
QQCATALYST™

Quick Start Guide

Setting Up Employee Commission

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Employee Commission

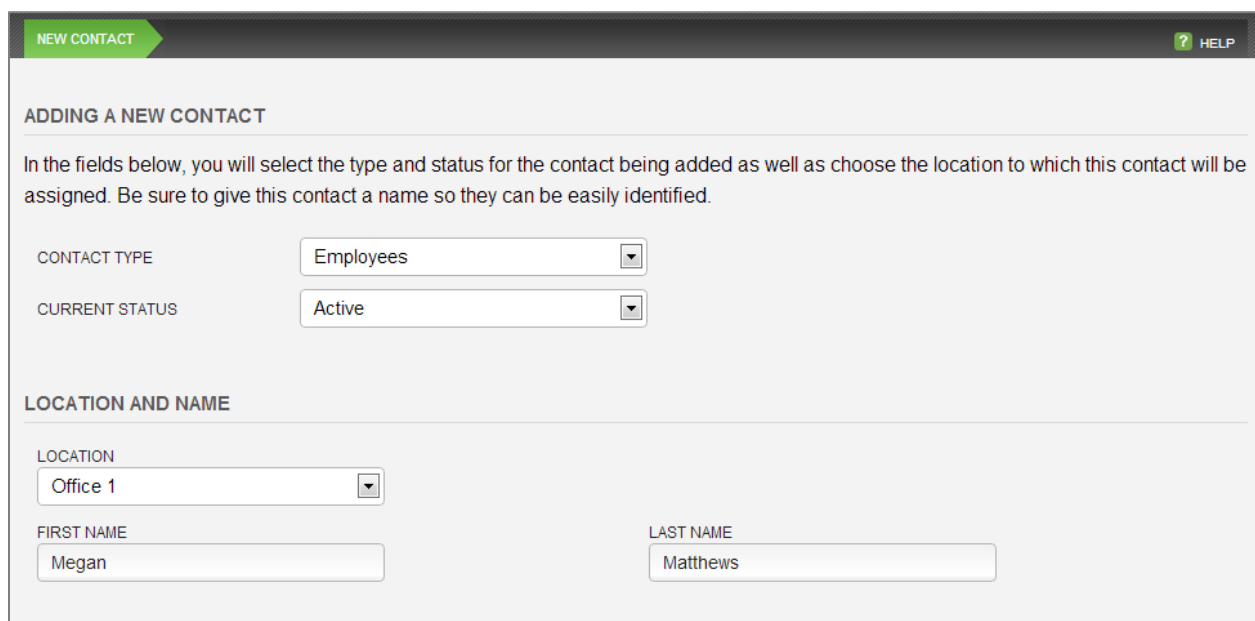
Commission Rules should be set up before any clients are entered in Catalyst and before downloads are processed. There is no retroactive commission functionality in Catalyst. Any commission entered for an employee will populate for policies entered that moment going forward.

Employee commissions can only be calculated if the Agency's Commission has been set up. If you have yet to set up the agency's commission, please refer to the [Setting Up Carrier & MGA Commissions Quick Start Guide](#).

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



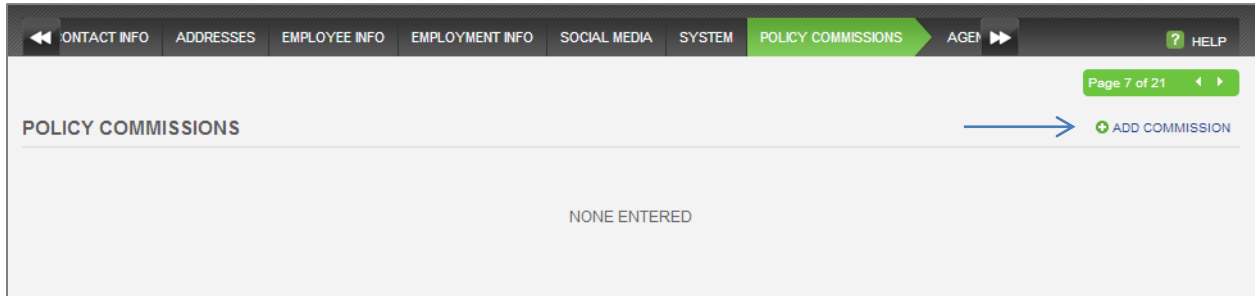
Select **Employee** as the contact type, **Active** as the current status, and select the default agency location.

