



COMMISSIONS USER MANUAL

Contents

- Welcome to EZLynx Commissions 4
- AGENCY SETUP TASKS 4
 - 1 ♦ Authorize Users for Commissions Access 4
 - 2 ♦ Create an Applicant & Policies for Chargebacks and Carrier Fees 4
 - 3 ♦ Request Commissions Downloads from Carriers 4
 - 4 ♦ Create the Service Team 5
 - 4.1 Add a Service Team Member 5
 - 4.2 Edit/Disable/Re-activate a Service Team Member 5
 - 5 ♦ Create & Order Commission Rules 5
 - 5.1 Workflow for Creating Commission Rules 6
 - 5.2 Review How Your Agency Pays Commissions 6
 - 5.3 Double Check the Service Team 6
 - 5.4 Create a “Catch-all” Commission Rule 6
 - 5.5 Create Rules to Pay New and Renewal Terms at Different Rates 7
 - 5.5.1 The Add Commission Rule Box 7
 - 5.5.2 Complete the Match Criteria Section 7
 - 5.6 Create Rewrite & Other Specific Rules 9
 - 5.7 Order Commission Rules 9
 - 6 ♦ Apply Commission Rules to Applicants or Policies 9
 - 6.1 Run a Policy Master Report 9
 - 6.2 Apply Rules Based on “Assigned To” User 10
 - 6.3 Apply Rules Based on Producer Code 10
 - 6.4 Apply Rules to Rewrites 11
- WORKING COMMISSION STATEMENTS & PAYING COMMISSIONS 11
 - Commissions Payment Workflow 12
- 7 ♦ Carrier Download Statements 12
 - 7.1. Request Statement Downloads from Carriers 12
 - 7.2 Statement Download Notifications 12
- 8 ♦ Non-Downloaded Commission Statements 13
 - 8.1 Manual Statements 13
 - 8.2 CSV File Import Statements 13
 - 8.2.1 CSV File Statement Format 14

8.2.2 Import a CSV File Statement.....	14
9 ♦ Reconcile a Statement.....	14
9.1 Locate the Statement.....	15
9.2 Match Unmatched Line Items.....	15
9.3 Add Chargebacks and Carrier Fees (if applicable).....	16
10 ♦ Update Commissions, Approve Line Items & Finalize Statement.....	16
11 ♦ Run a Commissions by Producer Report & Pay Commissions.....	16
12 ♦ EZLynx Support.....	17

Welcome to EZLynx Commissions

EZLynx Commissions is a Management System feature used to track and pay commissions. This manual provides detailed instructions for paying commissions accurately.

AGENCY SETUP TASKS

Before using EZLynx Commissions, an admin will complete the following agency setup tasks.

1 ♦ Authorize Users for Commissions Access

To perform commissions' related tasks, an EZLynx user's account must be setup with commissions access. An agency admin must decide which users should have Commissions access, then email the list of users to support@ezlynx.com for setup.

2 ♦ Create an Applicant & Policies for Chargebacks and Carrier Fees

A commission statement may include chargebacks and/or carrier fees. A chargeback is the reversal of a commission already paid by the carrier. Carrier fees include various charges, for example MVR report fees. A "dummy" applicant and policies are created to record these items when needed to reconcile a commission statement.

To create the "chargeback/carrier fee" applicant:

1. Hover over the **Applicants** icon, select **Create New Applicant**.
2. At **First Name**, enter "Chargeback", at **Last Name** enter "Carrier-Fees".
3. Enter any **Rating State**, and click **Create New Applicant**.

Add a policy for each type of fees you may receive from any carrier; commission chargeback, MVR fees, etc...

1. Go to **Overview** tab, then at **Policies**, click **Add Policy**.
2. At **Line of Business**, **Transaction Type**, and **Master Company**: select any answer.
3. At **Policy #**, make-up a policy # but it is helpful to add the type of fee in the policy #. For example, 001-MVR for use with MVR fees, or 001-CCB for commission chargebacks.
4. Enter any **Effective/Expiration Dates**.
5. At all **Premium** fields, enter \$0.
6. Check the **Override Rule** box, and remove producers listed in the Service Team.
7. Click **Add Policy**.
8. **Repeat these steps to add a policy for each type of fee.**

Create New Applicant

Applicant Information

First Name * Chargeback

Last Name * Fees

Rating State * Pick any state ▼

Lead Source <select>

VIP No Yes

Customer Since

Create New Applicant

3 ♦ Request Commissions Downloads from Carriers

Save time by having your carriers that support commission statement downloads send them automatically to your EZLynx account.

