

# Help Guide

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Getting started and getting the most  
from Agency Comp

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# Quick Start Guide

Agency Comp can import your DATA from an Excel file. Call us for details on the import process. If you wish to add your DATA manually, the following steps will help guide you through the process. You can also log in to your account to see "how to" videos in the HELP section.

## Step 1: Enter your DATA

Click the **DATA** tab on the top toolbar

1. On the Clients submenu, click the **ADD CLIENT** button and add your Clients.
2. Click Carriers on the submenu, click the **ADD CARRIER** button and add your Carriers.
3. Click Producers on the submenu, click the **ADD PRODUCER** button and add your Producers.
4. Each Product has Types affiliated with it. For example: A life Product has 10-Year Term, 20-Year Term, etc. Agency Comp Comes pre-filled with the most common Products and Types. Click Products on the submenu. To view the Types affiliated with each Product, click on the Product and the Type will appear. To add a new Product, click the **ADD PRODUCT** button. To edit an existing Product, select the Product and click on the Edit actions icon. Click the **ADD TYPE** button to add additional Types to a Product. To edit an existing Type, select the Type and click on the Edit actions icon.

## Step 2: Create your COMP Plans

Click the **COMP PLANS** tab

1. Click the **ADD PLAN** button
2. Enter a name for the plan
3. Select a Plan Type
4. Select a Carrier
5. Add a description (optional)
6. Add Rows as necessary for additional commission levels

Graded, Fee and % of Premium schedules are added on the COMP PLANS tab. **Target Premium comp plans are unique to each policy and are added at the policy level.**

## Step 3: Add policies to your Clients

Click the **CLIENTS** tab

1. Double click on a Client or select a Client and click Detail View
2. Click the **ADD POLICY** button
3. Enter policy information

# Help

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## Videos

The HELP tab contains videos on how to use your subscription. Videos are categorized by Data, Comp Plans and Reports. You can also view the User Guide or Contact Us for additional questions.

# Clients

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Clients are your customers who own policies. You can enter as many Clients as your subscription level allows.

## Add

### Option 1

1. Click **DATA** tab
2. Click Clients
3. Click **ADD CLIENT**
4. Enter the Client First Name, MI, Last Name, Company (optional)
5. Click **SAVE**

### Option 2

1. Click **CLIENTS** tab
2. Click Detail View or List View button
3. Click **ADD CLIENT**
4. Enter the Client First Name, MI, Last Name, Company (optional)
5. Click **SAVE**

## Edit

1. Click **DATA** tab
2. Click Clients
3. Select a Client
4. Click the Edit actions button
5. Enter Changes
6. Click **SAVE**

## Delete

Deleting a Client is permanent.

Any policies associated with the deleted Client will also be deleted.

1. Click **DATA** tab
2. Click Clients
3. Select an existing Client
4. Click the Delete actions icon
5. Click **CONTINUE**

# Carriers

Carriers are the insurance companies that you represent. Each Carrier can have multiple commission schedules associated with it.

## Add

1. Click **DATA** tab
2. Click Carriers
3. Click the **ADD CARRIER** button
4. Enter name
5. Click **SAVE**

## Edit

1. Click **DATA** tab
2. Click Carriers
3. Select an existing Carrier
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

## Delete

A Carrier that is affiliated with one or more policies **cannot be deleted** until another Carrier is assigned to those policies.

1. Click **DATA** tab
2. Click Carriers
3. Select an existing Carrier
4. Click the Delete actions icon
5. Click **CONTINUE**

# Producers

Producers are the agents who are assigned to each Policy. If you are the only one using the program, your name will be the only one entered. If you are a BGA, all of your producers will be entered here.

## Add

1. Click **DATA** tab
2. Click Producers tab
3. Click the **ADD PRODUCER** button
4. Enter the Producer information
5. Click **SAVE**

## Edit

1. Click **DATA** tab
2. Click Producers tab
3. Select an existing Producer
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

## Delete

A Producer who is affiliated with one or more policies **cannot be deleted** until another Producer is assigned to those policies.

