



Feature Scope Description | PUBLIC

2024-11-23

What is SAP SuccessFactors Agent Connection?

SAP Agent Connection

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1 What is SAP SuccessFactors Agent Connection?

Short Description

SAP SuccessFactors Agent Connection provides an integrated user experience for a company's agent sales team. This includes access to producer lifecycle management, sales tools, and service tools.

Long Description

Once logged in, agents and managers can access a variety of apps from the side navigation bar. Depending on who is logged in, the default screen is the *Individual Overview*, *Manager Overview*, or *Carrier Overview* page. Overview pages contain cards with various types of metrics in the form of charts, tables, and KPIs. Interacting with cards launches a more detailed breakdown of the information, with options to filter, group, sort, and export the data. Depending on system configuration, reporting hierarchy, payee hierarchy, and commission statements are also available through the side navigation bar.

Managers or other users with a reporting downstream can also view overview pages and hierarchies from the perspectives of anyone who reports to them.

System administrators can access apps in the side navigation bar that enable them to change certain settings for all users, connect to downstream systems, and customize content.

Environment

SAP SuccessFactors Agent Connection is a cloud-based software-as-a-service application.

Features

The following features are available in SAP SuccessFactors Agent Connection using the SAP Fiori UI:

- Single Sign-On
- Overview Pages
- Agent Sales Metrics
- Agent Customer Metrics

- Manager Sales Metrics
- Manager Customer Metrics
- Administrative Metrics
- Compensation Metrics
- Performance Metrics
- Premium Metrics
- Onboarding
- Quick Links
- Agent Profile
- Reporting Hierarchy
- Payee Hierarchy

2 What Comes Out-of-the-Box?

Depending on the connecting systems you have configured for SAP SuccessFactors Agent Connection, different cards are available out-of-the-box for each overview page.

SAP SuccessFactors Agent Lifecycle Management

Individual Overview

- Active Customers
- Active and Expiring Appointments
- Active and Expiring Insurance
- Active and Expiring Licenses
- Credit Breakdown
- Credits
- Customer Sales
- Demographics
- Deposit Breakdown
- Deposits
- Expiring Policies
- Incentives
- My Cases
- My Contacts
- My Courses
- Payment Breakdown
- Payments
- Policy Sales Over Time
- Producer Licenses
- Producer Ranking by Premium
- Producer Ranking by Sales
- Quick Links
- Retention of Premium
- Retention of Sales
- Year to Date Policy Sales

Manager Overview

- Downline Active Customers
- Downline Active and Expiring Appointments
- Downline Active and Expiring Insurance

- Downline Active and Expiring Licenses
- Downline Contacts
- Downline Courses
- Downline Expiring Policies
- My Cases
- Policies by Product / State
- Producers by State
- Producers by Type
- Quick Links
- Top Producers by Premium
- Top Producers by Sales
- Total Policy Sales
- Total Premiums

Carrier Overview

- Quick Links

SAP SuccessFactors Agent Performance Management

Individual Overview:

- Active Customers
- Active and Expiring Appointments
- Active and Expiring Insurance
- Active and Expiring Licenses
- Background Checks
- Bonus Amount
- Broker Licenses
- Broker Ranking by Commission
- Broker Ranking by Sales
- Commissions Amount
- Commissions Performance
- Commissions and Members Count
- Customer Applications
- Customer Sales
- Demographics
- Education
- Expiring Policies
- File Attachments
- My Addresses
- My Cases
- My Commission Statements

- My Courses
- My Letters
- My Tasks
- Performance History
- Policy Sales Over Time
- Quick Links
- Retention of Sales
- Year to Date Policy Sales

Manager Overview

- Brokers by State
- Brokers by Type
- Downline Active Customers
- Downline Active and Expiring Appointments
- Downline Active and Expiring Insurance
- Downline Active and Expiring Licenses
- Downline Addresses
- Downline Background Checks
- Downline Bonus Amount
- Downline Commission Statements
- Downline Courses
- Downline Customer Applications
- Downline Education
- Downline Expiring Policies
- Downline File Attachments
- Downline Letters
- Downline Tasks
- My Cases
- My Commission Statements
- Policies by Product / State
- Quick Links
- Total Commissions Earned
- Total Policy Sales
- Total Premiums

Carrier Overview



- Quick Links
- Reports

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