
QQCATALYST™

Quick Start Guide

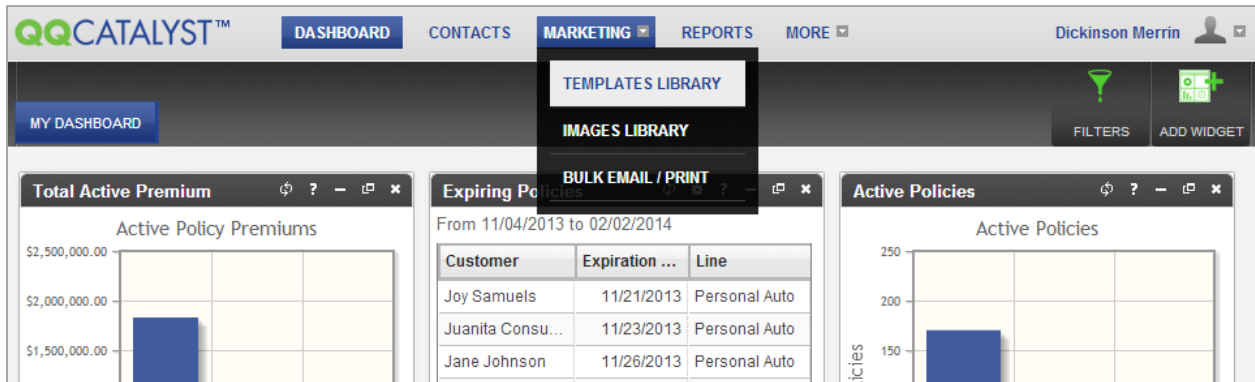
Marketing – The Template Library

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The Standard Library

To access the Standard Library, hover over **Marketing** and select **Templates Library**.



Click on **Standard Library** to view the list of templates that have been built for you. You can narrow your search by clicking on the category listed under **Standard Library**. You can also type the name of your template in the **Search** field to filter the list.

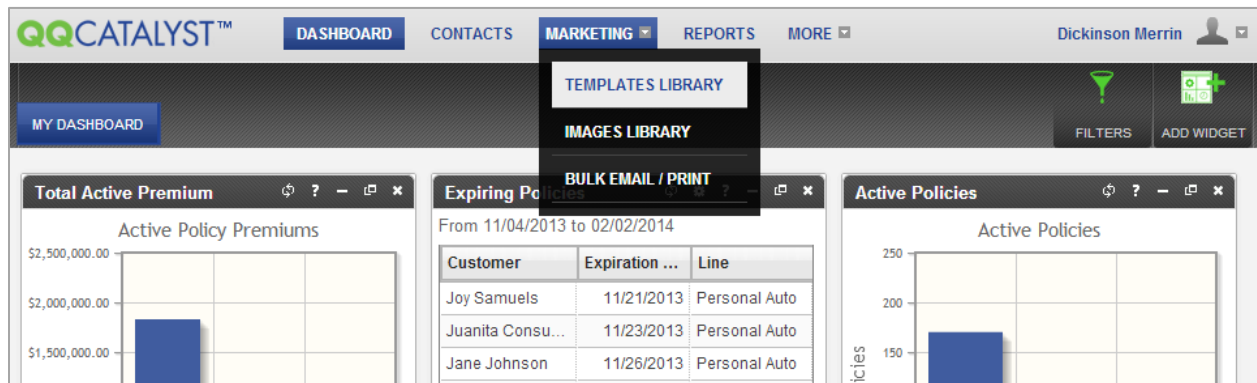
Office 1	NAME	DESCRIPTION	TYPE	CATEGORY	DATE MODIFIED
ALL					
STANDARD LIBRARY					
CANCELLATION	CANCELLATION LETTER		CANCELLATION	CUSTOMERS	01/04/2013
FINANCIAL	CONTACT US IMMEDIATELY L...		PERSONAL	CUSTOMERS	01/04/2013
INTENT TO CANCEL	ENDORSEMENT LETTER		PERSONAL	CUSTOMERS	01/04/2013
NEW BUSINESS	EXPIRATION LETTER		PERSONAL	CUSTOMERS	01/04/2013
PERSONAL	HAPPY BIRTHDAY LETTER		PERSONAL	CUSTOMERS	01/04/2013
REINSTATEMENT	REFERRAL LETTER		PERSONAL	CUSTOMERS	01/04/2013
RENEWAL					
REWRITE					

You can click on the template to duplicate it, make changes, and save it to the Agency Library. Templates are not issued in the Marketing Section. You will need to be on a contact or in the Bulk Email/Print section.

Office 1	NAME	DESCRIPTION	TYPE	CATEGORY	DATE MODIFIED
ALL					
STANDARD LIBRARY					
CANCELLATION	CANCELLATION LETTER		CANCELLATION	CUSTOMERS	01/04/2013
FINANCIAL			PERSONAL	CUSTOMERS	01/04/2013
INTENT TO CANCEL			PERSONAL	CUSTOMERS	01/04/2013
NEW BUSINESS			PERSONAL	CUSTOMERS	01/04/2013
PERSONAL	HAPPY BIRTHDAY LETTER		PERSONAL	CUSTOMERS	01/04/2013
REINSTATEMENT	REFERRAL LETTER		PERSONAL	CUSTOMERS	01/04/2013
RENEWAL					
REWRITE					

The Agency Library

To access the Agency Library, hover over **Marketing** and select **Templates Library**.



Click on **Agency Library** to view the list of templates that you have built or duplicated from the Standard Library. You can narrow your search by clicking on the category listed under **Agency Library**. You can also type the name of your template in the **Search** field to filter the list.