1. Check the green **Commissions** columns on [this list](#) to identify your agency's carriers that participate in Personal and/or Commercial commission statement downloads.
2. Even if your agency is already receiving downloads, it's important to double check that the carriers are actually downloading commission statements. Many carriers require a separate, specific request to begin downloading commission statements.

3. Contact any carrier that isn't currently downloading commission statements to your EZLynx account and request they start doing so.

4 ♦ Create the Service Team

The Service Team is used to pay commissions and track EZLynx users on reports. When creating the Service Team, add every person who is paid commissions (internal and external producers), and every non-commissioned person you'd like to track on reports (CSRs). Setup the team initially, then keep it up-to-date as staff or commission changes occur.

VIDEO: [Create the Service Team](#) 2 min.

4.1 Add a Service Team Member

1. Hover over the **Settings** icon, and select **Manage Service Team**. If you don't have this option, contact support@ezlynx.com for setup.
2. Click **Add New Mapping**, select a **Producer Type**.
Select carefully; once saved, Producer Type cannot be edited.
 - **CSR/Producer** = paid from agency's net commission.
 - **External** = paid from agency's gross commission.
3. At **Producer Code**, enter any 3-digit code; for example, a series of numbers like "001" or the person's three initials like "MHJ".
4. At **Producer Name**, enter the person's name.
 - If adding an EZLynx user, enter the name on their EZLynx account; to find this, hover over the **Settings** icon and select **Agency Admin**. See the **Users** tab.
5. Click **Save**.
6. Repeat steps 2 - 5 to add all Service Team members.

4.2 Edit/Disable/Re-activate a Service Team Member

To edit or disable a member:

1. Hover over the **Settings** icon, and select **Manage Service Team**.
2. Locate member, go to **Actions** on the right.
 - Click **Edit**, change the Producer Code or Name, and **Save**.
If agency uses EZLynx Accounting, contact accountingsupport@ezlynx.com before making changes.
 - To **disable** a Service Team member, click **Inactive**.

To re-activate an inactive member:

1. Check the **Show Inactive** box at top left.
2. Locate the inactive member, go to **Actions** on the right.
3. Click **Activate**.

5 ♦ Create & Order Commission Rules

Commission Rules are used to identify specific types of policies and then provide the payment instructions for those policies. Every policy transaction runs through the agency's commission rules, in order, until it meets a rule's match criteria; then commission is paid based on the rule's payment instructions.

VIDEO: [Create & Order Commission Rules](#) 9 min.

5.1 Workflow for Creating Commission Rules

1. Review how your agency pays commissions.
2. Double check your agency's Service Team.
3. Create a "catch-all" rule.
4. Create rules to pay new and renewal terms at different rates.
5. Create rewrite & other specific rules (as applicable).
6. Put rules in the right order.
7. Run a [Policy Master report](#), and use it review that rules apply to every applicant or policy.
8. Update the service team & rules as staff or commission changes occur within the agency.

5.2 Review How Your Agency Pays Commissions

Commission rules are created to pay at either the applicant or policy level. So, before creating rules, it's important to consider how your agency pays commissions. Think about how your agency pays commission for a customer with multiple policies. Is one person paid commission for all of the customer's polices? If so, you'll create commission rules that pay at the applicant level based on the assigned to user. Or, if different producers are paid commission on the applicant's different policies, you'll create rules that pay at the policy level based on the Policy Producer Code. Make a note of which method you'll use, because you'll need this information later.

5.3 Double Check the Service Team

Before creating commission rules, your agency's Service Team must already be setup in EZLynx. To check if this has been done, hover over the Settings icon, and select Manage Service Team. Everyone who is paid commissions and any non-commissioned people that you want to track on reports, like CSRs, should be listed on the service team. If this task still needs to be done, [click here for the Service Team instructions](#).

