

# CAPABILITIES

Commission Management Platform  
that Automates Everything!

We help BGAs, IMOs and agencies **make more money** and **grow faster** by **eliminating tedious manual** processing and **replacing** it **with automation and AI** from start to finish.



## FEATURES:

- Commission schedules
- Compensation Arrangements
- Policies/Cases
- Deposit reconciliation
- Automated revenue validation of income and calculation of payouts.
- Auto-Deliver statements to agents
- Direct deposit and ACH
- Agent portal with book of business, agent portal, statements, agent commission schedules, and more.
- Pre-built reports, ad-hoc reports and Business Intelligence

## COMMISSION FEEDS FOR ALL CARRIERS

- 100+ carrier feeds automated with Squids<sup>SM</sup>
- Import PDF, Excel/CSV, ACCORD and other formats from 187 carriers with Connectors<sup>SM</sup>

## AGENCY SYSTEM INTEGRATIONS

- iPipeline, Salesforce, Zinnia, OneHQ, and more.

## ACCOUNTING/PAYMENT INTEGRATIONS

- Quickbooks, Sage Intacct, Great Plains, and more.

## MANAGED SERVICES

- Custom-tailored on-boarding
- Done-for-you commission reconciliation & payout processing.

## TECHNOLOGY SERVICES

- Customizations, Custom integrations, and Business intelligence.

## VISION

Best in class commission forecasting, accounting, audit and payout platform –an indispensable tool in the pocket and on the desktop of every insurance distribution member from agent to broker to carrier.

## MISSION

Automate the tedious and help clients learn the best ways to track, audit and pay commissions making the most money with the least effort.

## NORTH STAR

Everything we do is to benefit 3 groups of people:

- Clients, Team Members, Owners/Investors.