

AIA SLOGANS data request

Can you please email me all my client information as a CSV file from your SLOGANS system using the search criteria below.

- Enter Broker – Provide Agency code
- Policies/Proposal Status – All Policy/Proposal Status(s)
- Show Benefits? – Yes
- Show Fund Information – No
- Select a Product(s) ? – All
- Broker Hierarchy – Include Full Broker Hierarchy
- Show Quick Standard Status – Yes
- Show NPW Columns – Yes
- Lives on the Policy/Proposal – All Lives on the Policy/Proposal
- Date Selection – No Date restriction

Once you have set the search criteria do the following.

- Click - View Report
- Save as CSV (comma delimited) format
- Email to me