

# QQEVOLUTION<sup>2</sup>

## USER'S MANUAL

QQEVOLUTION<sup>TM</sup>

[Refresh Dashboard](#)[Log Off](#)

Clients

Prospects

Mail Room

Reports

Rolodex

QuickWord

Forms

Videos

Carrier Download

Utilities

Batch Scanning

QQ Evolution Assistant

QQ Evolution Update

QQ WebRater

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

To Do List **Active** Agency Filter: All

In Progress Memo Reminder for 0, Delete Me: Here is my new memo 07/12/2011

In Progress Here is another task 07/12/2011

Policies Expiring/Intent to Cancel Past 3 days and Next 7 days

~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdaldg	Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdaldg	Auto (1111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

Clients X-Date Comments Past 3 days and Next 7 days

Memo Reminders

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

View All

Help and Information

Instant Support

Training Webinars

Newsletters

Self Service Portal

What's New

Recent Clients

Cataldo, Cory

O, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

Messages

- 8/30/2011 08:59 AM bincy\_ladmin1 Appointment created by bincy\_ladmin1
- 8/30/2011 08:27 AM bincy\_pu Appointment created by bincy\_pu
- 8/25/2011 09:50 AM bincy\_ladmin1 Appointment updated by bincy\_ladmin1
- 8/25/2011 09:50 AM bincy\_ladmin1 Appointment created by bincy\_ladmin1
- 8/24/2011 04:26 PM bincy\_dev Appointment updated by bincy\_dev
- 8/24/2011 04:23 PM bincy\_dev Appointment created by bincy\_dev

View All

## QQEvolution 2 Agency Management System

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350 Fairway Drive, Suite 101  
Deerfield Beach, FL. 33441.  
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## About this Manual

The QCEvolution 2 User & Installation Manual contains valuable information and instructions as to the operation of your new software package. This Manual is attached to your new software and is available at any time by using “**F1**” on your keyboard or by pressing help on your tool bar from any screen. This manual will apply to all versions up through QCEvolution 2 version 1.0. All new functionality is covered in this version of your Manual.

This manual will show the basic functionality of the software designed to give you a head start on all features of our software. Users will find that some of the information contained in this manual is repeated several times in different sections of the manual because those functions may repeat themselves throughout the program.

## Conventions Used In This Manual

There is information in this manual requires your attention and we have placed symbols to remind you or caution you as to certain procedures and functionality relative to the use of your program. The symbols are as follows:



Procedure



Warning



Tip or  
Note



Video

# **Chapter 1 – Welcome To QQEvolution 2**

## **About QQEvolution 2**

Welcome to QQEvolution 2, the most advanced electronic filing system, mailroom and customer service center that stores client files, commission information, agency production, and automates renewals and other daily operations. QQEvolution 2 is designed to work independently or together with your current rating system. QQEvolution 2 is enhanced with the added power of quote and application storage, allowing you to view a client's original quote & application and to quote endorsements and renewals automatically.

## **QQEvolution 2 – Complete Agency Management**

- Store and track Active, Expired and Cancelled clients/policies
- Print plain paper applications, ACORD and generic forms
- Store documents and images
- Customizable agency production reports
- QuickWord Word Processor
- Intra/Inter Office Messenger
- Calendar and To-Do List
- Schedule Reports
- Flexible Commission Structures
- MGA/Broker Tracking and Commissions
- Multiple Office Support
- Rolodex
- X-Date Tracking
- Claims Processing & Tracking
- Carrier Download
- Real Time Inquiry
- Reminders and Memos
- Dashboard
- Clients X-Dates & Policies Expiring/Intent to Cancel
- Mailroom
- Link Client Accounts
- And Much More

# Hardware and Software Requirements

**UAC (User Account Control) MUST be turned off in Windows Vista and Windows 7.**

Equipment	Minimum	Recommended
Operating System	Windows Vista (32 or 64 bit), Windows 7 (32 or 64 bit), Windows 8 (32 or 64 bit)	Windows Vista (32 or 64 bit), Windows 7 (32 or 64 bit), Windows 8 (32 or 64 bit)*
Computer	Processor: Pentium class processor, SVGA graphics display (1024x768, 16 bit color)	Processor: Intel Core I3 or AMD X2, SVGA graphics display (1024x768, 32 bit color)
Memory	2 GB RAM	4 GB RAM
Hard Disk	2 GB (free space or higher)	100 GB
Internet Access	Broadband	Broadband
Scanner	TWAIN compliant	TWAIN compliant

**\*Adobe Reader 9.1.3 or later must be installed.**

## Installing QCEvolution 2

Whether you are installing QCEvolution 2 on a single computer or on a multi-user network, you will need to install QCEvolution 2 on **EVERY** computer in your office.

### Installation Using the QCEvolution 2 CD-ROM

1. Shut down all running programs, including virus protection programs.
2. Insert the QCEvolution 2 CD-ROM into your computer's CD-ROM drive.



**Note:** If the installation process does not start automatically, select RUN from the Start menu and type X:\SETUP (where X is your CD-ROM drive letter) and press Enter on your keyboard or click **“OK”**.

3. Follow the prompts to complete the installation.

## Local Install

If you do not plan to run QCEvolution 2 on a network or if you are on a network and your server is not dedicated, then perform a Local Install on every computer including the server.

All saved client data will be stored on each individual computer until/unless you select a network drive in the Utilities section.



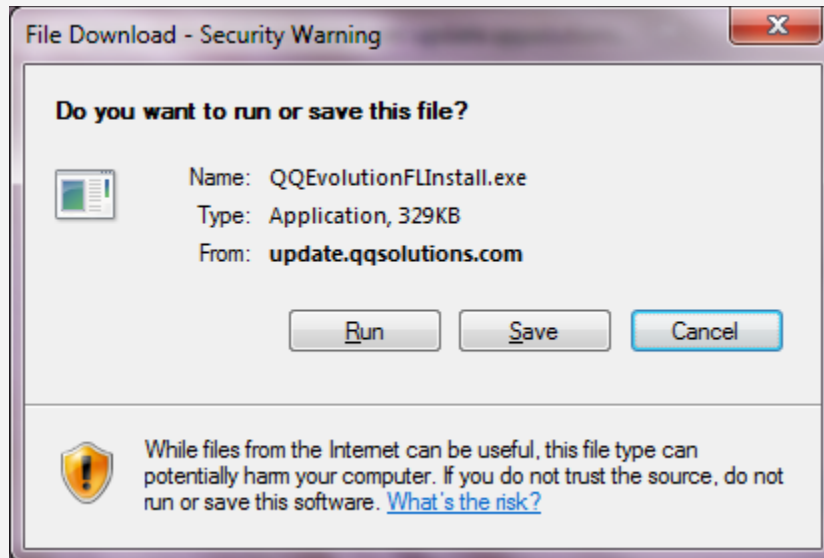
## Downloading Your New Software

1. Click on the link(s) below to begin downloading your new software.

<http://www.qgsolutions.com/downloads/>

2. This link will direct you to the download page of our Web site to begin the download process for your new QCEvolution 2 Software. Once here select **Download the latest version of QCEvolution 2 and QuickFile**.
3. When you click on the link, you will be required to login to your account. We sent the **User ID & Password** to you in a separate e-mail. Please refer to that e-mail for the required information.
4. Once logged in select **Full Install**, you will click on the **“Download”** button for QCEvolution 2.

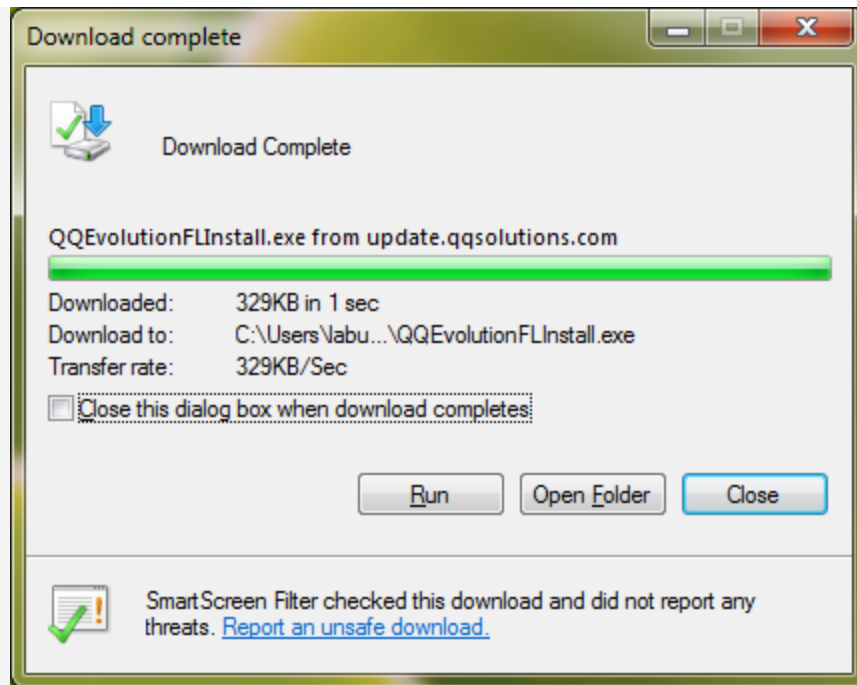
5. After clicking on the **Download** button, the file download window will appear, select **Save**.



6. Save the file to your **DESKTOP**. This will save the link back to the **Full Install** of QQEvolution 2 on your computer as shown below.



7. When choosing the **Desktop** and after clicking on **Save** the following screen will appear.



8. Now click on “**Run**” to begin the installation process. You will get the following additional message.



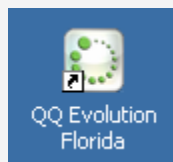
9. After clicking “Yes”, QQEvolution 2 will download the necessary files for installation.  
**Note: Remember you chose to save this file to your desktop as well, so if you decide not to run the installation at the end of the download process you will need to run the set up process from your Desktop.**
10. Once the files have been downloaded, you will see the message “Installation will now execute” displayed on your screen to remind you the Installation will now begin, click “OK”



**Important: If you cancel the installation of QQEvolution 2, look for the following icon on your Desktop. Double Click on the icon to begin the installation of QQEvolution 2. This icon will restart the download manager on your computer and verify that all of the files downloaded to your PC. After verification of the files, you will see the above message and installation will resume.**



11. Follow the on-screen directions to complete the installation of your Software.
12. Once you complete the installation on your computer, you will see a new circular icon appear on your desktop.

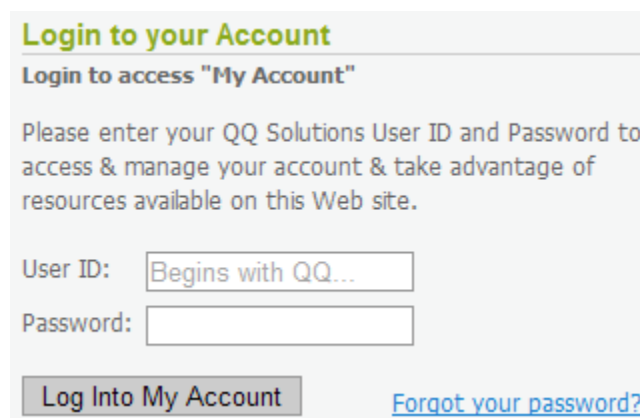


13. Login with the User ID and Password that was provided in the previous email. Enter the utilities and complete the setup of all your users, logins, companies, commissions and defaults.

## Activate & Begin Using Your Software

The following steps are required for you to activate your new software.

1. Once you complete the installation of the software on each computer, you will need to go to our Web site [www.QQSolutions.com](http://www.QQSolutions.com) to activate your software using your QQSolutions User ID and Password. This User ID and Password is contained in a separate e-mail that we have sent to you along with the download instructions. **Note: You should not have your QQEvolution 2 program open on any of the computers in your office when activating the software.**
2. Log in to your account from the home page of the Web site.



**Login to your Account**

Login to access "My Account"

Please enter your QQ Solutions User ID and Password to access & manage your account & take advantage of resources available on this Web site.

User ID:

Password:

[Forgot your password?](#)

3. Once you login to your account, the account information page will show you the information we have on file for your agency when you signed up for our service. While you are here, please verify that all of the information is correct. If you need to make any changes, please do so now and click on the **"Edit Profile"** button at the bottom of the page.



**Important Note:** Please Use the QQSolutions User ID and Password contained in a separate e-mail from our billing or sales department. If you have installed QQEvolution 2 on your computers, you must register your software on each computer. If you have installed your software on a network, you will only need to register on one computer; this will update the other computers with the correct information.

## My Account

Your software is registered to: Quickquote, Inc

### Account Profile

If you would like to update your profile, use the fields below to update your information. When you're done, click on "Submit Changes."

User Name:

Agency Name:  \*

Contact:  \*

Address:  \*

City:  \*

Zip Code:  \*

Phone:  \*

Fax:

Email:  \*

Email 2:

[Submit Changes](#)

[Cancel Update](#)

4. If the information on the page is correct, your registration process is now complete!

If you have any questions regarding the installation or setup of your software, please call our Product Support Department at 800-940-6600 option 1, or 800-330-8000 option 1 for assistance.



**Important Note:** Download times will vary, depending upon the speed of your Internet connection.



## Server Setup

Select this option to prepare your dedicated server for data storage and retrieval only. You will still need to perform a Local Install on every computer except for the dedicated server.

If you are going to use QREvolution 2 in a network environment, you **MUST** install QREvolution 2 on the root directory of the server.

1. Select the drive where you will install the QREvolution 2 software and click **Next**.
2. The installation program will now begin copying files to the drive you choose.
3. On a server setup, no icon is placed on the server's desktop. You will run the program by double-clicking the icon on one of the workstations.

## QREvolution 2 Dashboard Options

The QREvolution 2 Installation program will place an icon on your desktop that you will use to start QREvolution 2. Double-clicking the icon will bring you to the QREvolution 2 Dashboard.

**QREvolution 2 Dashboard**

Refresh Dashboard | Search | Use QuickSearch | Log Off

**Left Sidebar:**

- Clients
- Prospects
- Mail Room
- Reports
- Rolodex
- QuickWord
- Forms
- Videos
- Carrier Download
- Utilities
- Batch Scanning
- QQ Evolution Assistant
- QQ Evolution Update
- QQ WebRater

**Main Content Area:**

**To Do List** (Active) | Agency Filter: All

Status	Task	Due Date
In Progress	Memo Reminder for 0, Delete Me: Here is my new memo	07/12/2011
In Progress	Here is another task	07/12/2011

**Policies Expiring/Intent to Cancel** | Past 3 days and Next 7 days

Policy	Action	Expires on
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdaldg	Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdaldg	Auto (1111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Memo Reminders**

You have 681 reminders!

- QQ Download - Renewal Quote - Bill Created: \$100.00
- This is a memo with a reminder
- QQ Download - Renewal Quote -
- QQ Download - Renewal Quote -
- QQ Download - Renewal Quote -

[View All](#)

**Help and Information**

- Instant Support
- Training Webinars
- Newsletters
- Self Service Portal
- What's New

**Recent Clients**

- Cataldo, Cory
- O, Perico
- Brown, James
- Stryker, Ted
- Babcock, Allen
- Aqboan Gqkfaoc
- Pat, Nisha A Jr
- Test
- Zimmermann, Erich
- Price, Randy

**Messages**

Date	Time	From	Subject
8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

[View All](#)

**Contact Information:**

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

To make a selection, use your mouse and click the button of the section you wish to enter.

- **Clients:** Manually enter clients into QQEvolution 2 or manage client data
- **Prospects:** Stores all Prospects
- **Mailroom:** For client letters/labels and correspondence in batches
- **Reports:** Agency production reports, commission reconciliation, create custom reports, etc.
- **Rolodex:** Stores contact information
- **QuickWord:** QQEvolution 2 Word Processor
- **Forms:** QQEvolution 2 Forms access
- **Videos:** QQEvolution 2 training videos, which play on your monitor
- **Carrier Download:** Receive and report client policy information (cancellation, renewals, and endorsements) automatically
- **Utilities:** QQEvolution 2 section where all default values are entered
- **Batch Scanning:** A quicker way to scan your documents than scanning into each client directly
- QQEvolution 2 **Assistant:** To Do List, Messenger, Calendar
- QQEvolution 2 **Update:** Direct internet access to the Web site

## Chapter 2 – The Utilities Section

To access the Utilities Section of the QREvolution 2 program simply go to the Dashboard of QREvolution 2 and click on the Utilities Section.

The screenshot displays the QREvolution 2 Utilities Section dashboard. On the left is a sidebar with navigation icons for Clients, Prospects, Mail Room, Reports, Rolodex, QuickWord, Forms, Videos, Carrier Download, Utilities (highlighted with a red box), Batch Scanning, QQ Evolution Assistant, QQ Evolution Update, and QQ WebRater. Below the sidebar is contact information for QQ Dev FL EVO3. The main content area is divided into several sections: 'To Do List' with a dropdown menu set to 'Active' and a list of tasks; 'Policies Expiring/Intent to Cancel' with a table of policy details; 'Memo Reminders' showing 681 reminders; 'Help and Information' with links to support and training; 'Recent Clients' listing several names; and 'Messages' with a list of recent messages. The 'Utilities' icon in the sidebar is highlighted with a red box.

**QQEVOLUTION™**

Refresh Dashboard Search

☐ Use QuickSearch Log Off

**Utilities**

**To Do List** Active Agency Filter: All

Status	Task	Due Date
In Progress	Memo Reminder for 0, Delete Me: Here is my new memo	07/12/2011
In Progress	Here is another task	07/12/2011

**Policies Expiring/Intent to Cancel** Past 3 days and Next 7 days

Policy	Status	Expires
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdaldg	Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdaldg	Auto (1111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Memo Reminders**

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote - QQ Download - Renewal Quote - QQ Download - Renewal Quote -

[View All](#)

**Help and Information**

Instant Support

Training Webinars

Newsletters

Self Service Portal

What's New

**Recent Clients**

Cataldo, Cory

O, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

**Messages**

Date	Time	From	Subject
8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

[View All](#)

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

The QREvolution 2 Utilities Section contains multiple tabs that will affect most of the data that you enter. It is very important that you go through the first two tabs and set your default settings accordingly. Many settings have subsets that are equally important. For example, in order to track agent commissions, you must select the Popup Boxes tab, then click the radio button next to Agent/CSR, add agents to the list, and then click on the Commissions button.

To ensure program accuracy, adjust the settings under Utilities as necessary prior to entering any client information.

Upon entering the utilities section for the first time, you may see a message asking if you want QREvolution 2 to automatically set up the Popup Boxes. For example, the Sources will be reset with common default values such as referral, walk-in and yellow pages.