5.4 Create a "Catch-all" Commission Rule

Every agency must create a "catch-all" rule. It is applied to all policies that do not meet a more specific rule's match criteria. The catch-all rule pays 100% of the policy commission to the agency.

To create the "catch-all" rule:

1. Hover over the **Policy Mgmt icon**, and select **Commissions**.
2. Click **Rules**.
3. Click **Add New Rule**, at upper right.
4. At **Add Commission Rule page**, leave all filters set as-is.
5. Click **Save Rule**.

Add Commission Rule

New / Renewal: All
Transaction: All
LOB: All
State: All
Carrier: All
Lead Source: All

Commission Producer Code: All Specified
Policy Producer Code: All Specified
Assigned To: Any Specified

Pay Producer(s)

Payee	Pay Amount	Preview
<input checked="" type="radio"/> Commission Producer	<input checked="" type="radio"/> Agency Commission (%A)	<Commission Producer Code> (0%A)
<input type="radio"/> Policy Producer	<input type="radio"/> Written Premium (%P)	
<input type="radio"/> Assigned To	<input type="radio"/> Flat Fee (\$)	
<input type="radio"/> Service Team		

Select Payee: [v] %A Add Payee

Payee List

Type	Payee	Amount	Reorder	Actions
	Agency	100%A		Delete

Cancel **Save Rule**

5.5 Create Rules to Pay New and Renewal Terms at Different Rates

Most agencies pay producers at different commission rates for new and renewal terms. Therefore, create two rules for every person who receives commissions; one for new policies and one for renewals.

To create any type of rule, always start with these steps:

1. Hover over the **Policy Mgmt icon**, and select **Commissions**.
2. Click **Rules**.
3. Click **Add New Rule** at upper right.
4. Land on the **Add Commission Rule page**.

5.5.1 The Add Commission Rule Box

This box has two sections; each has a distinct purpose.

1. **Match Criteria Section** - used to identify a specific policy type by using the various filters.
2. **Pay Producer Section** – defines the payment instructions; who & how much to pay.

Add Commission Rule

MATCH CRITERIA SECTION 1

New / Renewal: All
Transaction: All
LOB: All
State: All
Carrier: All
Lead Source: All

Policy Producer Code: All Specified
Assigned To: Any Specified

Set to pay based on Policy Producer Code OR Assigned To user

PAY PRODUCER SECTION 2

Pay Producer(s)

Payee: Commission Producer Policy Producer Assigned To Service Team
Pay Amount: Agency Commission (%A) Written Premium (%P) Flat Fee (\$)

Preview: <Commission Producer Code> (0%A)

Select Payee: [dropdown] %A Add Payee

Type	Payee	Amount	Reorder	Actions
Agency	Agency	100%A		Delete

Cancel Save Rule

5.5.2 Complete the Match Criteria Section

1. **Order:**
 - a. **Rule order is set after all rules are created.** Leave this field set to the default number for now.

Rules can be created using any combination of these filters to locate & pay specific policy types

2. **New/Renewal:** New refers to the first term of a policy, and renewal is every subsequent term.
3. **Transaction:** always set this field to **All**; EXCEPT when creating a rewrite rule.
4. **LOB, State, Carrier and Lead Source:** used to find specific policy types.

5a. Policy Producer Code (policy level)

If your agency wants to pay commissions at the policy level, use the Policy Producer Code option. When an applicant has more than one policy, each policy can have a different set of payment instructions.

1. At **Policy Producer Code**, select **Specified**.
2. Enter the Service Team member's Produce Code.
3. Click **Apply**.
4. Go to [Complete the Pay Producer Section](#).

5b. Or, pay by "Assigned To" (applicant level)

If your agency wants to pay commissions at the applicant level, use the "Assigned To" option. When an applicant has more than one policy, all of the policies are paid with the same set of payment instructions.

1. At **"Assigned To"**, select **Specified**.
2. Click the people icon, click + signs to expand to users, and select user.
3. Scroll box sidebar down, and click **Apply**.
4. Go to [Complete the Pay Producer Section](#).