AGENCY LIBRARY	HAPPY THANKSGIVING CUST...	THANKSGIVING LETTER	PERSONAL	CUSTOMERS	09/05/2013
CANCELLATION	INFORMATION NEEDED LETT...	INFORMATION NEEDED LETTER	NEW BUSINESS	CUSTOMERS	02/07/2013
FINANCIAL	INQUIRY LETTER	THANK YOU FOR INQUIRING	NEW BUSINESS	CUSTOMERS	06/20/2013
INTENT TO CANCEL	LIFE INSURANCE	LIFE INSURANCE ANNOUNCEME...	NEW BUSINESS	PROSPECTS	04/23/2013
NEW BUSINESS	MY RENEWAL LETTER	FOR RENEWED POLICIES	RENEWAL	CUSTOMERS	03/07/2013
PERSONAL	MY THANK YOU LETTER	FOR NEW BUSINESS ONLY	NEW BUSINESS	CUSTOMERS	02/06/2013
REINSTATEMENT	NEW BIRTHDAY LETTER	FOR BIRTHDAYS	PERSONAL	CUSTOMERS	05/23/2013
RENEWAL					
REWRITE					

You can click on the template to duplicate it, edit, or delete it. Templates are not issued in the Marketing Section. You will need to be on a contact or in the Bulk Email/Print section to print or email a template.

AGENCY LIBRARY	HAPPY THANKSGIVING CUST...	THANKSGIVING LETTER	PERSONAL	CUSTOMERS	09/05/2013
CANCELLATION	INFORMATION NEEDED LETT...	INFORMATION NEEDED LETTER	NEW BUSINESS	CUSTOMERS	02/07/2013
FINANCIAL					
INTENT TO CANCEL					
NEW BUSINESS					
PERSONAL					
REINSTATEMENT					
RENEWAL					
REWRITE					

Add A New Template

You can add a new template by clicking on the **Add New Template** icon in the toolbar.

ADD NEW TEMPLATE

TEMPLATES LIBRARY

THE MARKETING TEMPLATE TOOL BELOW ALLOWS YOU TO BROWSE THROUGH THE DIFFERENT TEMPLATE LIBRARIES AVAILABLE OR SEARCH FOR A SPECIFIC TEMPLATE. TO EDIT AN EXISTING TEMPLATE, SELECT THE TEMPLATE AND CLICK "EDIT" IN THE DROP-DOWN MENU THAT APPEARS. IF YOU NEED TO CREATE YOUR OWN CUSTOM TEMPLATE, SELECT "ADD NEW TEMPLATE" IN THE TOOLBAR AND A WORKFLOW WILL WALK YOU THROUGH THE PROCESS OF CREATING A CUSTOM TEMPLATE.

Office 1

ALL	NAME	DESCRIPTION	TYPE	CATEGORY	DATE MODIFIED
STANDARD LIBRARY					
CANCELLATION	CANCELLATION LETTER		CANCELLATION	CUSTOMERS	01/04/2013
FINANCIAL	CONTACT US IMMEDIATELY L...		PERSONAL	CUSTOMERS	01/04/2013
INTENT TO CANCEL	ENDORSEMENT LETTER		PERSONAL	CUSTOMERS	01/04/2013

Choose the layout of your preference and then click next to continue.

CHOOSE A LAYOUT HELP

ADD NEW TEMPLATE: CHOOSE A LAYOUT Page 1 of 4

SELECT A LAYOUT FOR YOUR TEMPLATE. CLICK ON ONE OF THE LAYOUT OPTIONS AVAILABLE BELOW, THEN CLICK "NEXT" TO CHOOSE THE DATA SOURCES FROM WHICH INFORMATION CAN BE INSERTED INTO YOUR TEMPLATE.

Blank Template Sidebar Single Column Single Column with Logo Two Column

You will be able to pull in Merge Fields by selecting a category and Data Sources. The category should be who the template is built to go to. The Data Sources options are what information you would like to pull into the template.

CATEGORY

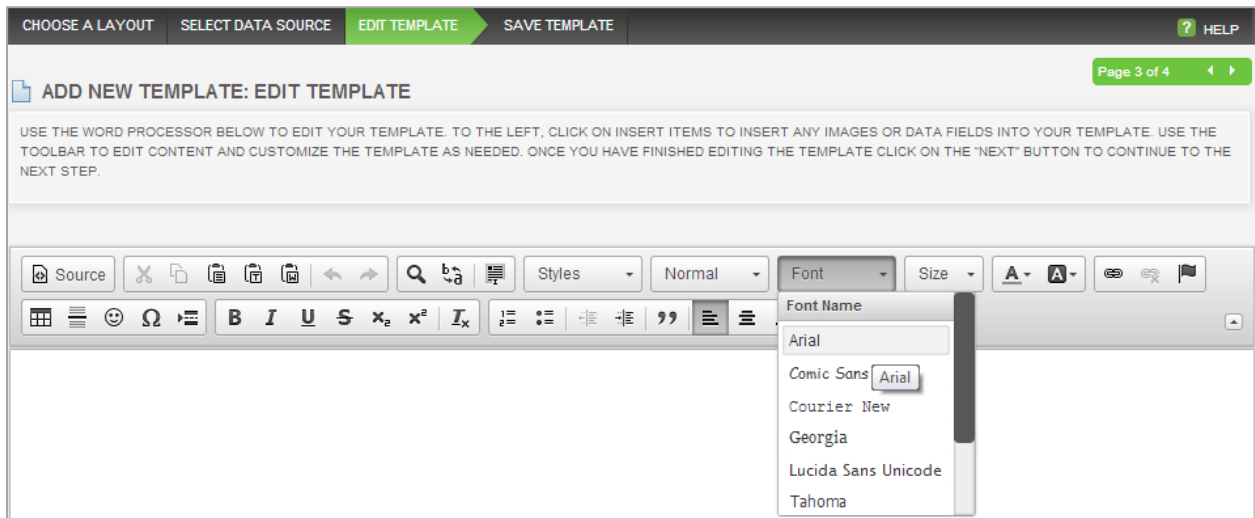
- Customers
- Carriers
- MGAs
- Employees
- Prospects
- Finance Companies

In this case I have selected the Customer category. I have also selected the Customer Information and Policy Information data sources. The Customer Information data source gives you merge fields like First Name, Last Name, Business Name, Address, Date of Birth and Phone Number. The Policy Information data source gives you merge fields like Writing Carrier, Policy Number, Policy Premium, Effective Date, and Expiration Date.

