



Agency Portal Features: Processing Commission Payments

1. Emails are sent out from CaliforniaMutualInsuranceCompany@smart-disburse.com and this email should arrive to the commission email we have on file.

Hi **Parker Industries Tester**,

You've been sent a commission payment by **California Mutual Insurance Company**.

To collect and complete the payment click on the button below and follow the instructions.

You'll have the option to choose from available payment methods to receive the funds.

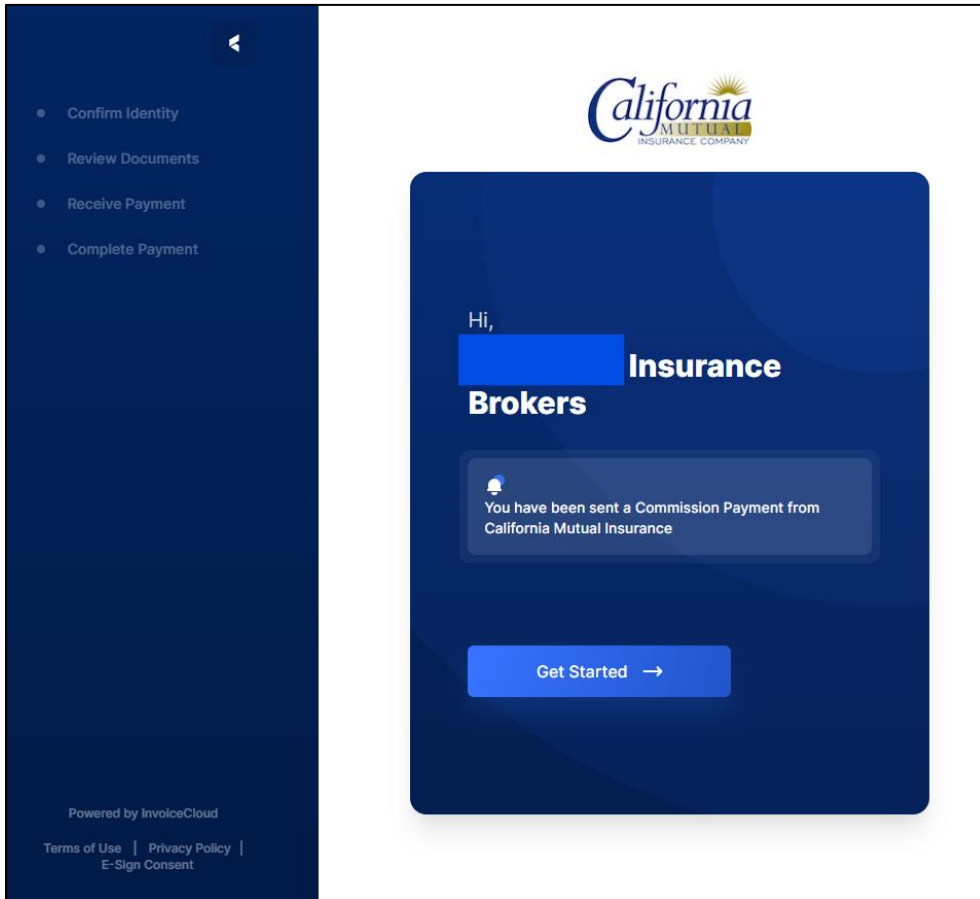
California Mutual Insurance Company allows agents to save their preferred method of payment for future payments, rather than having to select a payment method for each individual commission. You'll see a checkbox on the "One Final Step" screen of the payment acceptance workflow that says "I authorize Transcard to store and use my payment details for future transactions. I may withdraw this consent at any time." This box will be checked by default, which will allow for your payment method to be stored for future payments. If you elect to save your payment preference, you'll receive future commission payments directly, accompanied by a confirmation email.

[Get Started](#)

