree allows the manager to select multiple agents within their unit and display their combined performance.
When the screen is first opened, the tree is collapsed. Click the “+” sign next to the item to expand it. To collapse a section, click the “-” sign next to it.

In the center of the screen, the Performance table is displayed. This table displays the performance for the selected agents or agent.

Across the top of the table, columns for New Contacts, First Appointments, Closing Appointments, Submitted Life Applications, Submitted PA Applications, Life Premium, PA Premium and Referrals are shown. The data displayed will be for New Client, Existing Client or All Clients, depending upon what client type has been selected from the drop down box.

Down the left side of the Performance table, rows for Total, Quota, and Quota Percentage are shown. The data displayed will be for New Client, Existing Client or All Clients, depending upon what client type has been selected from the drop down box.

<table>
<thead>
<tr>
<th>Row Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>This column is the total number of activities completed for that row.</td>
</tr>
<tr>
<td>Quota</td>
<td>This column displays the quota set for that activity.</td>
</tr>
<tr>
<td>Quota%</td>
<td>This column is the percentage of the quota that has been completed.</td>
</tr>
</tbody>
</table>

Below, in the second part of this table, dates that activity performance was recorded are displayed. If more than one agent is selected, these numbers are a combination of the selected agents.

Below the Performance table is the Activity Ratios Table. This table displays the ratios between columns from the table above. The Activity Ratios will be calculated separately for New Client, Existing Client and All Clients.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts/FirstAppt</td>
<td>This column is the ratio between the number of Contacts and the number of First Appointments.</td>
</tr>
<tr>
<td>FirstAppt/ClosingAppt</td>
<td>This column is the ratio between the number of First Appointments and the number of Closing Appointments.</td>
</tr>
<tr>
<td>ClosingAppt/Sales</td>
<td>This column is the ratio between the number of Closing Appointments and the number of Sales.</td>
</tr>
<tr>
<td>Referrals/Appts</td>
<td>This column is the ratio between the number of Referrals and the number of Closing Appointments.</td>
</tr>
</tbody>
</table>
RECRUITMENT SCREEN DETAILS

The Recruitment Screen is used to track the Unit Manager’s own recruitment numbers.

Across the top of the Recruitment screen is the Menu Bar. It allows the user to switch screens based on the desired task. Each user will see Performance, Recruitment, Field Training, Quota Setting and Printable Reports options on this bar. To make a selection, simply click the desired selection. The user’s current location is highlighted.

Below the Menu Bar the Unit Name, Unit Code, Contract Date, Base Currency, Year and Month are displayed.

On the left side of the page is The Hierarchy Tree. It allows managers to see the reporting structure and it permits them to select entities within the tree and display the results on the right side of the screen.
When the screen is first opened, the tree is collapsed. Click the "+" sign next to the item to expand it. To collapse a section, click the "-" sign next to it.

The focus of the Recruitment Screen is the Recruitment table. This table allows the Agency Manager to record their recruitment activities for the current month.

4 The top row of the Recruitment table describes each activity, the user's quota, each week, the total, and the quota percentage.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment Activity</td>
<td>This column describes the activity the user is recording.</td>
</tr>
<tr>
<td>Quota</td>
<td>This column describes the quota for that activity.</td>
</tr>
<tr>
<td>Week</td>
<td>These columns describe which week the user is recording information about.</td>
</tr>
<tr>
<td>Total</td>
<td>This column shows the total number from all weeks for that activity.</td>
</tr>
<tr>
<td>%Quota</td>
<td>This column shows the quota percentage that has been completed for that specific activity.</td>
</tr>
</tbody>
</table>

5 On the left side of the table are the individual activities that the Unit Manager should record.
Below this table is the Monthly Activity Ratios table. This table shows ratios related to the Recruitment table in order to help the user better understand their progress. The ratios are as follows: the ratio between Approaches and 1st Interviews, 1st Interviews and Closing Interviews, Closing Interviews and Attendees, and Attendees and Contracted Agents.

<table>
<thead>
<tr>
<th>Monthly Activity Ratios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approaches/First Interviews</td>
</tr>
<tr>
<td>0.67</td>
</tr>
</tbody>
</table>

The Unit Manager should follow the table and enter their data accordingly.

During the process, he or she can see the Total column and the Quota Percentage column update using the data he or she just entered once the user moves to another text field. Additionally, the Monthly Activity Ratios table is updated each time the user moves to a new text field.

When the user is finished entering data into the Recruitment table, he or she should click the Update button at the bottom of the page to save the information.

At any time while the user is recording their information they can click on the Activity Definition button at the bottom of the screen for more information about the screen.

