

Insurance Accountants Launches Applied Epic Integration to Streamline Agency Accounting

The new integration simplifies payments, commissions, and bookkeeping within Applied Epic, helping independent insurance agencies improve accuracy, visibility, and operational efficiency.



SCOTTSDALE, Arizona January 19, 2026 Insurance Accountants today announced the launch of an enhanced Applied Epic integration designed to streamline accounting operations for independent insurance agencies. The integration enables agencies to manage payments, commissions, and bookkeeping directly within the Applied Epic platform, improving accuracy, visibility, and efficiency across financial workflows.

As agencies grow, payment processing and accounting tasks can become increasingly complex, with manual data entry, delayed reconciliations, and disconnected workflows creating operational challenges. Insurance Accountants' Applied Epic integration addresses these issues by embedding accounting support directly into the system agencies already use to manage their business.

The integration includes tools for bookkeeping, reconciliations, agency bill handling, and commission management, helping agencies maintain consistent financial records while reducing duplicate data entry. Structured reconciliation processes simplify both direct bill and agency bill transactions, supporting accurate commission calculations and timely payouts. Automated bank reconciliation further reduces manual workload while ensuring up-to-date financial records.

"Through this integration, Applied Epic users can manage end to end accounting tasks within a single platform, improving operational efficiency and accuracy," said Dan Garzella, founder of Insurance Accountants. "This allows agencies to focus on growth and client relationships rather than back-office tasks."

The integration also provides onboarding and configuration support to align accounting workflows with existing agency processes, ensuring continuity of operations as agencies scale. Monthly commission statements provide clear breakdowns by producer and carrier, increasing transparency and financial oversight.

For more information, visit <https://www.insuranceaccountants.com>

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