A screenshot of the 'NEW CONTACT' form in the Catalyst application. The form has a dark header with 'NEW CONTACT' on the left and a 'HELP' icon on the right. The main content area is titled 'ADDING A NEW CONTACT' and contains the following fields:

- CONTACT TYPE:** A dropdown menu with 'Employees' selected.
- CURRENT STATUS:** A dropdown menu with 'Active' selected.
- LOCATION AND NAME:** A section header followed by:
 - LOCATION:** A dropdown menu with 'Office 1' selected.
 - FIRST NAME:** A text input field containing 'Megan'.
 - LAST NAME:** A text input field containing 'Matthews'.

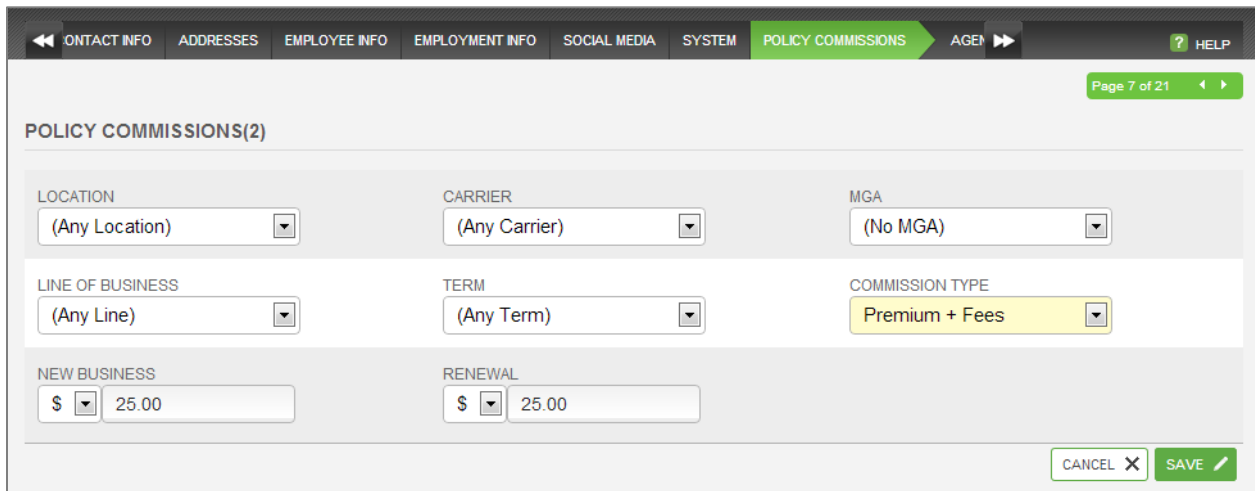
Policy Commissions

Enter all available contact information in each step of the guided workflow. The commission information will be listed in the **Policy Commission** tab. Click on **Add Commission** to begin entering your commission rules.