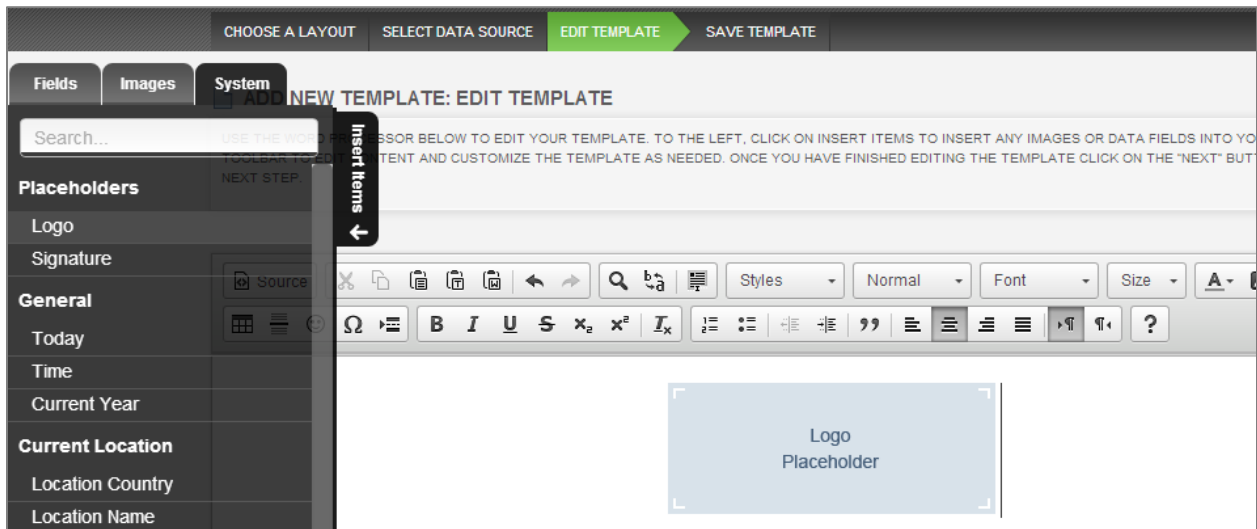
If you forget a Data Source option, you can always move back in the workflow to make an additional selection.

DATA SOURCES
Customer
 CUSTOMER INFORMATION
 CUSTOMER ACTIVITIES
 CUSTOMER TASKS
Policy
 POLICY INFORMATION
 POLICY ACTIVITIES
 POLICY TASKS
 ENDORSEMENT INFORMATION
 COMMISSIONS
Financial
 PAYMENTS
 BILLS

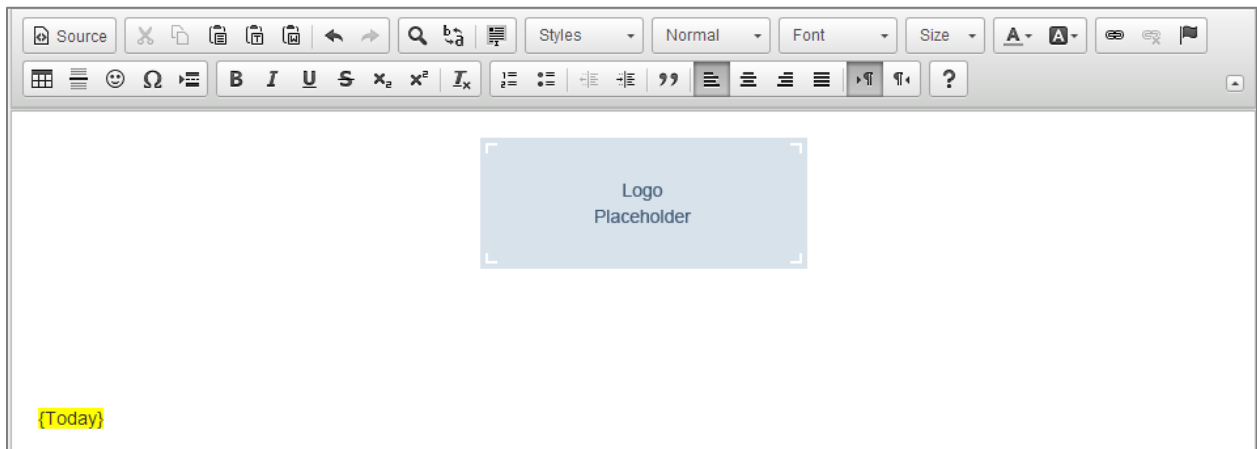
Begin by selecting a font and font size. If a font is not selected, the system will use a default font and size. The system's default font is much smaller than it appears in the Edit Template window. If you have already typed the contents of your template, left click and drag to highlight all the text. Then select a font and size.



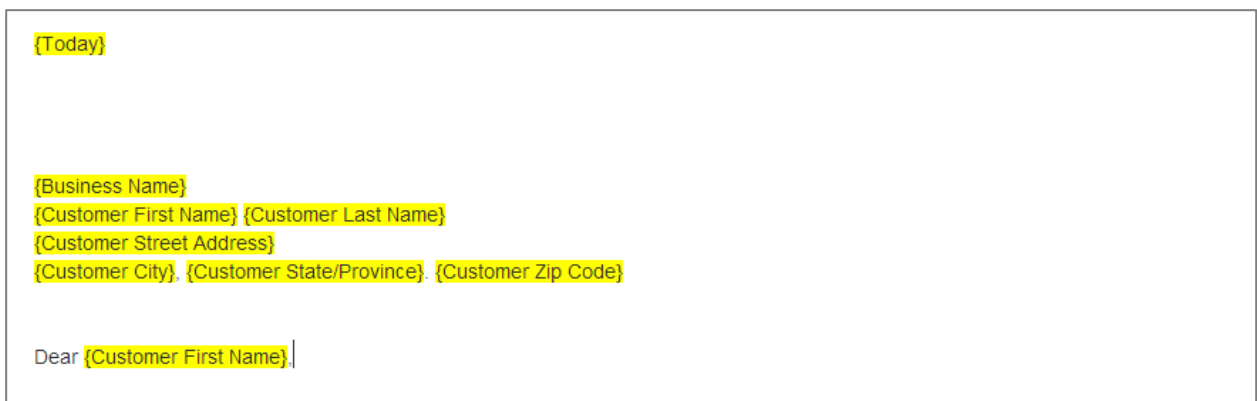
To insert your logo from the Location Preferences, click on the **Insert Items** tab on the left hand side. Then click on the System Tab and click on Logo under Placeholders.