QQ Evolution Dashboard | Users Management | Help ▾

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: AW2 ▾

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

	User	Permission Level
<input checked="" type="radio"/> <b>Users</b>	1ROGDJ	Administrator
<input type="radio"/> <b>Agent/CSR/Producer</b>	aaaaa1	User
<input type="radio"/> <b>Source</b>	abcdef1	Manager
<input type="radio"/> <b>Agency</b>	aboyle1	Manager
<input type="radio"/> <b>Line of Business</b>	Aboyle123	User
<input type="radio"/> <b>Coverage</b>	adminbug	User
<input type="radio"/> <b>Insurance Companies</b>	Adminff	Administrator
<input type="radio"/> <b>Financing</b>	Adminie	Administrator
<input type="radio"/> <b>Optional Coverage / Additional Coverage</b>	Adrian One	Administrator
<input type="radio"/> <b>Billing Descriptions</b>	Adrian Three	Administrator
<input type="radio"/> <b>Additional Premium Reasons for AP letters</b>	Adrian Two	Administrator
<input type="radio"/> <b>Payment Type</b>	Adrian_3	Administrator
<input type="radio"/> <b>MGA / Broker</b>	Adrian_Abc2	Manager
	Adrian_test3	Power User
	Adrian_test4	Manager
	Adrian101	Administrator
	Adrian11	Administrator

Enter/modify the User Accounts in your office

[View as Report...](#)

## Section A. – Utilities – Popup Boxes



### About Popup Boxes

Popup boxes refer to the boxes that pop up whenever you need to select from a drop-down list. These lists can be customized by clicking on the Add Entry, Edit Entry and Delete Entry function buttons. Each entry in the Popup Boxes section can be customized in this way.



**Note:** All Ribbon or Toolbars throughout the program will show a Help and Dashboard button.

Click the Help button from any screen to display four help choices:

- **Quick Help:** displays a quick reference of various function keys.
- **View Manual:** displays the QQEvolution 2 help manual.
- **What's New:** displays a list of all of the latest changes to the software. This list is updated every time you update from the web.

- **Make a Suggestion:** directs you to the QQSolutions Self Service Web Portal where you can share your ideas with us.
- **Dashboard Button:** takes you back to the Dashboard.

QQ Evolution Dashboard | Add | Edit | Delete | Reset List | Commissions | Fees | Help

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

Agent/CSR/Producer	Agency
0adi1	All
0adi1old	All
0adi2old	All
0adi3	All
0adi3old	All
0adi4	All
0adi4old	All
0adi7	All
0jim	All
10test3	All
13test779	All
6test9888	All
7testpriti	All
8test19	All
9test	All
A1a1	All
Adrian 23	All

Enter/modify the Agents/CSRs in your office

For example, if you wish to add an Agent/CSR click on the radio button to the left of this option. To add an entry click on the Add function button. A field will appear at the bottom of the screen entitled Type Entry to Add. Type an entry and click on the button, Add to List. Enter the next name of entry and click Add to List and so on. When done, click Done Adding.

You may erase all entries and reset the list with commonly used default values by clicking on the Reset List function button. In addition, commissions can be setup for Agent/CSR, Insurance Companies, and QQEvolution 2 Utilities Optional/Additional Coverage by clicking the radio button next to the option and clicking the Commissions function button.



**Note:** Using Reset List for Companies will delete all commission information you had previously entered for them. Do not use the Reset List button unless you are sure you want to erase the existing entries.

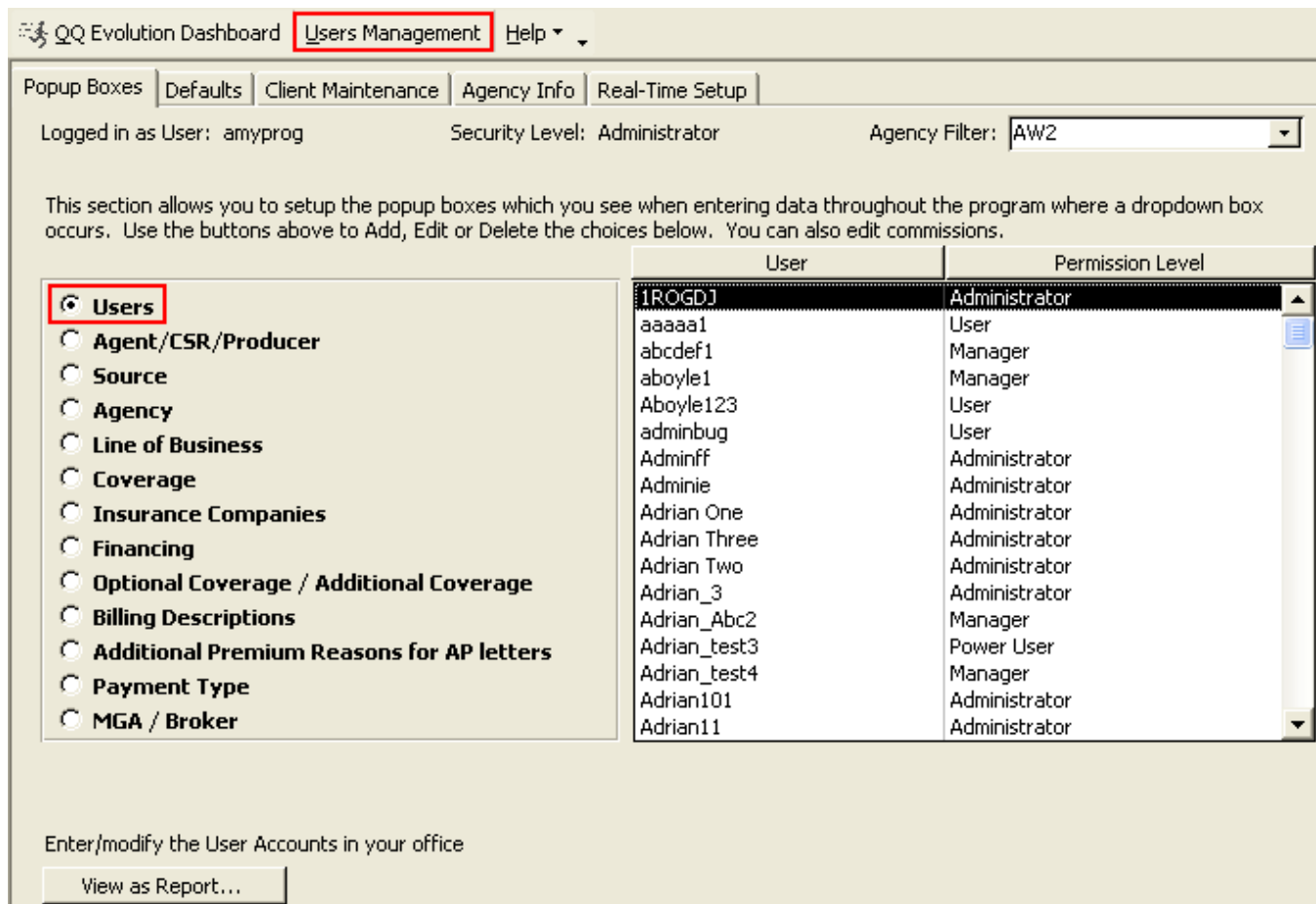
The commission button dims when not applicable.

You can also add entries to the popup boxes from the Client, Policy, and Billing screens as you enter data, if you have this feature activated under the Defaults tab.

## Users

### Accessing the Online Account Management System through QCEvolution 2

You will open Utilities from the QCEvolution 2 Dashboard. Once in Utilities you will be on the Popup Boxes select **Users**. On the Ribbon or Toolbar, you will then select **Users Management**. There will be no need to login when accessing the online account feature from within our programs. It will recognize the User ID and Password you used when logging into QCEvolution 2 and QQWebRater.



QQ Evolution Dashboard **Users Management** Help ▾

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW2 ▾

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

User	Permission Level
[ROGD]	Administrator
aaaaa1	User
abcdef1	Manager
aboyle1	Manager
Aboyle123	User
adminbug	User
Adminff	Administrator
Adminie	Administrator
Adrian One	Administrator
Adrian Three	Administrator
Adrian Two	Administrator
Adrian_3	Administrator
Adrian_Abc2	Manager
Adrian_test3	Power User
Adrian_test4	Manager
Adrian101	Administrator
Adrian11	Administrator

Enter/modify the User Accounts in your office

View as Report...

### Accessing and using the Online Account Management System

Once you have chosen to access your online account from a program the Dashboard for system will appear.

#### My Account

Update & Modify Your Account Information

- ▶ Account Information
- ▶ Offices
- ▶ My Rating Carriers
- ▶ QQ WebAgent Admin
- ▶ QQ WebAgent Reporting

#### User Management

Manage All Users from One Location

- ▶ Create Users
- ▶ Edit/Delete Users
- ▶ Agents/CSRs
- ▶ Source

#### Welcome Jane Doe

Username: **mypro**

Agency: **QQ Dev**

Product State: **FL**

Product String: **QUOTE APP HOME ENTERPRISE DOWN WEB EVO FIN**

Database:

As shown in the screen shot above your Username, Agency, Product State, and Product String are displayed. There is a Toolbar to the left with the different items you can access broken into two sections.

**1. My Account** – In this section you can modify and update your account information.

**A. Account Information** – You have the ability to modify your account information. After you have changed the information, click the **Update** button on the lower right to save the changes and have them applied to your account.

<b>Shipping Information</b> *Agency Name: <input type="text" value="Test Agency"/> *Address: <input type="text" value="350 Fairway Dr. STE 101"/> *City: <input type="text" value="Deerfield Beach"/> *State: <input type="text" value="Florida"/> *Zip: <input type="text" value="33441"/>	<b>Billing Information</b> *Agency Name: <input type="text" value="Test Agency"/> *Address: <input type="text" value="350 Fairway Dr. STE 101"/> *City: <input type="text" value="Deerfield Beach"/> *State: <input type="text" value="Florida"/> *Zip: <input type="text" value="33441"/>
<b>Contact Information</b> *First Name: <input type="text" value="Jane"/> *Last Name: <input type="text" value="Doe"/> *E-Mail: <input type="text" value="jdoe@qqonline.com"/> Alt E-Mail: <input type="text" value="doejane@testweb.com"/> *Phone: <input type="text" value="8009406600"/> Alt Phone: <input type="text" value="9546400800"/> Fax: <input type="text" value="9546400553"/>	
<input type="button" value="Update"/>	

**B. Offices** – Here your office(s) will be listed. The Agency ID, Operating State, Status, and Main Office will be listed for each office.

Agency Name	Agency ID	Operating State	Status	Main Office
Bret Roberts	QQ006585	FL	Active	True
Jerry Jay Boyle	jerry5	FL	Active	False

If you wish to add another office, you will click the **Add Office** button on the lower left. This will take you to a screen where you can create the new office for your account and select what products you wish to purchase for the office. The below screen shot of the Add Office screen is a test screen. However, it gives you the idea of how to select items for the new office and then proceed through checkout.

**2. Users Management** – You can create and edit users, as well as add and delete Agents/CSR and Sources. The administrator can manage the users for multiple locations in one convenient area.

**A. Create Users** – Once selected a screen will display where you can add in new user's information. You will enter all the users' basic information such as name and email address. You will also enter their Username and Password, which they will use to access the program(s). You can also assign a default Agent and/or CSR for the user. This would associate this username with the specific Agent and/or CSR name you have selected.

**Note:** When entering the user's new username you will click **Check Availability** to make sure the username is available. If it is not, you will have to enter a new one.

**Step 1: User Details**

\* -: Denotes a required field | ∞ -: Denotes an error in the field

*First Name:	<input type="text" value="Producer"/>	
Middle Name:	<input type="text" value="K"/>	
*Last Name:	<input type="text" value="Test"/>	
*E-Mail Address:	<input type="text" value="producer@qqonline.com"/>	
*Username:	<input type="text" value="producertest"/>	<a href="#">(Check Availability)</a>
*Password:	<input type="password" value="••••••"/>	
*Confirm Password:	<input type="password" value="••••••"/>	
User's Agent:	<input type="text" value="O'Ryan"/>	
User's CSR:	<input type="text" value="Test8"/>	
	<input type="button" value="Next"/>	<input type="button" value="Cancel"/>

After you have finished this step, you will click the “Next” button to continue onto assigning the user their permissions.

Permission Level **Administrator**

**Application Access**

Application ☒ QuickQuote

☒ QuickFile

☒ QuickHome

☒ Rolodex

☒ WebRater

**Agency Access**

Default Agency

Agencies Selected: 24

☒ Antonio Antonio Antonio Antonio Antonio Antonio 12

☒ AW1

☒ AW2

☒ AW3

☒ Bret Roberts

☒ Bret Roberts 2

☒ Clark Berry

☒ Coconut Cave

☒ Coral Springs

☒ Deerfield Beach

☒ Erik Finstad (Florida - Desktop)

☒ Gremlins

☒ Jerry Jay Boyle

Select All Deselect All

**Permissions**

Item	Modify	Add	Delete	View
AGENT Popup Box	<input checked="" type="checkbox"/>			
Bills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Claims	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Clients	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CSR Popup Box	<input checked="" type="checkbox"/>			
DownPayments	<input checked="" type="checkbox"/>			
Forms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Images	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mailroom		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Memos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Policies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Policy Commission and Fees	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
QuickChecks	<input checked="" type="checkbox"/>			
qqDownload	<input checked="" type="checkbox"/>			
QuickQuote Quotes			<input checked="" type="checkbox"/>	
QuickWord	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rolodex	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Social Security Number				<input checked="" type="checkbox"/>
Transfer From Rating System	<input checked="" type="checkbox"/>			
Utilities	<input checked="" type="checkbox"/>			

Back Create User Cancel

You will first assign the user a **Permission Level**. The available levels are User, Power User, Manager, and Administrator. A User has the lower permission level while an administrator has full permissions. The next area displays the program(s), which your agency has.

The **Agency Access** is shown next. Here you will select the default agency for the user. If you have multiple offices, you would select the office in which the user is stationed at or generally works from. You can then mark any of your other offices to grant the user access to them as well. Only grant access to offices that the user needs to access in order to process your clients.

The last item displayed on the screen is the **Permissions**. Depending on what permission level the user has been given some of the permissions will already be marked for you. A permission level of User would have the least amount of items check whereas the administrator would have all permissions checked. You can check and uncheck any of the permissions as you see fit. An administrator is in control as to what they would like the users to have access to and be able to do in the program(s).

Once you have finished setting the permissions you will click **Create User**. The new user has now been created and can start accessing the program(s). After you create the user, you can

send them a welcome letter directly from OLAM to the email address you entered on their information. The letter will contain their User ID and Password.

## Create User Succeeded

User created successfully.  
Click "Send Welcome Email" to send Producer Test a welcome email.

Send Welcome Email

**B. Edit/Delete Users** – Here you can change a user's information or permanently delete them.

### Edit/Delete Users

Agency Filter:

Records 1 - 10 of 157

Search User Name:

Edit	Username	Permission Level	Delete
	abc	User	
	aboyle1	Manager	
	adrian_u	Administrator	
	adrian1	Administrator	
	adrian123	Power User	
	adrian2	Manager	
	adrian33	Manager	
	adrian3u	User	
	agentcsr_a	Administrator	
	agentcsr_u	User	

To edit a user you will click on the paper and pencil icon to the left of the user's name. The column in which this icon appears is labeled "Edit." You can then change any of the user's information as well as their permissions.

In order to delete a user, click on the trash can icon to the right of the user's name. The column the icon is displayed in is labeled "Delete." The user will be **permanently** deleted from the Online Account Management system.

**C. Agents/CSRs** – Here you can add new agents and/or CSR to your office(s) so they will have the ability to use the program(s). After clicking Agents/CSRs, you will be presented with the same screen you use to edit the user's information. The one difference is the **Add Agent/CSR** towards the bottom left.

**Edit/Delete Users Available Agents/CSRs**  
Please select an Agent/CSR to edit

Agency Filter:

Records 1 - 10 of 188

Search Agent:

Edit	Agent/CSR	Agency	Delete
	0jim	All	
	10test3	All	
	11test	Gremlins	
	12test	Gremlins	
	13test775	Tamarac	
	13test779	All	
	2test	Ric Bowell	
	3test	Coconut Cave	
	4test81	Jerry Jay Boyle	
	6test9888	All	

After clicking Add Agent/CSR an extra area will appear allowing you to enter the name of the Agent/CSR and which agency they belong to. The agencies will be listed in a drop down menu and are the agencies listed on your account. When you are done click on the **Add To List** button.

Type Entry to Add:  Agency:

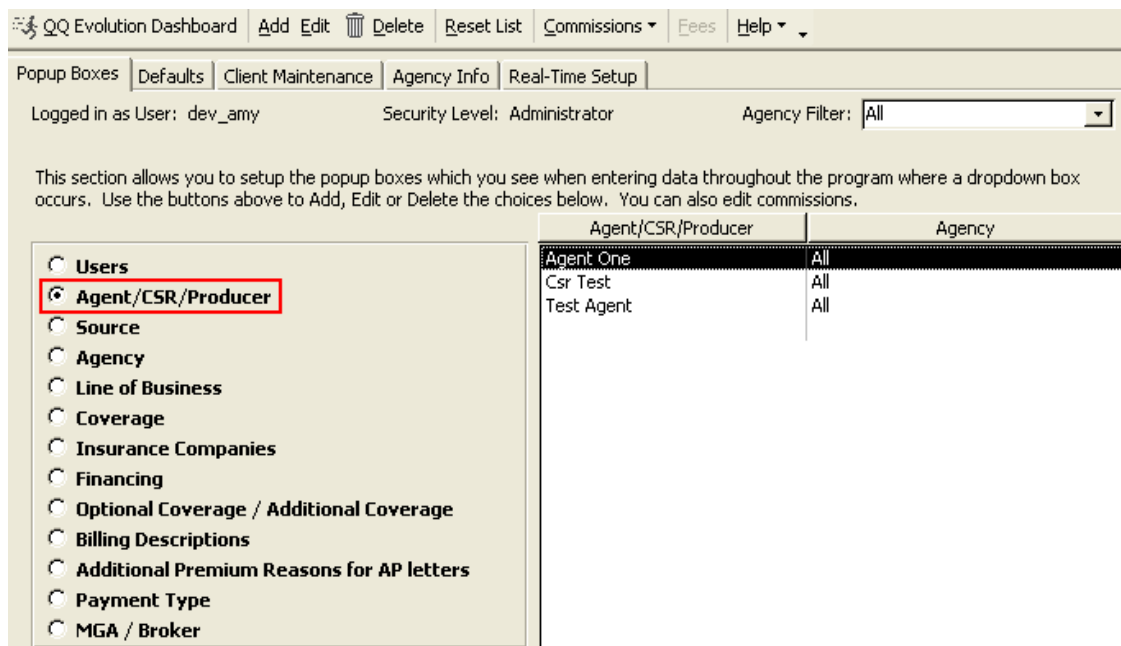
**D. Source** - Here you can enter the Source in which the client came to you. Examples of this would be Walk-In, Flyer Ad, or Yellow Pages. You will list all the different ways your clients find you. This will be of a help down the road because you can run reports showing the Source, which would allow you to tell if that flyer ad you used worked well.

**Note:** In QCEvolution 2, you can also add the Source in the Utilities section.

**Agent/CSR:** Enter the names of the Agents and CSR (Customer Service Representatives) in your office. When entering QCEvolution 2 data, you can select the Agent/CSR who performed the quote/policy. You can then use this information for agent production reports, agent commission tracking, etc.

You will open the Utilities Section from the Dashboard. Once open, you will be on the Popup Boxes, select **Agent/CSR/Producer**. The reason this is labeled by three different names is that every state and every agency as well are different from each other on what individual titles are so we list the three that could apply.

