

QQCATALYST®

User's Quick Start Guide

Table of Contents

- Introduction 4
- Browser Requirements..... 4
- Key Terms 5
 - Global Navigation Bar..... 5
 - Dock..... 5
 - Guided Workflows 5
 - Stack 6
 - Activity..... 6
- Logging Into QQCatalyst® 6
- Dashboard 7
 - Add/Remove Widgets..... 7
 - Filter Widgets 7
- My Preferences..... 8
 - Signatures 8
- Contacts..... 8
 - Searching for Contacts in QQCatalyst 8
 - Adding Contacts to QQCatalyst..... 9
 - Contact Types 9
- Policies10
 - Searching for policies in QQCatalyst10
 - Adding Policies to QQCatalyst.....11
 - Policy Actions11
- ACORD Forms.....11
- Files12
- Print / Email13

Reports 14
Carrier Downloads 15
Where to Go From Here..... 15

Introduction

This Quick Start Guide will take you through the steps to use QQCatalyst® in your agency.

Browser Requirements

QQCatalyst is designed for modern Web browsers that support HTML5 and other standards. It runs on a wide variety of devices:

- Google Chrome (PCs & Macs)
- Firefox 14 and above (PCs & Macs)
- Safari 5 and above (Macs, iPads, iPhones, PCs)
- Opera 11 and above (PCs & Macs)
- Internet Explorer 9 and above (PCs only)

The following platforms are supported:

- PCs: Windows Vista, 7, 8
- Macs: OS X 10.6 and above
- iPad/iPhone: iOS 5 and above (note drag-and-drop is not supported)

Minimum Supported Screen Resolution: 1024 x 768

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 customer, when a call comes in from another customer requesting proof of insurance. The Stack provides an easy way to pause what you are working on, do something else and then return to it at a later time.

1. To stack a screen, click on the arrow next to the stack folder icon. When an item is added to the stack, a number will appear on the folder indicating how many items are currently stacked.
2. To view stacked items, click on the stack folder icon. You can click on an item in the list that appears and you will be taken to that screen, right where you left off.

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.qqsolutions.com). Enter your email address and password, which we provided you. Click the **LOG IN** button.

Dashboard

After you log in, QQCatalyst will take you right to your Dashboard. The Dashboard is QQCatalyst's "home base" giving you visibility of the most important information, keeping you from missing opportunities, as well as saving you time.

The Dashboard is actually a container for small individual apps known as "widgets."

There are widgets that give you access to key data about your agency at a glance, graphical widgets to help you visualize data, data-driven widgets, which are like miniature reports, widgets to help you use QQCatalyst, utility widgets, social media widgets, and more. We'll be adding to the library of widgets from time to time.

The Dashboard is customizable. You can drag the widgets into different locations within the Dashboard, you can add and remove widgets, and apply filters.

Add/Remove Widgets

1. To add / remove widgets to your dashboard, click on the "Add Widget" button in the top right corner.
2. Place a check next to the widgets you want to see on your dashboard and click "Save."
3. To remove the widget, simply uncheck or click the X at the top right of the widget.

Filter Widgets

1. To filter information by location or user, click on the "Filter" button.
2. Place a check next to the user(s) or location(s) you want your widgets to filter and click "Save."
3. To remove the filter, simply remove the check mark from the user or location.

My Preferences

Signatures

This area allows you to upload any signature image file you want to apply to an ACORD form. The signatures you add here will be available to you along with any signatures your administrator has uploaded.

To upload 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.

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.

Searching for Contacts in QQCatalyst

1. Click the Search button on the Dock (located at the bottom of the page).
2. Select “Contact” from the Find drop-down menu.
3. Enter your search criteria and choose the contact type. You can click on “More” to narrow your search.
4. Click on “Go.”
5. When you find the contact you are looking for, click on their name to view it.

Adding Contacts to 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 and save.

Contact Types

Customers & Prospects:

A Customer is a personal or commercial entity with whom you do business with.

A *Prospect* is a personal or commercial entity with whom there is potential for business.

These contacts can be classified as:

- *Active*: Customer with one or more active policies.
- *Inactive*: Prior customer with no active policies, but has not been deleted.

Carrier:

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.

MGA / Cert Holder / Lien Holder:

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.

Employee:

An Employee contact is any employee in your agency and should include all QQCatalyst users. Employee records contain contact information, uploaded files, preferences, permissions, and producer commission rules.

Policies

In QQCatalyst, a Customer or Prospect can have policies associated to it. The types of policies available are:

- Monoline, which covers a single line of business.
- Package, which covers multiple lines of personal or commercial policies.

Searching for policies in QQCatalyst

1. Click the Search button on the Dock (located at the bottom of the page).
2. Select “Policy” from the Find drop-down menu.
3. Enter your search criteria and choose the contact type. You can click on “More” to narrow your search.
4. Click on “Go”.
5. When you find the policy you are looking for, click on the policy number to view it.

Adding Policies to QQCatalyst

QQCatalyst gives you two ways to add a policy to a customer or prospect:

Option 1

1. Look for the contact following the “Searching for Contacts in QQCatalyst” steps above.
2. When you find the contact, click on “Add a Policy”.
3. Select the Policy Type (Monoline or Package) and enter the policy information.

Option 2

1. Within a Customer/Prospect contact or policy, click the “New Policy” button.
2. Select the Policy Type (Monoline or Package) and enter the policy information.