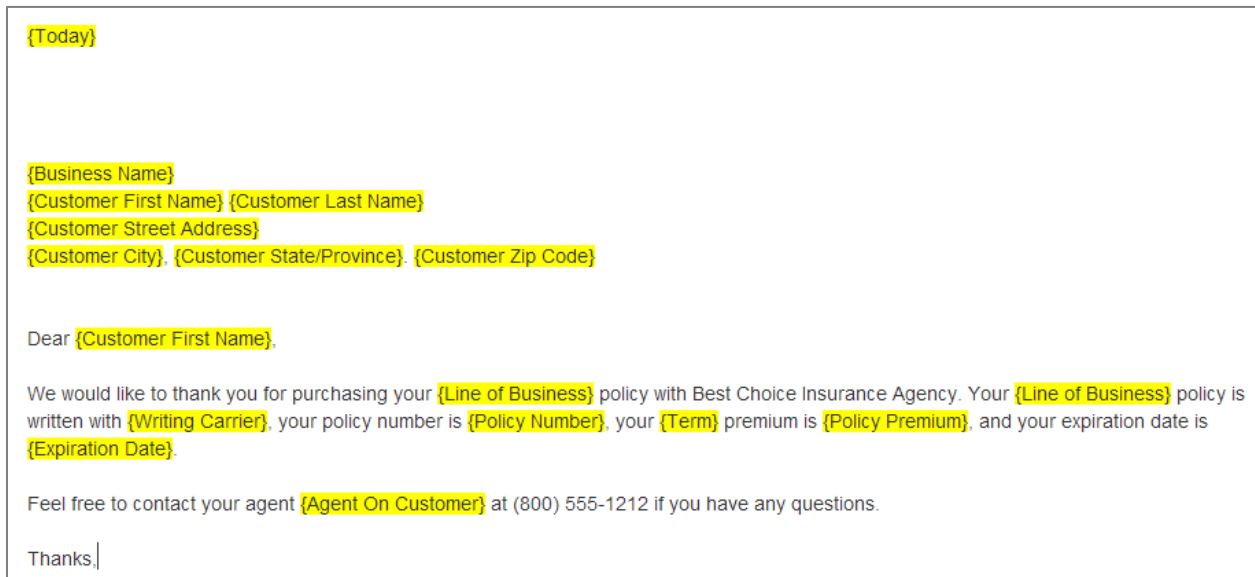
You can insert merge fields to help you build your template. Under the System Tab you can select Today to automatically populate today's date. By default, pressing enter is double space in the HTML editor. To single space hold down Shift and Enter.



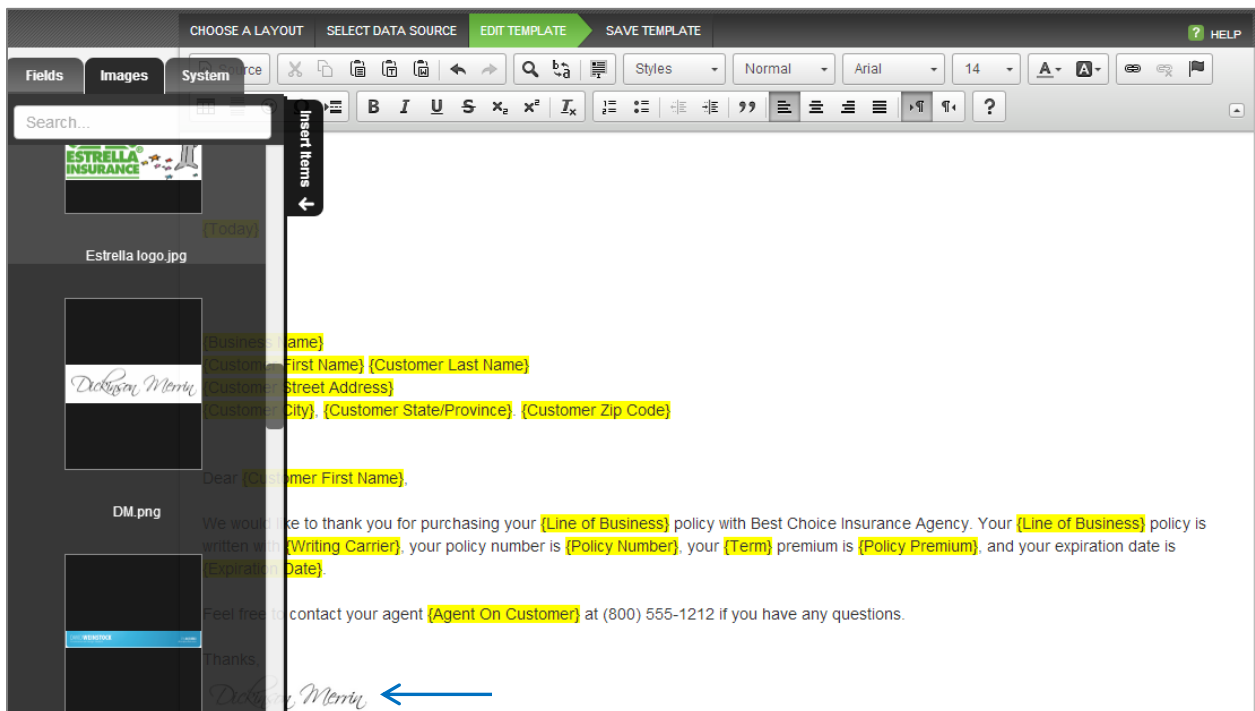
Then you will be able add additional merge fields from the Fields Tab.



