
QQCATALYST™

Quick Start Guide

Setting Up Carrier & MGA Commission

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Carrier - No MGA or Parent Company

Commission Rules should be set up before any clients are entered in Catalyst and before downloads are processed. There is no retroactive commission functionality in Catalyst. Any commission entered for a carrier will populate for policies entered that moment going forward.

Begin by clicking on **New Contact** on the Dock.



Select **Carriers** as the contact type, **Active** as the current status, and select the default agency location.

A screenshot of the 'NEW CONTACT' form. The form has a header bar with 'NEW CONTACT' on the left and a 'HELP' icon on the right. Below the header is a section titled 'ADDING A NEW CONTACT' with a sub-header 'ADDING A NEW CONTACT'. The text below reads: 'In the fields below, you will select the type and status for the contact being added as well as choose the location to which this contact will be assigned. Be sure to give this contact a name so they can be easily identified.' There are two dropdown menus: 'CONTACT TYPE' set to 'Carriers' and 'CURRENT STATUS' set to 'Active'. Below this is a section titled 'LOCATION AND NAME'. It contains a 'LOCATION' dropdown set to 'Office 1', a 'BUSINESS NAME' text field with 'Universal Alliance Insurance Company', a 'CONTACT FIRST NAME' text field with 'Hugh', and a 'CONTACT LAST NAME' text field with 'Spencer'.

Enter all available contact information in each step of the guided workflow including the NAIC code in the **Business Information** tab (for those doing carrier downloads).

BUSINESS INFORMATION		
BUSINESS NAME Universal Alliance Insurance Company	BUSINESS FEIN 	NAIC CODE 5116
A.M. BEST RATING 	CREATED BY Dickinson Merrin	PREMIUM SENT Gross

You can add Minimum Earned premium and minimum down payment information in the **Payment Information** tab. The Gross Commission field indicates when commission is due to the agency after a policy is written. The Remit By field indicates when a payment received in the agency needs to be forwarded to the carrier.

PAYMENT INFORMATION	
REMIT BY 0 Days	GROSS COMMISSION DUE WITHIN 15 Days
MINIMUM EARNED \$ 0.00	MINIMUM DOWN PAYMENT \$ 0.00

Since there is no MGA or subsidiary companies, you can skip to the **Locations Per Carrier** tab where you can enter the producer code for all agency locations.

LOCATIONS PER CARRIER (3)	
LOCATION	BROKER ID
Office 1	060540
Office 2	084943
Office 3	077112

On the **Policy Commission** tab, click on the blue **Add Commission** link.

Navigation: PAYMENT INFORMATION | LINKED MGAS | SUBSIDIARIES | LOCATIONS PER CARRIER | SOCIAL MEDIA | **POLICY COMMISSIONS** | HELP

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POLICY COMMISSIONS [➔](#) [+ ADD COMMISSION](#)

NONE ENTERED

At minimum, every carrier should have one commission rule to apply to all policies entered either manually or populated by carrier downloads. You can enter as many commission rules as you need.

If the carrier pays you the same commission percentage for all lines of business, you will create the “Any Rule.” For Any Location (Agency Location), No MGA, Any Line of Business, Any Term (Policy Term):

Navigation: PAYMENT INFORMATION | LINKED MGAS | SUBSIDIARIES | LOCATIONS PER CARRIER | SOCIAL MEDIA | **POLICY COMMISSIONS** | HELP

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POLICY COMMISSIONS

LOCATION: (Any Location) | MGA: (No MGA) | LINE OF BUSINESS: (Any Line)

TERM: (Any Term) | NEW BUSINESS: % 13.00 | RENEWAL: % 13.00

[CANCEL](#) [SAVE](#)

Be sure to save your commission rule. If the carrier pays you the same percentage for all lines of business except home and auto for example, you would set up specific rules for those exceptions in addition to the “Any Rule” you already created. Specific Rules will always override the catch all “Any Rule.” Note that you cannot have duplicate commission rules. The system will inform you if you try to create a rule that already exists.