1. Click **DATA** tab
2. Click Producers tab
3. Select an existing Producer
4. Click the Delete actions icon
5. Click **SAVE**

# Products

The Products you sell are represented on the Products tab. Examples include Life, P&C, Health, Voluntary Benefits and Group. The Products tab comes pre-filled with the most common Products. This section can be customized to fit the Products you sell.

## Add

1. Click **DATA** tab
2. Click Products tab
3. Click the **ADD PRODUCT** button
4. Enter a Product Name
5. Click **SAVE**

## Edit

1. Click **DATA** tab
2. Click Products tab
3. Select an existing Product
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

## Delete

Deleting a Product will delete it from all Policies affiliated with it. It will also delete all Types affiliated with it. Deleting a product cannot be undone.

1. Click **DATA** tab
2. Click Products tab
3. Select an existing Product
4. Click the Delete actions icon
5. Click **CONTINUE**

# Types

The Type field is a subgroup of the Product field. For example:

Product	Type
Group	LTD
	STD
	Life
	Dental

The Type field comes pre-filled with the most common Types. This section can be customized to fit the Types you sell.

### Add

1. Click **DATA** tab
2. Click Products tab
3. Select a Product
4. Click the **ADD TYPE** button
5. Enter a Type Name
6. Click **SAVE**

### Edit

1. Click **DATA** tab
2. Click Products tab
3. Select a Product
4. Select an existing Type
5. Click the Edit actions icon
6. Make changes
7. Click **SAVE**

### Delete

Deleting a Type will delete it from all Policies affiliated with it. Deleting a Type cannot be undone.

1. Click **DATA** tab
2. Click Products tab
3. Select a Product
4. Select an existing Type
5. Click the Delete actions icon
6. Click **CONTINUE**

### List View

Shows all Clients and Policies. Columns can be filtered at the top. Double-clicking a Client or clicking on the Detail View will take you to the Detail View screen. All Clients and policies selected in the List View will appear in the Detail View.

### Detail View

Shows all Clients and Policy Details for Clients selected on the List View screen. **This screen is used to Add, Edit, Duplicate or Delete policies.**

## Comp Plans

### Types of Comp Plans

A Comp Plan is required to calculate the commission for each Policy. The Comp Plan is the commission schedule that is applied to each Policy. The following schedules are available:

1. **% of Premium** – pays a percentage of the premium
2. **Graded** – pays a declining percentage of premium
3. **Fee**– pays a dollar amount per employee, Medicare Advantage, or Prescription Drug Plan fees
4. **Target Premium** – pays a percentage of premium during a specific period

The % of Premium, Graded and Fee schedules are Added, Edited, Duplicated and Deleted on the **COMP PLANS** tab. **Target Premium plans can only be created and modified at the Policy level.**

## % of Premium

### Add

1. Click **COMP PLANS** tab
2. Click the **ADD PLAN** button
3. Name the plan
4. Select a Carrier
5. Select % of Premium from the Plan Type
6. Add a description of the policy (optional)
7. Enter the ending year in the first row and % of premium for the first time period
8. Enter the annualized commission percentage in the “Annualization %” column. For example: 12 months=100%, 9 months=75%, 6 months=50%. If commissions are paid “as earned,” leave this field blank.
9. If commissions are annualized, enter the maximum first-year cap in the “Max Annualization Cap” column.
10. Click **ADD ROW** for more periods
11. Click the Delete actions icon to delete a row
12. Select “Endless” under the “End Year” column if the commission continues forever
13. Click **SAVE**

### Duplicate

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Duplicate actions icon
4. Enter a Name
5. Enter a Description (optional)
6. Enter any changes to the plan details
7. Click **SAVE**

### Edit

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Edit actions icon
4. Make changes
5. Click **SAVE**

### Delete

A Comp Plan that is affiliated with one or more policies **cannot be deleted** until another Comp Plan is assigned to those policies.