**NOTE: Only the Producer who is entered on the Policy screen will have their commission tracked so that their commissions can be reconciled within the program after being paid.**



QQ Evolution Dashboard | Add | Edit | Delete | Reset List | Commissions | Fees | Help

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: dev\_amy | Security Level: Administrator | Agency Filter: All


This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

Agent/CSR/Producer	Agency
Agent One	All
Csr Test	All
Test Agent	All

Left Sidebar Options:

- ☐ Users
- ☒ **Agent/CSR/Producer**
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☐ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

To add a new producer, click the **Add** button on the top Ribbon or Toolbar. An area will appear on the lower right for you to type in the producer's name and to select what agency the producer belongs to. After entering this information, click **Add To List** and the producer will be added to the default list. Repeat this process if you have more producers you would like to add, when you are finished click **Done Adding**. You also have the ability to edit and delete an existing producer by selecting the producer's name from the list and clicking the **Edit** or **Delete** button on the top Ribbon or Toolbar.



Type Entry to Add: Janet Teller

Add To List | Done Adding | Agency: All

After adding a producer, you need to set up their default commission structure. Either double click the producer name or select their name and click the "Commissions" button on the top Ribbon or Toolbar and select "In a Chart." A **Producer Commission** box will open, the name you had previously chosen will already be highlighted. You will notice the producer's name will be listed twice. This is because one is for setting up the commissions and then other is for setting up an agency fee if it applies.

## Setting up Default Producer Commissions in Utilities

Return Add Duplicate Edit Delete Help									
Producer Commissions									
Producer	Agency	MGA / Broker	Company	Line of Business	Coverage	Business Type	Comm. Type	Comm. Amount	
Agent One	All	Mga Test 1	All	All	All	All	Agency Com...	10.00%	
Agent One	All	All	All	All	All	All	Agency Fee	1.00%	
Agent One	All	All	A.R.A. Casualty	Auto	All	New Business	Agency Com...	5.00%	
Agent One	All	All	A.R.A. Casualty	Auto	All	New Business	Agency Fee	2.00%	
Agent One	All	All	A.R.A. Casualty	Auto	Comp	New Business	Agency Com...	1.00%	
Agent One	All	All	A.R.A. Casualty	Auto	All	Renewal	Agency Fee	6.00%	
Csr Test	All	All	All	All	All	All	Premium + Fees	10.00%	
Csr Test	All	All	All	All	All	All	Agency Fee	0.00%	
Janet Teller	All	All	All	All	All	All	Agency Com...	1.00%	
Janet Teller	All	All	All	All	All	All	Agency Fee	1.00%	

In order to set up the commission structure, make sure the correct producer name is still chosen and click the **Edit** button on the top Ribbon or Toolbar. Another smaller “Producer Commission” box will open. You will notice the producer’s name is grayed out and locked, that is because we already chose the specific producer.

Producer Commission - Edit

Producer:

Janet Teller

Agency:

All

MGA / Broker:

Mga Test 1

Company:

All

Line of Business:

Auto

Coverage:

All

Business Type:

New Business

Commission

Type:

Agency Commission

Flat Rate (\$)

Percentage (%)

Amount:

1.00%

OK

Cancel

You can set up numerous commission structures for one producer.

- **Agency** – Select the agency the producer belongs to you wish to set the commission for. If the producer belongs to multiple agencies and receives the same commission for all agencies you can leave this to “All.”
- **MGA/Broker** – If you use multiple MGA/Brokers and the producer receives a different commission for each one, select the individual MGA/Broker you wish to set up, this can be left as “All” if they receive the same commission for all of the MGA/Brokers.
- **Company** – Select the company you wish to set the producer’s commission for. This can be left to “All” if they receive the same commission for all companies.

- **Line of Business** – Select the line of business you are setting the producer's commission structure for. If they receive the same commission no matter what line of business it is this can be left to "All."
- **Coverage** – The coverage is selected, if the commission is the same no matter the coverage this can be left to "All."
- **Type of Business** – Select the type of business you are setting the producer's commission for. The choices are New Business, Renewal, and Rewrite. If they receive the same commission for every type of business leave this set to "All."
- **Commission Type** – There are three different commission types. Select the one you are setting the producer's commission structure for.

**A. Agency Commission** – Selecting this mean the producer receives their commission based on the agency's commission. This can be set to a flat dollar amount or to a percentage of the agency's commission.

**B. Premium + Fees** – The producer will receive their commission base on the total commissionable premium with any commissionable company fees included. This can be set to a flat dollars amount or as a percentage.

**C. Agency Fee** – This is setting the commission the producer will receive from the commissionable agency fee the agency charges on each policy. This can be set to a percentage or a flat dollar amount. It will depend on your specific agency and state if you charge an agency fee so this will not apply to all agencies.

You will repeat this procedure until each of the commission structures are set up for the producer. If you are an agency who gives their producer the same commission no matter what company, line of business, etc. it is, you would leave everything set to "All" and will only need to go through this procedure one time. If you do give your producer different commissions you will need to repeat these steps until all of the individual commission structures are set up.

Now having walked you through how to set up the commission structures we will give you an example of how this is done.

I give one of my producers 10% of the agency's commission for personal auto policies written through all companies for new business. I have multiple agencies and the producer writes business for all of them and receives the same commission no matter which agency the business is written for. Below is what should be selected in the producer's commission box.

**Producer Commission - Edit**

Producer: Janet Teller  
 Agency: All  
 MGA / Broker: All  
 Company: All  
 Line of Business: Auto  
 Coverage: All  
 Business Type: New Business

Commission  
 Type: Agency Commission  
☐ Flat Rate (\$) ☒ Percentage (%)  
 Amount: 10.00%

OK Cancel

**Source:** Enter potential sources of your business. When entering client data in QQEvolution 2, you may select the source of that business. A newspaper advertisement, radio commercial, a yellow page advertisement or even a walk-in are all examples of sources. This will help you determine where your business is coming from.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

	Source	Agency
<input type="radio"/> Users	Bench Ad	All
<input type="radio"/> Agent/CSR/Producer	Flyer -- New Times	All
<input checked="" type="radio"/> <b>Source</b>	Online Ad - Sun News	All
<input type="radio"/> Agency	Referral	All
<input type="radio"/> Line of Business	Walk In	All
<input type="radio"/> Coverage	Yellow Pages	All
<input type="radio"/> Insurance Companies		
<input type="radio"/> Financing		
<input type="radio"/> Optional Coverage / Additional Coverage		
<input type="radio"/> Billing Descriptions		
<input type="radio"/> Additional Premium Reasons for AP letters		
<input type="radio"/> Payment Type		
<input type="radio"/> MGA / Broker		

**Agency:** Your agency or agencies will be listed here. An agency cannot be manually entered here. You will need to do it through the Online Account Management System or contact QQSolutions to have an agency added or removed. QQEvolution 2 can generate reports that

can help you track an agency's information. If multiple agencies exist in your database, select the appropriate agency location when entering data within the program.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☒ Agency
- ☐ Line of Business
- ☐ Coverage
- ☐ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Agency
AW1
AW2
AW3

**Line of Business:** Enter the Lines of Business that you offer. An example of a Line of Business might be Homeowners, Auto, Life, Commercial General Liability, etc. If you use a comparative rater, see Appendix C

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☒ Line of Business
- ☐ Coverage
- ☐ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Line of Business	Acord Description	Agency
Agri Sched/Unsched	Agriculture Scheduled & Unsche	All
Agriculture Liab	Agriculture Liability	All
Agriculture Package	Agriculture Package	All
Agriculture Property	Agriculture Property	All
Auto	Private passenger automobile	All
Boiler And Machinery	Boiler and Machinery	All
Bop Liability	BOP Liability	All
Bop Property	BOP Property	All
Builders Risk	Installation/builders risk	All
Business Owners	Business owners	All
Commercial Articles	Commercial articles	All
Commercial Auto	Business automobile	All
Commercial Fire	Commercial fire	All
Commercial Package	Commercial package	All
Commercial Property	Commercial Property	All
Commercial Umbrella	Umbrella - Commercial	All
Computers	Computers	All

If you use QQDownload, your Lines of Business need to be matched to an ACORD standard Line of Business. Please do **not** delete the default Lines of Business provided to you within QQEvolution 2. If a line is missing, it can be added to the list. ACORD Lines commonly match what you have entered. A complete listing is provided to you as you add your Line of Business entries. Entering your own lines and matching them to ACORD will ensure proper downloads.

As a QQDownload user, you must first add your own distinct Lines of Business and then assign an ACORD description to each. Lines such as Health, Life, Bond or Annuity can be added here without matching ACORD descriptions because these types of Lines of Business do not currently download through most insurance carriers.

**Coverage:** Enter the different types of coverage your agency offers. These selections will be available when entering new clients. Some examples are Comp/Coll, PIP/PD - Comp/Coll, Liability, Homeowners, Flood, etc. By entering the coverage, you will be able to tell what type of coverage a client has when looking at their data. If you use a comparative rater, see Appendix C.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

	Coverage	LOB	Agency
<input type="radio"/> Users	15-Year Term		All
<input type="radio"/> Agent/CSR/Producer	30-Year Term		All
<input type="radio"/> Source	Comp		All
<input type="radio"/> Agency	Comp/Coll		All
<input type="radio"/> Line of Business	Crime		All
<input checked="" type="radio"/> Coverage	Dwelling Fire		All
<input type="radio"/> Insurance Companies	Earthquake		All
<input type="radio"/> Financing	Flood		All
<input type="radio"/> Optional Coverage / Additional Coverage	General Liability		All
<input type="radio"/> Billing Descriptions	Glass		All
<input type="radio"/> Additional Premium Reasons for AP letters	HMO		All
<input type="radio"/> Payment Type	Liability		All
<input type="radio"/> MGA / Broker	Liability - Comp		All
	Liability-Comp/Coll		All
	Pip/PD		All
	Pip/PD - Comp		All
	Pip/PD - Comp/Coll		All

**Insurance Company:** Enter the names of the insurance companies you write business for. QQEvolution 2 can accommodate auto insurance carriers, homeowner companies, life insurance companies, etc. These selections will be available when entering client data and when transferring quotes to be saved into QQEvolution 2. See Setting up Commissions on page.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☒ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Company	Code	Agency
ACA INS CO		All
Access General Agency	AGN	All
Access Insurance Company	LIN	All
Acuity		All
Affirmative Partner 6M	AFP	All
Aggressive Select	ARS	All
Aig Natl Ins Co Inc		All
ALLIED PROP & CAS IN CO		All
Allmerica Financial Benefit	AFB	All
Allmerica Financial Benefit	AFB	AW2
Amco ins co		All
American Family Home ins co		All
AMERICAN INTL PACIFIC INS		All
American Intl South Ins Co	666	All
American Mercury Ins Co		All
American Mercury Lloyds Ins Co		All
American modern Home ins co		All

**Financing Methods:** Enter the names of the finance companies you use for premium financing. You may also enter descriptive wording for situations where premium financing does not apply, such as Direct Bill and Paid in Full. These selections will be available when entering client data and when transferring quotes to be saved into QCEvolution 2.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☐ Insurance Companies
- ☒ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Financing	Agency
Agency Bill	All
Direct Bill	All
Finance company 1	All
Finance Company 2	All
Finance Company 3	All
Paid In Full	All
Prem Finance	All

**Optional / Additional Coverage:** Enter the type of Optional and Additional Coverage your agency offers such as Towing and Rental, Motor Club, etc. After entering selections, click the Commissions function button to enter commissions for the corresponding coverage.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: All

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

	Optional Coverage	Agency
<input type="radio"/> Users	AD&D	AW3
<input type="radio"/> Agent/CSR/Producer	Lease Sub	All
<input type="radio"/> Source	NSD	All
<input type="radio"/> Agency	Towing	AW2
<input type="radio"/> Line of Business		
<input type="radio"/> Coverage		
<input type="radio"/> Insurance Companies		
<input type="radio"/> Financing		
<input checked="" type="radio"/> <b>Optional Coverage / Additional Coverage</b>		
<input type="radio"/> Billing Descriptions		
<input type="radio"/> Additional Premium Reasons for AP letters		
<input type="radio"/> Payment Type		
<input type="radio"/> MGA / Broker		

**Billing Descriptions:** Enter billing descriptions for the debits and credits to your agency to describe these transactions including down payment, monthly payment, etc. The default descriptions, which QQEvolution 2 set up for you, must remain and be used should you decide to use the Export to QuickBooks feature in the Reports section.

**These include:**

- Additional Premium
- AP Paid
- Commission Due
- Commission Received
- Down Payment
- DP of AP
- Monthly Payment
- Monthly Payment Sent
- Optional Amount
- Producer Commission Due
- Producer Commission Paid
- Returned Premium
- Short Down/IOU
- Short Down/IOU Balance
- Short Down/IOU Paid
- Unearned Commission Paid

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: All

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☐ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☒ **Billing Descriptions**
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Billing Description	Agency
Additional Premium	All
AP Paid	All
Commission Due	All
Commission Received	All
Down Payment	All
DP of AP	All
Monthly Payment	All
Monthly Payment Sent	All
Optional Amount	All
Producer Comm Due	All
Producer Comm Paid	All
Returned Premium	All
Short Down/IOU	All
Short Down/IOU Balance	All
Short Down/IOU Paid	All
Unearned Commission Paid	All

**Additional Premium Reasons for AP Letters:** When sending Additional Premium (AP) letters to your client, you can include reasons why there is an AP and enter those reasons here.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: All

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☐ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☒ **Additional Premium Reasons for AP letters**
- ☐ Payment Type
- ☐ MGA / Broker

AP Reason	Agency
you have a speeding ticket	All
your MVR has additional violation	All

**Payment Type:** Select which payment types should be visible by making sure the word, "Yes" shows in the "Visible" column. Change Yes to No by double-clicking the Payment Type entry (such as Check to Finance or e-Check to Company).

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: All

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

	Payment Type	Visible	Agency
<input type="radio"/> Users	Cash	Yes	ALL
<input type="radio"/> Agent/CSR/Producer	Check To Agency	Yes	ALL
<input type="radio"/> Source	Check To Company	Yes	ALL
<input type="radio"/> Agency	Check To Finance	Yes	ALL
<input type="radio"/> Line of Business	Money Order To Agency	Yes	ALL
<input type="radio"/> Coverage	Money Order To Company	Yes	ALL
<input type="radio"/> Insurance Companies	Money Order To Finance	Yes	ALL
<input type="radio"/> Financing	Credit	No	ALL
<input type="radio"/> Optional Coverage / Additional Coverage	CC To Company	Yes	ALL
<input type="radio"/> Billing Descriptions	eCheck To Company	Yes	ALL
<input type="radio"/> Additional Premium Reasons for AP letters	CC to Agency	Yes	ALL
<input checked="" type="radio"/> Payment Type	Money Gram	No	ALL
<input type="radio"/> MGA / Broker	Check By Phone to Agency	No	ALL
	Check By Phone to Company	Yes	ALL
	EFT To Agency	Yes	ALL

## Setting up MGA/Brokers and their Commission Structure

QQEvolution 2 has a feature to account for MGA/Brokers. In order to set up MGA/Broker you will access the Utilities from the Dashboard, and then select MGA/Broker. In order to add a new one click the **Add** button on the top Toolbar. Enter the name of the MGA/Broker and click **Add to List**, if you are finished click "Done Adding."

QQ Evolution Dashboard **Add** Edit Delete Reset List **MGA / Broker Configuration** Commissions Fees Help

Popup Boxes Defaults Client Maintenance Agency Info Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW1

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

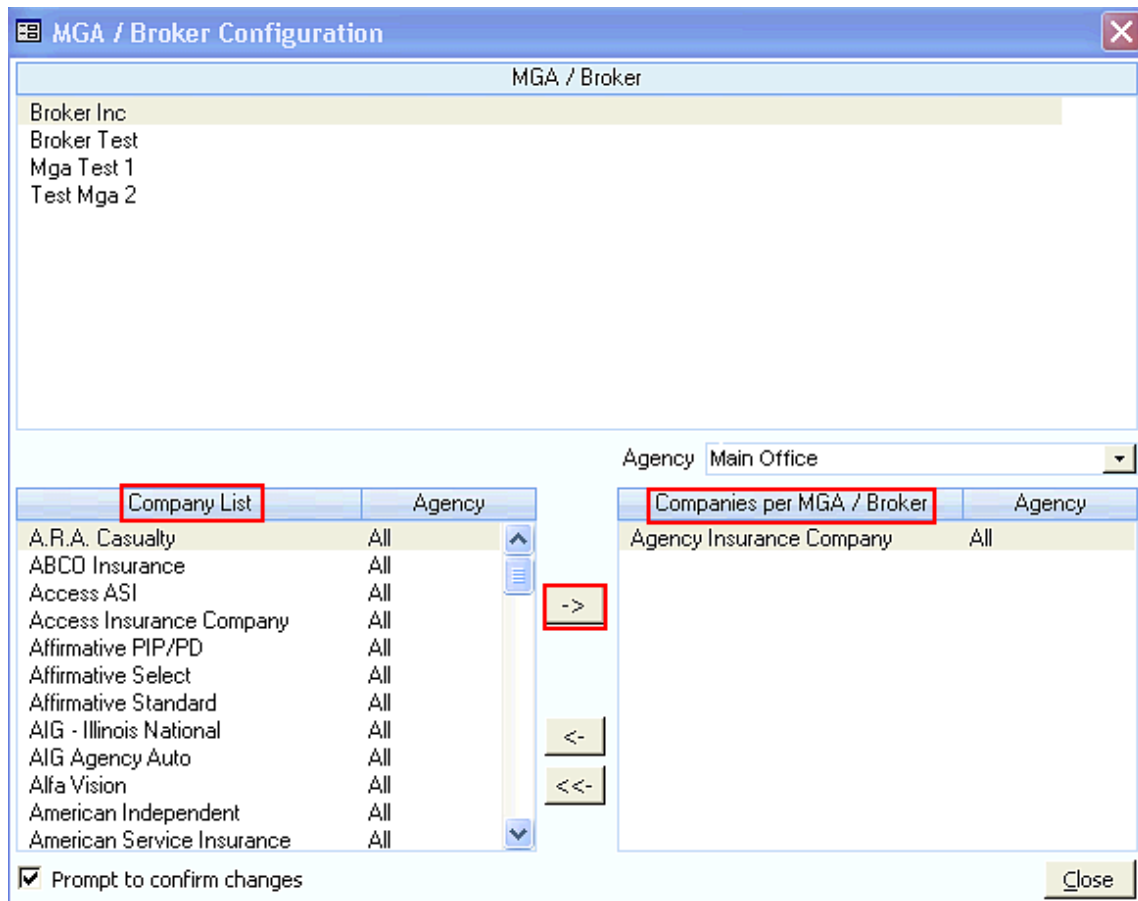
	MGA / Broker	Companies	Agency
<input type="radio"/> Users	Burns Assoc	ACA INS CO	All *
<input type="radio"/> Agent/CSR/Producer	Dunbar Mutual		
<input type="radio"/> Source	Lloyds of London		
<input type="radio"/> Agency	Smith & Richards Inc		
<input type="radio"/> Line of Business	Test Broker		
<input type="radio"/> Coverage			
<input type="radio"/> Insurance Companies			
<input type="radio"/> Financing			
<input type="radio"/> Optional Coverage / Additional Coverage			
<input type="radio"/> Billing Descriptions			
<input type="radio"/> Additional Premium Reasons for AP letters			
<input type="radio"/> Payment Type			
<input checked="" type="radio"/> MGA / Broker			

Type Entry to Add:

\* Has policies associated

Hide/Display the Payment Types. Double-click to change.