Policy Producer Code	<input type="radio"/> All <input type="radio"/> Specified	<input type="text"/>
Policy Producer Code	<input checked="" type="radio"/> All <input type="radio"/> Specified	<input type="text"/>
Assigned To	<input checked="" type="radio"/> Any <input type="radio"/> Specified	<input type="text"/>  

5.5.3 Complete the Pay Producers Section

Once a policy matches a rule's match criteria (above), the Pay Producer section defines the payment instructions; who to pay and how much. This is also where you add any non-commissioned person you'd like to track on reports.

1. At **Payee**, ALWAYS select **Service Team**.
2. At the **Select Payee** dropdown, select a Service Team member to be paid a commission.
3. At **Pay Amount**, enter the percentage (of the Agency Commission) to pay the Service Team member.
4. Click **Add Payee**.
5. Repeat steps 1-4 to **add any other Service Team member that should receive a commission**.
6. Repeat steps 1-4 to **add any non-commissioned Service Team member(s) to be tracked on reports**, set percentage to be paid to "0".

7. Check the **Payee List** for accuracy.
8. Click **Add Rule**.
9. Repeat all steps to add a second rule for this Service Team member, with the only difference being to set the New / Renewal field to Renewal, and set the renewal payment percentages.
10. Add these two rules for every Service Team member who receives commissions.

5.6 Create Rewrite & Other Specific Rules

Occasionally, an agency's customer cancels a policy, then buys a new policy for the same line of business with a new carrier. When this occurs, the carrier considers the policy "new business", but the agency classifies the policy as a "rewrite".

Some agencies pay commission on a rewrite policy differently than a new business policy. If this is true for your agency, it is important to create commission rules to process rewrites correctly.

To create a rewrite commission rule:

1. Follow all instructions for [creating rules to pay new & renewal terms differently](#), except make these two changes:
 - a. At **New/Renewal (term)**: select **All**.
 - b. At **Transaction**: select **Rewrite**.

5.7 Order Commission Rules

Commission rule order is very important. Policy transactions run through commission rules in order, from the first rule down to the last catch-all rule, until a criteria match is found. Commission is then paid based on the matched rule's "Pay Producers" instructions.

Place rules by type, in this order:

1. Rewrite rules to match by Producer Code
2. All other rules to match by Producer Code
3. Rewrite rules to match by Assigned To user
4. All other rules to match by Assigned To user
5. The catch-all rule (always last; placed at the bottom)

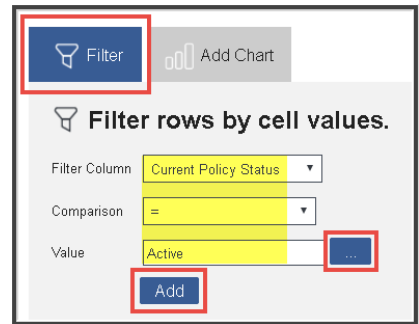
6 ♦ Apply Commission Rules to Applicants or Policies

Every active applicant and/or policy must be checked to ensure each will apply to the correct rule. This is an important step for paying commissions accurately. To accomplish this task, start by running a Policy Master report.

6.1 Run a Policy Master Report

1. Click the **Reports icon**.
2. From the **Book of Business Reports**, select **Policy Master**.
3. Click **gear icon** on right of **Table**.
4. Select these columns: **Actions, Full Name, Assigned Agent, Policy #, Line of Business**, and **Producer Code Override**. Click **OK** and click the **gear icon** next to **Table** again.
5. Click the blue **Filter button**.

- a. At **Filter Column**, select **Current Policy Status**.
 - b. At **Comparison**, select = (equal sign).
 - c. At **Value**, select **Active** (blue box on right).
6. Click **Add**.
 7. Click **Assigned Agent** header and select **Group**. This sorts producers in alphabetical order, and groups their active policies.
 8. Click the **Full Name** column header, and select **Sort A-Z**. This sorts each producer’s applicants in alphabetical order.
 9. **EZTip:** At the upper right of page, use the **Export icon** (down arrow) to save the report to your computer as a **CSV, Excel** or **PDF file**. Or, at upper right, use the **Print icon** (paper) to print the report.
 10. Use report to verify and apply the Commission Rules correctly.
 - a. Verify and [apply rules based on “Assigned To” user](#).
 - b. Verify and [apply rules based on Producer Code](#).
 - c. Verify and [apply rules for rewrites](#).