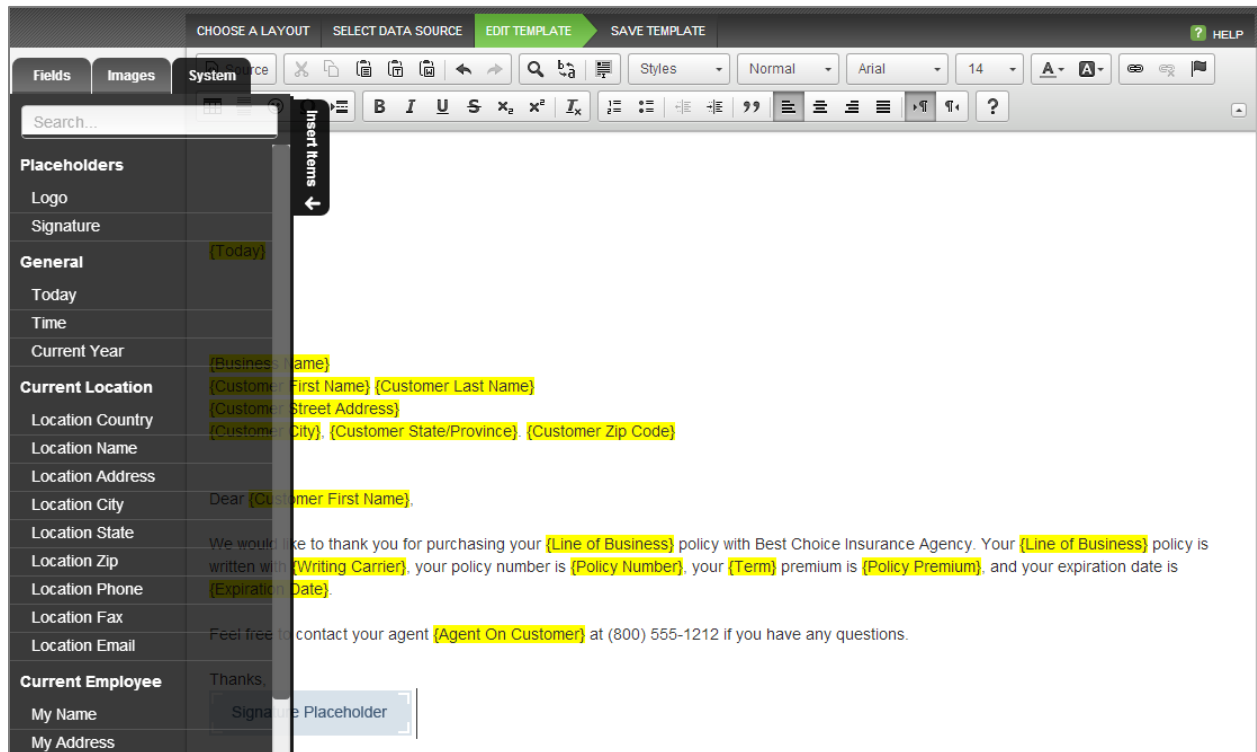
All the merge fields will be highlighted in yellow, and there is no limit to the number of merge fields that can be used.



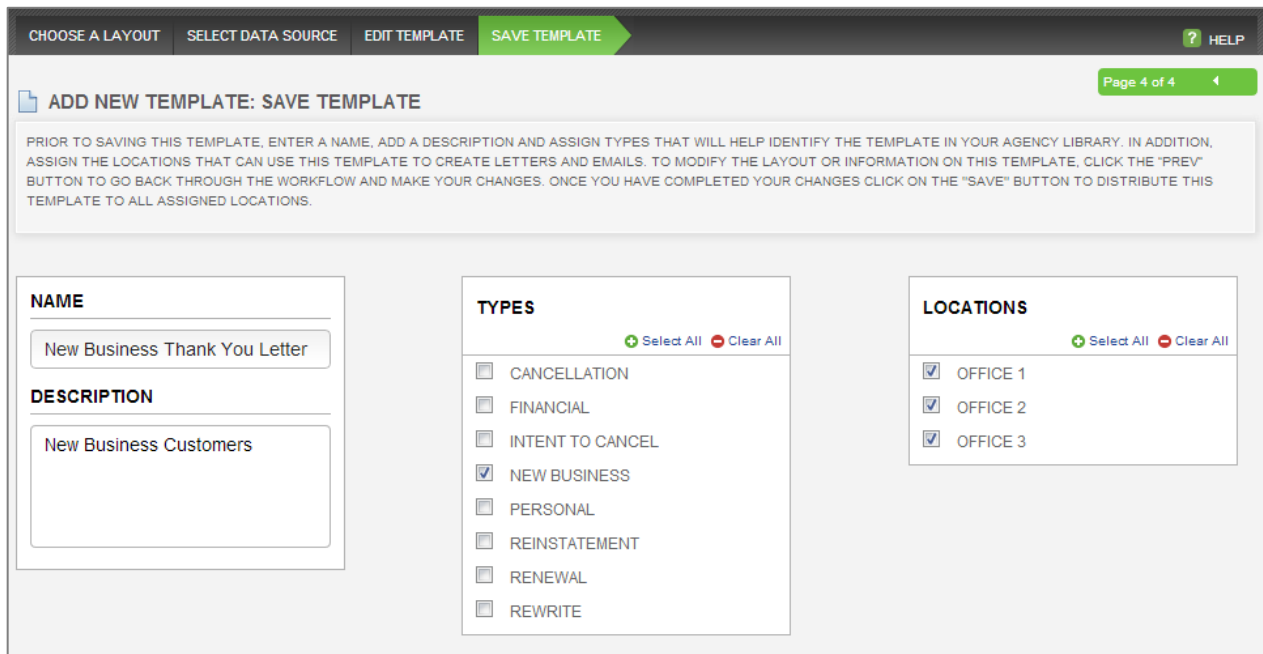
You can insert a fixed signature from the Images Tab or a signature placeholder which gives you the option of importing a signature each time the template is issued to a contact. To add a fixed signature that has been uploaded to the **Images** section, click on **Insert Items**, and click on the image.



If you prefer to insert a signature each time the template is issued, click on **Insert Items**, click on the **System** tab and then click on **Signature Placeholder**.



When done drafting your template click next to continue in the workflow. Title your template with a description; select the Type of document and which agency locations the template should be accessible to. Then click **Save** to exit the workflow.