In order to link the MGA/Broker to an insurance company, click the **MGA/Broker Configuration** button on the top Toolbar. In the box that opens select the name of the MGA/Broker you wish to configure. On the bottom half of the screen, select the insurance company name to associate with the MGA/Broker, click the right arrow button to add the company. Repeat this process until you have associated all of the companies needed to the MGA/Broker.



If you need to edit the MGA/Broker linked list, you can remove a company by selecting the company name and clicking the left arrow. When you are done adding or removing companies repeat the process as needed for the other MGA/Brokers listed and then click “Close.”

**NOTE:** Companies can be associated with multiple MGA/Brokers.

Now that the companies are associated with the MGA/Brokers, we can set up their commission structures. To do this make sure MGA/Broker is still selected, click the name of the MGA/Broker and then click the **Commissions** button on the top Toolbar and then “For this Company.” The “Commissions” box will open. The MGA/Broker commission structure is setup in the same manner as the insurance company.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Agency Insurance Company AIC MGA Brokers Inc

Line	Coverage
Agri Sched/Unsched	All
Agriculture Liab	15-Year Term
Agriculture Package	30-Year Term
Agriculture Property	Comp
<b>Auto</b>	Comp/Coll
Boiler And Machinery	Crime
Bop Liability	Dwelling Fire

**Premium Sent**

☒ Net Premium is sent to company minus the commission.

☐ Gross Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.

☐ Monthly Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Commissions	Annual	6 Month	3 Month	Monthly
New Commission	0.00%	0.00%	0.00%	0.00%
Renewal Commission	0.00%	0.00%	0.00%	0.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Add Edit Delete Company Fee Config OK Cancel

You will see your MGA/Broker in the upper right of the box. The insurance company you are setting the structure for is listed on the upper left. You will notice when the box opens it defaults to the line of Auto and the coverage of All, this is simply a default change it as needed to set up the commission structures. It is important to remember that you are not only going to be establishing the commission percentage for the MGA/Broker. Rather, you need to set up commissions for every type of business you write with this MGA/Broker for this company.

**Important Note:** At this point we are setting up the commission structure based on percentage; you will not use the **Tiers** feature at this time. A "Help" document on setting up Tiers is available in the Tier's area.

Steps to setting up the default MGA/Broker commission structure:

1. Select the Line of Business

2. **Select the Coverage:** If the MGA/Broker pays you different percentages depending upon the coverage, choose your first coverage. If for each coverage under the previously selected Line you earn the same commission, then you may select ALL. "All" is used as a short cut to be able to set the same commission percentage for all the coverages for that one line of business on the insurance company. The individual coverage does still need to be listed.
3. **Choose the Premium Sent (Net, Gross, or Monthly):** Net indicates that you take your commission directly out of the payment you receive from the insured and send the rest of the money, or the Net amount, to the company. Gross and Monthly indicate that you remit to the insurance company the money you receive from the insured and the company subsequently pays your agency commission to you either in one payment (Gross) or on a monthly basis (Monthly).
4. **Enter the commission percentage:** Enter the commission percentages. If you earn different commissions for new business and renewals, use the two rows provided to indicate the difference. In addition, if the MGA/Broker pays you different commission rates depending upon the policy period, we provide different columns for those policy periods, so you can indicate those individual percentages. If the MGA/Broker charges a standard, non-commissionable policy fee, add that fee at the bottom of the screen. This will tell QCEvolution 2 to subtract the fee from the premium before it calculates the commission due to your agency.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Agency Insurance Company AIC MGA Brokers Inc

**Line**  
 Fine Arts  
 Flood  
 Garage And Dealers  
 General Liability  
 Glass  
**Homeowners**  
 Inland Marine Comm

**Coverage**  
 All  
 15-Year Term  
 30-Year Term  
 Comp  
 Comp/Coll  
 Crime  
 Dwelling Fire

**Premium Sent**

☒ Net Premium is sent to company minus the commission.  
☐ Gross Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.  
☐ Monthly Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Commissions	Annual	6 Month	3 Month	Monthly
New Commission	0.00%	0.00%	0.00%	0.00%
Renewal Commission	0.00%	0.00%	0.00%	0.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Add Edit Delete
 Company Fee Config OK Cancel

After you have finished setting up the commission structure click “OK” to save the information. Repeat these steps until all of the commission structures are set up for the selected MGA/Broker.

If there are company charges associated with the company you are setting for this MGA/Broker like standard fees and taxes for this line of business, use the “Company Fee Config” button provided. In order to first set up the company fees you will do this directly on the Popup Boxes after you select **Insurance Companies**. A button on the top Toolbar will appear labeled **Fees**.

QQ Evolution Dashboard   Add   Edit   Delete   Reset List   Commissions ▾   **Fees**   Help ▾

Popup Boxes   Defaults   Client Maintenance   Agency Info   Real-Time Setup

Logged in as User: amyprog   Security Level: Administrator   Agency Filter: AW1 ▾

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☒ **Insurance Companies**
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Company	Code	Agency
ACA INS CO		All
Access General Agency	AGN	All
Access Insurance Company	LIN	All
Acuity		All
Affirmative Partner 6M	AFP	All
Aggressive Select	ARS	All
Aig Natl Ins Co Inc		All
ALLIED PROP & CAS IN CO		All
Allmerica Financial Benefit	AFB	All
Amco ins co		All
American Family Home ins co		All
AMERICAN INTL PACIFIC INS		All
American Intl South Ins Co	666	All
American Mercury Ins Co		All
American Mercury Iloyds Ins Co		All
American modern Home ins co		All
Anchor General	ANC	All

After selecting “Fees” a Company Fees box will open. Here you will enter any new fees and you can edit or delete existing fees.

Company Fees		
Fee Name	Default Amount	Commissonable
FHCF	1.00 %	No
Inspection Fee	\$ 20.00	No
Service Fee	2.00 %	Yes
Surplus Lines	\$ 30.00	No
Tax Amount	\$ 10.00	Yes
Tax Rate	3.00 %	No

New Edit Delete Duplicate Close

When you select the **New** button to add a fee another box will open. Here you will type in the name of the fee, choose if it is by percentage or flat amount, and put the percentage or dollar amount in. If the fee you have entered is “commissionable”, put a check next to it. If you are using QQWebRater and the fees are coming from QQWebRater you can select the fee from a default list.

Company Fee - Add New

Fee Name: Agency Fee

Amount: Percentage (%)

7

Commissionable: ☒

QQ Fee: None

OK

Cancel

Now when you set up the commission structures as previously shown and you need to add a company fee to the structure you will click on Company Fee Config and select the fees.

# Setting Up Insurance Company Commissions

## Setting up Agency Commission by Rules

You can set up commission structures by **Rules**. This means you can set structures based on things such as age, to access this feature open the Utilities from the Dashboard and select **Agency**.

QQ Evolution Dashboard | Add | Edit | Delete | Reset List | **Commissions** | Fees | Help

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: amyprog | Security Level: Administrator | Agency Filter: AW2

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

☐ Users  
☐ Agent/CSR/Producer  
☐ Source  
☒ **Agency**  
☐ Line of Business  
☐ Coverage  
☐ Insurance Companies  
☐ Financing  
☐ Optional Coverage / Additional Coverage  
☐ Billing Descriptions  
☐ Additional Premium Reasons for AP letters  
☐ Payment Type  
☐ MGA / Broker

Agency

AW1
AW2
AW3

In order to set up a Rule, either double click on the agency's name or select the Commissions button on the top Toolbar. This will open the **Commission Breakdown Configuration** box.

Rule	Agency	MGA / Broker	Company	Line of Business	Coverage	Business Type	Comm. Amount
learners permit	All	All	Peachtree Casualty	Auto	All	All	2.00 %
over 65	All	All	Access ASI	All	All	All	10.00 %
Under 17	All	All	A.R.A. Casualty	Auto	All	All	5.00 %
under 65	All	All	Cornerstone	All	All	All	4.00 %

\*Hold Ctrl to Make Multiple Selections

New Edit Duplicate Delete Close

To create a new Rule, click the **New** button on the bottom right of the box. Another box will open where you can set up the individual Rule.

Commission Breakdown Configuration - Add New	
Rule Name:	<input type="text"/>
Agency:	All
MGA / Broker:	All
Company:	All
Line:	All
Coverage:	All
Business Type:	All
Type:	Percentage (%)
Amount:	0
Notes: <input type="text"/>	
OK Cancel	

Rules can be broken down as specific as you need them to be.

- **Agency** – Select the agency the Rule belongs to you wish to set the commission for. If the Rule belongs to multiple agencies and receives the same commission for all agencies you can leave this to “All.”
- **MGA/Broker** – If you use multiple MGA/Brokers and the Rule applies different commissions for each one select the individual MGA/Broker you wish to set up, this can be left as “All” if the same commission applies for all of the MGA/Brokers.
- **Company** – Select the company you wish to set the Rule’s commission for. This can be left to “All” if it applies the same commission for all companies.

- **Line of Business** – Select the line of business you are setting the Rule's commission structure for. If the Rule applies the same commission no matter what line of business it is this can be left to "All."
- **Coverage** – The coverage is selected, if commission is the same no matter the coverage this can be left to "All."
- **Type of Business** – Select the type of business you are setting the Rule's commission for. The choices are New Business, Renewal, and Rewrite. If they receive the same commission for every type of business leave this set to "All."
- **Type** – You can either set the type as percentage or flat amount.
- **Amount** – Enter the actual percentage or the dollar flat amount.

We will now give an example of how to set the commission structure up by Rules.

For the company of A.R.A. they give 5% agency commission for drivers under the age of 17 for personal auto insurance. This applies to all coverage and business types. The below screen shot shows how the breakdown should be configured. You can also enter any notes you need to pertaining to this Rule.

**Commission Breakdown Configuration - Add New**

Rule Name: Under 17 years of age      Notes:

Agency: All

MGA / Broker: All

Company: A.R.A. Casualty

Line: Auto

Coverage: All

Business Type: All

Type: Percentage (%)

Amount: 5

OK Cancel

## Setting up Agency Commission by Tiers

Agency commissions can be set up by Tiers in QQEvolution 2. This meaning if a company does their commissions by set dollar amount of the premium you can base your commission structure on this. To set up the default commission structure by Tiers open Utilities from the Dashboard. After opening Utilities, you will see the below screen and select Insurance Companies.

**NOTE:** Tiers can also be set up for the MGA/Broker commission structure if needed. Please refer to the MGA/Broker section to set up their commissions.

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup

Logged in as User: anyprog Security Level: Administrator Agency Filter: AW1

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☒ Insurance Companies
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Company	Code	Agency
ACA INS CO		All
Access General Agency	AGN	All
Access Insurance Company	LIN	All
Acuity		All
Affirmative Partner 6M	AFP	All
Aggressive Select	ARS	All
Aig Natl Ins Co Inc		All
ALLIED PROP & CAS IN CO		All
Allmerica Financial Benefit	AFB	All
Amco ins co		All
American Family Home ins co		All
AMERICAN INTL PACIFIC INS		All
American Intl South Ins Co	666	All
American Mercury Ins Co		All
American Mercury Lloyds Ins Co		All
American modern Home ins co		All
Anchor General	ANC	All

All of the companies you write business with should be listed here. If you need to add any companies to this list, click **Add** at the top of the screen. Enter the insurance company information at the bottom of the screen. When done, click Add to List.

To set up commissions for any one company, find the name of the company and double-click it or use the Commission button at the top right hand side of the screen and select For This Company. The Commissions box that appears will help you set up your default commission structure.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Insurance Usa

Broker ID:  NAIC Code: 36524

**Line**

- Agri Sched/Unsched
- Agriculture Liab
- Agriculture Package
- Agriculture Property
- Auto**
- Boiler And Machinery
- Bop Liability

**Coverage**

- All**
- 15-Year Term
- 30-Year Term
- Comp
- Comp/Coll
- Crime
- Dwelling Fire

**Premium Sent**

☒ **Net** Premium is sent to company minus the commission.

☐ **Gross** Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.

☐ **Monthly** Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Commissions	Annual	6 Month	3 Month	Monthly
New Commission	0.00%	0.00%	0.00%	0.00%
Renewal Commission	0.00%	0.00%	0.00%	0.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Add Edit Delete Company Fee Config OK Cancel

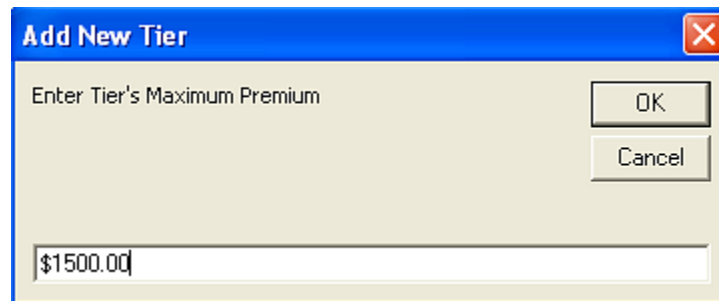
You will see your company name at the top of the window. You will notice when the box opens it defaults to the line of Auto and the coverage of All, this is simply a default change it as needed to set up the commission structures. Enter in your Broker ID and NAIC Code for those of you who are doing Downloads for the company and Real Time Inquiry. Now, you are ready to set up your commissions. It is important to remember that you are not only going to be establishing the commission percentage for the company. Rather, you need to set up commissions for every type of business you write with this company.

Steps to setting up the default agency commission structure by **Tiers**:

1. Select the Line of Business
2. Select the Coverage: If the company pays you different percentages depending upon the coverage, choose your first coverage. If for each coverage under the previously selected Line you earn the same commission, then you may select ALL. "All" is used as a short cut to be able to set the same commission percentage for all the coverages for

that one line of business on the insurance company. The individual coverage does still need to be listed.

3. Choose the Premium Sent (Net, Gross, or Monthly): Net indicates that you take your commission directly out of the payment you receive from the insured and send the rest of the money, or the Net amount, to the company. Gross and Monthly indicate that you remit to the insurance company the money you receive from the insured and the company subsequently pays your agency commission to you either in one payment (Gross) or on a monthly basis (Monthly).
4. Tiers: If the company pays their commission based on the amount of premium, set these up here by clicking the “Add” button under Tiers. If the company pays 10% up to \$500.00 in premium, enter the dollar amount of \$500.00 in the “Add New Tier” box. If the company now pays a different percentage of say 12% for the premium between \$500.00 to \$1500.00, click the “Add” button again and enter \$1500.00 in the “Add New Tier” box.



The Tiers will be listed as shown below. You will notice Tier 1 is the \$0.00 to \$500.00 amount so the commission percentage shows as 10%. It will change to 12% if we select the Tier for the \$500.00 to \$1500.00 amount. Each Tier can have its own commission percentage. Also remember the Tiers are set up by Line and Coverage so each one can have different Tiers set on them.

5. Enter the Commission Percentage: Select the first Tier and enter the commission percentages. You will do this for each Tier. If you earn different commissions for new business and renewals, use the two rows provided to indicate the difference. In addition, if the company pays you different commission rates depending upon the policy period, we provide different columns for those policy periods, so you can indicate those individual percentages. If the company charges a standard policy fee, add that fee at the bottom of the screen. This will tell QCEvolution 2 to subtract the fee from the premium before it calculates the commission due to your agency.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Insurance Usa

Broker ID: NAIC Code: 36524

**Line**

- 10104
- Agri Sched/unsched
- Agriculture Liab
- Agriculture Package
- Agriculture Property
- Auto**
- Boiler And Machinery

**Coverage**

- All
- 15-Year Term
- 30-Year Term
- Comp
- Comp/Coll
- Crime
- Dwelling Fire

**Premium Sent**

☐ Net Premium is sent to company minus the commission.

☒ Gross Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.

☐ Monthly Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Tier 1	0	500
Tier 2	> 500	1500
Tier 3	> 1500	3000
Tier 4	> 3000	

Add Edit Delete

**Commissions**

	Annual	6 Month	3 Month	Monthly
New Commission	10.00%	10.00%	10.00%	10.00%
Renewal Commission	10.00%	10.00%	10.00%	10.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Company Fee Config OK Cancel

If the company charges other standard fees and taxes for this line of business, use the "Company Fee Config" button provided. In order to first set up the company fees you will do this directly on the Popup Boxes after you select Insurance Companies. A button on the top Ribbon or Toolbar will appear labeled **Fees**.

QQ Evolution Dashboard   Add   Edit   Delete   Reset List   Commissions   **Fees**   Help

Popup Boxes   Defaults   Client Maintenance   Agency Info   Real-Time Setup

Logged in as User: amyprog   Security Level: Administrator   Agency Filter: AW1

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

- ☐ Users
- ☐ Agent/CSR/Producer
- ☐ Source
- ☐ Agency
- ☐ Line of Business
- ☐ Coverage
- ☒ **Insurance Companies**
- ☐ Financing
- ☐ Optional Coverage / Additional Coverage
- ☐ Billing Descriptions
- ☐ Additional Premium Reasons for AP letters
- ☐ Payment Type
- ☐ MGA / Broker

Company	Code	Agency
ACA INS CO		All
Access General Agency	AGN	All
Access Insurance Company	LIN	All
Acuity		All
Affirmative Partner 6M	AFP	All
Aggressive Select	ARS	All
Aig Natl Ins Co Inc		All
ALLIED PROP & CAS IN CO		All
Allmerica Financial Benefit	AFB	All
Amco ins co		All
American Family Home ins co		All
AMERICAN INTL PACIFIC INS		All
American Intl South Ins Co	666	All
American Mercury Ins Co		All
American Mercury Iloyds Ins Co		All
American modern Home ins co		All
Anchor General	ANC	All

After selecting “Fees” a Company Fees box will open. Here you will enter any new fees and you can edit or delete existing fees.

Fee Name	Default Amount	Commissonable
FHCF	1.00 %	No
Inspection Fee	\$ 20.00	No
Service Fee	2.00 %	Yes
Surplus Lines	\$ 30.00	No
Tax Amount	\$ 10.00	Yes
Tax Rate	3.00 %	No

When you select the **New** button to add a fee another box will open. Here you will type in the name of the fee, choose if it is by percentage or flat amount, and put the percentage or dollar amount in. If the fee you have entered is “commissionable”, put a check next to it. If you are using QQWebRater and the fees are coming from QQWebRater you can select the fee from a default list.

Company Fee - Add New	
Fee Name:	Agency Fee
Amount:	Percentage (%) <input type="text" value="7"/>
Commissionable:	<input checked="" type="checkbox"/> <span style="margin-left: 20px;">QQ Fee: None</span>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Now when you set up the commission structures as previously shown and you need to add a company fee to the structure you will click on the “Company Fee Config” button and select the fees.

Note: The fees area has its own Help document.

## Setting up Agency Commissions by LOB and Coverage with a Percentage

In order to have QREvolution 2 automatically calculate commissions due on all of your policies you must first set up a commission structure in your QREvolution 2 Utilities section, even if you are using Downloads. After opening Utilities, you will see the below screen and select Insurance companies.

Popup Boxes Defaults Client Maintenance Agency Info Real-Time Setup

Logged in as User: amyprog Security Level: Administrator Agency Filter: AW1

This section allows you to setup the popup boxes which you see when entering data throughout the program where a dropdown box occurs. Use the buttons above to Add, Edit or Delete the choices below. You can also edit commissions.

