STEP 1

Set Up Policies

Get the process rolling by setting up your clients and their policies in AgencyBloc.

**This is the minimum information necessary to process commissions in AgencyBloc.*

STEP 2

Set Up Rate Tables

Configure your rate tables to make sure each policy pays out correctly to your agents, house, and other necessary persons.

STEP 3

Tie Payees to Policies

Connect all of the necessary persons to the correct polices to make sure they're paid what they're due for that specific policy.

STEP 4

Import Carrier Files

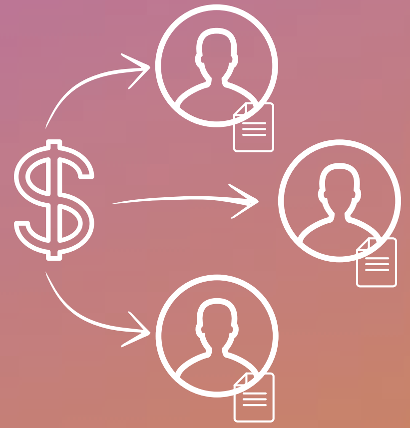
Upload your electronic statements from the carriers to automatically calculate commissions and reduce time spent manually inputting data.

STEP 5

Reconcile Commissions

Confidently identify when a carrier has made an error with your payments by quickly (and easily!) reconciling your commissions instantly.

STEP 6



Generate Agent Statements

Keep your agents in-the-know with up-to-date, detailed agent commission statements so they can track what they've earned for what they've sold.