Navigation: PAYMENT INFORMATION | LINKED MGAS | SUBSIDIARIES | LOCATIONS PER CARRIER | SOCIAL MEDIA | **POLICY COMMISSIONS** | HELP

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POLICY COMMISSIONS(3) [+ ADD COMMISSION](#)

LOCATION	MGA	LINE OF BUSINESS	TERM	NEW	RENEWAL
(Any Location)	(No MGA)	(Any Line)	(Any Term)	13.00%	13.00%
(Any Location)	(No MGA)	Personal Auto	(Any Term)	17.00%	17.00%
(Any Location)	(No MGA)	Homeowners	(Any Term)	15.00%	15.00%

If the agency gets paid commission on any of the carrier fees, that will be entered in the **Carrier Fee Commission** tab. The list of carrier fees populate from the Location Preferences section.

<< LINKED MGAS SUBSIDIARIES LOCATIONS PER CARRIER SOCIAL MEDIA POLICY COMMISSIONS **CARRIER FEE COMMISSIONS** >>> ? HELP

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CARRIER FEE COMMISSIONS

LOCATION Office 1	FEE NAME Inspection Fee	MGA (No MGA)
LINE OF BUSINESS (Any Line)	AMOUNT % 10.00	

CANCEL X SAVE

Click **Finish** to exit the workflow. Although commission information can be added on individual policies, we recommend that you add commission information to the carrier to minimize the amount of manual entry needed.

<< LINKED MGAS SUBSIDIARIES LOCATIONS PER CARRIER SOCIAL MEDIA POLICY COMMISSIONS **CARRIER FEE COMMISSIONS** >>> ? HELP

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CARRIER FEE COMMISSIONS

+ ADD COMMISSION

NONE ENTERED

PREV NEXT FINISH

Carriers With A Parent Company

Commission rules should be set up before any clients are entered in Catalyst and before downloads are processed. There is no retroactive commission functionality in Catalyst. Any commission entered for a carrier will populate for policies entered that moment going forward.

Carriers that belong to a Parent Company can be linked in Catalyst to make the reconciliation of premiums and commissions easy. Some carriers that fit into this mold are Travelers, Mercury, Progressive and Safeco. For those carriers, there is a name for the Parent Company and then individual Carriers linked to it.

You can set up this association one of two ways in Catalyst.

Option 1: Enter Individual Carriers and Create a Name for the Parent

For option one, you will enter each of the Carriers as Carrier contacts. Do not enter any contact information for them. Just enter their NAIC code and commission information.

The screenshot shows the 'ACTIVE CARRIER OVERVIEW' page for a carrier named 'St. Paul Fire & Casu...'. The page includes a profile picture placeholder, fields for BUSINESS NAME, PRIMARY PHONE, and PRIMARY EMAIL. Below this is a navigation bar with tabs for BUSINESS INFO, FILES, COMMISSIONS, TASKS/NOTES, and LOG. The main content area is titled 'POLICY COMMISSIONS (1)' and features an 'ADD COMMISSION' button. A table displays commission data with columns for LOCATION, MGA, LINE OF BUSINESS, TERM, NEW, and RENEWAL. A 'NAVIGATION' sidebar on the right lists 'Policy Commissions' and 'Carrier Fee Commissions'.

LOCATION	MGA	LINE OF BUSINESS	TERM	NEW	RENEWAL
(Any Location)	(No MGA)	(Any Line)	(Any Term)	17.00%	15.00%

Then you will enter the name of the Parent Company, as a Carrier contact, and enter all the contact information for them. Do not set up any commission or enter any NAIC codes for the Parent Company. Just enter all the contact and address information.

The screenshot shows the 'ACTIVE CARRIER OVERVIEW' page for a carrier named 'Travelers Group'. The page includes a profile picture placeholder, fields for BUSINESS NAME, PRIMARY PHONE, and PRIMARY EMAIL. Below this is a navigation bar with tabs for BUSINESS INFO, FILES, COMMISSIONS, TASKS/NOTES, and LOG. The main content area is titled 'BASIC CONTACT INFO' and contains sections for 'PHONE NUMBERS' and 'EMAIL ADDRESSES'. A 'NAVIGATION' sidebar on the right lists various contact and business information options. An 'EDIT' button is located at the bottom right of the contact information section.