	Company	Code	Agency
<input type="radio"/> Users	ACA INS CO		All
<input type="radio"/> Agent/CSR/Producer	Access General Agency	AGN	All
<input type="radio"/> Source	Access Insurance Company	LIN	All
<input type="radio"/> Agency	Acuity		All
<input type="radio"/> Line of Business	Affirmative Partner 6M	AFP	All
<input type="radio"/> Coverage	Aggressive Select	ARS	All
<input checked="" type="radio"/> Insurance Companies	Aig Natl Ins Co Inc		All
<input type="radio"/> Financing	ALLIED PROP & CAS IN CO		All
<input type="radio"/> Optional Coverage / Additional Coverage	Allmerica Financial Benefit	AFB	All
<input type="radio"/> Billing Descriptions	Amco ins co		All
<input type="radio"/> Additional Premium Reasons for AP letters	American Family Home ins co		All
<input type="radio"/> Payment Type	AMERICAN INTL PACIFIC INS		All
<input type="radio"/> MGA / Broker	American Intl South Ins Co	666	All
	American Mercury Ins Co		All
	American Mercury Lloyds Ins Co		All
	American modern Home ins co		All
	Anchor General	ANC	All

All of the companies you write business with should be listed here. If you need to add any companies to this list, click **Add** at the top of the screen. Enter the insurance company information at the bottom of the screen. When done, click Add to List.

To set up commissions for any one company, find the name of the company and double-click it or use the Commission button at the top right hand side of the screen and select For This Company. The Commissions box that appears will help you set up your default commission structure.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Insurance Usa

Broker ID:  NAIC Code: 36524

**Line**

- Agri Sched/Unsched
- Agriculture Liab
- Agriculture Package
- Agriculture Property
- Auto**
- Boiler And Machinery
- Bop Liability

**Coverage**

- All**
- 15-Year Term
- 30-Year Term
- Comp
- Comp/Coll
- Crime
- Dwelling Fire

**Premium Sent**

☒ **Net** Premium is sent to company minus the commission.

☐ **Gross** Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.

☐ **Monthly** Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Commissions	Annual	6 Month	3 Month	Monthly
New Commission	0.00%	0.00%	0.00%	0.00%
Renewal Commission	0.00%	0.00%	0.00%	0.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Add Edit Delete Company Fee Config OK Cancel

You will see your company name at the top of the window. You will notice when the box opens it defaults to the line of Auto and the coverage of All, this is simply a default change it as needed to set up the commission structures. Enter in your Broker ID and NAIC Code for those of you who are doing Downloads for the company and Real Time Inquiry. Now, you are ready to set up your commissions. It is important to remember that you are not only going to be establishing the commission percentage for the company. Rather, you need to set up commissions for every type of business you write with this company.

**Important Note:** At this point we are setting up the commission structure based on percentage; you will not use the **Tiers** feature at this time. A "Help" document is provided on how to set up Tiers. It is located in the Tier's area.

Steps to setting up the default agency commission structure:

1. Select the Line of Business

2. **Select the Coverage:** If the company pays you different percentages depending upon the coverage, choose your first coverage. If, for each coverage under the previously selected Line you earn the same commission, then you may select ALL. "All" is used as a short cut to be able to set the same commission percentage for all the coverages for that one line of business on the insurance company. The individual coverage does still need to be listed.
3. **Choose the Premium Sent (Net, Gross, or Monthly):** Net indicates that you take your commission directly out of the payment you receive from the insured and send the rest of the money, or the "Net" amount, to the company. Gross and Monthly indicate that you remit to the insurance company the money you receive from the insured and the company subsequently pays your agency commission to you either in one payment (Gross) or on a monthly basis (Monthly).
4. **Enter the commission percentage:** Enter the commission percentages. If you earn different commissions for new business and renewals, use the two rows provided to indicate the difference. In addition, if the company pays you different commission rates depending upon the policy period, we provide different columns for those policy periods, so you can indicate those individual percentages. If the company charges a standard policy fee, add that fee at the bottom of the screen. This will tell QCEvolution 2 to subtract the fee from the premium before it calculates the commission due to your agency.

Here is an example of the Commissions box, showing everything necessary to track the agency commission for this specific company. As you see, Auto is selected as the LOB and, since the company gives me the same percentage for Auto no matter the coverage, "All" is selected for Coverage. Gross was selected for Premium Sent. The commissions were entered based on the percentage you receive from the company. In order to save this information, I would now click OK.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Insurance Usa

Broker ID: NAIC Code: 36524

**Line**

- Agri Sched/Unsched
- Agriculture Liab
- Agriculture Package
- Agriculture Property
- Auto**
- Boiler And Machinery
- Bop Liability

**Coverage**

- All**
- 15-Year Term
- 30-Year Term
- Comp
- Comp/Coll
- Crime
- Dwelling Fire

**Premium Sent**

☐ Net Premium is sent to company minus the commission.

☒ **Gross** Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.

☐ Monthly Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Commissions	Annual	6 Month	3 Month	Monthly
New Commission	10.00%	10.00%	10.00%	10.00%
Renewal Commission	7.00%	7.00%	7.00%	7.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Add Edit Delete Company Fee Config OK Cancel

If the company charges other standard fees and taxes for this line of business, use the "Company Fee Config" button provided. In order to first set up the company fees you will do this directly on the Popup Boxes after you select Insurance Companies. A button on the top Ribbon or Toolbar will appear labeled **Fees**. Please refer to the previous section of setting of Tiers for directions on entering default fees.

Note: The company fee area has its own Help document.

## Section B – Utilities – Default Tab

While operating QQEvolution 2, certain fields will always produce the same answers or results. For example, the area code in the Client section will always be whatever is in the Defaults section unless it is changed. The defaults are broken up into several groups as described here.

The screenshot shows the 'Defaults' tab in the QQEvolution 2 application. At the top, there are navigation tabs: 'Popup Boxes', 'Defaults' (highlighted), 'Client Maintenance', 'Agency Info', and 'Real-Time Setup'. Below these, it shows 'Logged in as User: amyprog', 'Security Level: Administrator', and 'Agency Filter: AW1'. The main content area has sub-tabs: 'Entry', 'Letters', 'Client Screen', 'Policy Screen', and 'Dashboard'. The 'Entry' sub-tab is active, displaying various configuration options. These include: 'Area Code / Language' (305, English), 'Policy Period / Agency' (Annual, AW1), 'City / State / Zip' (Deerfield Beach, FL, 33441), 'Acord Forms' (Signatures Setup), 'Email' (Email Options), 'Yes/No' section with checkboxes for 'Ask for policy when attaching images' (checked), 'Don't send AP to billing' (unchecked), and 'Show Tip Of The Day at startup' (unchecked); 'Data Wizard' section with checkboxes for 'Use Wizard when adding new Acord forms' (checked) and 'Do not show introduction' (unchecked); 'Check for newer versions of QQ Evolution' (Weekly); 'Rolodex' section with 'Use Rolodex "Gold"' checked; 'Local Server Drive Letter' (C); and 'Image's Cache in Claims' section with 'Amount of time to store local copies of images viewed' set to 7.

### Entry Tab

The default entry options you select here will appear when entering client data. Even though you may set a specific area code, for example, you can always change it when actually entering a client's information.

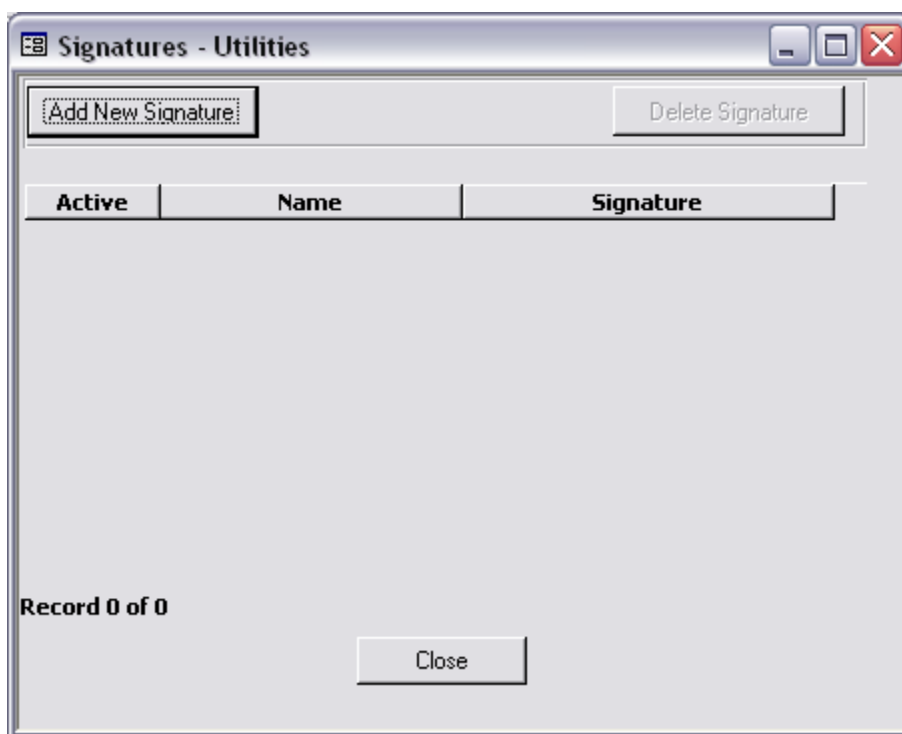
#### Entry Information

- **Area Code:** Enter the area code most frequently used.

- **Language:** When sending letters to clients, select the default language to be used (letters in any language must have been previously created in the word processor).
- **Policy Period/Agency:** Select the most common policy period and agency location.
- **Agent/CSR** (Does not apply to Enterprise Users): Select the Agent or CSR who serviced the client. When working with client data, you can always choose from the list of agents that you entered in the Popup Boxes section. The agent will default to what you choose here.
- **City/State/Zip:** Enter the most common city, state and zip code.

## ACORD Forms

**Signatures Setup:** This is the agent signature, which can be used on select ACORD Forms. First, use your scanner to scan your signatures and save them as bitmap (.bmp) files on your desktop or in a folder on your computer. When ready, click on the Signatures Setup...button in QREvolution 2. A box will appear to select your signatures, Add New Signature. Browse your computer to add, and name, each of your signatures in QREvolution 2.



## E-Mail

**E-mail Options:** If you use Microsoft Outlook (not Outlook Express) as your default e-mail client, and you would like to keep copies of each of your messages in your Sent Items folder in Outlook, then check the box that says Use Microsoft Outlook for E-mailing. If you would also

like to “bundle” and e-mail messages along with forms, letters, and/or images or combinations of any of these check Use Print/E-mail/Fax.

The image shows a Windows-style dialog box titled "Email Options". It contains several settings. At the top, there are two checkboxes: "Use Print/Email/Fax" which is checked, and "Use Microsoft Outlook for emailing" which is unchecked. Below these are several text input fields: "Agent Email Address:" with the value "QuickQuote@qqonline.com", "Agent Email Display As:" with the value "QuickQuote", "Outgoing Mail Server:" (empty), "Email User ID:" (empty), "Email Password:" (empty), and "Email Port:" with the value "25". There is another checkbox "Use Email Signature" which is unchecked, followed by a large text area labeled "Email Signature:". At the bottom of the dialog are "OK" and "Cancel" buttons.

Enter your default e-mail address for your agency. This will act as the default “sender” for any message you send by e-mail from QQEvolution 2. This can be altered every time you e-mail something from the program. Next, enter how you would like your name displayed.

For example, instead of your e-mails coming from QQEvolution 2@qqsolutions.com, you might instead want your name to be displayed simply as, QQEvolution 2. If you use an e-mail client such as Microsoft Outlook, also note other default e-mail information that can be entered here, such as your Outgoing Mail Server, E-mail User ID, E-mail Password, and E-mail Port. This information can be found in your e-mail settings.

## Yes / No Selections

These check boxes allow customization for communication and usability.

- **Ask for policy when attaching images:** Every time you scan or attach an image to a client's record, QQEvolution 2 will ask to which policy this image belongs.
- **Don't send AP to billing:** If you are not concerned with collecting the AP from the client because the actual insurance company takes responsibility, then select this option. This will ensure that a bill to the client is not created and an AR (Accounts Receivable) balance will not show for this client.
- **Show Tip of The Day:** Will display user tips every time you run QQEvolution 2.

## **Data Wizard**

**Use Wizard when adding new ACORD forms:** When entering specific ACORD forms into QQEvolution 2, a Wizard will popup that will help you import data from other forms into the new ACORD form. Please see Chapter 3 for details.

## **QQRolodex**

**QQRolodex:** When you register your product for the first time this box will be checked for you automatically.

## **Check for Newer Versions of QQEvolution 2**

Here you can choose how often you would like the program to look for an update of QQEvolution 2. The options are Daily, Weekly and After each Available Update. Based on what you have chosen the program will contact to our Web site and determine if a new update is available. You can then proceed with doing the update.

## **Local Server Drive Letter**

This will be defaulted to C: which is your local computer. If you have chosen to network the QQEvolution 2 program for updating purpose you can set your network drive here.

## **Image Cache in Claim's**

In the Claim's image section when you access an image we use a process called "caching" so the next time you access that same image it will appear immediately instead of having to wait a few seconds for it to download from our servers. This cached version of the image is stored locally on your computer. The image is still stored on our servers as well. You will most likely want to discard these stored images periodically from your computer. Here you can set when you would like those images removed. It can be set to discard the images after the amount of days you have entered. It will not be removed from our servers just your local computer.

## **Letters Tab**

When performing certain actions, such as receiving a down payment and taking a payment, QQEvolution 2 can automatically generate a receipt.



**Letters**

Popup Boxes | Defaults | Client Maintenance | Agency Info | Real-Time Setup |

Logged in as User: amyprog      Security Level: Administrator      Agency Filter: AW1

Entry | **Letters** | Client Screen | Policy Screen | Dashboard

**Letters**

**Down Payment Receipt**

**Payment Receipt**

**Agency Bill Receipt**

**Last Receipt #**

**Additional Premium (AP) Info**

If AP is more than  Use AP Financed Letter:

And insert AP % Down

Otherwise, use AP Letter

**Letter Defaults**

Font Size: Letterhead  Addressee

Today's Date On Letter

Days To Reply

- **Down Payment Receipt:** Use this option to select which receipt letter will be sent when a down payment is made. Create receipt letters in QuickWord or use our already made receipt.
- **Payment Receipt:** Use this option to select which receipt letter will be sent by default.
- **Agency Bill Receipt:** Use this option to select which agency letter will be sent by default.
- **Last Receipt #:** QREvolution 2 can track each receipt you send. Enter the number before the number you wish to start with. QREvolution 2 will automatically increment receipt numbers as receipts are created.

## Additional Premium (AP) Info

When the issued premium is higher than the quoted premium, an Additional Premium (AP) exists. Use the following default options to notify the client of the additional premium:

- Enter a minimum AP dollar amount that would trigger the specific AP Finance letter. You can create these letters in QuickWord, accessible from the Dashboard. If the AP is less than the minimum AP dollar amount entered above, then the regular AP letter is automatically printed.

- Enter the appropriate percentage down required for financed AP's. This inserts the amount into the AP Financed letter selected above.

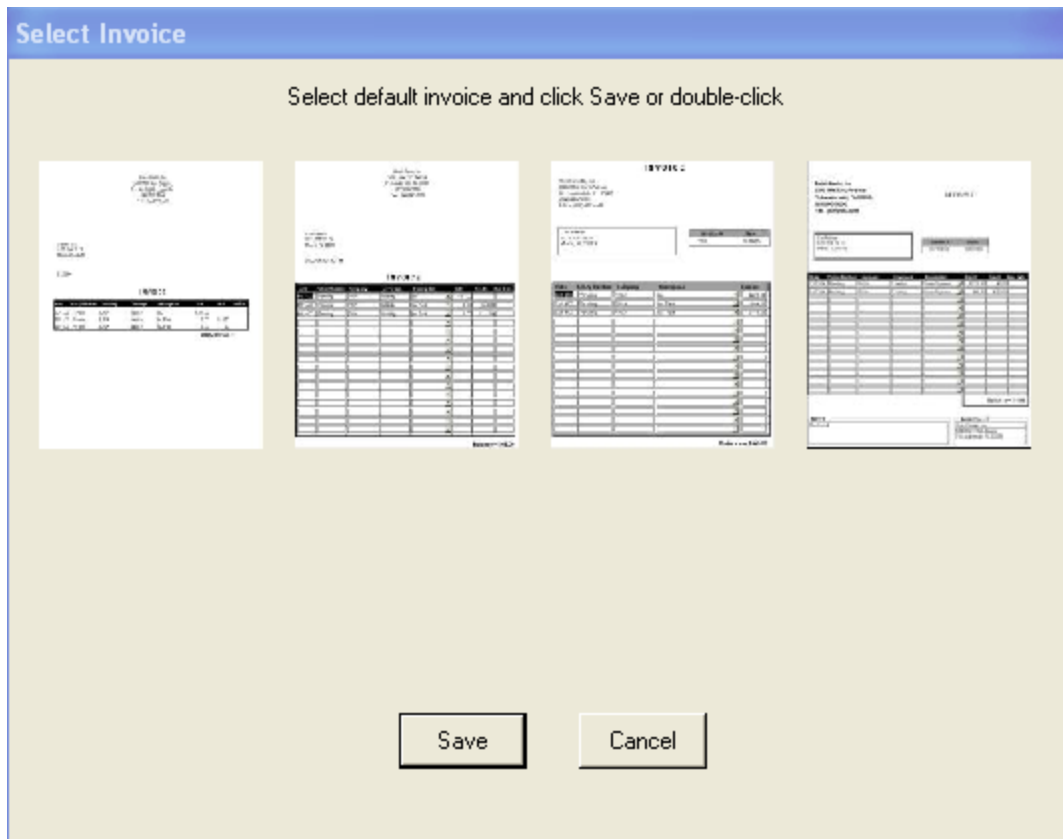
## Letter Defaults

- **Font Size:** Letterhead and Addressee: modifying these values will cause the appropriate text size to be increased or decreased. If these values are set to "None", they will not print.
- **Today's Date On Letter:** Select where on the letter you want today's date to be printed, either the left side or right side of the page. Detailed will spell out the complete date (e.g., July 3, 2007 instead of 07/03/07) and position the date on the left side of the page.
- **Days to Reply:** Enter the number of days from today that your client should respond to a letter. Use the field {Reply Date} in your letter to get this value to print in the letter. Fields are explained in the QuickWord section.
- **Use Microsoft Word as Word Processor (not applicable for QQEvolution 2 Enterprise Users):** Checking this box will allow you to use Microsoft Word instead of QuickWord for creating letters. You can also use the QQEvolution 2 fields in Microsoft Word. Start Word, click on Tools, Options and then the File Locations tab. Under File locations note the Location of the File type: Startup Copy the file QFWinTemplate.dot (located in your QuickFL folder) to the Startup Location you noted above. The next time you start Word, you will see a new button, QQEvolution 2 Fields. Use these Fields to insert QQEvolution 2 data into your Word document.