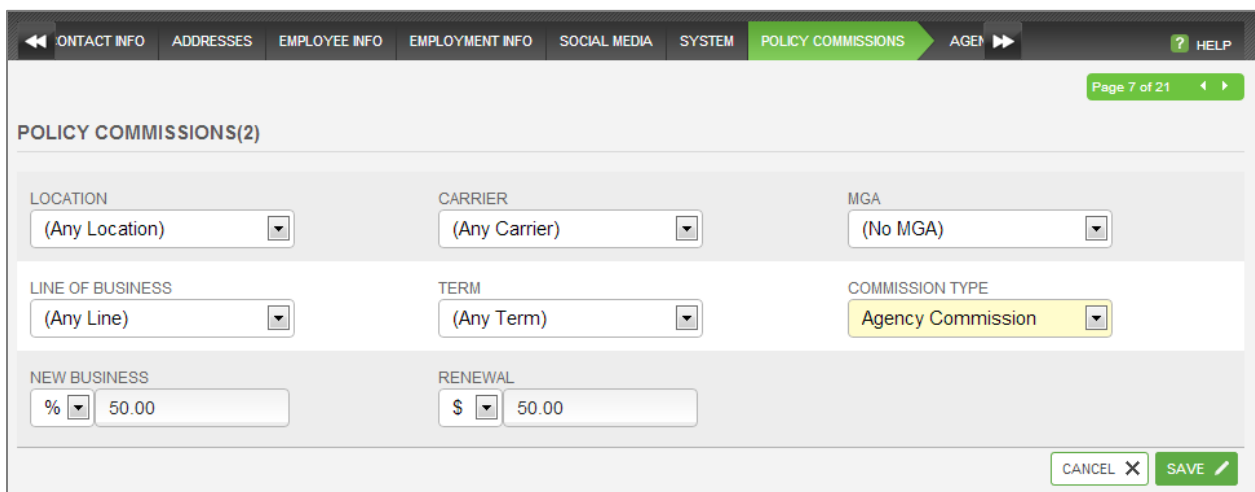


The screenshot shows the 'POLICY COMMISSIONS' tab in a software interface. At the top, there is a navigation bar with tabs: CONTACT INFO, ADDRESSES, EMPLOYEE INFO, EMPLOYMENT INFO, SOCIAL MEDIA, SYSTEM, POLICY COMMISSIONS (highlighted), and AGE. A 'HELP' icon is visible in the top right. Below the navigation bar, the page number 'Page 7 of 21' is displayed. The main content area is titled 'POLICY COMMISSIONS' and contains the text 'NONE ENTERED'. A blue arrow points to a green button labeled 'ADD COMMISSION'.

You can pay the Employee a flat dollar amount, or a percentage of one of two amounts: the Agency Commission or the Premium + Fees.



The screenshot shows the 'POLICY COMMISSIONS(2)' form. The form has several fields: LOCATION (Any Location), CARRIER (Any Carrier), MGA (No MGA), LINE OF BUSINESS (Any Line), TERM (Any Term), COMMISSION TYPE (Premium + Fees), NEW BUSINESS (\$ 25.00), and RENEWAL (\$ 25.00). The 'COMMISSION TYPE' dropdown is highlighted in yellow. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.



The screenshot shows the 'POLICY COMMISSIONS(2)' form. The form has several fields: LOCATION (Any Location), CARRIER (Any Carrier), MGA (No MGA), LINE OF BUSINESS (Any Line), TERM (Any Term), COMMISSION TYPE (Agency Commission), NEW BUSINESS (% 50.00), and RENEWAL (\$ 50.00). The 'COMMISSION TYPE' dropdown is highlighted in yellow. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

At minimum, each employee should have two commission rules to account for all admitted carriers (No MGA) and policies written through an MGA (Any MGA). If you pay your employee the same commission for all Lines of Business, you will set up two Any Rules whether it's a flat dollar amount or a percentage.

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POLICY COMMISSIONS(2) [+ ADD COMMISSION](#)

LOCATION	CARRIER	MGA	LINE OF BUSINESS	NEW	RENEWAL
(Any Location)	(Any Carrier)	(Any MGA)	(Any Line)	50.00%	50.00%
(Any Location)	(Any Carrier)	(No MGA)	(Any Line)	50.00%	50.00%

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POLICY COMMISSIONS(2) [+ ADD COMMISSION](#)

LOCATION	CARRIER	MGA	LINE OF BUSINESS	NEW	RENEWAL
(Any Location)	(Any Carrier)	(Any MGA)	(Any Line)	\$25.00	\$25.00
(Any Location)	(Any Carrier)	(No MGA)	(Any Line)	\$50.00	\$50.00

To make changes to any of the commission rules, left click anywhere in the shaded area. You do not need to click on the **Click To Edit** link on the left side. The entire shaded area can be clicked to edit.

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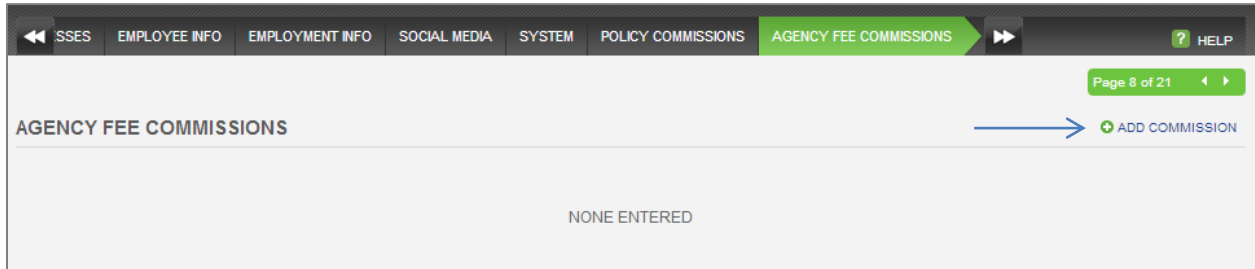
POLICY COMMISSIONS(2) [+ ADD COMMISSION](#)

