Standard Service Terms

Data Jigsaw Limited, trading as AgencyTally · Version 1.0 · Effective date: 28 November 2026 · Last reviewed: 28 November 2026
Registered in England and Wales · Company number 09655831

1. Introduction

These Standard Service Terms ("Terms") set out the basis on which Data Jigsaw Limited, trading as AgencyTally ("we", "us" or "our"), provides commission reconciliation services to independent insurance agencies ("you" or "your"). By asking us to provide the Services, including joining our Closed Beta, you agree to these Terms.

Data Jigsaw Limited is a company registered in England and Wales under company number 09655831. Our registered office is 231 Elliott Street, Tyldesley, Manchester M29 8DG, United Kingdom.

2. Definitions

Agency Data means the commission statements, policy records and any other information you provide to us, and anything we produce from them.

Closed Beta means our free, limited programme for a small number of agencies before public launch.

Data Agreement means the Data Protection and Confidentiality Agreement signed between you and us before any Agency Data is shared.

Report means the reconciliation report we produce for you.

Services means the commission reconciliation services described in clause 4.

Subscription Fee means the flat monthly fee for the Services after the Closed Beta.

Working Day means Monday to Friday, excluding public holidays in England.

3. Entire agreement and changes

These Terms, together with the Data Agreement and any written order or confirmation we send you, form the entire agreement between us. If there is any conflict about how Agency Data is protected, the Data Agreement takes priority.

We may update these Terms from time to time and will publish the current version at agencytally.com. Where a change is material, we will give you reasonable notice by email. Continued use of the Services after a change takes effect means you accept the revised Terms.

4. The Services

We provide a back-office service. We read the carrier commission statements you send us, compare each line with your policy records, and produce a Report showing what matched and what appears to be missing, short, at the wrong rate or clawed back.

We will use reasonable endeavours to provide the Services with reasonable care and skill. We aim to deliver each Report promptly, and normally within three Working Days of receiving complete and readable files. This is a target, not a guarantee, and time is not of the essence.

The accuracy of each Report depends on the completeness and accuracy of the information you and your carriers provide. We do not guarantee that every discrepancy will be found or that any amount will be recovered.

5. What we do not do

We are not an insurance agency, broker or producer. We do not sell, solicit or negotiate insurance, handle or adjust claims, or collect premium.

We do not contact your carriers, policyholders or producers on your behalf unless you ask us to in writing and we agree.

We do not give legal, tax, accounting or insurance advice. Reports are information to support your own review. You remain responsible for checking a Report and for any decision or action you take, including whether and how to follow up with a carrier.

6. Closed Beta

The Closed Beta is free of charge. It is provided on an “as is” and “as available” basis while we test and improve the Services.

We may change, pause or end the Closed Beta, or your place in it, at any time. You may leave at any time. There is no obligation to subscribe afterwards.

If you give us feedback or suggestions, we may use them to improve the Services without any obligation to you. We will never identify you or use your Agency Data in doing so.

7. Fees and payment

After the Closed Beta, the Services are provided for a flat monthly Subscription Fee. We will confirm the fee in writing before you subscribe.

We never charge a percentage or share of any commission recovered.

The Subscription Fee is payable monthly in advance. There is no fixed term. If a payment is not received when due, we may suspend the Services until it is.

We may change the Subscription Fee by giving you at least 30 days’ notice by email. Fees are exclusive of any applicable taxes.

8. Your obligations

You agree to provide information that is complete, accurate and up to date, and to tell us promptly about anything that may affect the Services.

You confirm that you are entitled to share the Agency Data with us for the purpose of the Services.

You agree to send Agency Data only through the secure channels we agree with you, and only after the Data Agreement is signed.

You agree to review each Report before relying on it or acting on it.

9. Data protection and confidentiality

The Data Agreement governs how we protect, use, keep and delete Agency Data. Our Privacy Policy explains how we handle personal information about you and your staff.

Each of us will keep the other’s confidential information confidential and use it only for the purposes of these Terms. Neither of us will refer to the other in publicity without written consent.

10. Intellectual property

You own your Agency Data. We own our methods, software, templates and know-how, and the format of our Reports.

We grant you a non-exclusive, non-transferable licence to use each Report for your own internal business purposes.

11. Limitation of liability

Nothing in these Terms limits or excludes liability for fraud, for death or personal injury caused by negligence, or for any other liability that cannot lawfully be limited or excluded.

Subject to that, we are not liable for any loss of profit, revenue, commission, business, contracts, goodwill or anticipated savings, or for any indirect or consequential loss.

We are not responsible for errors, omissions or delays by carriers or other third parties, or for any commission that a carrier fails to pay.

Our total liability to you in connection with these Terms and the Services is limited to the greater of the Subscription Fees you paid in the three months before the event giving rise to the claim, or one hundred US dollars.

Any claim must be notified to us in writing within six months of the event giving rise to it.

12. Suspension and termination

Either of us may end the Services at any time by email. Paid months are not refunded, but the Services continue until the end of the month already paid for.

We may suspend or end the Services immediately if you materially breach these Terms, fail to pay, or cease to carry on business.

When the Services end, we will return or delete Agency Data as set out in the Data Agreement. Clauses that by their nature should survive, including clauses 9, 10 and 11, continue to apply.

13. Notices

Notices under these Terms may be given by email. Our address for notices is reconcile@agencytally.com. Yours is the main email address you give us. An email notice is treated as received at 9:00am on the next Working Day after it is sent.

14. Resolving disputes

If a dispute arises, we will each try in good faith to resolve it by discussion first. If that does not work, either of us may propose mediation with a neutral mediator, with costs shared equally, before starting court proceedings.

15. General

If any part of these Terms is found invalid or unenforceable, the rest continues in force. A delay in exercising a right is not a waiver of it.

Nothing in these Terms creates a partnership, joint venture or agency between us. You may not transfer your rights under these Terms without our written consent.

We are not liable for delay or failure caused by events outside our reasonable control.

These Terms are governed by the laws of England and Wales, and the courts of England and Wales have jurisdiction.

The current version of these Terms is always available at agencytally.com/terms.html. Questions: reconcile@agencytally.com.