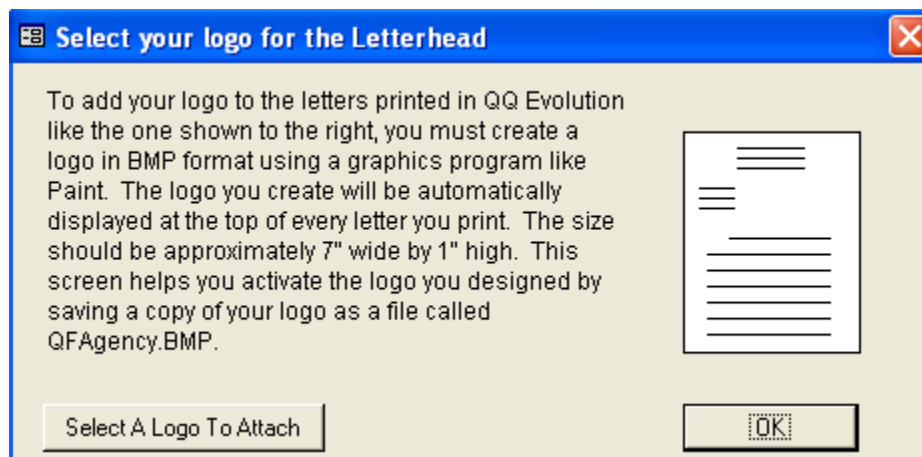


**Note:** If you use Microsoft Word, you must save the letters in Rich Text Format (RTF) in the \English, \Spanish or \French sub-directories in the QuickFL or QuickTX directory.

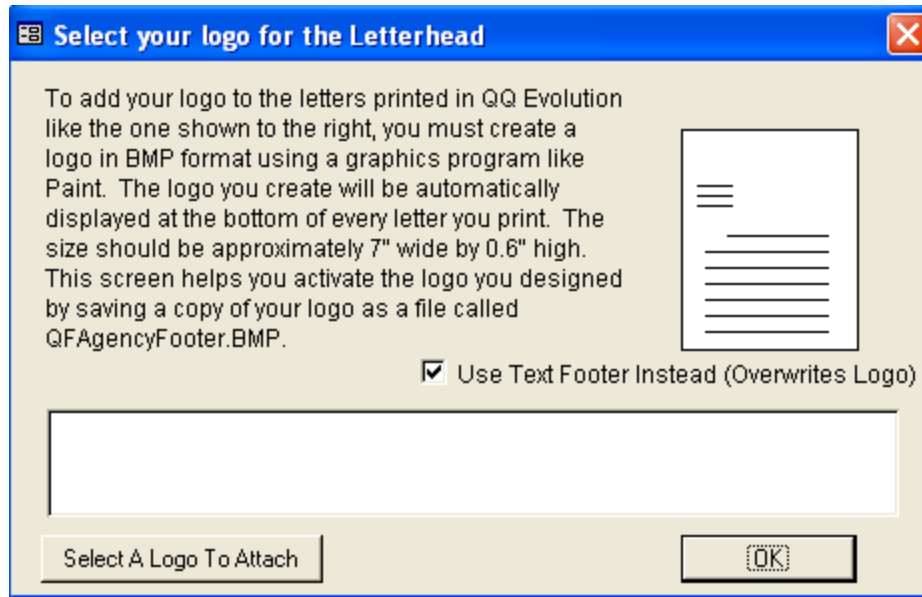
**Select Default Invoice:** Select this option if you would like to use a pre-existing, formatted invoice.



**Select Logo for Letterhead:** Select this option if you would like to attach a pre-existing, customized logo on all letters printed by QQEvolution 2 (logo format: bitmap, 7" wide x 1" high). Otherwise, your basic agency information will print as the logo.



**Select Logo for Footer:** See instructions above. You also have the option to include text footer (footer format: bitmap, 7" wide x 0.6" high)



## Cross Selling Report – Defaults

The Cross Selling Report in QQEvolution 2 has a default setting that can be set up in the Utilities Section. To set up the default selections for the Cross Selling Report, open your Utilities Section from the Dashboard of QQEvolution 2. Once you have opened Utilities, select the “Defaults Tab” and then select “Letters”. You will see the Cross-Marketing Report button. Click on the button and you will be presented with the default selections of the report. These defaults will be important if you always run the same report.

Entry Letters Client Screen Policy Screen Dashboard

**Letters**

**Down Payment Receipt** Down Payment.RTF

**Payment Receipt** Payment.RTF

**Agency Bill Receipt** RENEWAL-EXPIRATION.RTF

**Last Receipt #** 4782

**Additional Premium (AP) Info**

If AP is more than  Use AP Financed Letter:

None  And insert AP % Down 0.00%

Otherwise, use AP Letter

**Letter Defaults**

Font Size: Letterhead 12 Addressee 12

Today's Date On Letter Detailed

Days To Reply

Cross Selling Defaults

Select Default Invoice Select Logo for Letterhead Select Logo for Footer

**Cross Selling Report**

Show customers with a policy through: ALL And without a policy through: ALL

With this line of business:

☐ .  
☐ 10104  
☐ 10106  
☐ A11  
☐ Acord Description  
☐ Agri Sched/unsched  
☐ Agri Sched/Unsched1  
☐ Agriculture Liab

Date Type: Expiration

Predefined Dates: This Month

☐ Include all active policies for a Client with the given Criteria

Date: 9 / 1 / 2011 to 9 / 30 / 2011

Agency: Jerry Jay Boyle

Note: Dates are inclus

☐ Show one entry per Client

Reset OK Cancel

## Client Screen Tab

This section sets the preferences for your clients.

The screenshot shows the 'Client Screen' tab selected in a software interface. At the top, there are tabs for 'Popup Boxes', 'Defaults', 'Client Maintenance', 'Agency Info', and 'Real-Time Setup'. Below these, it says 'Logged in as User: amyprog', 'Security Level: Administrator', and 'Agency Filter: AW1'. The 'Client Screen' tab is highlighted with a red box. Inside this tab, there is a 'Yes/No' section with several checkboxes: 'Client Screen Total Includes Expired Policies' (unchecked), 'Show Total on Client Screen' (unchecked), 'Show AR Balance on Client Screen' (checked), 'Allow user to add new items to popup boxes in client/policy screens' (unchecked), 'Add new clients as PROSPECTS' (unchecked), 'Disable message after entering duplicate client based on phone/last name' (unchecked), and 'Popup Important Note' (checked). Below this is the 'Add New Client As' section with radio buttons for 'Personal' (selected) and 'Commercial' (unselected). There are also buttons for 'Set Client Number...' and 'List of Phone Types'. At the bottom, there is a 'Client's Image' section with a checkbox for 'Download the Client's Image Automatically' (unchecked).

## Yes / No Selections

These options will affect the way QCEvolution 2 behaves in certain situations or on certain screens. To answer "Yes", place a checkmark in the box to the left of the option. To answer No, clear the checkmark.

- **Client Screen Total Includes Expired Policies:** Include the premiums of expired policies in the Total Premium on the client screen.
- **Show Total On Client Screen:** Show total policy premiums on the Client data screen.
- **Show AR Balance on Client Screen:** If a client has an Accounts Receivable balance (e.g., an outstanding IOU), the AR balance will be displayed in red on the **Client** screen. This balance is calculated from the client's Billing screen and will only show if the client has an outstanding balance. The same applies if there is an AR balance for the Company.

- **Allow user to add new items to popup boxes in Client / Policy Screens:** Allows you to enter items directly into popup boxes without having to enter these items in *Utilities*.



**Important Note!** If you are tracking commissions in QQEvolution 2 **this box should never be checked. It will allow any user to enter any item into QQEvolution 2. Leaving this box unchecked will force the user to select from the items in the designated list.**

- **Add New Clients as Prospects:** All new entries would be entered as a Prospect by default, rather than an Active Client.
- **Disable message after entering duplicate client based on phone/last name:** This allows you to enter duplicate clients without the warning message.
- **Popup Important Note:** Allows a yellow post-it type window to appear giving you up to 255 characters to enter information on the client.

**Add New Client As:** This feature will allow you to set new client entries to default as Personal or Commercial automatically.

**Set Client #:** Will automatically create a client (file) number for every client as they are added to your data. You will need to set your own client number format.

## Policy Screen Tab

This group presents you with a series of YES/NO options on policy preferences.

The screenshot shows the 'Policy Screen' tab selected in a navigation bar. The interface includes a top menu with 'Popup Boxes', 'Defaults', 'Client Maintenance', 'Agency Info', and 'Real-Time Setup'. Below the menu, it displays 'Logged in as User: amyprog', 'Security Level: Administrator', and 'Agency Filter: AW1'. The 'Policy Screen' tab is highlighted in the navigation bar. The main content area contains a 'Yes/No' section with three checkboxes: 'Disable message after selecting policy Line of Business', 'Ask to create credit to company after entering premium', and 'Jump To Premium Issued After Policy #'. Below this is a 'MVR Cost' field set to '\$0.00' with a description '(The amount that the MVR costs the agency)' and a 'Set Binder Number...' button. The 'Producer Commissions' section includes a 'Default Amount' field set to '17', radio buttons for 'Flat Rate (\$)' (selected) and 'Percentage (%)', a 'Priority' dropdown menu with options 'MGA', 'Company', 'Coverage', 'LOB', 'Business Type', and 'Agency', and a text box explaining the purpose of the priority filters.

## Yes / No Selections

These options will affect the way QCEvolution 2 behaves in certain situations or on certain screens. To answer yes, place a checkmark in the box to the left of the option. To answer No, clear the checkmark.

- **Disable message after selecting policy Line of Business:** Allows the user to disable the message that says, "You can enter further info in the Forms section by clicking Add a Form..."
- **Ask to create debit to company after entering premium:** Allows the user to create a credit in the Company Billing screen without a debit, indicating an amount due to the company on a certain date.
- **Jump To Premium Issued After Policy #:** After you enter the Policy # on the policy screen in QCEvolution 2 the cursor will automatically jump to the Issued Premium Amount to enter the Issued Amount into the corresponding field. If you uncheck this

box, QCEvolution 2 will leave the cursor in Policy # Field until you either hit “Tab” or “Enter” on your keyboard.

**MVR Cost Field:** Enter the amount that the MVR costs the agency.

**Set Binder #:** Will automatically create a policy binder number for each client when a policy has been entered for the client. You will need to set your own binder number format.

**Producer Commissions:** Use this list of items to set the priority of the commission filters on producers. This information will be used to determine which producer commission entry applies to a policy if two or more producer commission entries could apply to the same policy. You will select the producer commission filter and use the blue up and down arrows to change that filters priority in the list. The filter listed at the top will be the first priority and taken into account first when determining which commission for the producer applies and then going down from there it will take each of the next filters in account.

## Dashboard Tab

The screenshot shows the 'Dashboard' tab selected in the application. At the top, there are tabs for 'Popup Boxes', 'Defaults', 'Client Maintenance', 'Agency Info', and 'Real-Time Setup'. Below these, a status bar shows 'Logged in as User:', 'Security Level:', and 'Agency Filter:' with a dropdown menu. The main content area has a sub-tab bar with 'Entry', 'Letters', 'Client Screen', 'Policy Screen', and 'Dashboard'. The 'Dashboard' section contains several configuration panels: 1. 'Policies Expiring/Intent to Cancel' with 'Sort By' set to 'Date' and 'Ascending'. 2. 'Auto Report Defaults' with a text box for file names, an example path 'C:\QuickFL\Reports\Daily\_Closeout-09-07-2011.pdf', a 'Directory' dropdown set to 'C:\QuickFL\Reports\' and a 'File Name' dropdown set to 'RR-MM-DD-YYYY'. It also has a checkbox 'Limit reports to only run on the PC they were created (it is already limited by user)' which is unchecked. 3. 'Inactivity - Log Off' with a dropdown set to 'Never' and the text 'Log me off after ... of inactivity'. 4. 'Office Assistant' with a checkbox 'Load QQ Evolution Assistant after log on' which is unchecked.

**Policies Expiring/Intent to Cancel:** Use this feature to determine how you want to sort the Policies Expiring / Intent to Cancel.

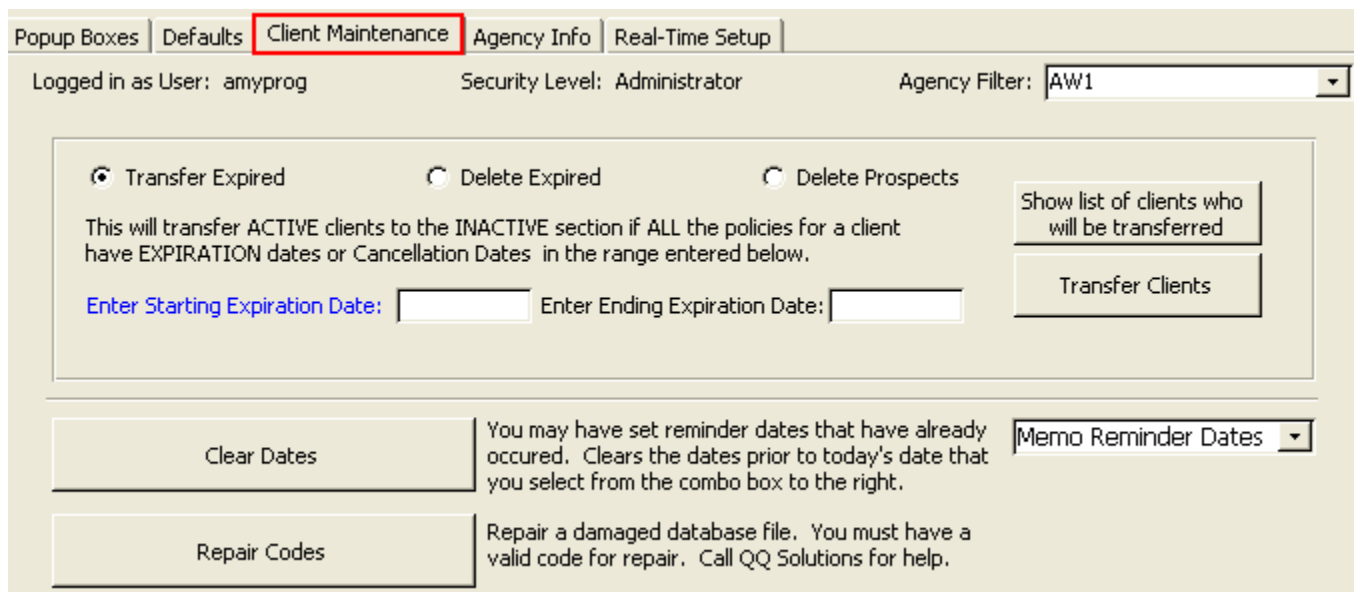
**Auto Report Defaults:** Select your Auto Report Defaults here.

**Inactivity-Log Off:** Select how long you want wait before a user is logged off automatically.  
**Note that the user may have to re-enter some information after they are logged off.**

**Office Assistant:** Check this box if you want the QQEvolution 2 Assistant to load after you log on to QQEvolution 2

## Section C - Utilities – Client Maintenance Tab

This section is used to change the status of groups of clients from Active to Inactive Client (or to delete groups of Inactive or Prospect Clients). Only clients that have **NO** active policies will be marked as Inactive. If a client has multiple policies and at least one has not been cancelled or expired, they will remain Active since at least one policy is still active.



The screenshot shows the 'Client Maintenance' tab selected in the top navigation bar. Below the tabs, the user is logged in as 'amyprog' with 'Administrator' security level, and the 'Agency Filter' is set to 'AW1'. The main area contains three radio buttons: 'Transfer Expired' (selected), 'Delete Expired', and 'Delete Prospects'. A text box explains that this will transfer active clients to the inactive section if all policies have expiration or cancellation dates within a specified range. There are input fields for 'Enter Starting Expiration Date' and 'Enter Ending Expiration Date'. To the right, there are two buttons: 'Show list of clients who will be transferred' and 'Transfer Clients'. Below this, there are two sections: 'Clear Dates' with a description and a 'Memo Reminder Dates' dropdown, and 'Repair Codes' with a description.



### Transfer Expired Clients Radio Button

Enter the Starting and Ending Expiration date for the group of clients you would like transferred.

To preview/print the list before transferring, click the Show List of Clients Who will be Transferred button. If you are satisfied with the list of clients, click the Close function button on the display of clients. Now you can click the Transfer Clients button.

If you need to change this client's status back to Active from Inactive, you can do that from their individual client screen. Click on Change Status to make their client record Active once again.

## Delete Expired Clients Radio Button

Use this button to **permanently** remove **Inactive Clients** from QQEvolution 2, if all policies for a client have expiration dates within the range that you enter.

Enter the Starting and Ending Expiration date for the group of clients you would like to delete. Click the Delete Clients button.

You can also Show List here, as above.

## Delete Prospects Radio

Use this button to **permanently** remove **Prospects** from QQEvolution 2, if all clients have an entry date within the entered range.

Enter the Starting and Ending Entry date for the group of prospects you would like to delete. Click the Delete Prospects button.

You can also Show List here, as above.



**Important Note:** Once a client (or group of clients) is deleted, they cannot be retrieved.

**Clear Dates:** Clears dates prior to today's date for Memo Reminders, Bill Due Dates and Intent to Cancel Dates.

**Repair Codes:** Reserved for QQSolutions Product Support's internal use.

## Section D - Utilities- Agency Info

The user section displays your current agency information.

Popup Boxes	Defaults	Client Maintenance	<b>Agency Info</b>	Real-Time Setup
Logged in as User: amyprog		Security Level: Administrator		
<b>Local Agency</b>				
Name of Agency	Quickquote, Inc			
Address	350 Fairway Drive			
City/State/Zip Code	Deerfield Beach, FL 33441			
Agency Phone Number	(800) 940-6600			
Agency Fax Number	(800) 940-3299			
Agency Email Address	webmaster@qqsolutions.com			
Agency Product String	CHECKS ENTERPRISE DOWN WEB EVO ROLODEX			
Agency Product State	FL			
User ID (from Agency.dat)	mickey			

To modify agency information go to [www.QQSolutions.com](http://www.QQSolutions.com). Click on the My Account and then enter your User ID and Password. Follow the on screen directions to change your information.

## **Section G – Utilities – Transformation Station™ Setup**

### **Transformation Station**

Transformation Station is an IVANS managed Internet data exchange, providing a seamless connection between the QQEvolution 2 Agency Management System and insurance company data systems. Transformation Station allows you to process insurance company policy transactions, and retrieve insurance company account information, directly from within your QQEvolution 2 Agency Management System with the click of a mouse button, at exactly the time you need it.

### **Using Transformation Station**



**Note:** You must be signed up for QQEvolution 2 Downloads and have an established IVANS Account in order to utilize Transformation Station. You are also required to have all NAIC codes and Broker codes in place in QQEvolution 2 Utilities for all the insurance companies that you will be working with in Transformation Station.

In order to be setup with IVANS, you will need to e-mail us a list of Carriers you wish to do Real-Time Inquires for. We will then send that information to IVANS and let you know when you are confirmed. At that time, you will be contacted by our Product Support Department to guide you through the setup process for Transformation Station.

### **Initial Setup**

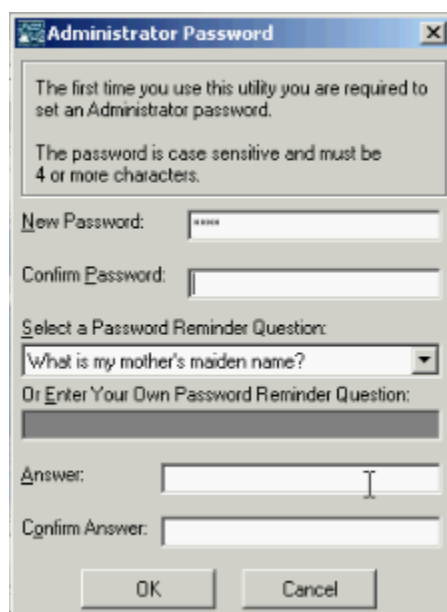
The initial setup and configuration for the Transformation Station must be performed in the Utilities Section of QQEvolution 2.

