

SBS Report Generator Service FAQs

1. How do I view a sample of the report?

The illustration below is a partial sample result set from Report Generator, opened using Microsoft® Excel. The report is delivered in Comma Separated Values (CSV) format that can be opened and manipulated using a variety of software applications; however, Microsoft® Excel is the optimal choice.

The entire result set is too wide to fit this page. The fields (column headings) displayed on all reports are:

LICENSE_NUM: License Number for the Individual or Business Entity producer.

NPN: National Producer Number (displays for Individual producers only).

FIRST_NAME: First name of the Individual producer.

MIDDLE_NAME: Middle name of the Individual producer.

LAST_NAME: Last name of the Individual producer.

SUFFIX: Suffix of the Individual producer (Jr. or Sr., for example).

BUSINESS_ENTITY_NAME: Name of the Business Entity.

FEIN: Federal Employer Identification Number (displays for Business Entities only).

LICENSE_TYPE: Type of license held by the producer (adjuster or producer, for example).

LINE_OF_AUTHORITY: Lines of authority granted the producer by the selected state.

LICENSE_STATUS: Status of the producer's license (active or expired, for example).

FIRST_ACTIVE_DATE: Date that this license first became active in the selected state.

EFFECTIVE_DATE: Date the producer's license most recently became active.

EXPIRATION_DATE: Date the active producer's license will expire unless renewed.

DOMICILESTATE: State in which the producer resides.

IS_RESIDENT: The producer resides in the selected state.

7 fields for producer's Mailing Address

MLG_ADDRESS1

MLG_ADDRESS2

MLG_ADDRESS3

MLG_CITY

MLG_STATE

MLG_ZIP

MLG_COUNTRY

7 fields for producer's Business Address

BUS_ADDRESS1

BUS_ADDRESS2

BUS_ADDRESS3

BUS_CITY

BUS_STATE

BUS_ZIP

BUS_COUNTRY

BUSINESS_PHONE: The producer's business telephone number.

BUSINESS_EMAIL: The producer's business e-mail address.

CE_COMPLIANCE: Displays a Y/N (Yes/No) indicating producer's CE compliance for next license renewal.

Sample Report:

	A	B	C	D	E	
1	LICENSE_NUM	NPN	FIRST_NAME	LAST_NAME	LICENSE_TYPE	LINE_OF_AUTHORITY
2	70281	74634	JAMES	IRWIN	Producer	Casualty,Life,Property,Accident & Health
3	5463	2310807	BETTY	OSTENDORF	Producer	Life,Accident & Health
4	80240	77296	JAMES	INSKEEP	Producer	Accident & Health,Casualty,Prop

2. How do I determine the cost of the report?

The purchase price for the generated report/resulting data set is \$.02 per row (record) returned from the query based on the user-selected criteria, with a minimum charge of \$10.00 per report. Reports greater than \$10.00 must be calculated in even dollar amounts, so if your report contains an uneven number of records, the price will simply be rounded down a penny.

From the Search Criteria for Report Generator page, select the desired criteria by which to pull the data. Click the Continue button. The report query then runs and refreshes the page. Now displayed are the report fields available along with the input or selected criteria. Below the criteria, a Report Summary table displays with the number of records (rows) generated from the criteria, the cost per row, and the total cost for this report.

3. How do I purchase the report?

Once you have examined the report summary table and decide to purchase this report/data set, read the [Terms and Conditions](#), and check the box indicating that you agree to them.

Click the Continue button.

On the Fee Summary page, verify that the fee is correct as stated, and then click the Credit Card Details button to input your credit card payment information. When finished entering payment information, click the Process button. A credit card details confirmation page displays with the information you've just input. Click the Process button again to place the order, or click the Back button to return to the Credit Card Details page for needed additions/corrections.

4. How do I download the report?

Once payment is successfully made, a confirmation page displays. You can download the report directly from this page by clicking the "Download your report" button. A file download dialog box opens with the options to open or save the file. Click the Save button to save the file to your computer.

It is highly recommended that you also print this page for your records. Along with the payment details, there is also the PIN Number, and Transaction Number (sample below).

PIN Number: 6zHmmK

Transaction Number: 34yVRa

These six-character codes allow you to retrieve this report at a later time should it be necessary to do so. Simply go to the first screen for Report Generator, then click the button labeled "Retrieve Existing Report" in the header. Input the PIN and the Transaction ID, and then click

Continue to retrieve the report again. The report is available for about thirty (30) days from the transaction date.

5. How do I find information about output format?

The comma-separated values (CSV) file format is a set of file formats used to store tabular data in which numbers and text are stored in plain textual form that can be read in a text editor. Lines in the text file represent rows of a table, and commas in a line separate what are fields in the table's row.

CSV is a simple file format that is widely supported, so it is often used to move tabular data between different computer programs that support compatible CSV formats. For example: a CSV file might be used to transfer information from a database program to a spreadsheet.