



RE: American Revelry - Transaction Corrections Needed

From Obed Medrano <omedrano@swinglecollins.com>
Date Wed 9/4/2024 7:49 AM
To Joanna Paredes <jparedes@swinglecollins.com>
Cc Grant Lair <glair@swinglecollins.com>; Abby Veach <aveach@swinglecollins.com>; Lisa Beers <lbeers@swinglecollins.com>; Freedom Hernandez <fhernandez@swinglecollins.com>

Hello everyone!

The corrections have been transacted in Epic.

Please review and advise if the billing now reflects correctly.

Thank you and have a great day!

OBED MEDRANO
ACCOUNTING DEPARTMENT
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From: Joanna Paredes <jparedes@swinglecollins.com>
Sent: Wednesday, September 4, 2024 8:33 AM
To: Obed Medrano <omedrano@swinglecollins.com>
Cc: Grant Lair <glair@swinglecollins.com>; Abby Veach <aveach@swinglecollins.com>; Lisa Beers <lbeers@swinglecollins.com>; Freedom Hernandez <fhernandez@swinglecollins.com>
Subject: American Revelry - Transaction Corrections Needed

Hi Obed,

I came across this account and noticed the Pr/Br and transactions were incorrect. This should be split 50/50 between Grant and Abby. Can you help us with the corrections and let me know once complete? Thank you!

1. Grant's commission is listed with an @ sign and Abby's commission is listed with a #.

Account Detail

Contacts

Opportunities

Client Contracts

Policies

PACK - 6/17/2025

Servicing/Billing

Policy

Line

Commercial AP

Property

General Liability

Business Auto

Proofs of Insurance

Transactions

Attachments

Claims

Activities

Lines of Business

Line	Status Description	Line Eff	Line Exp	Iss Loc	Bill	ICO	PPE	Prft Cntr
BAUT	New Policy - New Client	6/17/2024	6/17/2025	TX	D	SOCIN1	SOCIN1	PFC
GL	New Policy - New Client	6/17/2024	6/17/2025	TX	D	SOCIN1	SOCIN1	PFC
PROP	New Policy - New Client	6/17/2024	6/17/2025	TX	D	SOCIN1	SOCIN1	PFC

Line

Billing

Servicing

Pr/Br Commissions

Categories/History

Pr/Br Commissions

Pr/Br	Code	Name	Address	Type	Percent	Amount
PPAY	LAIGR1	Grant Lair		@	50.0000%	
PPAY	VEAAB1	Abby Veach		#	50.0000%	

2. Looking through the transactions only Abby received commission instead of it being split with Grant.

FileEditAreasHomeLocateActionsReal-TimeOn DemandAccessLinksmyEpicSMSSMSNewPrintSaveUndo

APPLIEDEpic

HomeLocateActionsReal-TimeOn DemandAccessLinksmyEpicIVANSMSNewPrintSaveUndo

Account Detail

Contacts

Opportunities

Client Contracts

Policies

Proofs of Insurance

Transactions

Item #876355

Detail

Agency Commission

Pr/Br Commission

Attachments

Accrued

Split #	Line	Policy Number	Order #	Pr/Br	Pr/Br Code	Prod Cr %	Acctg Month	Trans	Trans Amt	Pr/Br Type	Agcy Com %	Pr/I
1	PROP	BP10037863-1	0	PPAY	VEAAB1	100.0000%	July 2024	NEWB	\$15,314.00	#	15.0000%	40.

a.
3. I'm correcting the Pr/Br now – see below.

Lines of Business

Line	Status Description	Line Eff	Line Exp	Iss Loc	Bill	ICO	PPE	Prft Cntr	Estimated Prem
GL	New Policy - New Client	6/17/2024	6/17/2025	TX	D	SOCIN1	SOCIN1	PFC	

LineBillingServicingPr/Br CommissionsCategories/History

Pr/Br Commissions

Pr/Br	Code	Name	Address	Type	Percent	Amount	Production Credit %	Order #
PPAY	LAIGR1	Grant Lair		#	40.0000%	50.0000%		2
PPAY	VEAAB1	Abby Veach		#	40.0000%	50.0000%		1

JOANNA PAREDES C/C
DIRECTOR OF OPERATIONS
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SwingleCollins
& Associates

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