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Delete actions icon
4. Click **CONTINUE**

## Graded

### Add

1. Click **COMP PLANS** tab
2. Click the **ADD PLAN** button
3. Name the plan
4. Click on Graded from the Plan Type
5. Select a Carrier
6. Add a description of the policy (optional)
7. Enter the premium and commission % for the FIRST premium threshold
8. Enter the premium and commission % for the NEXT premium threshold
9. Click **ADD ROW** for more premium levels
10. Enter the commission % for the OVER premium threshold
11. Click the Delete actions icon to delete a row
12. Click **SAVE**

### Edit

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Edit actions icon
4. Make changes
5. Click **SAVE**



### Duplicate

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Duplicate actions icon
4. Enter a Name
5. Enter a Description (optional)
6. Enter any changes to the plan details
7. Click **SAVE**

### Delete

A Comp Plan that is affiliated with one or more policies **cannot be deleted** until another Comp Plan is assigned to those policies.

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Delete actions icon
4. Click **CONTINUE**

## Fee

Fee is a dollar amount that is paid. Fee is the plan used for Medicare Advantage and Prescription Drug plans.

### Add

1. Click **COMP PLANS** tab
2. Click the **ADD PLAN** button
3. Name the plan
4. Select a Carrier
5. Select Fee Plan Type
6. Add a description of the policy (optional)
7. Enter the beginning date in the first row and ending date in the second column for the first period of time. **The beginning date is the Effective Date of the fee.**
8. Enter the fee amount in the third column
9. Enter the mode frequency of the Fee in the fourth column
10. Click **ADD ROW** for more periods
11. Click the Delete actions icon to delete a row
12. Click **SAVE**

### Edit

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Edit actions icon
4. Make changes
5. Click **SAVE**

### Duplicate

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Duplicate actions icon
4. Enter a Name
5. Enter a Description (optional)
6. Enter any changes to the plan details
7. Click **SAVE**

### Delete

A Comp Plan that is affiliated with one or more policies **cannot be deleted** until another Comp Plan is assigned to those policies.

1. Click **COMP PLANS** tab
2. Select an existing Comp Plan
3. Click the Delete actions icon
4. Click **CONTINUE**

## Target Premium

Target Premium is specific to each Policy and is added at the Policy level.

### Add

1. Click **CLIENTS** tab
2. Select a Client from the List View
3. Click Detail View
4. Click Add Policy
5. Select Producer
6. Select Target from the Comp Plan Type
7. Select Carrier
8. Select Product (optional)
9. Select Type (optional)
10. Enter a policy number (optional)
11. Enter premium amount
12. Enter premium mode
13. Select if you want commissions annualized
14. Enter effective date
15. Select a Status
16. Enter Target Premium
17. Select the number of months in the Target Premium period
18. Enter 1035 Exchange or Lump Sum amount (if applicable)
19. Enter number of years that premium will be paid
20. Enter First-Year rate
21. Enter Excess rate
22. Enter Renewal rate
23. Select if commissions are annualized
24. Click **SAVE**

### Edit

1. Click **CLIENTS** tab
2. Select a Client from the List View
3. Click Detail View
4. Select an existing Policy
5. Click the Edit actions icon
6. Make changes
7. Click **SAVE**

### Delete

Deleting a Target Premium Comp Plan is done at the Policy level. Deleting a Policy cannot be undone.

1. Click **CLIENTS** tab
2. Select a Client from the List View
3. Select Detail View
4. Select an existing Policy
5. Click the Delete actions icon
6. Click **CONTINUE**

# Add a Policy to a Client

Once your Data and Comp Plans are entered, you are ready to add policies to your Clients.

## Add

1. Click **CLIENTS** tab
2. Select a Client from the List View
3. Select Detail View
4. Click the **ADD POLICY** button
5. Select a Producer
6. Select a Plan Type – % of Premium, Graded and Fee plans must be created in the **COMP PLANS** tab. Target Premium comp plans are created at this level.
7. Select a Carrier
8. Select a Comp Plan – only comp plans affiliated with each Carrier will be shown.
9. Select a Product (optional)
10. Select a Type (optional)
11. Enter a policy number (optional)
12. Enter a premium amount
13. Enter a premium mode
14. Enter an effective date - Fee effective date is created at the **COMP PLAN** level
15. Select an option for Annualized Commissions (Target Premium policies only)
16. Select a Status
17. Click **SAVE**

## Duplicate

1. Select a Client from the List View
2. Select Detail View
3. Click a policy
4. Click the Duplicate actions icon
5. Enter Effective Date
6. Click **SAVE**

## Edit

1. Select a Client from the List View
2. Select Detail View
3. Click a policy
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

## Delete

1. Select a Client from the List View
2. Select Detail View
3. Click a policy
4. Click the Delete actions icon
5. Click **CONTINUE**

## Annualized Commissions

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Annualized Commission calculations are available for % of Premium and Target Premium policies only. For Target Premium policies, annualization is chosen at the policy level. The options available are None, First Year, Renewals or Both. For % of Premium policies, annualization is chosen at the **COMP PLAN** level when the commission schedule is created.