The Activity Definition button opens a new window with definitions of common terms included on this screen.
The user may also want to track their recruitment performance. To do this, they should click on the Report link just above the upper right corner of the Recruitment table. This screen allows the user to see a broad view of their progress for a specific time period.

The Recruitment Report Screen, by default, displays information for the current month.
1. Across the top of the Recruitment Screen is the Menu bar. It allows the user to switch screens based on the information a Unit Manager may want to review.

2. On the left side of the page is the Hierarchy Tree. It allows the Unit Manager to see the reporting structure in which the unit reports.

3. The central table on this page, the Recruitment Report table, shows the user’s progress for the specified time period. This allows the user to view which weeks they were most productive.

4. To return to the Recruitment Screen for data entry, the user should click the Data Entry link just above the upper right of the Recruitment Report table.

5. Across the top row of the table are the column descriptions.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td>This column shows the time period for the row.</td>
</tr>
<tr>
<td>Approaches</td>
<td>This column shows the number of successful contacts of the prospect that the user wants to recruit.</td>
</tr>
<tr>
<td>First Interviews</td>
<td>This column shows the number of face-to-face appointments such as the presentation of the industry, the company &amp; the user, or Fact Finding of the prospect.</td>
</tr>
<tr>
<td>Closing Interviews</td>
<td>This column shows the number of interviews in which the prospect is presented the career and is asked to join in.</td>
</tr>
<tr>
<td>PCT Attendees</td>
<td>This column shows the number of pre-contracted agents.</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contracted Agents</td>
<td>This column shows the number of contracted agents.</td>
</tr>
<tr>
<td>Prospects</td>
<td>This column shows the number of potential candidates for recruiting.</td>
</tr>
<tr>
<td>that attended PCT (Pre-Contracted Training).</td>
<td></td>
</tr>
</tbody>
</table>

6 On the side of the Recruitment screen, there are sections for Totals, Quota, Quota % and an identifier representing the time frame used in determining the figures in each column.

<table>
<thead>
<tr>
<th>Row Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>This row is the total number of an activity that has been completed and recorded by the entity (ies) as defined by the hierarchy tree during the requested time frame.</td>
</tr>
<tr>
<td>Quota</td>
<td>This row represents the total number of an activity that is required to be completed and recorded by the entity(ies) as defined by the hierarchy tree during the requested time frame.  Quota values are calculated as follows:  Quota = (Total Quota set / 7) * Number of Days in the viewing period. (From and To Calendar fields)</td>
</tr>
<tr>
<td>Quota%</td>
<td>This row is the percentage of the quota that has been met by the entity(ies) as defined by the hierarchy tree during the requested time frame.  Quota percentage is calculated as follows:  Quota % = (Total Reported Activity / Quota Set) * 100</td>
</tr>
</tbody>
</table>

7 The Recruitment Ratios table allows the user to view their recruiting effectiveness. The ratios shown are: Approaches and First Interviews, First Interviews and Closing Interviews, Closing Interviews and PCT and PCT and Contracted Agents.
FIELD TRAINING SCREEN DETAILS

The Field Training Screen is much like the Recruitment Screen in that it is a place for the Unit Manager to track their own training activities.

1. Across the top of the screen is the Menu Bar. It allows the user to switch screens based on their desired task. Each manager will see Performance, Recruitment, Field Training, Quota Setting and Printable Reports options on this bar. To make a selection, simply click the desired selection. The user's current location is highlighted.

2. Below the Menu Bar the Unit Name, Unit Code, Contract Date, Base Currency, Year and Month are displayed.

3. On the left of the screen, The Hierarchy Tree is shown. For this section, the tree has no relevance since the information is about the Unit Manager.

The Field Training table is in the center of the screen. This table is where the user should record their data.

4. Across the top of the table are the descriptions of the columns.
### Column Name | Description
--- | ---
Field Training | This column describes the training activity.
Quota | This column shows the quota that has been set for that particular training.
Week | These columns show which week the user is to record information for.
Total | This column shows the total amount of training the user has recorded.
%Quota | This column shows the percentage of the user’s quota that has been completed.

5 Down the side of the table are the types of Field Training.

As the user enters information, the Total and Quota Percentage number change once the user clicks into a new text field.

6 Once the user is finished entering the data, he or she should click the Update button below the table to save their data.

7 As with the Recruitment Screen, the Field Training Screen also allows the user to see a Report view. To access the Report, the user should click on the Report link above the upper right corner of the Field Training table.

8 Once in the Field Training Report Screen, the user may view their field training progress. By default, the user is shown information for the current month but the user can change this by using the Search By Date feature above the Report table.
Across the top of the screen is the Menu Bar. It allows the user to switch screens based on their desired task. Each manager will see Performance, Recruitment, Field Training, Quota Setting and Printable Reports options on this bar. To make a selection, simply click the desired selection. The user’s current location is highlighted.