PHONE NUMBERS	WORK PRIMARY
(866) 954-4811	WORK PRIMARY
(866) 954-4818	WORK

EMAIL ADDRESSES	PERSONAL PRIMARY
info@travelersgroup.com	PERSONAL PRIMARY

You will need to create a link between the Carriers and the Parent Company. If you're in the Guided Workflow, you will click on the **Subsidiaries** tab. If you're not in the workflow, click on the **Business Info** tab, scroll down to the Subsidiaries section or click on Subsidiaries in the Navigation box. Click on **Add A Carrier** and click within the field. Select all the writing carriers that should be tied to the Parent Company.

SUBSIDIARIES

SELECT SUBSIDIARIES

Travelers Insurance Company × Travelers Property & Casualty Ins Co ×

Travelers Property Ins × Add More+

CANCEL × SAVE ✓

Once you click **Save** the Subsidiaries will be linked to the Parent Company. All billing entries created for premium and commission from this point forward will be associated with the Parent Company. Any billing entries for premium or commission created before linking a Subsidiary to a Parent Company will still be on the Subsidiary.

SUBSIDIARIES ADD A CARRIER

St. Paul Fire & Casualty Company

Travelers Casualty & Surety Company

Travelers Casualty Company of Connecticut

Travelers Casualty Insurance Company of America

Travelers Commercial Casualty Company


Travelers Indemnity Company

EDIT ✓

Option 2: Enter Individual Carriers and Choose one as the Parent

For option two, you will enter each of the Carriers as Carrier contacts with only their NAIC codes and commission information. You will need to choose one of them to be the Parent Company. Enter all contact information for the carrier you choose as the Parent Company, the NAIC code and commission information. Please note that commission set up on the Parent Company doesn't apply to any of the linked carriers. Commission has to be set up on each carrier before linking it to the Parent Company.

ACTIVE CARRIER OVERVIEW ?



BUSINESS NAME	PRIMARY PHONE	PRIMARY EMAIL
Travelers Insurance Company	(800) 764-2365	carrier@travelers.com

BUSINESS INFO FILES COMMISSIONS TASKS/NOTES LOG

POLICY COMMISSIONS (2) + ADD COMMISSION

LOCATION	MGA	LINE OF BUSINESS	TERM	NEW	RENEWAL
(Any Location)	(No MGA)	(Any Line)	(Any Term)	15.00%	15.00%
(Any Location)	(No MGA)	Personal Auto	(Any Term)	17.00%	17.00%

If you're in the Guided Workflow, you will click on the **Subsidiaries** tab. If you're not in the workflow, click on the **Business Info** tab, scroll down to the Subsidiaries section or click on Subsidiaries in the Navigation box. Click on **Add A Carrier** and click within the field. Select all the writing carriers that should be tied to the Parent Company.

SUBSIDIARIES

SELECT SUBSIDIARIES

Travelers Property & Casualty Ins Co * Travelers Property Ins * |

- The Summit Insurance Co
- The Tower Insurance Company
- Travelers Casualty & Surety Company_Copy
- Travelers Insurance Company
- United Automobile
- Universal Alliance Insurance Company
- Western World Insurance Company
- Zurich Property & Casualty Company

Carrier With A MGA

Commission rules should be set up before any clients are entered in Catalyst and before downloads are processed. There is no retroactive commission functionality in Catalyst. Any commission entered for a carrier will populate for policies entered that moment going forward.

Excess and Surplus Lines Carriers can be linked to MGA's in Catalyst to make the reconciliation of premiums and commissions easy. Some carriers that fit into this mold are Lloyd's of London, Omega US, Scottsdale Insurance and Landmark Insurance Company.

Begin by creating the MGA contact.

