QQEVOLUTION^2

Astonish VPC Integration Process

@stonish

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Preparing to Integrate

With the integration of these two systems, agents can now keep contacts and policies synchronized. Both systems are simultaneously updated with important client and policy information, reducing data entry errors. To sign up for the integration, follow these steps:

1. You must subscribe to both QQ Evolution 2 and Astonish VPC. The fields that will be synchronized between the systems are:

   Clients

   - Client Status
   - Name or Business Name
   - Agency
   - Address
   - Phone (Home, Work, Cell, Fax)
   - Email
   - Notes
   - Occupation
   - DOB
   - Spouse
   - Source (in Astonish VPC this is listed as Contact Type)
   - Agent

   Policies

   - Line
   - Company
   - Policy Number
   - Binder Date
   - Effective Date
   - Expiration Date (in Astonish VPC this is listed as Renewal Date)
   - Policy Period
   - Policy Status
   - Premium (Sent from QQ Evolution 2 to Astonish VPC one-way)

2. Verify you have QQ Evolution v2.0.2 or greater installed.

3. Contact Product Support at 877.809.2509 and request to be setup with the QQ Evolution 2 and Astonish VPC integration.

In order to get started, QQ Solutions needs to provide Astonish with a copy of your data to import into their system. You must first authorize us in writing to release your data to Astonish.

If you are an existing Astonish VPC customer, Astonish will then review with you what you can expect when your QQ Client data is re-imported into VPC, which is necessary to synchronize. Prospects and Active Leads in VPC will not be affected by the re-import unless you request it.

4. Astonish will contact your agency to get setup in their system.

5. Once Astonish completes the import process they will provide you with your login credentials, which includes a token that will be later used to login through QQ Evolution 2.

6. Once setup is complete with Astonish, you are ready to start configuring synchronization within QQ Evolution 2.

Configuration in QQ Evolution 2

Before you start configuration in QQ Evolution 2, you must have completed the steps within "Preparing to Integrate" above.

Important Items to Note:

Multiple Offices

- In Utilities, Pop-Up Tab, Agent/CSR/Producers, any user listed must have a default location associated. If no default location is setup the Agent/CSR/Producer won't be found when syncing Astonish VPC to QQ Evolution 2.

Changing Defaults

- If adding/editing a Company or non-ACORD Line of Business in QQ Evolution 2, the user must contact Astonish as well to have the change made in their database too. Otherwise when the policy transfers it won't find a match and that Company and/or Line field will be blank in Astonish.

- If adding/editing a Source in QQ Evolution 2, you must add the same into Astonish VPC as a Contact Type. Both must be spelled *exactly* the same for the bridge to find the match.

Deleting Records

- Deletion of clients or policies must be done manually in both systems. Deletions are not automatically synced between QQ Evolution 2 and Astonish VPC. This helps assure that no data is ever deleted in error.

Getting Started

Important! The synchronization of data between these two systems must be done from <u>only one</u> computer within your office. Assign an administrator to handle the integration by following these steps on the designated computer:

1. Launch QQ Evolution 2 and go to a client's policy. From the top toolbar, select "Bridge." In the box that appears, highlight Astonish VPC and click "Select."
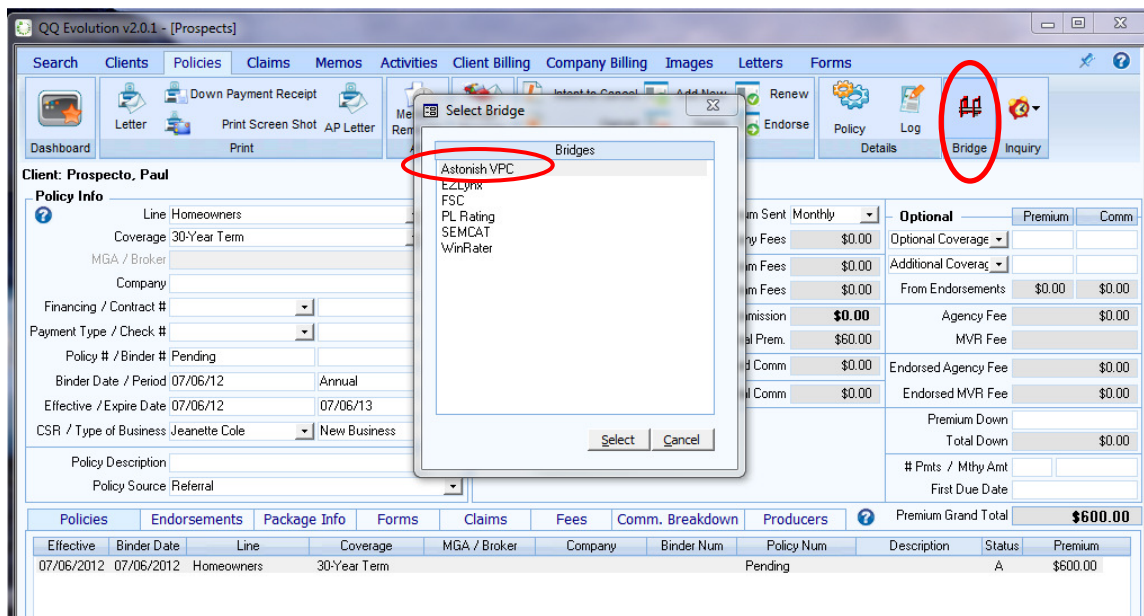
2. The first time the bridge is accessed, the administrator must enter their QQ Evolution 2 login information. The Astonish User ID, Password, and token given to you by Astonish must be entered as well and can be accessed at any time from the "Astonish UID & PW" button.