On the left side of the page is the Hierarchy Tree. It allows the Unit Manager to see the reporting structure in which the unit reports.

The Search by Date feature, which is repeated throughout the application, allows the user to search for a report within specified dates. To use this feature, the manager needs
to select two dates to search within. The user should click the calendar icons next to the From and To text boxes, use the popup calendar to select the dates, pick a Unit Of Time from the dropdown menu at the right and then click the Refresh button.

Below the Search By Date feature is the Field Training Report table. This table is an overview of the information in the Field Training table on the Field Training Screen.

The central table on this page, the Field Training Report table, shows the user’s progress for the specified time period. This allows the user to view which weeks they were most productive.

4 To return to the Field Training Screen for data entry, the user should click the Data Entry link just above the upper right of the Field Training Report table.

Data Entry

5 Across the top row of the table are the Field Training Activities column.

6 On the side of the Field Training screen, there are sections for Totals, Quota, Quota % and an identifier representing the time frame used in determining the figures in each column.

| Total:   |
| Quota:   |
| Quota%:  |
| 2010:Jun:Week4 |
| 2010:Jun:Week3 |
| 2010:Jun:Week2 |
| 2010:Jun:Week1 |

<table>
<thead>
<tr>
<th>Row Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>This row is the total number of an activity that has been completed and recorded by the entity (ies) as defined by the hierarchy tree during the requested time frame.</td>
</tr>
<tr>
<td>Quota</td>
<td>This row represents the total number of an activity that is required to be completed and recorded by the entity(ies) as defined by the hierarchy tree during the requested time frame. The Quota values are calculated as follows: Quota = (Total Quota set / 7) * Number of Days in the viewing period. (From and To Calendar fields)</td>
</tr>
</tbody>
</table>
This row is the percentage of the quota that has been met by the entity(ies) as defined by the hierarchy tree during the requested time frame.

Quota percentage is calculated as follows:

\[
\text{Quota} \% = \left( \frac{\text{Total Reported Activity}}{\text{Quota Set}} \right) \times 100
\]

QUOTA SETTING SCREEN DETAILS

In the Unit Manager view, the Quota Setting Screen is used for setting the Sales Activity quotas for the manager’s agents. A quota is to be set for each client type: New Client and Existing Client.

1. The Menu Bar is displayed at the top of the screen. It allows the user to switch screens based on their desired task. Each manager will see Performance, Recruitment, Field Training, Quota Setting and Printable Reports options on this bar. To make a selection, simply click the desired selection. The user’s current location is highlighted.
Below the Menu Bar, the current Year, Base Currency, and the Unit Code are displayed. Also in this section, is the drop down box where the client type for which the quotas are to be established, is selected.

On the left of the screen is The Hierarchy Tree, although in this section, it does not change the information within the table.

The main focal point of the screen is the Agent Weekly Sales Quota Setting table.

Across the top of the table are the column names that describe what information is stored or needs to be recorded into the table.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Included</td>
<td>When this box is checked, this agent is included in the Sales Activity Performance Report. If it is not checked, the agent is not included in the Sales Activity Performance Report.</td>
</tr>
<tr>
<td>Agent Code</td>
<td>This column displays the agent’s code.</td>
</tr>
<tr>
<td>Agent Name</td>
<td>This column displays the agent’s name.</td>
</tr>
<tr>
<td>Contract Date</td>
<td>This column displays the agent’s contract date.</td>
</tr>
<tr>
<td>New Contacts (Tel Calls)</td>
<td>This column describes the number of potential clients the agent is expected to contact, i.e. telephone calls to schedule a sales appointment to discuss insurance products.</td>
</tr>
<tr>
<td>1st Appointment (Fact Finds)</td>
<td>This column describes the number of face-to-face appointments to discuss insurance needs and wants, and completion of a fact-finding process expected to be completed.</td>
</tr>
<tr>
<td>Closing Apmns (Presentations)</td>
<td>This column describes the total number of appointments expected where a solution to the client's insurance needs is presented in order to complete the sale and the client is asked to sign the application</td>
</tr>
<tr>
<td>Apps Subm</td>
<td></td>
</tr>
<tr>
<td>Life</td>
<td>This column describes the number of new OL applications submitted.</td>
</tr>
<tr>
<td>PA</td>
<td>This column describes the number of new PA applications submitted.</td>
</tr>
<tr>
<td>Premium</td>
<td></td>
</tr>
<tr>
<td>Life</td>
<td>This column describes the annualized OL premium submitted.</td>
</tr>
<tr>
<td>PA</td>
<td>This column describes the annualized PA premium submitted.</td>
</tr>
<tr>
<td>Referrals</td>
<td>This column describes the number of referrals expected from the closing appointment.</td>
</tr>
</tbody>
</table>

Note: Each of the sales activities listed in the table above must be tracked separately for new clients and existing clients.