NEW CONTACT ? HELP

ADDING A NEW CONTACT

In the fields below, you will select the type and status for the contact being added as well as choose the location to which this contact will be assigned. Be sure to give this contact a name so they can be easily identified.

CONTACT TYPE:

CURRENT STATUS:

LOCATION AND NAME

LOCATION:

BUSINESS NAME:

CONTACT FIRST NAME:

CONTACT LAST NAME:

Enter all available contact information in the **Basic Contact Info**, **Addresses**, **Business Information** and **Business Contacts** tabs.

BASIC CONTACT INFO ? HELP

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BASIC CONTACT INFO

PHONE NUMBERS

Cell PRIMARY PHONE Remove

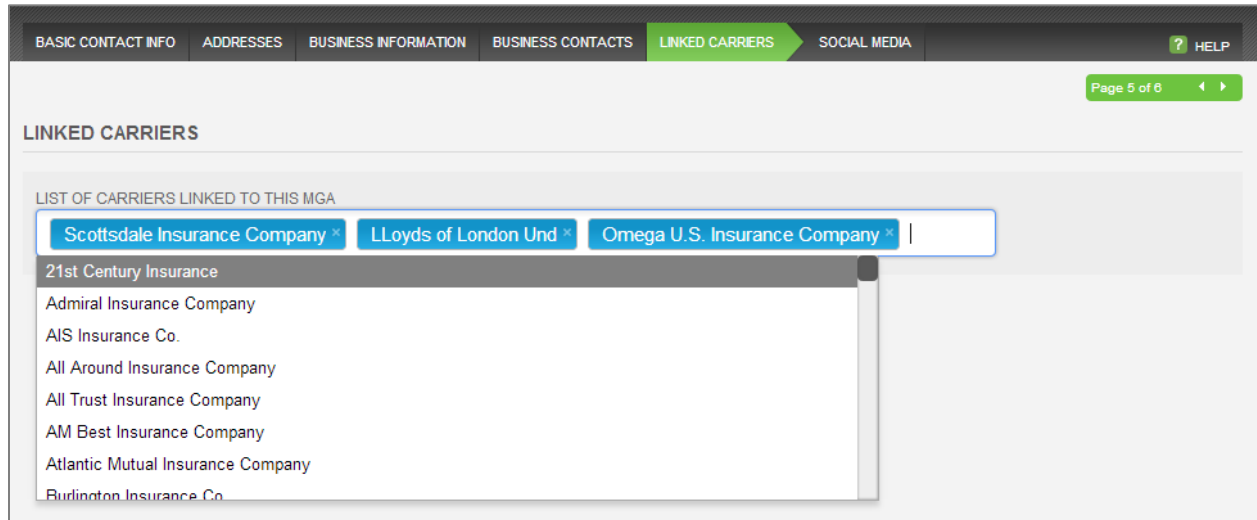
[Add Number](#)

EMAIL ADDRESSES

Personal PRIMARY EMAIL Remove

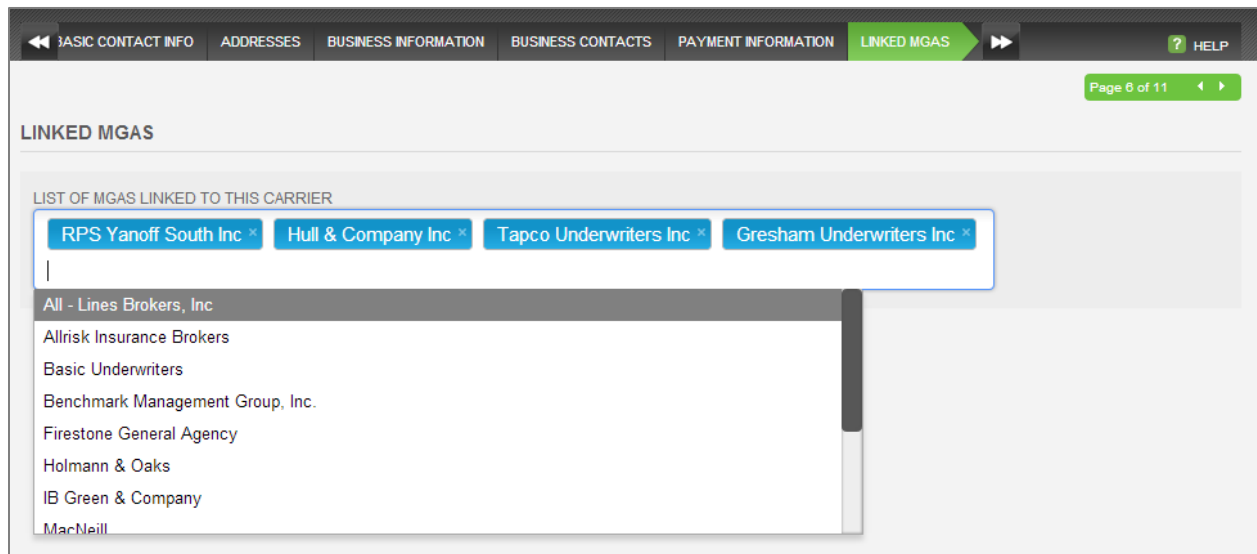
[Add Email](#)