6.2 Apply Rules Based on “Assigned To” User

If your agency created rules based on “Assigned To” match criteria, every applicant with at least one active policy must be verified that the correct EZLynx user is assigned to each applicant.

1. From the [Policy Master Report](#), check the **Assigned Agent column**. Make sure the assigned to agent is correct for each APPLICANT.
 - a. If correct, no further action is necessary. Commissions will pay correctly.
 - b. If incorrect, go to next step.
2. Locate applicant.
3. Go to **Lead Info** tab
 - a. Click **Edit** at bottom of page.
 - b. Click **people icon** on right of “Assigned To” field.
 - c. Uncheck current user, and check box for correct user.
 - d. Click **Apply**, then **Save**.
4. Repeat steps 2 – 3 for the entire Policy Master Report.
5. NOTE: As the agency’s adds new customers, always set the “Assigned To” user correctly.



6.3 Apply Rules Based on Producer Code

If your agency created rules based on “Producer Code” match criteria, every active policy must be verified that the correct Producer Code is entered in the Producer Code Override field.

1. From the [Policy Master Report](#), check the **Producer Code column**. Make sure the Service Team member’s Producer Code is correct for each POLICY.
 - a. If correct, no further action is necessary. Commissions will pay correctly.
 - b. If incorrect, go to next step.

2. Locate Applicant, go to the policy.
3. At right, click **Actions**, select **Edit**.
4. At **Producer Code Override** field, enter the Service Team member's Producer Code.
5. Check and uncheck the **Override Rule** box to reprocess the policy.
6. Click **Save Policy**.
7. Repeat steps 2 – 6 for any missing or incorrect Producer Code on the Policy Master Report.
8. NOTE: Whenever the agency writes a new policy, set the Override Produce Code field with the correct Producer Code.

6.4 Apply Rules to Rewrites

If your agency has any rewrite commission rules, check that every rewrite policy has Rewrite set for the Transaction Type.

Apply Rewrite for a downloading carrier:

A rewrite policy bound with a downloading carrier enters EZLynx with a New Business transaction type, so the transaction type must be changed to Rewrite.

1. When the download is received, locate the policy.
2. Go to policy **Actions** on the right, select **Edit**.
3. At **Transaction Type**, select **Rewrite**.
4. Check and uncheck the **Override Rule** box.
5. Click **Save Policy**.

Apply Rewrite for a manual policy:

A rewrite written with a non-downloading carrier, or for a LOB that doesn't download, the policy is entered manually.

1. Enter the policy as you would any other manual policy.
2. Except, at **Transaction Type**, select **Rewrite**.

WORKING COMMISSION STATEMENTS & PAYING COMMISSIONS

Once commissions setup tasks are completed, the agency can immediately begin using EZLynx to pay commissions. Commissions are prepared for payment by reconciling carrier commission statements in EZLynx. Every carrier commission statement must be recorded in EZLynx before it can be reconciled.

There are two types of commission statements; downloaded and non-downloaded. A non-downloaded statement is recorded in EZLynx in one of two ways; by manual entry or CSV file import. Once available in EZLynx, a commission statement must be reconciled by approving and finalizing all of its line items. This insures the commissions reports, used to make commission payments, are accurate.

Video: [Commissions Workflow: Commission Statements](#) 5 min.

An agency receives a commission statement from each carrier every month. Each of these must be worked individually in EZLynx using the commissions payment workflow.

Commissions Payment Workflow

1. Carrier generates a commission statement and notifies the agency.
2. Check that the statement has been recorded in EZLynx in one of these ways:
 - Carrier download
 - Manual entry
 - CSV file import
3. Reconcile, update, approve and finalize the statement.
4. If agency uses EZLynx Accounting; complete the applicable extra steps.
5. Run a Commissions by Producer report.
6. Pay commissions based on the report using the agency's payroll method.