Once the user has finished setting the quotas for one client type for their unit, the user should click the Update button below the table to save the quotas. The process is repeated to establish quotas for the remaining client type.
PRINTABLE REPORT SCREEN DETAILS

In the Unit Manager view, the Printable Report Screen is used to display the sales activity summary, training and recruitment activity summary, access logs, and activity entering logs for a selected period and scope. There are six types of reports: Individual Agent Activities, Agent Access Logs, Sales Activities Entering Logs, Individual Financed Agent Activities, Financed Agent Access Logs, and Financed Agent Sales Activities Entering Logs. These are all defined below. Two reports can be generated for the different client types: New Client, Existing Client and All Clients.

INDIVIDUAL AGENT ACTIVITIES DETAILS
This report is a summary of all agents’ sales activities, within the selected period and under the selected scope. The performance data is displayed agent by agent. This report is available as low as the unit level. When selecting unit report scope, it will display data for agents under the selected unit(s). This report can be generated for Active Agents or Active and Terminated Agents. The report can be created separately for the three client types: New Client, Existing Client or All Clients.

AGENT ACCESS LOGS DETAILS
This report displays how many times and what dates the specified agent(s) logged on to BMS, within the selected period and under the selected scope. The OK notation under a date means the agent successfully logged in on the date displayed. This report is available as low as unit level. When selecting the unit report scope, it will display data for agents under the selected unit(s).

SALES ACTIVITIES ENTERING LOGS DETAILS
This report displays what dates the specified agent(s) logged on to BMS and entered sales activity data, within the selected period and under the selected scope. The OK notation under a date means the agent successfully logged in and entered data on that date. This report is available as low as the unit level. When selecting the unit report scope, it will display data for agents under the selected unit(s).

INDIVIDUAL FINANCED AGENT ACTIVITIES DETAILS
This report is a summary of financed agents’ sales activities, within the selected period and under the selected scope. The performance data is displayed agent by agent. This report is available as low as the unit level. When selecting the unit report scope, it will display data for agents under the selected unit(s). This report can be generated for Active Agents or Active and Terminated Agents. The report can be created separately for the three client types: New Client, Existing Client or All Clients.

FINANCED AGENT ACCESS LOGS DETAILS
This report displays how many times and what dates the specified financed agent(s) logged on to BMS, within the selected period and under the selected scope. The OK notation under a date means the agent successfully logged in on that date. This report is available as low as the unit level. When selecting the unit report scope, it will display data for agents under the selected unit(s).

FINANCED AGENT SALES ACTIVITIES ENTERING LOGS DETAILS
This report displays what dates the specified financed agent(s) logged on to BMS and entered sales activity data, within the selected period and under the selected scopes. The OK notation under a date means the agent successfully logged in and entered data on
that date. This report is available as low as the unit level. When selecting the unit report scope, it will display data for agents under the selected unit(s).

1. The Menu Bar is displayed at the top of the screen. It allows the user to switch screens based on their desired task. Each manager will see Performance, Recruitment, Field Training, Quota Setting and Printable Reports options on this bar. To make a selection, simply click the desired selection. The user's current location is highlighted.

2. On the left side of the screen, the Hierarchy Tree is displayed. This tree can be used to select the scope of the reporting.
3. Below the Menu Bar is the Period section. This section is where the user can select a time frame for the report. By default, the time frame is the current month.

| Period: | From: 01/07/2008 | To: 31/07/2008 |

4. The next section displays the Scope. This allows the user to narrow or broaden the scope of the report. By default, the scope is the current user’s access scope. To change the scope, the user can simply click the scope level on the Hierarchy Tree on the left side of the screen.

   Report Scope: 046001

5. Below the Report Scope is the Report Type. This displays the different types of reports available, as defined above.

   Report Type: Individual Agent Activities  
   Agent Access Logs  
   Sales Activities Entering Logs  
   Individual Financial Agent Activities  
   Financial Agent Access Logs  
   Financial Agent Sales Activities Entering Logs

   Agent Status: Active Only  
   Active & Terminated

   Client Type: All Clients  
   New Client  
   Existing Client

6. Once the user has made all of the desired selections, the user should click the Generate Report button.

Once the Generate Report button has been pressed, a report will be generated, this may take a few minutes.

The report will be created in Microsoft Excel’s .xls format. The user will be given the option to simply open the report or save it. The file name should read:

   ReportType_BeginningDate_EndDate.xls.