

QQCATALYST®

Carrier Downloads Quick Start Guide

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Before You Begin

Before you begin using Carrier Downloads in QQ Catalyst, it is essential that you first configure IVANS within the system. This guide will show you how to configure and use Carrier Downloads to help you make the most out of this powerful feature.

First, be sure that you have an IVANS account. Note: if you need to download at multiple locations, you must have a separate account for each office!

Do you have an IVANS account?

If you already have an IVANS account, you can use your IVANS credentials. All you need to do is contact your carriers to let them know you are switching to QQ Catalyst and they will make the necessary changes to ensure Carrier Downloads works with your new system.

Are you new to IVANS?

If you do not yet have an IVANS account, contact one of the insurance carriers you work with that utilizes IVANS to establish a new account. Once you receive your IVANS account from the first carrier, you can contact the rest of your carriers. Provide each of them with this account information, and, you will be set with all your insurance carriers.

Next, set up each of your carriers as a contact in QQ Catalyst. Enter each carrier's complete contact information, making sure you enter the correct NAIC code. To learn more about adding contacts, please refer to User's Quick Start Guide.

Note: You can process downloads only for the locations that your administrator has given you access to.

Adding Your IVANS Accounts

QQCATALYST® DASHBOARD CONTACTS MARKETING REPORTS DOWNLOADS Andrea Boyle

MY PREFERENCES
LOCATION PREFERENCES
FEEDBACK
LOGOUT

LOCATION PREFERENCES

LOCATION: Corporate ADDRESS: 100 E Las Olas Blvd Fort Lauderdale, AB - PRIMARY PHONE: (444) 444-4444

USER CONTACT POLICY EMAIL DOWNLOADS

IVANS ACCOUNTS

ACCOUNT	MAILBOX SUPPORT
USER ID	PASSWORD

EDIT

NAVIGATION
Ivans Accounts

To add IVANS account information, the Agency Administrator must grant you permission to Location Preferences. If you need access, contact your agency's account administrator.

1. At the top of each page in QQ Catalyst, is the Global Navigation bar with your name on the far-right. Click on your name and a drop-down menu will appear. Select "Location Preferences" (see example above).
2. Next, click "Downloads" on the Global Navigation bar to enter the Carrier Downloads section.
3. Since you need a separate IVANS account for each location, the setup is based on the Location chosen (see example above). To switch to another Location, click on the drop-down menu and choose the desired Location.
4. Enter your IVANS account information. In the IVANS Accounts area (displayed above), click on the EDIT button and enter all your IVANS credentials.

Processing Carrier Downloads

Sections of Carrier Downloads

Transactions in Carrier Downloads are arranged as follows, in tabs:

- **Completed:** These are transactions that have been successfully processed and updated the client and/or policy in QQ Catalyst.
- **Need Matching:** These are transactions you must take action on.
- **Print Only:** Here you will find transactions the carriers provide for print purposes only and do not automatically update the client and/or policy.
- **Failed:** If a transaction cannot be processed because of an error from the information within the transaction, please contact our Product Support team. We will contact the carrier (if needed) to resolve the error. Once it has been resolved you will be able to re-process the transaction.

Everything you see within these tabs refers to the transactions for one location. To see transactions for another location you have access to, select the location from the drop down.

Starting Downloads

When you are ready to start downloading information from your carriers, click the Downloads button. If you have multiple locations, you will have the option to select the location you want to process.

NOTE: Once you start processing downloads, you will not be able to access Carrier Downloads for that location until the process is completed. You can access other areas of QQ Catalyst, including downloads for different locations.

When the download is complete, the summary area will show how many transactions were processed per section (Completed, Need Matching, Print Only, Failed).

Need Matching

This tab groups transactions by customer name. To see all the transactions grouped for each, click on the green arrow. To process them, click on the customer name and QQ Catalyst will start the Guided Workflow.

Depending on the number and types of transactions a customer has, QQ Catalyst will determine the steps necessary to update the customer and/or policy. Follow the steps as prompted, and when you are finished, your customer and/or policy will be updated and automatically moved to the Completed tab.

If you have a transaction that can't find an NAIC code, update the carrier's contact information with the correct NAIC code and process again the download.

Your Agency Administrator must give you access to Downloads. If you do not have permission, contact your agency's administrator.