## Effective Date

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The Effective Date is the start date of the policy.

## Policy Number

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The Policy Number is the one provided to each policy. Policy numbers are optional.

## Status

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### Pending

Policy is in underwriting or has been issued but is not in force or paying commissions. All new policies default to Pending Status.

### Active

Policy is in force and paying commissions. Depending on the Comp Plan, certain fields are required for Active Status.

### Termed

Policy has terminated and no longer paying commissions. A Term Date is required for this Status.

## Premium

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The amount of premium paid on the policy.

## Mode

The frequency of the premium payment. The following modes are available:

1. Monthly (M)
2. Quarterly (Q)
3. Semi-Annual (SA)
4. Annual (A)

## Annualized Premium

The amount of premium paid multiplied by the mode.

Example:

\$100 paid quarterly:  $\$100 \times 4 = \$400.00$  annualized premium

## Term Date

The date a policy terminates. A termed date is required for the Termed Status.

## Reports

The REPORTS tab provides Analytics, Revenue Projection, Expected Commission and Pending Commission reports.

## Analytics

Provides a summary of Annualized Premium or Paid Commissions for Primary and Secondary fields over a specific period. The Report options include:

Name	Status	Primary Field	Secondary Field	Calculate	Start Date	End Date
	Active	Producer	All	Annualized Premium	1/1/2018	12/31/2018
	Termed	Carrier		Paid Commissions		
		Company				
		Product				
		Type				

**Add**

1. Click **REPORTS** tab
2. Click Analytics tab
3. Click **ADD REPORT** button
4. Enter Name
5. Select Primary Field
6. Select Secondary Field
7. Select Status
8. Select Calculate Field
9. Enter Start Date
10. Enter End Date
11. Click **SAVE**

**Edit**

1. Click **REPORTS** tab
2. Click Analytics tab
3. Select an existing report
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

**Duplicate**

1. Click **REPORTS** tab
2. Click Analytics tab
3. Select an existing report
4. Click the Duplicate actions icon
5. Enter Name
6. Make changes
7. Click **SAVE**

**Delete**

1. Click **REPORTS** tab
2. Click Analytics tab
3. Select an existing report
4. Click the Delete actions icon
5. Click **CONTINUE**

## Revenue Projection

The Revenue Projection report projects revenue over a specific period by year and month on Active cases. Income also includes Termed cases up to the Termination Date. Report options include:

Name	Comp Plans	Primary Field	Secondary Field	Start Date	End Date
	ALL	Producer	All	1/1/2018	12/31/2018
	% of Premium	Carrier			
	Graded	Client			
	Fee/MA/PDP	Company			
	Target	Product			
		Type			

**Add**

1. Click **REPORTS** Tab
2. Click Revenue Projection Tab
3. Click the **ADD REPORT** button
4. Enter Name
5. Select the comp Plan
6. Select Primary Field
7. Select Secondary Field
8. Enter Start Date
9. Enter End Date
10. Click **SAVE**

**Edit**

1. Click **REPORTS** tab
2. Click Revenue Projection tab
3. Select an existing report
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

**Duplicate**

1. Click **REPORTS** tab
2. Click Revenue Projection tab
3. Select an existing report
4. Click the Duplicate actions icon
5. Enter Name
6. Make changes
7. Click **SAVE**

**Delete**

1. Click **REPORTS** tab
2. Click Revenue Projection tab
3. Select an existing report
4. Click the Delete actions icon
5. Click **CONTINUE**

## Expected Commission

The Expected Commission report provides a list of all Active policies, by Carrier, that are paying commissions over a specific period. This report can be compared to actual commissions paid from each Carrier. Report options include:

Name	Carrier	Start Date	End Date
	Principal	1/1/2018	12/31/2018
	MetLife		
	Standard		

**Add**

1. Click **REPORTS** tab
2. Click Expected Commission tab
3. Click the **ADD REPORT** button
4. Enter Name
5. Select Carrier
6. Enter Start Date
7. Enter End Date
8. Click **SAVE**

**Edit**

1. Click **REPORTS** tab
2. Click Expected Commission tab
3. Select an existing report
4. Click the Edit actions icon
5. Make changes
6. Click **SAVE**

### Duplicate

1. Click **REPORTS** tab
2. Click Expected Commission tab
3. Select an existing report
4. Click the Duplicate actions icon
5. Enter Name
6. Make changes
7. Click **SAVE**

### Delete

1. Click **REPORTS** tab
2. Click Expected Commission tab
3. Select an existing report
4. Click the Delete actions icon
5. Click **CONTINUE**

## Pending Commission Report

The Pending Commission report shows the first-year annualized commission and premium for policies that are currently in Pending Status.

### View

1. Click **REPORTS** tab
2. Click Pending Commission tab
3. View Report

## Lookup

The Lookup feature filters the number of Clients shown on the Detail and List View pages. To use this feature:

1. Click the **CLIENTS** tab
2. From the List View, select an option from each column (or enter a value)
3. Select a Client
4. Click Detail View to view selected Clients and Policies
5. Click on **CLEAR FILTERS** to view all Clients

## Profile

The **PROFILE** tab contains valuable information about your account.

### Contact Info

#### Edit

1. Click the PROFILE tab
2. Click the Edit icon in the Contact Info window
3. Make changes
4. Click **SAVE**



## Administrators

This feature is only available on the Pro and Select plans. The user can add up to five (5) administrators who can log in using their own email and password for the purposes of entering DATA. **The Administrator users will not have access to sensitive information, including the Reports tab and the Profile section, or be able to view the 5-Year Commission Projection in the Detail View window.**

### Add

1. Click the **PROFILE** icon
2. Click **ADD** in the Administrators window
3. Enter the email address of the Administrator
4. Enter the password
5. Confirm the password

### Delete

1. Click on the **PROFILE** tab
2. Select the Administrator to delete
3. Click **DELETE** in the Administrators window
4. Click **CONTINUE**

## Username

This section contains the username that you chose when you signed up for your membership. The username can be changed at any time **with another valid email address.**

### Edit

1. Click the **PROFILE** tab
2. Click on the "Change Username" in the Username & Password window
3. Enter your current password
4. Enter a new email address
5. Verify your new email address
6. Click **SAVE**

## Password

This section contains the password that you chose when you signed up for your membership. The password can be changed at any time.

### Edit

1. Click the **PROFILE** tab
2. Click on the "Change Password" in the Username & Password window
3. Enter your current password
4. Enter a new password
5. Verify your new password
6. Click **SAVE**

### Lost

1. Go to the Login screen
2. Enter your username
3. Click on "Forgot Password"
4. Check your email for instructions

## Current Subscription

This section contains the current subscription, including the maximum available clients and monthly cost. You can upgrade your plan or cancel it.

### Upgrade Your Subscription

1. Click the **PROFILE** tab
2. Click the Edit icon
3. Select the new plan
4. Enter your current password
5. Enter your credit card information
6. Click **SAVE**

### Cancel Your Subscription

Once your subscription is canceled, it cannot be undone. We do not store your DATA, and all information is permanently deleted.

1. Click on the **PROFILE** tab
2. Click Cancel Subscription
3. Type in **"CANCEL"**
4. Enter your password
5. Click "Proceed with Cancellation"

## Card Info

Subscription to the Service requires a valid credit card or debit card for our third-party payment processor to retain for billing and payment purposes. (We do not receive or store payment information.) You can change your credit card information any time.

1. Click on the **PROFILE** tab
2. Click the Edit icon
3. Make your changes
4. Click **SAVE**

## 5-Year Commission Projection

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You can select any policy on the **CLIENTS-** Detail View tab and see the 5-Year Commission Projection for that policy. The projection is only for Active cases. To see commission payments by mode during the 5-year period, click on the Details button in the 5-Year Commission Projection window.