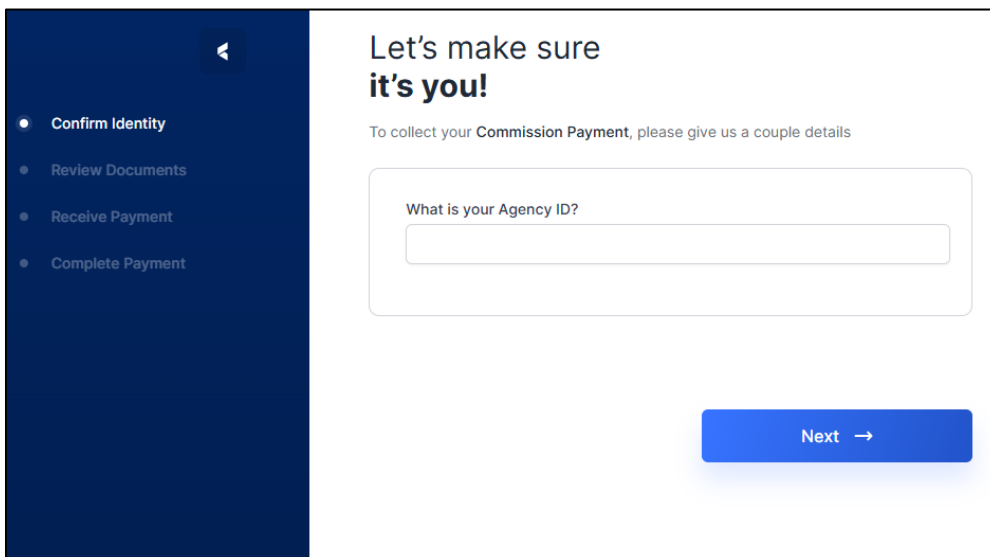
Should you have any questions or concerns regarding accuracy of payment please contact **California Mutual Insurance Company** at [1-800-310-5824](tel:1-800-310-5824) or frontdesk@calmutual.com with your code **0ad7bdea-284f-46d4-afcc-68336f543a5e**.

*****As of July 1st, agencies can now save the method of payment rather than having to select a payment method for each commission statement, on the One Final Step Screen, there will be a box to check that allows Transcard to store and use the payment method, this can be revoked at any time*****

2. Click on the **Get Started** link (if payment is not processed, reminders will be sent daily for 10 days, after this time frame, the link will expire, and a check will be sent out)
3. This is the next screen that will pop-up on the browser, be sure to have the agency code ready and click “Get Started”



4. Input your agency code (this information can be found in previous commission statements, look at image below) and proceed





650 San Benito Street
Suite 250
P.O. Box 1326
Hollister, CA 95024
(831) 637-5824

123 Test Address
Walnut Creek, CA 94596

COMMISSION DUE AGENT FOR THE MONTH OF March 2025

Agent Account No: AGENCYCODE

Statement No:

Statement Date: 03/31/2025

Policy Number	Effective Date	Insured Name	Transaction Type	Transaction Amount	Rate	Commission Due
			PAYMENT			
TOTALS:						

COMMISSION DUE TO Insurance Brokers:

- After the agency code has been inputted, this next screen will pop up where you must view the commission statement and accept it to continue, please go ahead and **click on the PDF provided**

Review your Commission Statement

Please select to review the documents below before proceeding with your payment

Commission Statement

I further agree that by selecting Accept on this document it is as valid as if I signed the document in writing.

ATTACHMENTS

MARCH2025.pdf

PDF

Accept

Dispute

Powered by InvoiceCloud

Terms of Use | Privacy Policy | E-Sign Consent

6. Click on the PDF and this next screen will display the commission statement where it can be printed and downloaded using the buttons on the top right. After that toggle the bottom left button to accept, and then click Done

31MARCH2025.pdf

California MUTUAL INSURANCE COMPANY
650 San Benito Street
Suite 250
P.O. Box 1326
Hollister, CA 95024
(831) 637-5824

Insurance Brokers
123 Test Address
Walnut Creek, CA 94596

COMMISSION DUE AGENT FOR THE MONTH OF March 2025
Agent Account No: [REDACTED]
Statement No: [REDACTED]
Statement Date: 03/31/2025

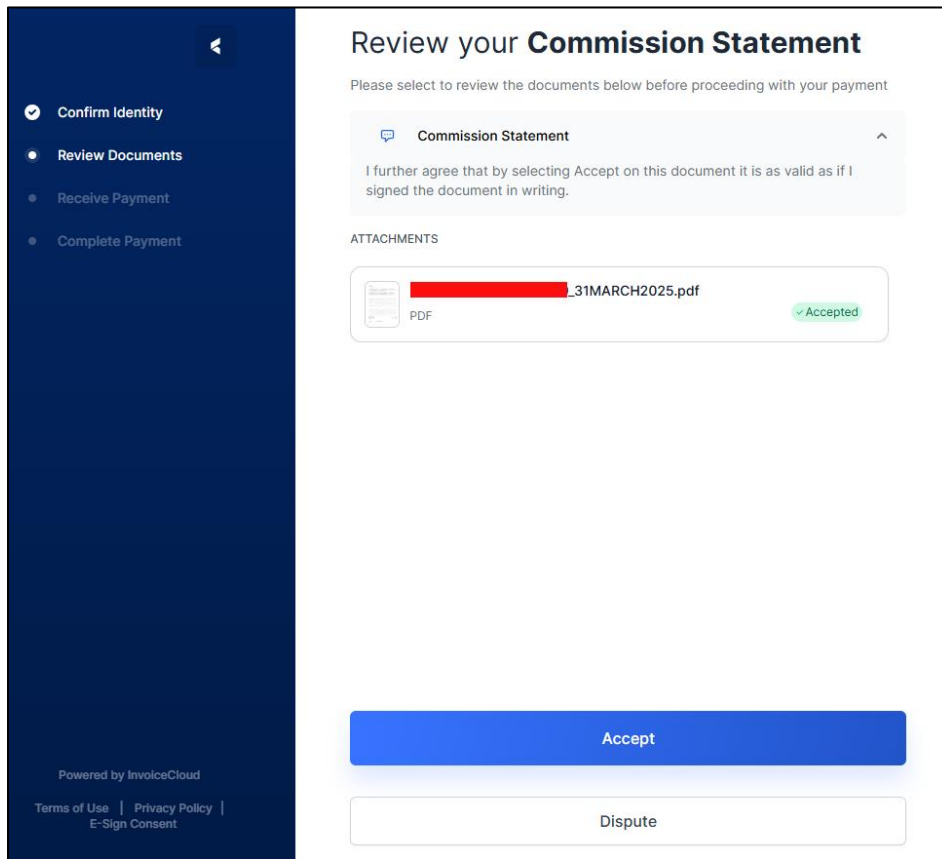
Policy Number	Effective Date	Insured Name	Transaction Type	Transaction Amount	Rate	Commission Due
[REDACTED]						
TOTALS:				[REDACTED]		

