

QQCATALYST®

Administrator's Guide

Table of Contents

- Introduction 3
- Key Terms 3
 - Global Navigation Bar..... 3
 - Dock..... 3
 - Guided Workflows 3
 - Stack 3
 - Activity..... 4
- Logging Into QQCatalyst® 4
- Part 1 – Setting Up Location Preferences 5
 - User Tab 5
 - System Timeout / Logout Period..... 5
 - Contact Tab..... 6
 - Occupations and Industries Sections..... 6
 - Policy Tab 6
 - Signatures 6
 - Agency Fees / Carrier Fees 7
 - Lines of Business / Coverages..... 7
 - Email Tab 8
 - Downloads Tab 8
- Step 2 – Adding Contacts 9
 - Carriers 9
 - Critical Business Information Needed 9
 - Setting Up Agency Commission Rules 10
 - MGAs / Cert Holders / Lien Holders..... 11
 - Employees 11
 - User Preferences 11
 - Commissions..... 11
 - User Profile..... 11
 - Permissions..... 12
- Where to Go From Here..... 13

Introduction

This Quick Start guide will take you through the steps an agency administrator needs to follow to successfully setup and use QQCatalyst® in your agency.

Key Terms

Global Navigation Bar

The Global Navigation Bar is located at the top of every QQCatalyst page. The Global Navigation Bar provides quick access to the main sections of the system: Dashboard, Contacts, Reports, Downloads, and your User and Location Preferences.

Dock

The Dock is located at the bottom of every QQCatalyst page. The Dock provides quick access to the following common actions: New Contact, Search, and New Task. The Dock also contains the Stack (the folder icon), which allows you to set aside anything you're working on and come back to it later, right where you left off.

Guided Workflows

A Guided Workflow is a step-by-step process that will “walk” you through adding a new contact or policy record. This feature is set to “On” by default for each new user. If the user prefers, he/she can turn it “Off”. With Guided Workflows turned off, the user enters new contact or new policy information directly without guidance.

Stack

The Stack is an innovative feature designed to help you manage your busy day, by managing work-in-process and frequent interruptions.

Interruptions are a fact of life in a busy insurance agency. For example, you may be entering a new policy for a client, when a call comes in from another client requesting

proof of insurance. The Stack provides an easy way to pause what you're working on, do something else and then return to it at a later time.

Activity

An Activity is a record of any action taken on a contact or policy. Activities are recorded automatically by QQCatalyst in the Activity tab.

QQCatalyst lets you document additional information about the Activity. You can type comments about a conversation you had with your client, record an event, make any kind of note, flagging them as important when you need it to stand out. Simply click inside the "Write a comment" box and enter your notes.

Logging Into QQCatalyst[®]

To log into QQCatalyst, open your web browser to [QQCatalyst.com](https://www.qqcatalyst.com). Enter your email address and password, which we provided you. Click the **LOG IN** button.

Part 1 – Setting Up Location Preferences

Setting up all your preferences for each of your agency's locations is essential. The information you enter in these sections is required for the creation of contacts and policies, as well as for the functionality of email and carrier downloads.

To set up your preferences, follow these steps:

1. Point your mouse over your User Name in the Global Navigation bar.
2. A dropdown menu will appear.
3. Click on Location Preferences.
4. Choose a location from the drop-down list available at the top-left of the page.

Once you choose a location, you will see a series of tabs, each of which contain settings related to specific areas within QQCatalyst. Go through each tab, completing the information in each. Then, move on to your next location by selecting it from the drop-down menu. Repeat this process until all locations are set up.

User Tab

System Timeout / Logout Period

For security purposes, QQCatalyst will automatically log out any user who is inactive for a pre-selected period of time. The System Timeout / Logout Period refers to how long QQCatalyst will wait when inactive before a user is automatically logged out (from 1 to 8 hours of inactivity). This will apply to all users at the selected location.

To set the System Timeout Period for the selected location:

1. Click the Edit button and choose the number of hours of inactivity, after which the system will log out users (1 to 8 hours).
2. Click the Save button.

Contact Tab

Occupations and Industries Sections

Setting up these two sections is important when adding contacts, specifically for those policies and forms that require employment information. These two sections work together; each occupation must be associated with an industry in QQCatalyst.

First, set up the list of occupations as follows:

1. Add occupations to the list by clicking the Add Occupation button.
2. To search for occupations after they are added, use the pages listed located at the bottom of the Occupations section.

Once the list of occupations is complete:

1. Click on the name of the industry you want to modify within the Industry section and then click on Edit.
2. Add occupation(s) to the industry you have selected by clicking inside the Occupations box and selecting the occupations you want to add from the drop-down menu that will open. When done click on Save.

Policy Tab

Signatures

This area allows you to upload any electronic (or scanned) signature file you want to apply to an ACORD form. The signatures available in this section will be available to any user with access to the corresponding location.

To add a signature(s):

1. Click on "Add Signature".

2. Navigate to the folder that contains your signature files. These files must be in an image format, such as jpg, gif, png, bmp, etc.
3. Upload one signature at a time. You can upload as many as you need.
4. Enter a Signature Name for the uploaded signature.
5. Now, make it active or inactive.

