

Using the Forma Commission System

<https://login.forma.ai>

Credentials: Login with your email address, and password

NOTE: You can reset your Password at any time if necessary

- **Dashboard:** Shows the following detail (NOTE: Click the “Switch Years” icon at the top right to change your date range):
 - Review Details 🔍
 - Click the Magnifying Glass to search for a particular policy by Name/Policy #/Effective Date/etc.
 - Use the filter to narrow your search, and also need to select Q1 – Q4 to determine the quarter (date) you are searching for.
 - Ability to view this info on the screen or click the “...” to Export a CSV file.
 - Carrier Analysis
 - Revenue by Commission Cycle
 - Yearly Carrier Summary
 - More!
- **Reports:** Shows the monthly statements
 - **NOTE:** The default view is “Latest Reports” but you need to click on the “Reports” link to see all of your statements.
 - All Request: See outstanding, and completed commission inquiries
- **Account:** You can change your Password on this screen.

If you have any questions please let us know, and thanks as always for your partnership!

Email: info@saversmarketing.com or Phone: 800-310-1110