COMMISSION DUE TO Heffernan Insurance Brokers: [REDACTED]

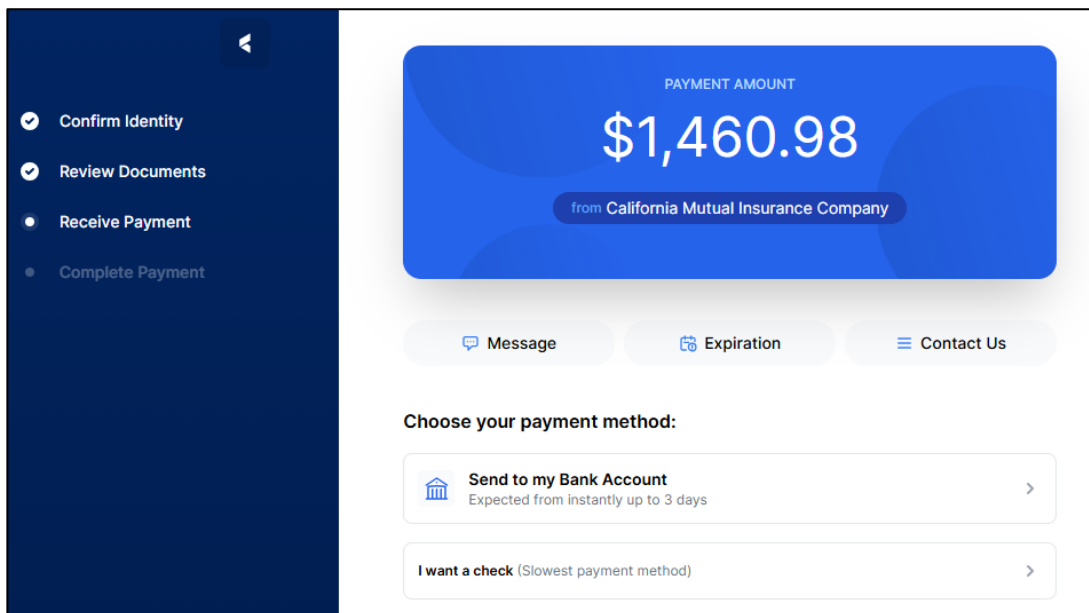
[Toggle Switch] [REDACTED]_MM117399_31MARCH2025

Done

- Once the screen says “Accepted,” proceed to click “Accept”



- The next screen will show how much you will be receiving and let you choose between an ACH payment or a check (takes longer)



10. Be sure to verify all address and account information before clicking “Next”

Bank Details Account Information Summary

Review **Account Information**

Please fill in or edit your account information

Company Name (Account Holder)

Address Line 1

Address Line 2 (optional)

City

State

Postal / ZIP Code

11. Verify the information one last time in this screen and click “Deposit”

Bank Details Account Information Summary

One Final Step

Make sure all the details are accurate

PAYMENT AMOUNT

\$1,460.98

ESTIMATED PROCESSING TIME: Instant

Company Name (Account Holder)
Insurance Brokers

Routing Number Edit

Account Number

It's important to verify your entries to ensure payment is received to your valid bank account.


Billing Address
123 Test Address
WALNUTCREEK CA 94596 Edit

I authorize Transcard to store and use my payment details for future transactions. I may withdraw this consent at any time. ⓘ

I've read, understand and consent to the [Terms of Use](#), [Privacy Policy](#) and [E-Sign Consent](#).