Issuing A Template

To issue a template go to the contact you'd like to issue the template to. You can click on **Print/Email** in the toolbar on the Customer Overview Screen or on the Policy Overview Screen. If your template has merge fields with policy information, you have to have a policy selected to auto populate the policy information.

If Print/Email is selected on the Customer Overview Screen, you will need to select the policy on the first step of the workflow.

POLICY LIST TEMPLATE LIST ? HELP

CREATING A DOCUMENT FOR SIERA ALVAREZ

BELOW IS A LIST OF ALL POLICIES ASSOCIATED WITH THIS CONTACT. IF YOU WANT TO INCLUDE INFORMATION FROM A POLICY ON THE DOCUMENT, CLICK ON THE APPROPRIATE POLICY RECORD IN THE LIST AND CLICK "NEXT". IF YOU DO NOT WANT TO ASSOCIATE THIS DOCUMENT WITH A POLICY, CLICK "SKIP" TO CONTINUE TO THE NEXT STEP.

EFFECTIVE	EXPIRATION	LINE OF BUSINESS	CARRIER	MGA / BROKER	POLICY NUMBER	PREMIUM	STATUS	AGENT
11/01/2013	11/01/2014	Wind Policies	Travelers Insu...		FRJH5448816	\$1,470.00	Active	Dickinson M...
11/01/2013	11/01/2014	Life	Travelers Insu...		09856325-01	\$1,450.00	Pending	Dickinson M...

Then you will be prompted to select your template.

POLICY LIST **TEMPLATE LIST** ? HELP

CREATING A DOCUMENT FOR SIERA ALVAREZ

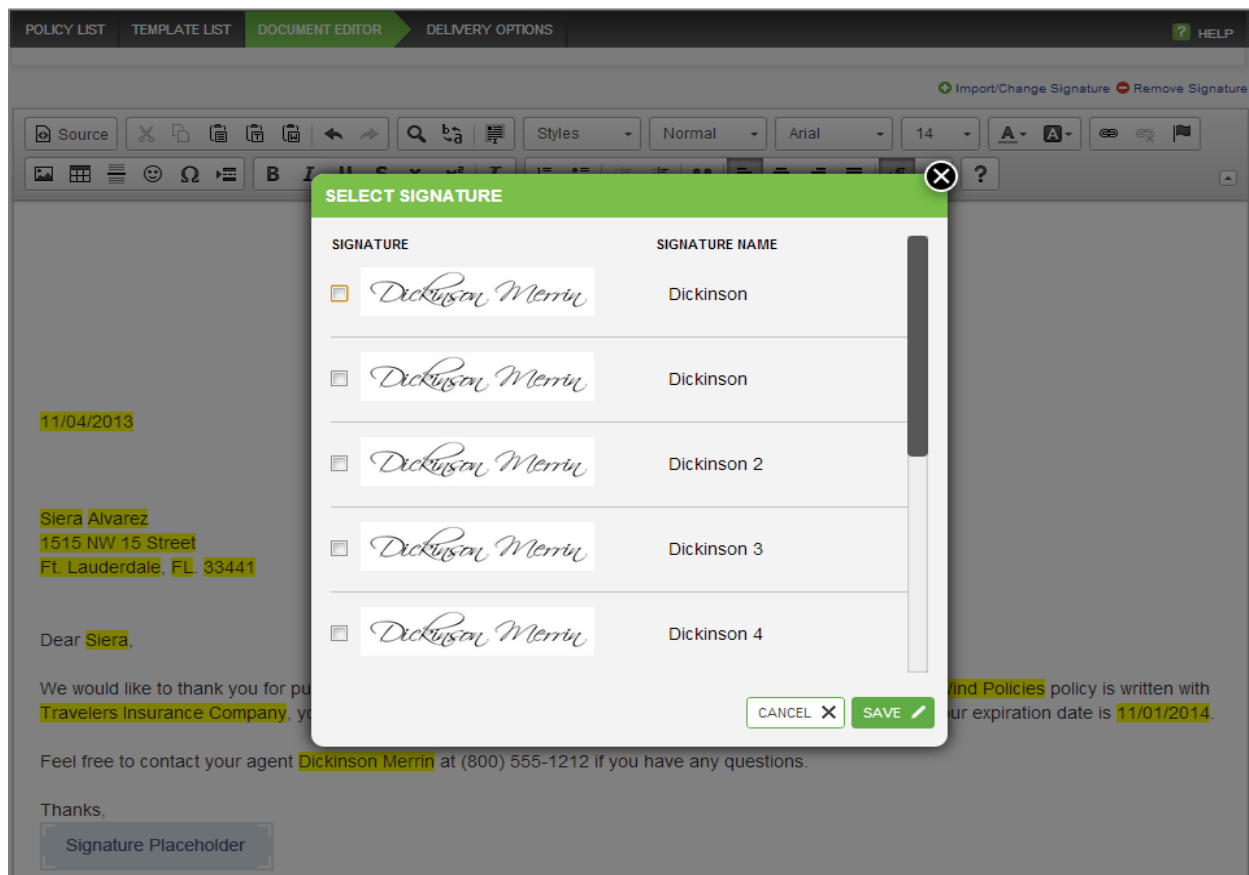
BELOW IS A LIST OF AVAILABLE TEMPLATES. THESE TEMPLATES ALLOW YOU TO CREATE PROFESSIONAL DOCUMENTS AND EMAIL TO SEND TO YOUR CONTACTS. SELECT A TEMPLATE BELOW AND CLICK "NEXT" TO CONTINUE TO THE NEXT STEP.

Office 1 Search...