LOCATION	CARRIER	MGA	LINE OF BUSINESS	NEW	RENEWAL
click to edit (Any Location)	(Any Carrier)	(Any MGA)	(Any Line)	25.00%	25.00%
(Any Location)	(Any Carrier)	(No MGA)	(Any Line)	50.00%	50.00%

Changes made to a commission rule apply that moment going forward. No previously entered policies will be affected by the changes made retroactively.

Agency Fee Commissions

You will be able to track any commission you pay employees on agency fees. Click on **Add Commission** on the **Agency Fee Commissions** tab.



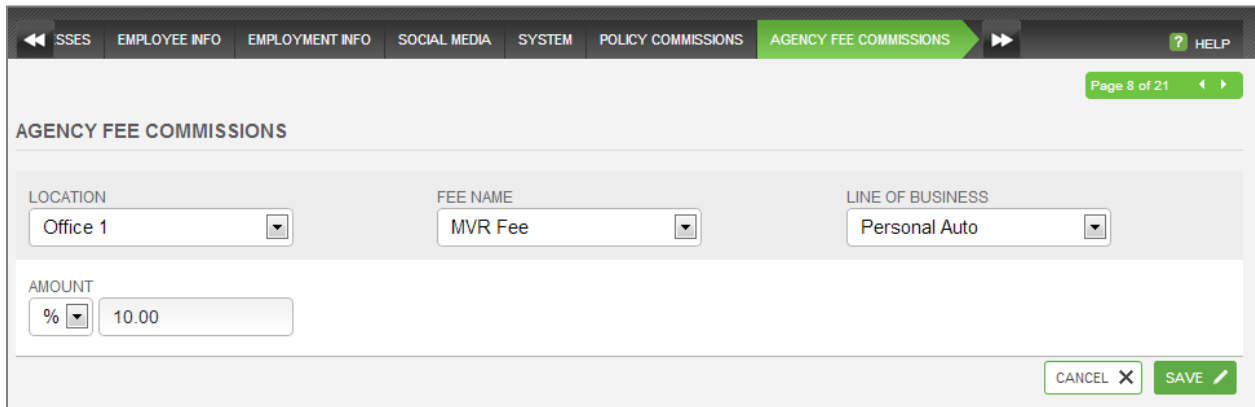
Navigation: SSES | EMPLOYEE INFO | EMPLOYMENT INFO | SOCIAL MEDIA | SYSTEM | POLICY COMMISSIONS | **AGENCY FEE COMMISSIONS** | HELP

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AGENCY FEE COMMISSIONS ➔ ADD COMMISSION

NONE ENTERED

You will not see any options in the **Fee Name** dropdown if you haven't added any Agency Fees in the **Global Preferences** section.



Navigation: SSES | EMPLOYEE INFO | EMPLOYMENT INFO | SOCIAL MEDIA | SYSTEM | POLICY COMMISSIONS | **AGENCY FEE COMMISSIONS** | HELP

