

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

A white line-art icon of a table with a document icon in the top right corner. The table has 4 rows and 2 columns. The first row is a header, and the following three rows contain a person icon in the first column and a percentage symbol followed by a dollar sign in the second column.

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	%\$
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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 policies 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.

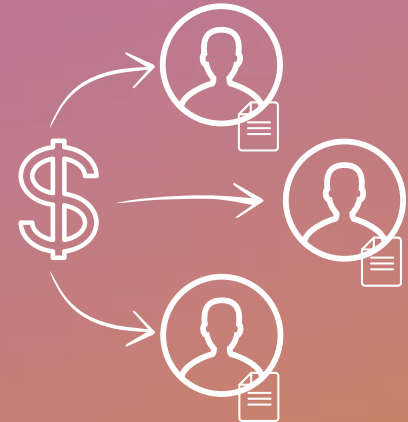
STEP 5



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.