Policy Actions

Policy Actions lets you take the following types of actions on a policy: Renew, Rewrite, Set Intent to Cancel, Cancel, and Reinstate. With the policy record open, click on “Policy Action” and select the one you need.

ACORD Forms

QQCatalyst comes with a standard library of ACORD forms. Now you can save time when completing the forms electronically with information already stored in the system. You can minimize errors, save the form with the contact, and document the transaction in Activities.

To add an ACORD form to a policy:

1. Look for the policy following the “Searching for policies in QQCatalyst” steps above.
2. Select the policy and click on “New Form”.

3. When you get to the “Add ACORD Form” screen, you’ll see a list of the available ACORD forms. Scroll through this list or use the search tool to find the form you need.

Note: There is a list of locations to the left of the ACORD form list. Changing the location here will change the location information prefilled on the selected ACORD form.

4. Select the ACORD form you need and click “Next”.
5. The ACORD form will come up on your screen with prefilled with information. Edit if necessary.
6. When finished, you can save, print, or email. It will be automatically stored in the “ACORD” tab of the policy, from which you can later make edits if needed.

Files

The Files tab accesses QQCatalyst’s file manager. This is a repository of files you’ve uploaded, and files created for you by QQCatalyst. Any letter and email associated with a contact or policy is saved here for future reference. When you click on the file name, the context menu will appear, depending upon the file type:

- *Download / Print:* Allows you to download & open, save, and print a file. Files that you have uploaded will open in the associated program (e.g., .DOCX files will open in Word).
- *Preview:* Displays a preview of any image file. Non-image files cannot be previewed. To view a non-image file, choose Download / Print.
- *Edit:* Allows you to edit the file name, description, and policy associated with any file. In addition, letters and email generated by QQCatalyst can also be edited.
- *Delete:* Deletes the file. This cannot be undone.

From the Files tab, you can also add a file to a contact or policy in two ways:

1. *Browse for Files*: Click the Select Files button. This will open a file browser window that will allow you to locate and select files to add to a contact or policy.
2. *Drag & Drop*: To drag & drop files for uploading, simply drag one or more files from any folder, or from your desktop, to the “Drop Files Here” box.

Note: Internet Explorer 9 does not support multiple file selection when browsing for files, nor does it support drag & drop. Other browsers (e.g., Chrome, Firefox 14+, Safari 5+, Opera 11+) fully support these capabilities.

Print / Email

With QQCatalyst, you can send letters and emails styled with professional formatting. Now, you can send your clients eye catching marketing pieces that will get your customer’s attention and enhance your agency’s image.

QQCatalyst features an HTML word processor. In addition to creating great letters and email, you can insert your agency’s logo and identity (e.g., colors, fonts, hypertext links, and much more). To begin:

1. Access any contact or policy and click on the “Print / Email” button to open the word processor.
2. Then, select a letter from the list of templates and click “Next”.
3. The Document Editor will come up with the template open, which you can edit as needed. Each template has merge fields that will automatically populate with the contact and policy information chosen.
4. When you finish editing, click Next to choose a “Delivery Option”.
 - *Email*: You can email your document using our workflow process.
 - *Print*: Will open a new tab or window with your printed document.
 - *Save*: Save your created document to the contact / policy record for later retrieval.

Reports

The Reports section provides you with an incredibly powerful tool to derive actionable information from the vast amount of information in QQCatalyst. The unlimited reporting capability in QQCatalyst's report generator can help you identify opportunities for increasing sales, retention, productivity, and much more. QQCatalyst provides you with a set of commonly used reports within its Standard Reports Library. And, you can create your own custom reports and save them in the Agency Library.

To access QQCatalyst's report generator, click on Reports in the Global Navigation bar at the top of the page. To create a new custom report, click on "Add New Report". You can also go to one of the libraries to run an existing report.

Note: Customized reports can be limited to specific locations, which are displayed in the upper left corner of the Report list. Changing the location will update the list of reports available in the Agency library. However, the Standard Library is not affected by location.

To run a report:

1. Click on the report name. A menu will appear, click "Run".
2. On the pop-up screen that comes up, select the export type (PDF or spreadsheet), locations, enter any additional fields that may be required, and click "Run".
3. If your export type is PDF your report will appear in a new tab, if you chose to export to a spreadsheet your report will be saved to a default folder based on your browser's settings.

To add a report:

1. Select "Add New Report" in the action toolbar.
2. Select a report category (Customers, Carriers, MGAs, Employees, or Prospects).
3. Place a check mark next to the data sources you want to see on the report.
4. Click Next to select the columns for your report. Place a check mark next to each field you want to populate your report.

5. Click Next to filter your report. To add filters, choose a field from the column list. Based on the field you choose, options appear that define how the information will be filtered. You can select "ASK AT RUNTIME" to be prompted to enter information when you run the report.
6. Click Next to organize your report. Use the "Group Your Data" and "Sort Your Data" to organize the information within the report.
7. Click Next to add calculations to report columns. Apply a sum, average, or count to the columns in your report.
8. Click Next to see a final preview of the report. If you want to make any changes, click the Prev button to go back.
9. Once finished, chose a name for the report, add notes, choose print layout (Portrait or Landscape), and assign locations. You can then save it in the Agency Library, or save and run the report instantly.

Carrier Downloads

Refer to the QQCatalyst Carrier Downloads Quick Start Guide for detailed information.

Where to Go From Here

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.

ⁱ Copyright © 2012 - 2014 QQSolutions, Inc. All Rights Reserved. QQCatalyst is a registered trademark of QQSolutions, Inc.