



This quick card will show the steps needed to setup any of the auto-generated forms within GreatAg. Auto-generated forms are generated when a policy has no PASS errors, no open audits and the policy is booked (APH for the M202 or Acreage for the schedules). The auto-generated program is run Tuesday through Saturday at noon eastern.

Follow these steps to setup your auto-generated forms:

- 1) Goto your Dashboard
- 2) The Policy Statistics area contains the Multi Peril Tab
- 3) Click the Multi Peril Tab
- 4) Click the Auto Generated Forms Tab - You can click this tab to default, by clicking the push pin.
- 5) Click the drop down and choose the Add / Configure Forms option
- 6) Click the Off radio button to On for the form you want to be auto-generated.
- 7) Click the 'Setup' button

The M202 APH 10 year APH form does not have any specific options.
The M203 Schedule of Insurance also does not have any options.
The On/Off button can be used to shut off the entire auto-generate process for the selected form. The setup options shown on the following page are saved based on an agency code.

The screenshot shows the GreatAg dashboard interface. At the top, there's a navigation bar with a menu icon, the GreatAg logo, and links to 'Dashboard' and 'Accounts'. Below this is a 'Policy Statistics' section with several tabs: 'Multi Peril', 'Crop Hail', 'Named Peril', 'Livestock', and 'ACF'. The 'Multi Peril' tab is selected. Within this tab, there are sub-tabs: 'Sales', 'APH / IPR', 'Acreage', 'GIS', and 'Auto Generated Forms'. The 'Auto Generated Forms' tab is selected and has a pushpin icon. A dropdown menu is open under 'Auto Generated Forms', showing a list of forms: 'Schedule of Insurance - M203', 'GIS Schedule of Insurance - G205', 'Production and Yield Reporting Form (APH) - M202', 'Schedule of Insurance - M203', 'Schedule of Insurance with Production Report - M205', and 'Add / Configure Forms'. The 'Add / Configure Forms' option is highlighted. Below the dropdown, there are three rows of form details. Each row shows the form name, a toggle switch (labeled 'On' or 'Off'), and a 'Setup' button. The first row is 'GIS Schedule of Insurance - G205' with the toggle set to 'On'. The second row is 'Schedule of Insurance - M203'. The third row is 'Schedule of Insurance with Production Report - M205' with the toggle set to 'On'.

Auto-Generate Forms Guide

G205 Schedule of Insurance - This is a map based schedule of insurance and offers a few options when setting up this form.

- **Include Zero Acre Lines** - If you want to see all the lines on the policy - even with zero acres check this box. This will significantly increase the number of pages to the report and if zero acres are not needed to be seen it should be unchecked.
- **Run By** - Choose how you want the report to be printed by. For the Custom Views option, it will only generate policies with custom views that have been setup. If no custom views were created for a policy it will revert to the default for the policy/state - either by Section or FSN-Tract.
- **Imagery Source**- Choices are ESRI NAIP or Cached. Default is NAIP and the most popular.
- **Map Text** - If you have created any agent map text boxes choose this option.
- **County Label** - If you want to see the county name on the map.
- **High Risk Land** - Select if you want to see this on the map and what year - defaults to 2022.
- **T-Yield Land** - Select if you want to see this on the map and what year - defaults to 2022.
- **Exclude URA/U** - This would exclude showing any Unrated land on the map.

GIS Schedule of Insurance - G205 - Options

☒ Include Zero Acre Lines

Run By: ☒ Section ☐ FSN-Tract ☐ Farm ☐ Unit ☐ Custom Views

☐ Use Custom View When Available

Layers:

Imagery Source:

☐ Map Text

Agent

☐ County Label

☐ High Risk Land

2022

☐ T-Yield Land

2022

☐ Exclude URA/U

SUBMIT

M205 Schedule of Insurance - This is a non-map based schedule with limited options to select.

- **Include Zero Acre Lines** - The same explanation as listed above for the G205 schedule.
- **Run By** - Print by unit or by FSN.
- **Print Temporary Database Lines** - Check if you want to print these lines.
- **Display Linked Legal Info**- Check if you want to see the field information.
- **Show Linked Legal/Acres** - Will show the legal and field acres.

Schedule of Insurance with Production Report - M205 - Options

☒ Include Zero Acre Lines

Run By: ☐ Unit ☐ FSN

☐ Print Temporary Database Lines

☒ Display Linked Legal Info

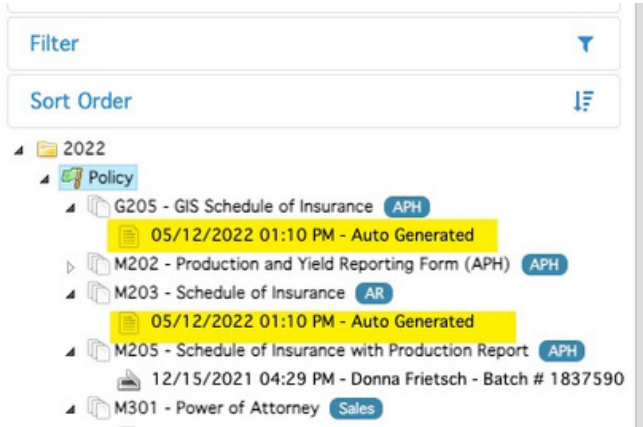
☒ Show Linked Legal Info with Acres

SUBMIT

Auto-Generate Forms Guide

Once you have your options selected for the forms you want turned on then click the Submit button. This will complete the setup process.

Once you have policies booked with no PASS errors and no open audits and after our auto-generate process runs, it will auto-generate the forms that were setup. When viewing these forms in Crop File Management System (CFMS) there is a descriptive label 'Auto Generated' to the right of the form date/time stamp.



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