Deposit \$1,460.98

12. Payment has been disbursed, and a confirmation email will be sent out as well, **please view the second screenshot which will be disbursed if payment method is saved**



Successfully Submitted!

PAYMENT AMOUNT

\$1,460.98

ESTIMATED PROCESSING TIME: **Instant**

Company Name (Account Holder)
Insurance Brokers

Routing Number
ending in 0021

Account Number
ending in 1998

Saved Payment Method
Bank Transfer

Receipt Date
Wed, Nov 05 2025 07:46:58 PM (ET)


Transaction ID
dbf4a965-5d7b-462a-b22c-62a395f4bd7a

Client Payment Reference ID
3E11A7EE-B200-403D-9EF9-A2046CED7B98

California Mutual Insurance Company

[Download Receipt](#)

Finish and Close Google Chrome



California Mutual UAT
sent you a payment.

Hi Peter Parker,

California Mutual UAT has initiated a payment for 1 commission(s) with a total amount of **\$1.00USD**.

Payment submitted on: June 25, 2026
Payment type: RTP
Routing Number: ****0021
Account Number: *****3456

You can expect to receive payment shortly based upon your preferred method of payment. Please see the attached receipt for your payment. Should you have any questions or concerns regarding accuracy of payment please contact 1-800-310-5824 or frontdesk@calmutual.com for further assistance.

Commission statements may be retrieved by your agency account administrator at calmutual.com.

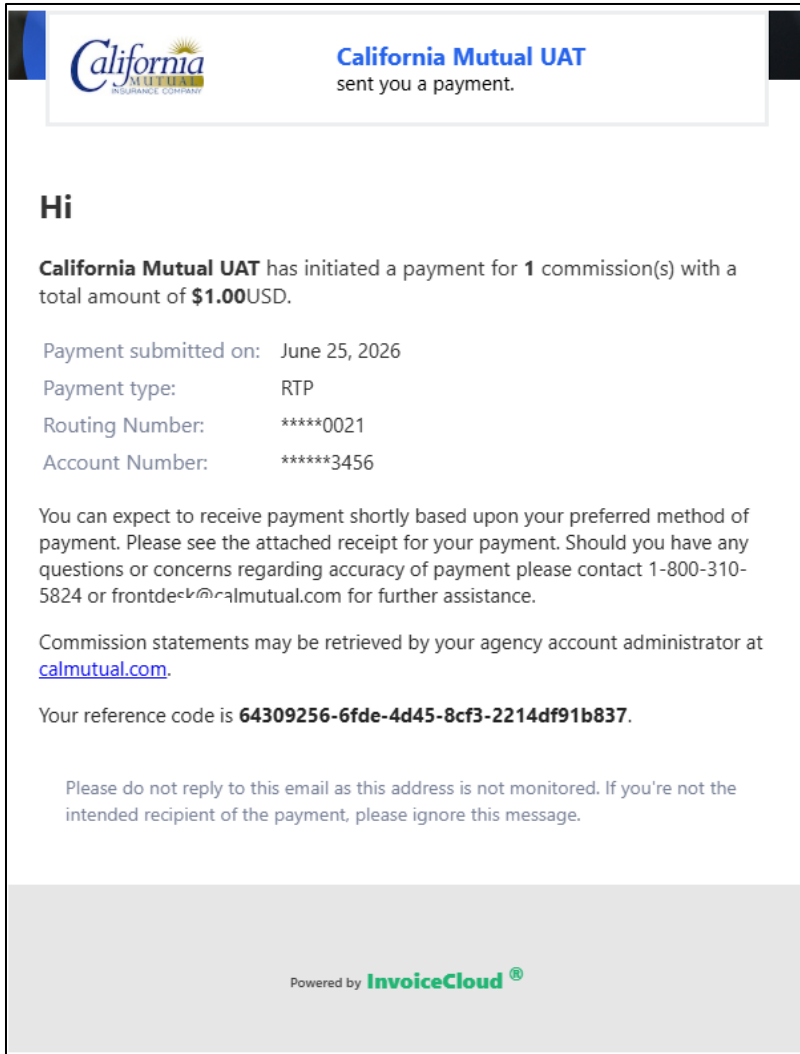
Your reference code is **64309256-6fde-4d45-8cf3-2214df91b837**.

Please do not reply to this email as this address is not monitored. If you're not the intended recipient of the payment, please ignore this message.

Powered by **InvoiceCloud**®

NEXT PAGE

13. If the payment method has been saved, then please expect to receive this email every month after payment has been disbursed



If you have any more questions, or if your payment has been cancelled/revoked, please call our office at (831)637-5824 for assistance