Upon entering the QQEvolution 2 program click on the Utilities Section from the Dashboard.

In order to submit a transaction to Transformation Station your IVANS account must be configured. In the main window of the Utilities Section, click on the tab entitled "Real-Time Setup".

Popup Boxes	Defaults	Client Maintenance	Agency Info	<b>Real-Time Setup</b>
Logged in as User: amyprog		Security Level: Administrator		Agency Filter: <input type="text" value="AW1"/>
<div>Initial Setup Wizard</div>		Click this button to initially setup IVANS Transformation Station for your agency. You will be prompted for a Password and Email Address. Only click this button once you have been setup with IVANS. In order to be setup with IVANS, you will need to email us a list of Carriers you wish to do Real-Time Inquires for. We will then send that information to IVANS and let you know when you are confirmed. Then you can click the button.		
<div>Update Wizard</div>		This feature allows you to add more Carriers for Real-Time Inquiry. You will first need to email us the Carrier(s) you wish to add. We will then send that information to IVANS. Once confirmed, click this button to enable those Carriers for Real-Time Inquiries.		
<div>Carrier Transaction Security</div>		Some carriers require a Username and Password (that is different from the one on the Initial Setup Wizard). Click this button to enter the Username and Password for each Carrier/Product. A Product is a type of inquiry such as Billing Inquiry or Policy Inquiry. The Carrier will supply you with the Username and Password and may change it from time to time.		
<b>Progressive Real-Time Inquiry Initial Setup and Configuration</b>				
<div>Progressive Initial Setup</div>		Click this button to initially setup Progressive real-time inquiry services for your agency. You will be prompted for a user name and a password.		

Click on Initial Setup Wizard button. Remember; only click this button once you have been setup with IVANS. This starts the initial setup for IVANS Transformation Station for your agency. The first time you use this utility, you are required to set an Administrator password for access to Real-Time Configuration for your company that you create. Once you have completed the required information click OK.



**Administrator Password**

The first time you use this utility you are required to set an Administrator password.

The password is case sensitive and must be 4 or more characters.

New Password:

Confirm Password:

Select a Password Reminder Question:

Or Enter Your Own Password Reminder Question:

Answer:

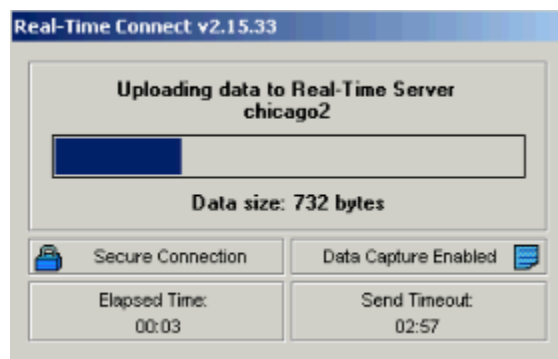
Confirm Answer:

OK Cancel

Next the Initial Account Setup Wizard window will appear. Your e-mail address should be entered on this screen. You must be connected to the Internet in order to configure your online configuration at the Transformation Station server and complete this wizard.



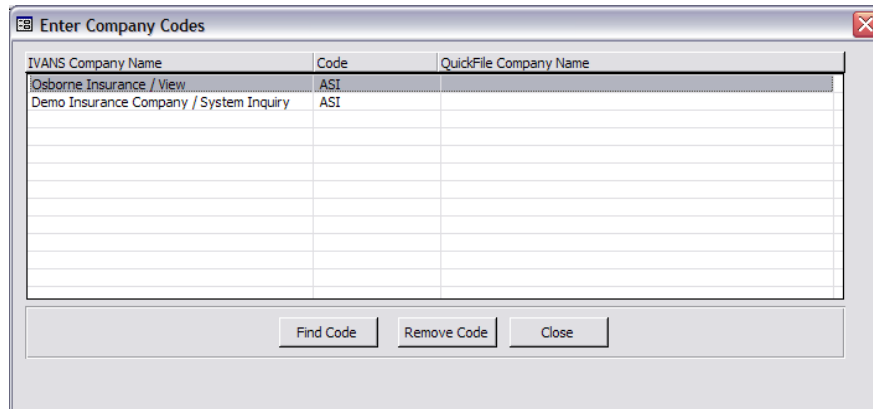
After the wizard is completed, a secure connection will be made between QCEvolution 2 and Transformation Station, where the agent is identified and any new Real-Time insurance companies and their associated transactions are downloaded. The Real-Time Connect window will appear indicating the progress of the download.



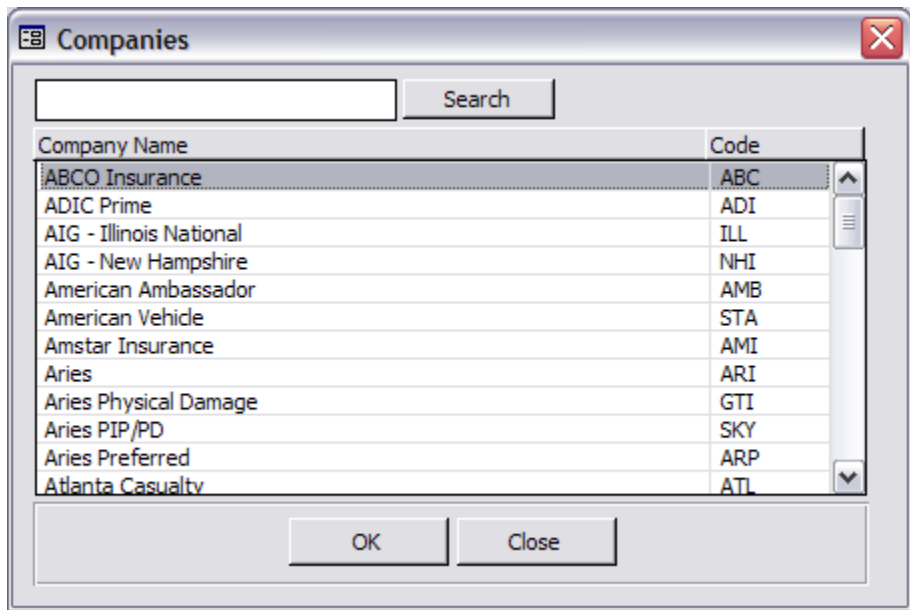
On completion of the initial set up and configurations process, the Users are going to be added to the QCEvolution 2 automatically. All users that are available in the Utilities Section, Popup Boxes tab (Users); will be added to the QCEvolution 2 with password XXXX.

## Company Configuration

Once initial setup is completed, the Enter Company Codes window will appear and the list of available companies in Transformation Station will be displayed.



Every company listed in the IVANS column needs to be associated with the same company in the QCEvolution 2 program. In order to achieve this association with QCEvolution 2 companies highlight a company from the list and click the Find Code button. Another popup window will be displayed listing the companies in the QCEvolution 2 program. The NAIC code is what associates the two lists of companies.



Select an associated company from the list and click the OK button. The selected QCEvolution 2 Company and the NAIC code will be displayed in the list of available Transformation Station companies along with the IVANS Company Name.

IVANS Company Name	Code	QuickFile Company Name
Osborne Insurance / View	ABC	ABCO Insurance
Demo Insurance Company / System Inquiry	ASI	

You have the ability to associate one Transformation Station company with multiple companies in QCEvolution 2. Select one company from Transformation Station list and click the Find

Code button. From the QQEvolution 2 companies list, select multiple companies, by holding the Ctrl button down and clicking on each company in the list. When your selection process is completed, click the “OK” button. The names and NAIC codes of all the QQEvolution 2 companies selected will be displayed next to the selected IVANS Company Name.

IVANS Company Name	Code	QuickFile Company Name
Osborne Insurance / View	ABC	ABCO Insurance
Demo Insurance Company / System Inquiry	ILL; NHI	AIG - Illinois National; AIG - New Hampshire

Likewise, you can perform the same operation in reverse. You can associate multiple Transformation Station companies with a single QQEvolution 2 Company. Simply select a number of companies from Transformation Station list by holding down the Ctrl button down and clicking each company. When you have finished selecting, click the Find Code button and select a particular company from the QQEvolution 2 Company list. All Transformation Station companies will be associated with the chosen QQEvolution 2 Company.

IVANS Company Name	Code	QuickFile Company Name
Osborne Insurance / View	SEC	Bristol West Basic
Demo Insurance Company / System Inquiry	SEC	Bristol West Basic

## Update Wizard

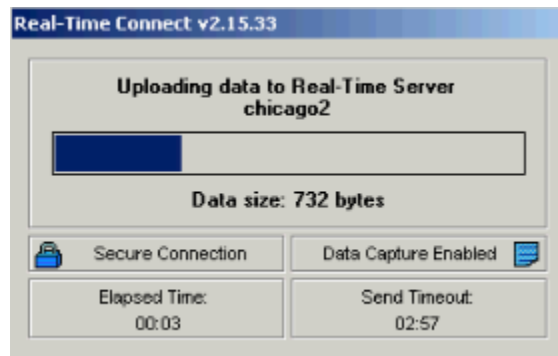
This feature allows you to add more Carriers to Real–Time Inquiry

First, you will need to e-mail to QQEvolution 2 the Carrier(s) you want to add. QQEvolution 2 will then forward that information to IVANS. Once confirmed, you will then have access to this feature of the program.

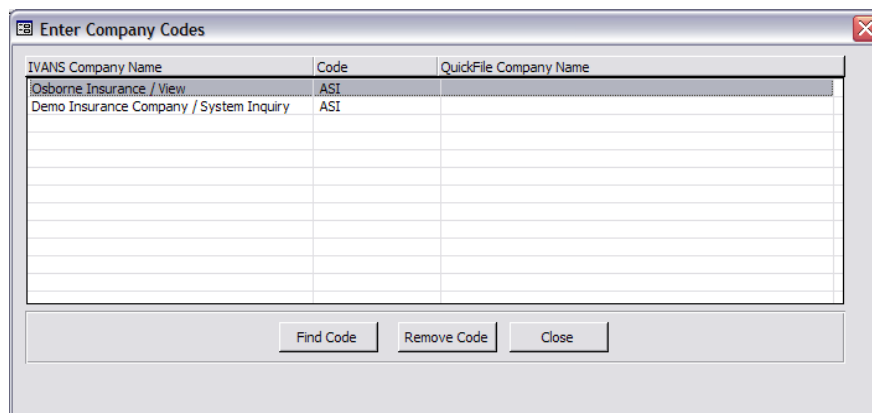
Upon entering the QQEvolution 2 program click on the Utilities Section from the Dashboard. In the main window of the Utilities Section, click on the tab entitled Real–Time Setup. Click on the Update Wizard button to enable those Carriers for Real–Time Inquiries.

PopUp Boxes	Defaults	Client Maintenance	Agency Info	<b>Real-Time Setup</b>
Logged in as User: amyprog      Security Level: Administrator      Agency Filter: AW1				
<input type="button" value="Initial Setup Wizard"/>		Click this button to initially setup IVANS Transformation Station for your agency. You will be prompted for a Password and Email Address. Only click this button once you have been setup with IVANS. In order to be setup with IVANS, you will need to email us a list of Carriers you wish to do Real-Time Inquires for. We will then send that information to IVANS and let you know when you are confirmed. Then you can click the button.		
<input type="button" value="Update Wizard"/>		This feature allows you to add more Carriers for Real-Time Inquiry. You will first need to email us the Carrier(s) you wish to add. We will then send that information to IVANS. Once confirmed, click this button to enable those Carriers for Real-Time Inquiries.		
<input type="button" value="Carrier Transaction Security"/>		Some carriers require a Username and Password (that is different from the one on the Initial Setup Wizard). Click this button to enter the Username and Password for each Carrier/Product. A Product is a type of inquiry such as Billing Inquiry or Policy Inquiry. The Carrier will supply you with the Username and Password and may change it from time to time.		
<b>Progressive Real-Time Inquiry Initial Setup and Configuration</b>				
<input type="button" value="Progressive Initial Setup"/>		Click this button to initially setup Progressive real-time inquiry services for your agency. You will be prompted for a user name and a password.		

After the Update Wizard is completed, a secure connection will be made between QREvolution 2 and Transformation Station, where the agent is identified and any additional Real-Time insurance companies and their associated transactions are downloaded. The Real-Time Connect window will appear indicating the progress of the download.



Once the initial setup of the additional carriers is completed, the Enter Company Codes window will appear and the list of additional available companies in Transformation Station will be displayed.



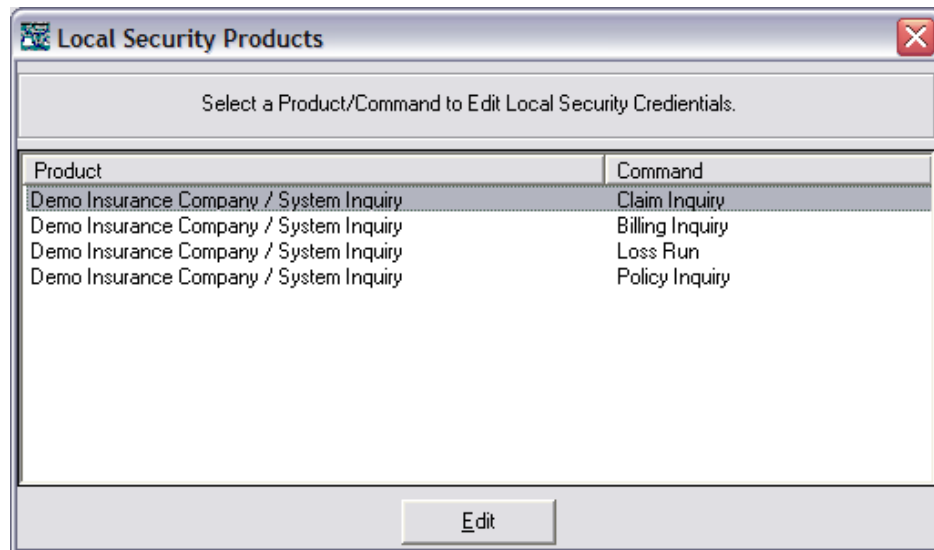
As with the initial Company Configuration, every company listed needs to be associated with the same company in the QQEvolution 2 program. Simply follow the same steps in the Company Configuration section to complete this process.

## Carrier Transaction Security

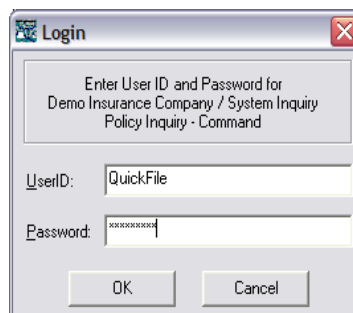
Some carriers in the industry require additional transaction security. These carriers require a unique Username and Password. (Note: This Username and Password is different from the one used on the Initial Setup Wizard and is the Username and Password provided to you by the each of carriers you work with).

Upon entering the QCEvolution 2 program click on the Utilities Section from the Dashboard. . In the main window of the Utilities Section, click on the tab entitled "Real-Time Setup". To setup additional transaction security click on the Carrier Transaction Security button. The

window entitled Local Security Products will appear and all carriers with available products that require additional transaction security setup will be displayed.



Select a product you wish to setup or change and click the Edit button. At this point the Login window will appear. Enter the Username and Password provided by the carrier as outlined above for the Carrier / Product and click OK. (Note: A Product is a type of Inquiry such as Billing Inquiry or Policy Inquiry.)



Close the Local Security Products screen when you are finished. This completes the Carrier Transaction Security setup.

## Section H — Utilities — Progressive® Real-Time Inquiry Initial Setup

Progressive Real-Time Inquiry is an Internet data exchange, providing a seamless connection between the QCEvolution 2 Agency Management System and Progressive Insurance. Progressive Real-Time Inquiry allows you to conduct policy inquiries, billing inquiries, claims inquiries, FAO Home Requests and Make Payments directly from within your QCEvolution 2 Agency Management System.

### Initial Setup

The initial setup and configuration for the Progressive Real-Time Inquiry performed in the Utilities Section of QCEvolution 2.

Upon entering the QCEvolution 2 program click on the Utilities Section from the Dashboard.

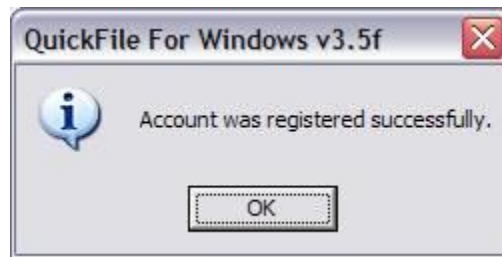


**Note:** You must be signed up for QCEvolution 2 Downloads and have the NAIC and Broker codes for all Progressive companies entered in the QCEvolution 2 Utilities section in order to activate this feature.

In the main window of the Utilities Section, click on the tab entitled "Real-Time Setup".

Popup Boxes	Defaults	Client Maintenance	Agency Info	<b>Real-Time Setup</b>
Logged in as User: amyprog		Security Level: Administrator		Agency Filter: AW1
<b>Initial Setup Wizard</b>		Click this button to initially setup IVANS Transformation Station for your agency. You will be prompted for a Password and Email Address. Only click this button once you have been setup with IVANS. In order to be setup with IVANS, you will need to email us a list of Carriers you wish to do Real-Time Inquires for. We will then send that information to IVANS and let you know when you are confirmed. Then you can click the button.		
<b>Update Wizard</b>		This feature allows you to add more Carriers for Real-Time Inquiry. You will first need to email us the Carrier(s) you wish to add. We will then send that information to IVANS. Once confirmed, click this button to enable those Carriers for Real-Time Inquiries.		
<b>Carrier Transaction Security</b>		Some carriers require a Username and Password (that is different from the one on the Initial Setup Wizard). Click this button to enter the Username and Password for each Carrier/Product. A Product is a type of inquiry such as Billing Inquiry or Policy Inquiry. The Carrier will supply you with the Username and Password and may change it from time to time.		
<b>Progressive Real-Time Inquiry Initial Setup and Configuration</b>				
<b>Progressive Initial Setup</b>		Click this button to initially setup Progressive real-time inquiry services for your agency. You will be prompted for a user name and a password.		

Click on Progressive Initial Setup button. This starts the initial setup for Progressive Real-Time Inquiry for your agency. The first time you use this utility, you are required to enter your [www.foragentsonly.com](http://www.foragentsonly.com) (FAO) user ID and password. Once you have completed the required information click OK. You are only required to do this setup once.



The setup for Progressive Real-Time Inquiry is now complete.

# Chapter 3 QCEvolution 2 Dashboard

## About the Dashboard

The dashboard contains valuable information to help you run your office on a daily basis. This information is outlined below.