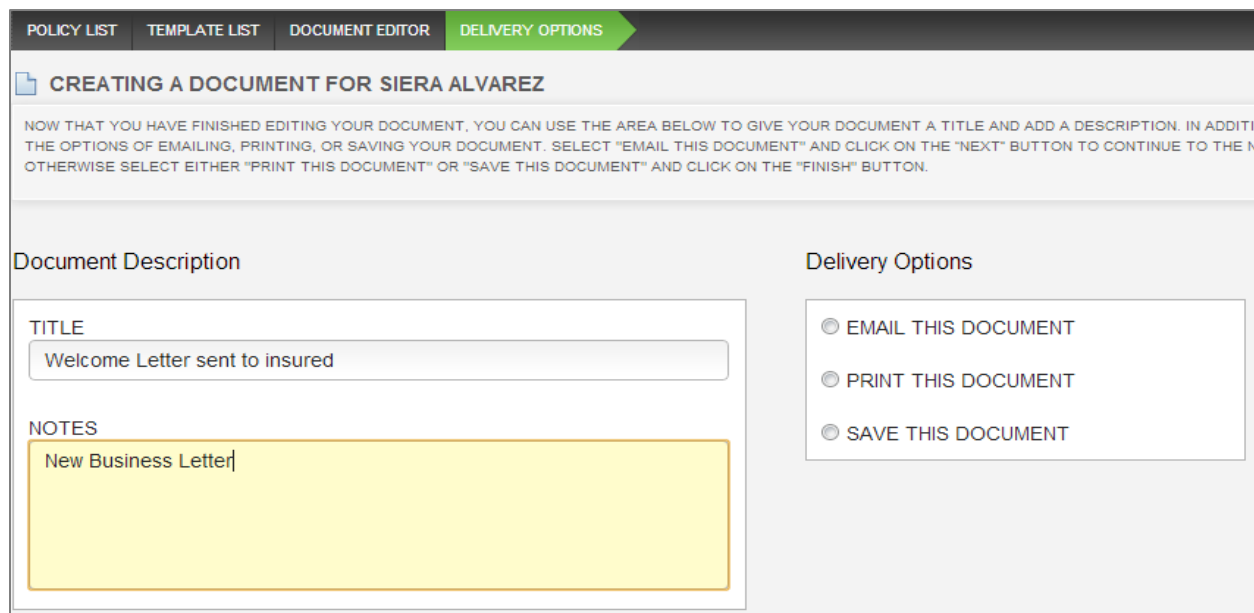
ALL	NAME	DESCRIPTION	TYPE	CREATED	DATE MODIFIED	MODIFIED BY
STANDARD LIBRARY	NEW BUSINESS THANK ...	NEW BUSINESS C...	NEW BUSINESS	11/04/2013	11/04/2013	DICKINSON M...
CANCELLATION	DICKINSON'S EMAIL TEM...	BLANK	CANCELLATIO...	10/31/2013	10/31/2013	DICKINSON M...
FINANCIAL	GRATUITY LETTER	THANK YOU FOR Y...	NEW BUSINESS	10/31/2013	10/31/2013	DICKINSON M...
INTENT TO CANCEL	MARKETING CLASS 10/2...	NEW BUSINESS C...	NEW BUSINESS	10/24/2013	10/24/2013	DICKINSON M...
NEW BUSINESS	ESTRELLA - THANK YOU ...	NEW BUSINESS T...	NEW BUSINESS	10/03/2013	10/22/2013	PEDRO PEREZ
PERSONAL	BLANK LETTER WITH LE...	BLANK LETTER	CANCELLATIO...	10/10/2013	10/10/2013	DICKINSON M...
REINSTATEMENT	THANK YOU LETTER 2	OPEN SIGNATURE	NEW BUSINESS	10/03/2013	10/10/2013	PEDRO PEREZ
RENEWAL	THANK YOU LETTER	THANK YOU FOR Y...	NEW BUSINESS	07/25/2013	09/27/2013	PEDRO PEREZ
REWRITE	INQUIRY LETTER	THANK YOU FOR I...	NEW BUSINESS	06/20/2013	09/27/2013	PEDRO PEREZ
AGENCY LIBRARY	CONTACT US IMMEDIAT...	WITH AGENCY LOGO	NEW BUSINESS	06/06/2013	09/27/2013	PEDRO PEREZ
CANCELLATION						
FINANCIAL						
INTENT TO CANCEL						
NEW BUSINESS						
PERSONAL						

CANCEL X ← PREV NEXT →

The logo, customer information and policy information will auto-populate into the merge fields. If you have a signature placeholder, you will see an option in the upper right hand corner to **Import/Change Signature**. The signatures are pulled in from the Location Preferences & My Preferences sections.



When you click **Next**, you can enter a title for the file and then select your delivery option.



Printing A Template

If printing, select **Print This Document** and click **Finish**.

POLICY LIST TEMPLATE LIST DOCUMENT EDITOR **DELIVERY OPTIONS**

CREATING A DOCUMENT FOR SIERA ALVAREZ

NOW THAT YOU HAVE FINISHED EDITING YOUR DOCUMENT, YOU CAN USE THE AREA BELOW TO GIVE YOUR DOCUMENT A TITLE AND ADD A DESCRIPTION. IN ADDITION THE OPTIONS OF EMAILING, PRINTING, OR SAVING YOUR DOCUMENT. SELECT "EMAIL THIS DOCUMENT" AND CLICK ON THE "NEXT" BUTTON TO CONTINUE TO THE NEXT STEP. OTHERWISE SELECT EITHER "PRINT THIS DOCUMENT" OR "SAVE THIS DOCUMENT" AND CLICK ON THE "FINISH" BUTTON.

Document Description

TITLE
Welcome Letter sent to insured

NOTES
New Business Letter


Delivery Options

EMAIL THIS DOCUMENT

PRINT THIS DOCUMENT

SAVE THIS DOCUMENT

The merged document will be created for you to print in your browser. A copy of the document is automatically attached to your contact's **Files** tab.



11/04/2013



Siera Alvarez
1515 NW 15 Street
Ft. Lauderdale, FL. 33441

Dear Siera,

We would like to thank you for purchasing your Wind Policies policy with Best Choice Insurance Agency. Your Wind Policies policy is written with Travelers Insurance Company, your policy number is FRJH5448816, your Annual premium is \$1,470.00, and your expiration date is 11/01/2014.

Feel free to contact your agent Dickinson Merrin at (800) 555-1212 if you have any questions.

Thanks,



Emailing A Template

If emailing, select **Email This Document** and click **Next** to continue in the workflow.

