



BRIDGER

Welcome to the BridgerAuto Commission Report Instructions Guide

As the Owner/Principal or someone who has been identified by your Owner/Principal you have been assigned the role of Producer Principal in the **Bridger Policy Management System** that allows you access to the Commission Reports (Commission Total Report and Commission Detailed Report) for your operation. If you would like someone else within your operation to have access to the Commission Reports, please email our marketing team and let us know who else in your operation would like to have access to these reports.

In the following pages, you will find a detailed document outlining exactly how to run both reports and the detailed information that is generated from the reports. Please remember when running the report that you need to select the 1st week of the month as your date criteria to capture the ACH run date of commissions for the prior month. Do not run the report using the dates for the period the commission was earned, but instead use the commission paid date (ACH run) as stated above. This is Bridger's official procedure for commission statements. You will be responsible for running the reports and they will provide you all the details you need to compensate your individual producers anyway you see fit. You can also find the "How to Operate Your Agency's Commission Statements" document on the **Broker FAQ** page:

<https://BridgerIns.com/Commissions-Reporting>

If you have any questions, please contact one of our **Marketing Team Members** listed below:

- **Stephen Williams** – Executive Vice President: (916) 320-3565 or swilliams@bridgerins.com
- **Dawn Huff** – Marketing Representative – Northern CA: (916) 996-9966 or dhuff@bridgerins.com
- **Isabel Perez** – Broker Relations and Marketing: (925) 800-7442 or iperez@bridgerins.com

Thank you for your business and we look forward to working with you.



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How to Operate Your Agency's Commission Statements

Commissions Total and Commissions Detailed in the Bridger Policy Management System

Commission Total Report

This report shows all producers, offices, agencies and bank accounts that have batched commissions with Created Batch Dates within a selected period.

- 1) Log in to the system with your specific credentials at:
<https://BridgerIns.com/Broker/>
- 2) Go to Reports
- 3) Go to Commission Total
- 4) Select the From Date (First of the Month) and the To Date (Usually 7 to 10 days out). This will capture the ACH processing date. Commissions for the previous month are paid within the first 3-5 working days of the next month. The day can vary depending on workflow/balancing issues/account updates.
- 5) Carrier -Select ALL as we currently only have the **Knightbrook Insurance Company BridgerAuto** program on the system.
- 6) Product - Select ALL as we currently only have the **Knightbrook Insurance Company BridgerAuto** program in the system.
- 7) Agency - Select your Agency
- 8) Agency Office - Select ALL offices or a specific office or multiple offices within your agency. They will all show up in the dropdown menu. Just click on the office to highlight the selection.
- 9) Commission Method – Commissions are paid on collected premium. Select Collected.
- 10) Commission Payment – Select All
- 11) Producer - Select ALL producers or a specific producer or multiple producers within your agency. They will all show up in the dropdown menu. Only those producers for which we have individual information in the system and that have credentials will show up. Just click on the producer to highlight the selection.
- 12) Payment Status – Select ALL
- 13) Choose how you would like to receive the report:
 - a. View Report
 - b. Generate PDF
 - c. Generate Excel
 - d. Generate Word
 - e. Send Email



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Commission Detailed Report

This report shows Paid, Pending and Received batched commissions transactions (Producer type only) with Created Batch Dates within the selected period.

- 1) Log in to the system with your specific credentials at:
<https://BridgerIns.com/Broker/>
- 2) Go to Reports
- 3) Go to Commission Total
- 4) Select the From Date (First of the Month) and the To Date (Usually 7 to 10 days out). This will capture the ACH processing date. Commissions for the previous month are paid within the first 3-5 working days of the next month. The day can vary depending on workflow/balancing issues/account updates.
- 5) Carrier -Select ALL as we currently only have the **Knightbrook Insurance Company BridgerAuto** program on the system.
- 6) Product - Select ALL as we currently only have the **Knightbrook Insurance Company BridgerAuto** program in the system.
- 7) Agency - Select your Agency
- 8) Agency Office - Select ALL offices or a specific office or multiple offices within your agency. They will all show up in the dropdown menu. Just click on the office to highlight the selection.
- 9) Commission Method – Commissions are paid on collected premium. Select Collected.
- 10) Commission Payment – Select All
- 11) Producer - Select ALL producers or a specific producer or multiple producers within your agency. They will all show up in the dropdown menu. Only those producers for which we have individual information in the system and that have credentials will show up. Just click on the producer to highlight the selection.
- 12) Payment Status – Select ALL
- 13) Choose how you would like to receive the report:
 - a) View Report
 - b) Generate PDF
 - c) Generate Excel
 - d) Generate Word
 - e) Send email

This report will show the following for each transaction.

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| 1) Policy Number | 9) Insured Name |
| 2) Agency Name | 10) Transaction Date |
| 3) Agency Number | 11) Transaction Type |
| 4) Office Name | 12) Premium |
| 5) Producer First Name | 13) Commission % |
| 6) Producer Last Name | 14) Commission \$ |
| 7) Address, City, State and Zip Code | 15) Payment Date |
| 8) Tax ID Number | 16) Original Payment Amount |