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AGENCY FEE COMMISSIONS

LOCATION: Office 1

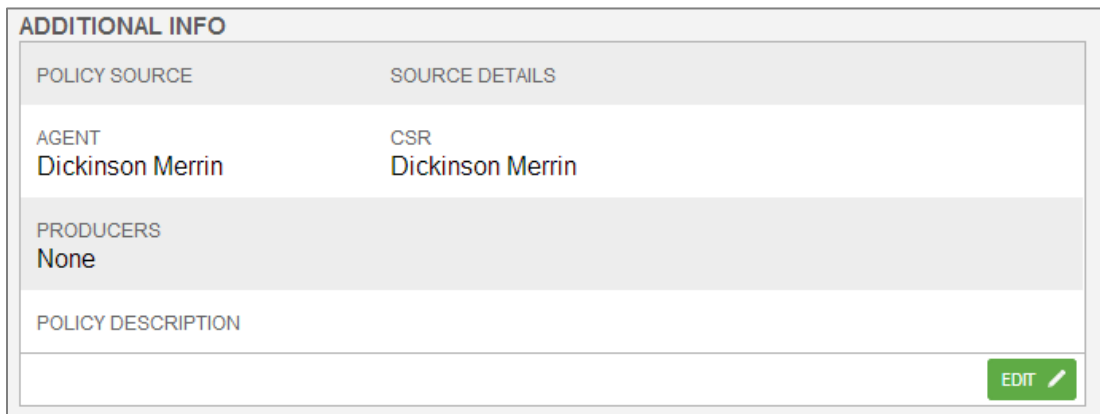
FEE NAME: MVR Fee

LINE OF BUSINESS: Personal Auto

AMOUNT: % 10.00

CANCEL SAVE

After entering the rest of the information in the workflow for the employee, click **Finish** to exit the workflow and save your Employee. The Employee getting paid commission must be listed in the **Producer** field of the **Additional Info** section of the **Policy Info** tab. If they are not listed click **Edit**.



ADDITIONAL INFO

POLICY SOURCE	SOURCE DETAILS
AGENT Dickinson Merrin	CSR Dickinson Merrin
PRODUCERS None	
POLICY DESCRIPTION	

EDIT

Multiple producers can be added to the same policy. As long as you have entered commission information on the employee, their commission information will automatically populate in the **Producer Commission** tab.

ADDITIONAL INFO

POLICY SOURCE

SOURCE DETAILS

AGENT

CSR

PRODUCERS

Megan Matthews ✕
Add More+ ←

POLICY DESCRIPTION

The Producer Commission will only populate if the Agency's Commission populates. Click on the **Agency Commissions** tab to make sure commissions have been set up.

POLICIES	POLICY INFO	ENDORSEMENTS	BILLING	FILES	ACORD	AGENCY COMMISSIONS	PRODUCERS	TASKS/NOTES	
AGENCY COMMISSIONS GRAND TOTAL							\$225.00		
POLICY COMMISSIONS									
COMMISSION TYPE	COMMISSIONABLE AMOUNT	COMMISSION							AMOUNT
New Business	\$1,500.00	15.00%							\$225.00
		TOTAL:							\$225.00
								<input style="background-color: #28a745; color: white; padding: 2px 5px; border: none;" type="button" value="EDIT ✓"/>	

Then click on the **Producer Commissions** tab to view the Producer Commissions. The commission information can be edited on this policy by clicking **Edit**.

POLICIES	POLICY INFO	ENDORSEMENTS	BILLING	FILES	ACORD	AGENCY COMMISSIONS	PRODUCERS	TASKS/NOTES
PRODUCERS								
PRODUCER							COMMISSION	
Megan Matthews							\$112.50	
TOTAL							\$112.50	
POLICY COMMISSIONS								
PRODUCER	COMMISSION TYPE	COMMISSIONABLE AMOUNT	COMMISSION	AMOUNT				
Megan Matth...	Agency Com...	\$225.00	50.00%	\$112.50				
			TOTAL	\$112.50				
								EDIT

To view or make changes to an existing employee's commission information, click **Search** on the Dock, and type in the employee's name. Then click on the **Commissions** tab. Click anywhere in the shaded area to edit the commission rule. Changes made to a commission rule apply that moment going forward. No previously entered policies will be affected by the changes made retroactively.

ACTIVE EMPLOYEE OVERVIEW

	FULL NAME Megan Matthews	PRIMARY PHONE	PRIMARY EMAIL
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[EMPLOYEE INFO](#)
[USER PREFERENCES](#)
[COMMISSIONS](#)
[PERMISSIONS](#)
[FILES](#)
[TASKS/NOTES](#)
[LOG](#)

POLICY COMMISSIONS (2) [+ ADD COMMISSION](#)

LOCATION	CARRIER	MGA	LINE OF BUSINESS	NEW	RENEWAL
(Any Location)	(Any Carrier)	(Any MGA)	(Any Line)	25.00%	25.00%
(Any Location)	(Any Carrier)	(No MGA)	(Any Lin <input type="text" value="(Any Line)"/>	50.00%	50.00%

[click to edit](#)

AGENCY FEE COMMISSIONS (1) [+ ADD COMMISSION](#)

LOCATION	FEE NAME	LINE OF BUSINESS	AMOUNT
Office 1	MVR Fee	Personal Auto	10.00%