7 ♦ Carrier Download Statements

Save time by having your carriers download their commission statement to your EZLynx account. Once a statement downloads, it is ready for reconciliation.

7.1. Request Statement Downloads from Carriers

It is important to double check that your agency's downloading carriers are actually downloading commission statements. Many carriers require a separate, specific request to begin downloading commission statements.

1. **Check the green Commissions columns on this list** to identify your carriers that participate in Personal and/or Commercial commission statement downloads.
2. Contact any carrier that isn't currently downloading commission statements to your EZLynx account.
3. Ask for and record the date the carriers download commission statements each month so you know when to expect them.

7.2 Statement Download Notifications

Commission statements download after the beginning of each month, although the exact date varies by carrier.

EZTIP: Downloaded statements can be reconciled anytime - usually based on an agency's monthly commission payment schedule.

1. **Carrier Notification:** Some carriers email the agency to say the commissions statement download has been sent. Check with your carriers for specific information.
2. **EZLynx Notification:** The **Daily Download Report** includes a commission statement section.

The Daily Download Report is an automatic email sent to designated EZLynx users, and is available each morning in a user's regular email inbox. If a user is not currently receiving the Daily Download Report, an admin can setup the user.

To setup a user to receive the Daily Download Report:

- a. An agency admin can hover over the **Settings icon**, and select **Email Subscription Management**.
- b. Locate the user and click **Edit** on the right.
- c. Check the **Daily Download** box, and **Save**.

8 ♦ Non-Downloaded Commission Statements

There are two options for recording non-downloading statements in EZLynx: manual entry or CSV file import.

Some commission statements don't download because:

1. A carrier doesn't participate in commission statement downloads.
2. There are certain lines of business that NO carriers download, for example – Life, Bonds and Health.

8.1 Manual Statements

Manual entry is one option for entering non-downloading commissions in EZLynx.

VIDEO: [Manually Enter a Commission Statement](#) 2 min.

To manually enter a paper statement:

1. Hover over the **Mgmt System icon**, select **Commissions**, then **Statements**.
2. From statements grid, click blue **+ New** button.
3. Enter required statement information.
 - a. At **Commission**, enter the statement's total commission amount.
4. Click **Add**.
5. Follow directions to add each line from the paper statement:

EZTIP: Increase efficiency by using keyboard instead of a mouse.

 - a. **Search** applicant/policy #.
 - b. Use **down arrow** to highlight a policy (when applicant has more than one policy).
 - c. Use **Tab** key to select the policy.
 - d. Use **down arrow** to highlight Transaction Type, and **Tab** key to select it.
 - e. **Tab** through fields to enter data.
6. Select **Add**, to add the line item to the statement.
7. Repeat steps until all line items are added to the statement.
8. [A manual statement is normally reconciled immediately after entry.](#)

8.2 CSV File Import Statements

CSV file import is another option for recording non-downloading commissions in EZLynx.

VIDEO: [Import a CSV File Commission Statement](#) 3 min.

8.2.1 CSV File Statement Format

Once the agency obtains a non-downloading commission statement from a carrier (via email, regular mail or online at carrier site), the data must be formatted a specific way for CSV file import.

[Click here to download the EZLynx CSV file template](#)

Be sure header columns are the first row of your spreadsheet.

Be sure header names are entered exactly as they appear below.

EZLynx Header	Definition
PolicyHolder Name	Insured's name
Agency ID	Refers to statement carrier – agency's Agent Code for this carrier
Producer Subcode	Producer subcode
Policy Number	Policy #
Transaction Date	Policy transaction's effective date
Trans Type Code	Code used to describe the transaction type i.e.) NBS = New Business
Premium	Transaction premium
Comm Percent	Agency's commission percentage based on a rate for a specific coverage or the entire policy.
Comm Amount	Agency's commission for a line item on the statement.
LOB Code	Code that describes the line of business i.e.) Personal Auto = AUTOP
LOB Subcode	LOB subcode
Policy Eff Date	Policy's effective date
Policy Exp Date	Policy's expiration date

8.2.2 Import a CSV File Statement

1. Hover over the **Policy Mgmt icon**, select **Commissions**, then **Statements**.
2. At top right, click **Import** button.
3. Enter required data from the statement and **Continue**.
4. Click **Choose File** to locate the CSV file on computer, then **Continue**.
5. If our template was used, the fields will map for you. Otherwise, manually map each field.
6. Click **Continue**.
7. Correct any invalid commissions, then **Import**.