Agency Fees / Carrier Fees

In these two sections, you can set up all of the fees your agency and your carriers charge. Fees cannot be entered anywhere else in QQCatalyst. Fees can only be changed, if needed, on the policy itself. These fees will be used later when you add your default commissions and assign commissionable amounts.

To add fees:

1. Click on “Add Agency Fee” or “Add Carrier Fee”.
2. Enter a Fee Name.
3. Set the values as a percentage (of policy premium) or as a fixed dollar amount.

Lines of Business / Coverages

The lines of business and coverage listed in QQCatalyst are based on ACORD standards. It is important to have a complete list of all the lines of business and coverages you provide. If a line of business or coverage is not set up for a given location, your employees will not be able to select it when they are entering a policy or processing a carrier download.

To add a line of business:

1. Click “Add a Line of Business”.

2. Choose a line of business from the drop-down menu.
3. Click on Add Coverage to add coverages associated to this line.

Note: Since the list is based on ACORD standards, you cannot add custom lines of business to this list.

Email Tab

Here, you set up one or more corporate email addresses that can be assigned to employees and use when sending email through QQCatalyst. Keep in mind that all email addresses you enter here for common use must be verified before they can be used.

To set up your corporate email address(es):

1. Enter the email address and click Save.
2. After adding the email address, the system will send to that address a validation email with a special link.
3. You must open the validation email **within 24 hours** and click on the link to validate the address.
4. Once verified, users will be able to select the address from which to send emails. This will be the “From” address.

Note: Do not use this section to add email addresses you want available to specific users. Individual email addresses must be set up in the Employee’s contact under the Email tab.

Downloads Tab

See the QQCatalyst Carrier Downloads Quick Start Guide for detailed information.

Step 2 – Adding Contacts

Every person you do business with or work with can be entered as a Contact in QQCatalyst, including customers, employees and carriers. The types of contacts available are: Customer, Prospect, Carrier, MGA, Cert Holder, Lien Holder, and Employee.

To add a contact in QQCatalyst:

1. Click the New Contact button on the Dock (located at the bottom of the page).
2. Select a Contact Type.
3. Indicate a status (Active or Inactive).
4. Begin entering information for the new contact.

Carriers

A carrier contact contains all the information related to the insurance carriers you work with. They must be associated to your locations in the “Locations per Carrier” section so they will appear when creating new policies.

Critical Business Information Needed

- The correct NAIC code, which is up to six characters in length and is specific to each carrier contact. Two or more carriers **cannot** have the same NAIC code.

- Each carrier can be linked to an MGA in the “Linked MGAs” section, or when you add an MGA contact. Making the appropriate link is important, as these pairings will be filtered in QQCatalyst when creating policies.

Setting Up Agency Commission Rules

There are two sections for commission rules: Policy Commissions and Carrier Fee Commissions.

- To add Policy Commissions, click on “Add Commission” and enter the required information. You can add as many as need.
- To add Carrier Fee Commissions, click on “Add Commission” and enter the required information. You can add as many as need.

MGAs / Cert Holders / Lien Holders

ACORD certificates often require Cert Holder and Lien Holder information. MGA contacts are especially important when linking carriers and MGAs to create a policy, and for commission rules.

Employees

Entering Employees in the system allows you to manage their employment information and their access to QQCatalyst. Only Employees entered into QQCatalyst can be set up as users.

User Preferences

- Signatures: In addition to signatures available to an employee based on their location, each user can have specific signatures that only they can use.

Commissions

There are two sections for commission rules: Policy Commissions and Agency Fee Commissions.

- To add Policy Commissions, click on “Add Commission” and enter the required information. You can add as many as need.
- To add Agency Fee Commissions, click on “Add Commission” and enter the required information. You can add as many as need.

User Profile

Each user logs into QQCatalyst using a valid email address and password. These are their login credentials. As the administrator, you create their credentials within the user

profile section. Passwords must have a minimum of six (6) characters, must contain at least one (1) capital letter, and must contain at least one (1) number. You must also activate the employee's user license to enable access the system. If you require additional user licenses, please contact QQ Solutions.

There are three levels of system access:

- *Super Admin*: Highest access level with permissions to all sections of QQCatalyst.
- *Local Admin*: Full permissions to all areas of QQCatalyst, but limited to agency location(s) assigned to them by the Super Admin or another Local Admin.
- *User*: Lowest access level, limited to sections of QQCatalyst based on the permissions assigned to them. Users with *User level* access have no access to Location Preferences and limited access to agency locations, as assigned to them by a Super Admin or Local Admin.

Permissions

The Permissions section is divided into several sections: Contacts, Policies, Files, ACORD Forms, Reports, Dashboard, Carrier Downloads, and Location Preferences. A check mark indicates permission is granted. No check mark indicates permission is denied. To grant a permission to the employee, simply click to place a check in the appropriate column (View, Edit, Create, Delete, Access). To deny a permission, click the check mark to remove it.

An employee's access can be limited, so that they can view only their own customers and policies, (i.e., where they are listed as the agent, CSR, or producer). You can also restrict them from viewing and editing their own commission rules, preferences, and permissions.

Where to Go From Here

Now that your QQCatalyst's location preferences are set up, you can train all users and begin to use it. On-page videos, in-line help, tooltips and more, are available to help you learn the highly intuitive QQCatalyst system.

If you would like to attend group training, you can [click here](#) to visit our training website and sign up for the training sessions available.

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