If your Carrier already exists in Catalyst, link it to the MGA in the **Linked Carriers** tab.



After you click **Finish**, the MGA contact will be created. Notice that commission information is not set up on the MGA. All commission information is set up on the Carrier. Now search for the Carrier that you linked to the MGA. If the Carrier doesn't exist as a contact yet, create a new Carrier contact. You will have the option of linking to a MGA in the new Carrier workflow.

In the Linked MGA's tab, click in the blank field to select the MGA's associated with the Carrier. There is no limit to the number of MGA's that can be linked to a Carrier.



Click **Add Commission** in the **Policy Commissions** tab. If you get paid the same commission percentage for this Carrier regardless of the Line of Business, Policy Term, or which MGA you bind the policy with, set up the **Any** rule.

The screenshot shows the 'POLICY COMMISSIONS' configuration interface. The 'MGA' dropdown is set to '(Any MGA)'. The 'NEW BUSINESS' and 'RENEWAL' percentage fields are both set to 10.00. The 'LOCATION' dropdown is set to '(Any Location)' and the 'LINE OF BUSINESS' dropdown is set to '(Any Line)'. The 'TERM' dropdown is set to '(Any Term)'. There are 'CANCEL' and 'SAVE' buttons at the bottom right.

If all but one of the MGA's pay the same commission percentage, set up the **Any** rule for the majority, and then a specific rule for the exception. Specific rules always override the general **Any** rules. In this case, Catalyst will add 13% commission for RPS Yanoff South Inc, but 10% for any other MGA.

The screenshot shows the 'POLICY COMMISSIONS' configuration interface. The 'MGA' dropdown is set to 'RPS Yanoff South Inc'. The 'NEW BUSINESS' and 'RENEWAL' percentage fields are both set to 13.00. The 'LOCATION' dropdown is set to '(Any Location)' and the 'LINE OF BUSINESS' dropdown is set to '(Any Line)'. The 'TERM' dropdown is set to '(Any Term)'. There are 'CANCEL' and 'SAVE' buttons at the bottom right.

The same logic applies if you specify a Line of Business. The specific rule overrides the **Any** Line of Business Rule for All Risk.

The screenshot shows a table with three rows of commission rules. The columns are LOCATION, MGA, LINE OF BUSINESS, TERM, NEW, and RENEWAL. The first row is for RPS Yanoff South Inc with a 13.00% commission. The second row is for '(Any MGA)' with a 10.00% commission. The third row is for 'Allrisk Insura...' with a 12.50% commission for 'BOP Property'.

LOCATION	MGA	LINE OF BUSINESS	TERM	NEW	RENEWAL
(Any Location)	RPS Yanoff ...	(Any Line)	(Any Term)	13.00%	13.00%
(Any Location)	(Any MGA)	(Any Line)	(Any Term)	10.00%	10.00%
(Any Location)	Allrisk Insura...	BOP Property	(Any Term)	12.50%	12.50%