The screenshot shows a web interface titled "Commission Statement Upload". At the top, it says "File Requirements: CSV Comma Separated Text". Below that is a "Choose File" button next to a text input field containing "test.csv". A "Field Mapping" section follows, with a "Saved Field Mapping" dropdown menu and a "Save Map" button. A red warning message states: "Be sure the column headers are in the first row". Below this is a table for mapping fields:

EZLynx Field	Import Column
PolicyHolder Name *	POLICYHOLDER NAME
Agency ID	AGENCY ID
Producer SubCode	PRODUCER SUBCODE
Policy Number *	POLICY NUMBER
Transaction Date	TRANSACTION DATE
Trans Type Code	TRANS TYPE CODE
Premium *	PREMIUM
Comm Percent	COMM PERCENT
Comm Amount *	COMM AMOUNT

At the bottom right of the form are three buttons: "Cancel", "Back", and "Continue".

9 ♦ Reconcile a Statement

To reconcile a commission statement, the total of the matched line items must match the total of the commission statement. To accomplish this, all line items must match a policy in EZLynx. If any unmatched line items exist on a statement, they must be manually matched to the appropriate policy. Chargebacks

and carrier fees often have to be manually added as a line item and matched to the “dummy chargeback” applicant.

9.1 Locate the Statement

1. Hover over the **Policy Management** icon, select **Commissions**, then **Statements**.
2. The Commission Statements page defaults to open statements for the last three months.
3. If necessary, use Commission Statement Filers:
 - a. **Sort Column** - click any column header to sort from A to Z; click again to sort in opposite direction.
 - b. **Search Box** – enter carrier name, statement #, or total statement dollar amount, then click Enter on keyboard.
 - c. **Date Range** – filter uses Statement Date; adjust date range as necessary.
 - d. **Show Hidden Statements checkbox** – from Actions, there is an option to **Hide** a statement. To view a hidden statement, check the **Show Hidden Statements** checkbox. From Actions, **Show** statement again, if desired.
 - e. **Type** –select manual, download, or imported statement.
 - f. **Status** – page defaults to open statements; toggle between all, open, or closed options.

Carrier	Statement #	Statement Date	Premium	Commission	Status	Type	Download Date	Actions
Progressive Insurance	3182016	6/24/2016	\$2,000.00	\$500.00	Open	Manual	11/13/2015	Actions
This is a test statement for Commissions training purposes.								
AAA Insurance	4589654	7/12/2016	\$0.00	\$524.36	Open	Manual	7/12/2016	Actions

9.2 Match Unmatched Line Items

1. Locate the statement to be reconciled in EZLynx, click **Actions** at right, select **Edit Details**.
2. Look at the **Unmatched Commission** amount.
 - a. If \$0.00 – there are no unmatched commissions. Skip to [Update Commissions, Approve Line Items & Finalize Statement](#).
 - b. If any amount other than \$0.00, continue to the next step.
3. Scroll through all line items to locate and **click line items with a Match link** on the right.
4. At **Applicant/Policy #** box, search by applicant name and select applicant/policy from results dropdown.
5. Ignore **Service Team** and **Override Rule**. Entire statement is updated later.
6. Click **Match** button.
7. Repeat steps 3 – 6 until all unmatched line items are matched.
8. The **Unmatched Commission** amount should equal \$0.00.
 - a. If \$0.00, skip to [Update Commissions, Approve Line Items & Finalize Statement](#).
 - b. If a negative amount, [click here for instructions](#).

9.3 Add Chargebacks and Carrier Fees (if applicable)

A commission statement that is otherwise reconciled may have a negative unmatched commission amount. This is usually because a carrier has subtracted chargebacks and/or carrier fees from the commission total, but not included these as line items on the statement. When this happens, the chargebacks and carrier fees must be added to the statement manually - as line items.