The screenshot shows the 'DELIVERY OPTIONS' step of a document creation process. The breadcrumb trail at the top includes 'POLICY LIST', 'TEMPLATE LIST', 'DOCUMENT EDITOR', 'DELIVERY OPTIONS' (highlighted), 'EMAIL ATTACHMENTS', and 'EMAIL HEADER'. A 'HELP' icon is in the top right. The main heading is 'CREATING A DOCUMENT FOR SIERA ALVAREZ'. A text box contains instructions: 'NOW THAT YOU HAVE FINISHED EDITING YOUR DOCUMENT, YOU CAN USE THE AREA BELOW TO GIVE YOUR DOCUMENT A TITLE AND ADD A DESCRIPTION. IN ADDITION, YOU HAVE THE OPTIONS OF EMAILING, PRINTING, OR SAVING YOUR DOCUMENT. SELECT "EMAIL THIS DOCUMENT" AND CLICK ON THE "NEXT" BUTTON TO CONTINUE TO THE NEXT STEP, OTHERWISE SELECT EITHER "PRINT THIS DOCUMENT" OR "SAVE THIS DOCUMENT" AND CLICK ON THE "FINISH" BUTTON.' Below this, there are two sections: 'Document Description' and 'Delivery Options'. The 'Document Description' section has a 'TITLE' field with the text 'Welcome Letter sent to insured' and a 'NOTES' field with the text 'New Business Letter'. The 'Delivery Options' section has three radio buttons: 'EMAIL THIS DOCUMENT' (selected), 'PRINT THIS DOCUMENT', and 'SAVE THIS DOCUMENT'. At the bottom, there is a 'CANCEL X' button on the left and 'PREV' and 'NEXT' buttons on the right.

Select any files or Acord forms you would like to attach to the email and click **Next**.

The screenshot shows the 'EMAIL ATTACHMENTS' step of the document creation process. The breadcrumb trail at the top includes 'POLICY LIST', 'TEMPLATE LIST', 'DOCUMENT EDITOR', 'DELIVERY OPTIONS', 'EMAIL ATTACHMENTS' (highlighted), and 'EMAIL HEADER'. A 'HELP' icon is in the top right. The main heading is 'CREATING A DOCUMENT FOR SIERA ALVAREZ'. A text box contains instructions: 'BELOW IS A LIST OF THE FILES AND ACORD FORMS ASSOCIATED WITH THIS CONTACT THAT YOU CAN ATTACH TO THIS EMAIL. YOU CAN ONLY ATTACH FILES AND ACORD FORMS THAT HAVE BEEN UPLOADED AND SAVED TO THE CONTACT IN QQ CATALYST. TO ATTACH, PLACE A CHECK IN THE BOX NEXT TO THE FILE OR ACORD FORM NAME. ONCE YOU HAVE SELECTED ALL OF YOUR ATTACHMENTS, CLICK "NEXT" TO ENTER THE RECIPIENTS OF THIS EMAIL.' Below this, there are two tabs: 'FILES' and 'ACORD' (highlighted). A table lists the available attachments:

FILE	ACORD
<input checked="" type="checkbox"/> RECEIPT_00224-2013.PDF	
<input type="checkbox"/> BMW 3.JPG	
<input type="checkbox"/> BMW 4.JPG	
<input type="checkbox"/> BMW 5.JPG	
<input type="checkbox"/> BMW 6.JPG	

At the bottom, there is a 'CANCEL X' button on the left and 'PREV' and 'NEXT' buttons on the right.

All validated email addresses assigned to you will be listed in the **From** field and your contact's primary email will be listed in the **To** field. If your email address does not populate in the **From** field, please refer to the **Setting Up Email in Catalyst** guide.

POLICY LIST **TEMPLATE LIST** **DOCUMENT EDITOR** **DELIVERY OPTIONS** **EMAIL ATTACHMENTS** **EMAIL HEADER** ? HELP

CREATING A DOCUMENT FOR SIERA ALVAREZ

IN THE EMAIL HEADER BELOW, YOU WILL NEED TO SELECT A FROM: ADDRESS FROM THE LIST OF AVAILABLE EMAIL ADDRESSES. NEXT, ENTER THE TO: EMAIL ADDRESSES. YOU CAN ENTER MULTIPLE EMAIL ADDRESSES SEPARATED BY A COMMA (,) OR SEMICOLON (;). IF NECESSARY, ENTER ADDITIONAL EMAIL ADDRESSES FOR THE CC: AND BCC: FINALLY, ENTER A SUBJECT LINE THAT WILL APPEAR ON THE EMAIL. ONCE YOU HAVE FINISHED COMPLETING THESE FIELDS, CLICK THE "NEXT" BUTTON TO SEE A PREVIEW ON THE FINAL EMAIL.

FROM: dmerrin@qqsolutions.com

TO: salvarez@myemail.com

CC:

BCC:

SUBJECT: Thank You For Your Business


CANCEL X PREV NEXT

On the next step in the work flow you will be able to review your email. You can go back to any step to make changes.

◀ TEMPLATE LIST DOCUMENT EDITOR DELIVERY OPTIONS EMAIL ATTACHMENTS EMAIL HEADER REVIEW EMAIL ▶▶ ? HELP

CREATING A DOCUMENT FOR SIERA ALVAREZ

THIS A PREVIEW OF THE EMAIL TO BE SENT. TO EDIT THE EMAIL, CLICK ON THE "DOCUMENT EDITOR" TAB ABOVE. TO SEND THIS EMAIL, CLICK ON THE "FINISH" BUTTON BELOW.



11/25/2013

Siera Alvarez
1515 NW 15 Street
Ft. Lauderdale, FL. 33441

Dear Siera,

We would like to thank you for purchasing your Wind Policies policy with Best Choice Insurance Agency. Your Wind Policies policy is written with Travelers Insurance Company, your policy number is FRJH5448816, your Annual premium is \$1,470.00, and your expiration date is 11/01/2014.

Feel free to contact your agent Dickinson Merrin at (800) 555-1212 if you have any questions.

Thanks,

Click **Finish** to send the email and exit the workflow. A copy of the email will be automatically attached to the contact's **File** tab and on the **Log** tab of the Customer Overview.