

Agency Financials Portal Guide

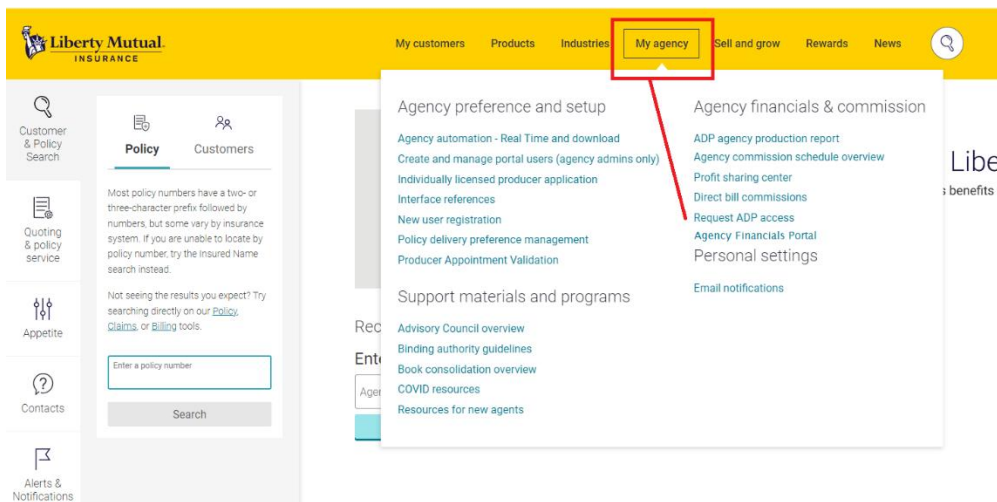
Overview

On the Agency Financials Portal, you can search for and download financial information for policies that bill through our new billing system, including policy transaction details and commission rates.

Navigation

To access the Agency Financials Portal:

- ❖ Log in to the Agents' Portal and open the **My agency** menu.
- ❖ Under **Agency financials & commission**, click **Agency Financials Portal**.



By default, a policy transaction search returns all transactions associated with your profile. To narrow your results, search by policy number or agency code. Note that results are capped at 300 transactions.

A screenshot of the Liberty Mutual Insurance website showing the 'Policy transaction search' form. The form is located below the Liberty Mutual logo and the text 'Policy transaction search'. It consists of several input fields: 'Policy number', 'Policy effective date' (with a calendar icon), 'Transaction start date' (with a calendar icon), 'Transaction end date' (with a calendar icon), 'Agency code(s)', and 'Bill type' (with a dropdown arrow). Below the input fields is a blue 'Search' button.

Results include important transaction information such as transaction type, transaction amount and commission details.

Liberty Mutual
INSURANCE

Policy transaction search

Policy number: Policy effective date: mm/dd/yyyy Transaction start date: mm/dd/yyyy Transaction end date: mm/dd/yyyy Agency code(s): Bill type:

Search

Policy number: #####

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Account number	Policy number ↑	Agency	Policy effective	Bill type	Payment plan	Transaction type	Receivable type	Transaction process date	Accounting date	Transaction amount	Commission rate	Commission total
^ #####	#####	#####	YYY/MM/DD	Direct Bill	Monthly	New Business	-	YYY/MM/DD	YYY/MM	\$###.##	-	\$###.##
Account number	Policy number	Agency	Policy effective	Bill type	Payment plan	Transaction type	Receivable type	Transaction process date	Accounting date	Transaction amount	Commission rate	Commission total
	#####	#####	YYY/MM/DD	Direct Bill	Monthly	New Business	Taxes Surcharge	YYY/MM/DD	YYY/MM	\$###.##	0.00%	\$###.##
	#####	#####	YYY/MM/DD	Direct Bill	Monthly	New Business	Premium	YYY/MM/DD	YYY/MM	\$###.##	15.00%	\$###.##

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FAQs

How do I request portal access?

Email Agency Support at agencyinterfacesupport@libertymutual.com, or call 888-451-8414.

What if I can't find a policy on the portal?

The Agency Financials Portal only displays details for policies in the new billing system. We are continuing to migrate policies to the new system.

Eventually the Agency Financials Portal will become your single source of transaction details for all policies. Until then, you can find transaction details for non-migrated policies in the **Policy Decs and Forms** section of the Agents' Portal.

When will agency bill statements be available?

Agency bill statements are in progress and will be available in the next few months. We will notify you once we have deployed this feature.

Who should I contact if I have a question?

For agency bill questions, email agencybillinginquiry@libertymutual.com. For direct bill commission questions, email commissioninquiry@libertymutual.com.