1. From the opened commission statement, click the **+ Add Commissions** button.
2. At **Applicant / Policy #** box, search for your agency's "[chargeback fees](#)" applicant.
3. Select the policy for the type of fee you are adding.
4. At the **Commission** box, enter the chargeback or carrier fee as a **negative amount**.
5. Click the **Add** button.
6. Repeat steps 1 – 5 until all chargebacks and/or carrier fees are added.
7. The **Unmatched Commission** amount should now be \$0.00.

10 ♦ Update Commissions, Approve Line Items & Finalize Statement

Before finalizing a commission statement, line items must run through the commission rules. Also, all line items must be approved, and the statement finalized to ensure reporting accuracy.

VIDEO: [Reconcile & Finalize a Commission Statement](#) 5 min.

1. From the opened Commission Statement, click the **Update Commissions** button.
 - a. This runs the line items through the rules and applies updates made to applicants, policies, and/or commission rules so that **commissions pay accurately**.
2. At top left of Line Items grid, check the **Approve All** box.
3. Click **Finalize Statement** at upper right.
4. Once the agency is ready to pay commissions and all related commission statements are finalized, run **Commissions by Producer Reports** (see below).

11 ♦ Run a Commissions by Producer Report & Pay Commissions

Commission reports only pull data from the commission statements recorded in EZLynx. Once statements are finalized, run a Commissions by Producer report, then use it to pay your agency's producers.

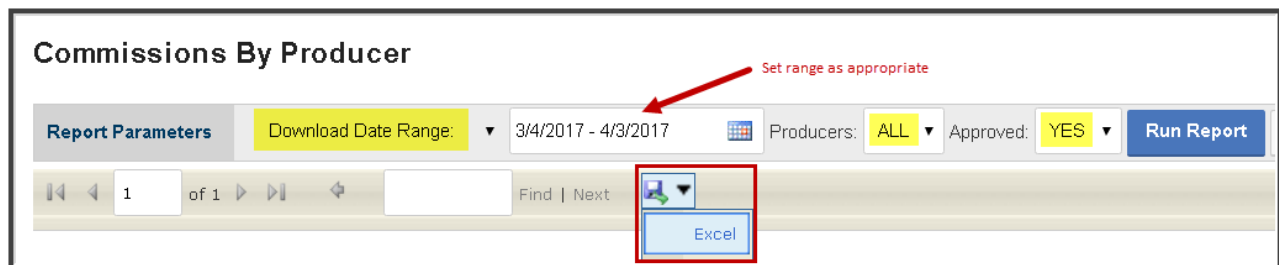
EZTip: Most EZLynx reports update each day at midnight, but the Commissions by Producer report updates in real-time.

VIDEO: [Run a Commissions by Producer Report & Pay Commissions](#) 2 min.

To run a Commissions by Producer report:

1. Hover over the **Reports icon**, select **Commission**, and **Commissions by Producer**.

2. At the **Date Range type dropdown**, always select **Download Date Range**, and enter the appropriate date range.
 - **Download Date Range** refers to the date the statement entered EZLynx, regardless of statement type (download, manual or import statements). For example, a statement manually entered in EZLynx in August has an August “Download Date”
3. At **Producers** drop-down; select **All**.
4. At the **Approved** filter, select **YES**; includes only finalized statements which ensures accurate reporting.
5. Click **Run Report**.
6. Use the **Export** icon to export to Excel, sort by producer, then print.
7. **Provide each producer a copy of their portion of the report** - to review for accuracy.
 - If any errors are found in a finalized statement, go to **Actions>Edit Details**, and click **Reopen Statement**. Uncheck **Approve All**, make the necessary updates, then re-approve all lines items. Finalize statement and re-run the report.
8. Once approved, use the reports to **pay commissions** using your agency’s payroll method.



12 ♦ EZLynx Support

Support: support@ezlynx.com

Policy Management: downloadsupport@ezlynx.com

Phone: 877-932-2382, option 1

Training: training@ezlynx.com



EZLynx ♦ support@ezlynx.com ♦ 877-932-2382 ♦ www.ezlynx.com