Separate messages will appear asking for these logins. Both will be stored after entering it the first time, you will not need to login every time you sync the systems.

3. You can set the bridge to sync automatically every 5, 10, 15, 20, 30, or 60 minutes from the Update Frequency drop-down menu (see picture below). You can also manually sync by selecting 0.

   When syncing manually, set the date and time you want the data to synchronize and click the appropriate Transfer button. Anything you add to either system will be synced.

4. The Time to Sync will count down, and then roll over automatically based on the selection made. The Start and End date and time fields will update to match.
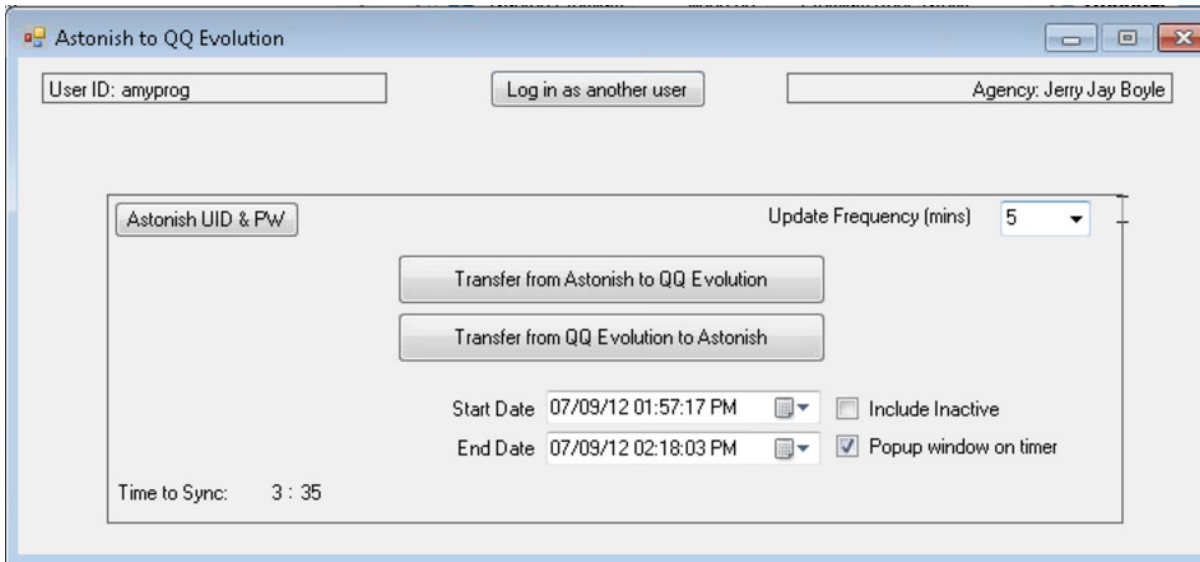
5. **Note** that when a client is added in Astonish's client page, you must click the **Send Lead** button under Lead Synchronization every time you want data updated in QQ Evolution 2. This will flag the client to be synced to QQ the next time the process is run. If the client is not flagged it will not transfer to QQ Evolution 2.

Lead Synchronization

Is Synchronized:
True

Last Modified:
4/20/2012 8:37:38 AM

Customer Id:
503

Send Lead

Additional Notes

- Once the bridge has been opened, it can be minimized into the system tray on the lower right of your computer screen. If it has been set to sync automatically, it will run seamlessly as programmed, you will not see it syncing.

- If you wish to see when the system automatic synchronizes, check "Popup Window on Timer" (see picture above). The bridge window will pop up every time, showing you the number of files transferring. Once finished, it will automatically minimize back into the system tray.

- If you are syncing manually, click the QQ Evolution icon in the system tray to open the bridge and access the transfer buttons.

- To include inactive clients in the synchronization, check "Include Inactive" (see picture above). Any changes made to inactive clients will be included.

- You cannot choose specific items to bridge. Any client or policy that has been added or changed in QQ Evolution 2 will automatically be found and included in the next bridge transfer.