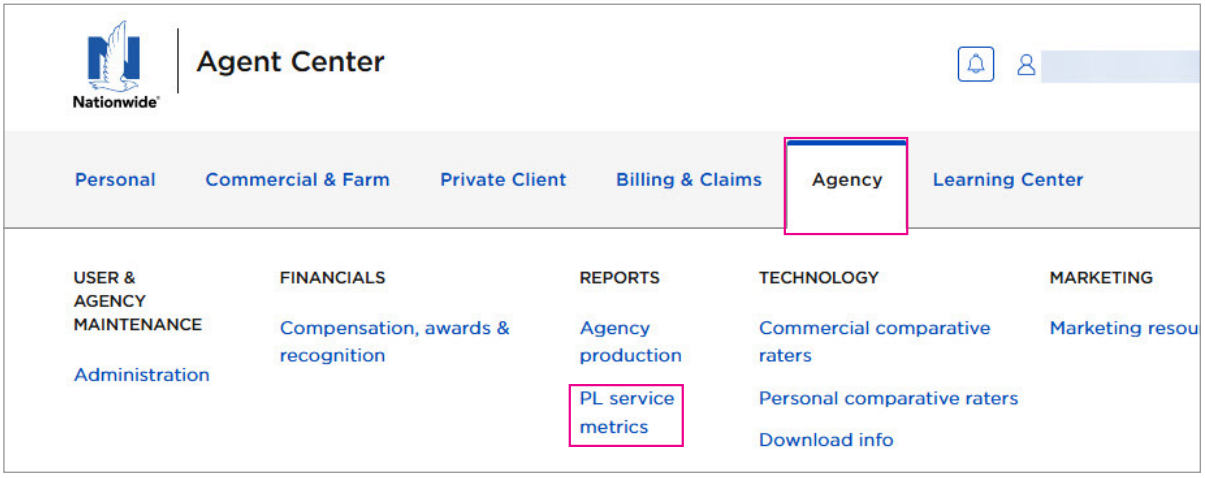
How to access the personal lines service metric report

Where to find data regarding your agency's usage of PL servicing

From the Agent Center workspace you will select **Agency** and then **PL service metrics**.



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Next, you will select the desired **5-digit agency number** in the drop-down.

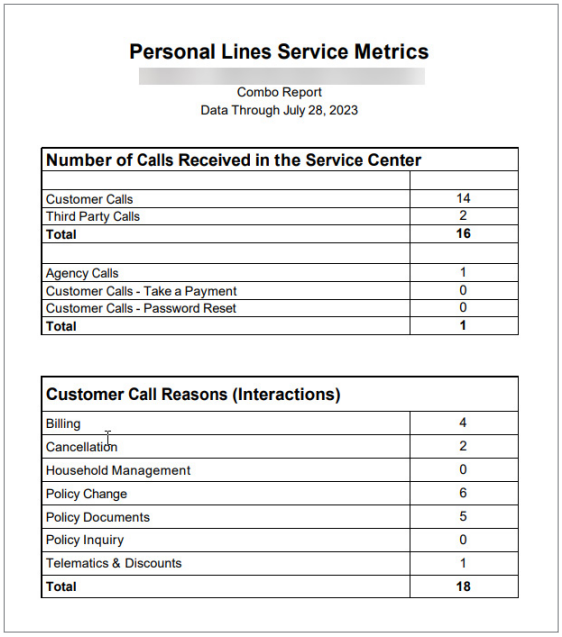
- The Unified Agency Combo (UAC) code or master code refers to the main agency entity. You will need to select **Show combo report** to see data for all codes under your UAC.
- The subcode or tracking code refers to 1 or more subgroupings organized under a UAC/master code. A subcode or tracking code could differentiate between agency locations, lines of business, transfer, book rolls, etc. Select **Show detailed report** to see only this code.
- Once the agency code is selected, you will select which type of report you want: **monthly** or **weekly**.



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Weekly reports will show your agency's calls on a weekly basis throughout the month.

Monthly reports will show total monthly calls.



Personal Lines Service Metrics

Combo Report
Data Through July 28, 2023

Number of Calls Received in the Service Center	
Customer Calls	14
Third Party Calls	2
Total	**16**
Agency Calls	1
Customer Calls - Take a Payment	0
Customer Calls - Password Reset	0
Total	**1**

Customer Call Reasons (Interactions)	
Billing	4
Cancellation	2
Household Management	0
Policy Change	6
Policy Documents	5
Policy Inquiry	0
Telematics & Discounts	1
Total	**18**

FAQs

What are customer call interactions? Are they different than total phone calls?

Yes, customer interactions are different than phone calls. A customer can call in to ask to add a vehicle, add a driver and obtain a new ID card. These are three separate interactions in our records that occurred on one phone call. The customer interaction counts provide a summary of all the interactions that occurred on customer phone calls.

Are take a payment calls included in my customer call counts?

No. Customer call counts do not include take a payment or password reset calls; these are captured separately.

When I select combo report, am I seeing all the data for the codes that roll up to my UAC?

Yes, the total numbers reflect the data for the UAC collectively.

How can I see the policy-level details of the calls or interactions?

Click on the **Contact History** supporting link. This will take you back to the notification center. Next click on the **Contact History** tab. You will see transactions listed by date, customer name, policy or account number, as well as a brief description of the call, including who the caller was. An export function for this data is available.

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