## Dashboard Overview

1. Search – Here you can type in the name of a client and click the Search button to be taken to that client's record.
2. Memo Reminders – When you click on "View" you will see the memo reminders for today or any old ones that have not be dismissed which you have set on clients.
3. Help and Information – These links will take you to that area on our Web site. An example is if you click on Newsletters, it will take you to the web page on our site which has all of the newsletters listed.
4. Recent Clients – Up to the last 10 clients you have accessed are listed here. You can select a client from here and you will be taken to their client record.
5. To Do List – Any "To Do" items you have set up in the QCEvolution 2 Assistant will be displayed here. It will automatically default to active items but you can filter them by Active, Pending, Next 7 Days, or Overdue.
6. Policies Expiring/Intent to Cancel – Any client with an expiration date or "intent to cancel" date set on a policy within the range of days you choose will be displayed here.
7. Clients X-Dates – Clients and contacts that have X-Dates set on them within the range of days you choose will be displayed also with any comments you entered on the X-Date. When an "Other Contacts" X-Date is shown, the comment listed will be the client they are associated with.
  - a. **Note:** Policies Expiring/Intent to Cancel and Clients X-Dates can be displayed by Agency. However, to view a different agency's information you must have permission to that agency.
8. Messages – Messages from QCSolutions to agencies are displayed here. These could be messages to all agencies such as letting you know an update is available or a message for an individual agency pertaining to their account. Some of the messages can only be accessed by administrators.

- a. You can view any message you have received from here without opening the QQEvolution 2 Assistant. It displays the most recent messages but to view them all click "View All." You have the ability to read, reply, delete, and create messages. You have the option to include read messages if you wish and also to mark messages which have been already read as unread. If the message you are viewing happens to be an ongoing message you can view the history of the message.
9. The left side toolbar displays buttons to take you to the different areas of the program. On the bottom left, your agency name is shown. The **Batch Scanning** button when selected does allow you to mass scan directly from here instead of doing it from the "Search" screen.
10. Listed on the top right is the username who is logged into the program. When you are done in the program and wish to close it select the **Log Off** button. This will take you to the login screen where you can then close the program or log back in if needed.

**QQEVOLUTION™**

Refresh Dashboard Search Use QuickSearch Log Off

**Clients**

**To Do List** Active Agency Filter: All

In Progress Memo Reminder for 0, Delete Me: Here is my new memo 07/12/2011

In Progress Here is another task 07/12/2011

**Policies Expiring/Intent to Cancel** Past 3 days and Next 7 days

Policy	Auto	Expires on
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdlf, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdlf, Dasdafdg	Auto (1111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expired on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Memo Reminders**

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote - QQ Download - Renewal Quote - QQ Download - Renewal Quote -

**View All**

**Help and Information**

Instant Support

Training Webinars

Newsletters

Self Service Portal

What's New

**Recent Clients**

Cataldo, Cory

O, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

**Messages**

Date	Time	From	To	Subject
8/30/2011	08:59 AM	bincy_ladmin1	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	bincy_dev	Appointment created by bincy_dev

**View All**

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

# Chapter 4 – Clients

The Clients section is used to view and edit information regarding Clients and their policies (which includes pending and active policies), memos, bills, images, letters and forms. Click the Clients from the QREvolution 2 Dashboard to retrieve active clients. When you first enter the Client section, you will always be in the Search Screen, which displays the Active Client directory. The search screen displays the entire list of active clients, a summary of highlighted client's policies and the number of active clients.

QREVOLUTION™

Refresh Dashboard

Log Off

Clients

Prospects

Mail Room

Reports

Rolodex

QuickWord

Forms

Videos

Carrier Download

Utilities

Batch Scanning

QQ Evolution Assistant

QQ Evolution Update

QQ WebRater

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

To Do List

Active

Agency Filter: All

In Progress

Memo Reminder for 0, Delete Me: Here is my new memo

07/12/2011

In Progress

Here is another task

07/12/2011

Policies Expiring/Intent to Cancel

Past 3 days and Next 7 days

~aw2policy, ~aw2only

Dwelling Fire (Pending)

Expires on 9/10/2011

~aw3policy, ~aw3only

Auto (Pending)

Expires on 9/10/2011

Aaaaaa, Hhhhhhhhhhh

Auto (Pending)

Expires on 9/8/2011

Aasdfd, Dasdaldg

Auto (Pending)

Expires on 9/10/2011

Aasdfd, Dasdaldg

Auto (1111)

Expires on 9/10/2011

Aku, Aku

Auto (QQ0002)

Expires on 9/5/2011

Ayala, Cesar

Auto (2222)

Expires on 9/10/2011

Ayala, Cesar

Auto (2222)

Expires on 9/10/2011

Clients

X-Date

Comments

Past 3 days and Next 7 days

Memo Reminders

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

View All

Help and Information

Instant Support

Training Webinars

Newsletters

Self Service Portal

What's New

f y t in

Recent Clients

Cataldo, Cory

Q, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

## Using the Clients Section

The QREvolution 2 Icon Ribbon appears on every screen within the Clients section (as well as the Prospects section). Each icon allows access to all of the QREvolution 2 client features and functions:

80

Clients Button



Click the Question Mark on the upper right side of your screen for help with any of these topics.

**Make A Suggestion:** The login box for the QQSolutions Self Service Web Portal—a convenient, online 24/7 “one-stop shop” for information, inquiries and idea sharing will appear. The login information for the portal is the User ID and Password you setup when registering QQEvolution 2 on our Web site. We strongly encourage you to take a few minutes to register and submit your enhancement requests. **WE WANT YOUR BRIGHT IDEAS!**

**What’s New:** Displays a list of all of the latest changes to the software. This list is updated every time you update from the web, and will open up immediately after you update and enter QQEvolution 2.

**View Manual:** Displays the QQEvolution 2 help manual in PDF format.

**QuickHelp:** Displays a quick reference of various function keys.

## Finding an Existing Client

When you first enter the Clients Section, you will be presented with the Search Screen. This screen will be blank. You must click the Browse button or search for a client in order for the screen to populate.

You may use the Radio Buttons at the top of the screen to view:

- Active Clients
- Inactive Clients
- Prospects
- All Clients

**Client: Air Plus**

Client Status: ☒ Active Clients ☐ Inactive Clients ☐ Prospects ☐ All Clients Agency Filter: AW2

Search By: Insured Search Mode: Starts with Type in the Insured Name

Search Browse Linked Accounts

Browsing Clients Record [ 1 ] Displaying 1-20 of 97 Clients Matching Search Criteria

Insured	C	Phone Number	Street Address	Client #	Agency
Air Plus	C	800		chip9298QD	AW2
Alessi, Charles		(111) 111-1111	123 N QQ Street	chip1586QD	AW2
ALFRED, Willie		(954) 345-3453	34 Sdf	AAA7302888	AW2
Allen, Beth		954		chip10968QD	AW2
Andre, Cindy		(305) 222-6565	2514 Main Ave	chip10588QD	AW2
Apple, Bob		954		chip10768QD	AW2
Arden, Devon		800		chip9064QD	AW2
AW2, MICKEY		(954) -		chip7314QD	AW2
AW2, MICKEY		(954) -		chip7315QD	AW2
AW2, MICKEY		(954) -		chip7316QD	AW2
Ayala, Juan		(954) 999-9999	101 Street	1237786zzzzz	AW2
Bailey, Jack			258 NW 87th Ave	chip9967QD	AW2
Barber, Judy		954		chip10928QD	AW2
Bates, Leslie		800		chip10587QD	AW2
Bell, James		954		chip7565QD	AW2
Berry Harvest	C		65 N 90th St	chip9969QD	AW2
Burket, Gabe				chip10398QD	AW2
Charrie, Brenda		(901) 465-8789	123 Dallas Dr	chip10589QD	AW2
Collins, Jet		954		chip10922QD	AW2
Construction LLC	C		9930 Cord St NE	chip9381QD	AW2

Policies for Air Plus

Effective	Binder Date	Line of Business	Coverage	MGA / Broker	Company	Binder Num	Policy Num	Description	Status	Premium
04/07/2010	04/07/2010	Auto	Comp/Coll		Deerbrook Insurance	QD77chip	4645646464		A	\$6,000.00

To find a client, begin typing the client's name (last name, first name) or company name in the input box titled **Type in Insured Name**.

If you have more than one person with the same last name, you should put a comma after the last name then enter a space and then type in the first name, for example, Smith, John or Smith, Jeff. Remember also that if you are searching by insured that a commercial account name is the insured so if you search by the last name you will only show those personal lines clients that match the criteria for that search. Then, hit the Enter key on your keyboard, or click the Search button. To bring up your full list of clients again, use the Browse button.



**Important Note: Users with multiple offices can sort clients by their office locations by using the Agency Filter. You must have permission to an office in order to view the clients.**

You can also use the **Search Mode**. This will allow you to search for clients based on "Starts with," "Contains," and "Ends With" regarding what you have typed in to search for.

Select the client by double-clicking the client's name or clicking the Clients icon. You can click on any of the icons in the icon bar.

Below the client names are the highlighted client's policies. You may view the policy by double-clicking it or by clicking the Policies Screen.

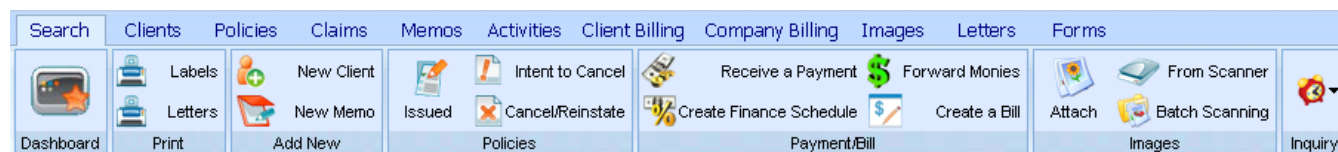
By selecting a Search by option, you can search for clients/policies by the following criteria (the default method is Insured):

- Additional Drivers
- Address
- Binder Date
- Binder Number
- City
- Client Number
- Driver License Number
- E-mail Address
- Finance Contract Number
- First Name
- Garage/Property Address
- Insured
- Ins Co
- Last and First name
- Phone Numbers
- Policy Number
- Receipt Number
- Social Security Number
- Source
- Spouse First or Last Name
- SS# in HO app
- Zip Code
- MGA/Broker
- Other Contacts

## Working in an Existing Clients File

### Search Screen Ribbon

There are multiple functions that you can perform directly from the Search Screen without the need to actually retrieve the client's file. In order to use these functions, you must first locate the client in the directory. Click the client's name once to highlight it. Any of the following actions will apply to the selected client only.

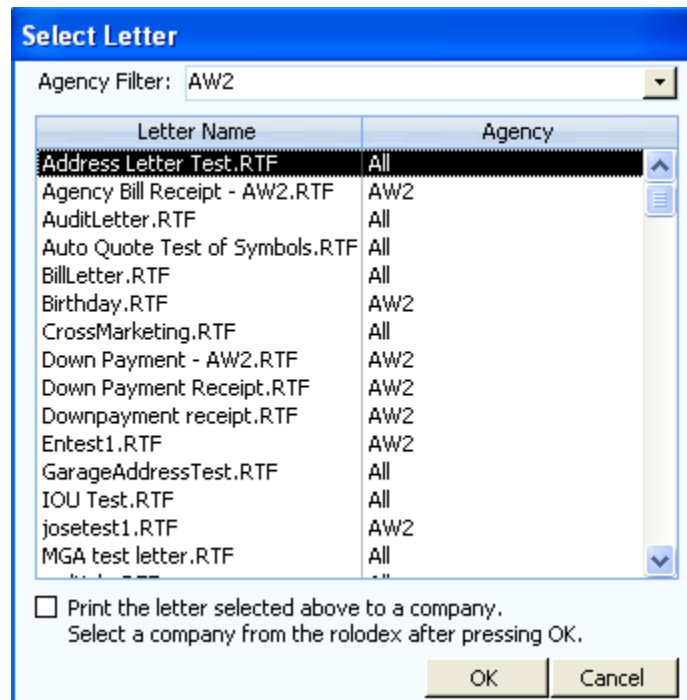


### Print Function Button

Prints letters created in QuickWord to the selected client. Letters can be sent for any reason (e.g., renewal, cancellation, request for information, etc.) assuming that you have an existing letter created for that reason.

#### Print a Letter

1. Click Letters in Print area on Ribbon.



2. Select a letter from the list. You can create or customize these letters in QuickWord.
3. You may check the Print the Letter selected above to a Company box if you wish to print the letter to a company in the QQRolodex instead of the client.
4. If the client has multiple policies, you will be prompted to select the policy the letter applies to.
5. To fill in any additional information before sending the letter (if necessary), you must first set up a letter in QuickWord using the **{Type Info Here}** or **{Preview}** field.
6. QQEvolution 2 will then display the letter in Preview mode. Click the Print this Letter button to print a copy of the letter. A memo box will open where you can enter a memo and a reminder date and/or CSR. Click OK. Select the printer you wish to use and the number of copies to print. Or, instead of selecting a printer, you may select E-mail via Outlook to e-mail this letter to your client.
7. The agency name, address, phone number or logo will automatically be included in the letter, along with the client name, address and the date.
8. An automatic memo noting that the letter has been sent is created in the client's memo screen. Click the Memo icon to view and/or add more details to the memo.
9. Click the Close button to continue.

10. The letter will be saved in the client's Letters screen with the date and time noted.

If you click the **Close** button without printing the letter, QCEvolution 2 will prompt you to print it later, placing it in a print queue. You can print these unprinted letters from the Mailroom section on the Dashboard by clicking the Print Unprinted Letters button. If you do not answer Yes to print it later, the letter will be lost.

## Print a Label

QCEvolution 2 can print mailing labels in multiple formats that you specify.

QCEvolution 2 was designed to work with Avery 5160/8160 standard sheet-fed labels (purchased separately).

1. Click Labels in Print area on Ribbon.
2. Select the appropriate policy from the Select Policy window if client has multiple policies, and click OK.

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

3. Select label style from Label Style screen.

☒ Put Label in queue for later  
☐ Print Labels Now

☒ Last Name, First  
☐ First Name, Last  
☐ Insured

Example  
Smith, Jon  
100 NE 23 Street  
Suite 200  
Miami, FL 33123

Date type to be printed: No Date

Instead of address, print: ☐ Insurance Company ☐ Phone # ☐ Policy Description  
☐ Policy Number ☐ File #

4. Decide if you want to print the labels now or later.
5. Select the naming format you desire.
6. Select a Date type.
7. If you decide to print the labels now, use the layout of your sheet of labels as a guide and select the number of columns and rows to begin printing.
  - You will be prompted to enter the row and column specifying where on your sheet of labels you wish to print. This methodology allows you to conserve labels by printing to a specific label location or to a single label.
  - For example, if you have a sheet of labels with three rows and three columns and you want to print to the third label on the second row then you would enter a 2 for the row and a 3 for the column.
  - If you decide to put the labels In Queue for later, you can print the labels at any time by entering the Mail Room section from the QREvolution 2 Dashboard. Once in the Mail Room, click the Print UNPRINTED Labels button.
  - If you have decided to Print Labels Now, you have the option to use your Dymo label writer if you have one. Check the box labeled Use Dymo Printer.
8. Click the OK button to continue.



## **Add New Function Button**

### **Add a Client**

Selecting this will take you to the Client screen where you can enter a new client and their information.

### **Add a Memo**

An automatic memo is created when certain events occur (e.g., creating a bill, printing a letter, renewing a policy, etc.) and will be stored under the Activities Screen section of the program. These are system-generated memos. You can also manually create a memo to note any file activity. These memos will be stored under the Memo icon section of the program.

1. Click New Memo on the Add New area on the Ribbon.

2. Today's date is automatically entered. You can type in a memo, a Reminder Date if desired and the name of the CSR that entered the memo. You may also select the policy that the memo applies to from the dropdown list.
3. Click OK when finished to post the memo to the client's Memo screen.
4. Placing a check next to Add to To-Do List will add the memo to your To-Do List.

Enter commonly typed memos where indicated. Once entered, you can select from this list for fast memo entry.

To view manually created memo(s) retrieve the client from the Search Screen and click the Memo icon. To review a system generated memo(s) retrieve the client from the Search Screen and click the Activities Screen.

If you post a Reminder Date in a memo, and today is the day you entered the memo, then the next time you view the QCEvolution 2 Dashboard, the Memo Reminders section will state you have Reminders. You can print a list of your reminders by opening the Memo Reminder and selecting Print.



## Policies Function Button

### Issued

When you receive the policy, click the Policy Issued button. This will take you to the Policy Screen where you will issue the policy. For more information on issuing a policy, please visit the Policy Screen section.

### Intent to Cancel

When an agent receives the intent to cancel notice, the agent can flag a policy for cancellation at a later time. The policy will not cancel automatically. After flagging a client for cancellation, their policy screen will have a new field, Cancel On, and the date the policy is scheduled to be cancelled will be highlighted red.

1. Click Intent to Cancel in the Policies area on the Ribbon.
2. Select the policy that you intend to cancel (if the client has more than one policy).

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

OK Cancel

Intent To Cancel	
Date	05/01/10
Memo	Intent To Cancel on 05/01/10
Reminder	04/28/10
CSR	Chris
Intent To Cancel Letter	Don't print a letter
Lets the system know the date the policy WILL BE cancelled. A report can be run based on this date. The policy WILL NOT cancel automatically.	
OK	I changed my mind

3. Enter the date the policy WILL BE cancelled.
4. Enter a memo describing the reason why the policy will be cancelled, a reminder date and the CSR who entered the cancellation.
5. Select the Intent to Cancel Letter to send to the client (if desired).
6. You may click the “I changed my mind” button if necessary.
7. Click OK and the selected letter will be automatically printed.

You can run a custom report based on the Intent to Cancel date.

To remove the Intent to Cancel, enter the client's Policy screen, highlight the date in the red field and hit the Delete or Backspace key on your keyboard.

## Cancel/Reinstate

Cancels or reinstates a policy. If a policy is active, you will be prompted for the cancellation date. Select Pro Rate or Short Rate (based on the rules set by the insurance company) or Flat Cancel. Pro Rate and Short Rate will calculate unearned premium commission. You can run reports that will contain cancelled client policies. If the policy is cancelled, you will be prompted to reinstate the policy.

1. Click on Cancel/Reinstate in the Policies area of the Ribbon.
2. Select Policy for which you are canceling or reinstating (if the client has more than one policy).

Select Policy						
Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired

OK Cancel

**Cancel Policy**

Cancel Date07/16/09Pro/Short/FlatPro Rate

MemoPolicy Cancelled

Reminder

CSRBtest1

Cancellation LetterDon't print a letter

☐ Print Acord Cancellation Request

☐ Auto-Forward Unearned Commission via EFT

Cancel PolicyDon't Cancel Policy

If all but one of the client's policies have expired and if that one policy becomes cancelled, the client's status becomes Inactive and is transferred to the Inactive section automatically.



## Payment/Bill Function Button

Click in the Payment/Bill section to Receive a Payment, Create a Bill, Forward Monies, or Create a Finance Schedule. All transactions will be posted to the client's Memo and Billing screens and a receipt will be printed.

### Receive a Payment

1. Click on Receive a Payment in the Payment/Bill area on the Ribbon.
2. Select the appropriate policy from the Select Policy window if client has multiple policies, and click **OK**.

Select Policy						
Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

OK Cancel

**Enter Payment Info**

Billing Type  
☒ Client Bill ☐ Company Bill

Transaction Date 04/08/10

Payment Info

Amount \$100.00 Agency Fee \$5.00  
Description Monthly Payment Forward Date  
Payment Type Check To Agency Check # 5624 ☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount Agency Fee  
Payment Type Cash Check #

☒ Create a Debit and Credit for the amount above in the billing screen Receipt None

Add the following to the memo section...

Memo Payment Received: \$100.00 - Agency Fee:\$5.00 Reminder Date CSR 0adi1

OK Real-Time Inquiry: Make Payment Cancel

3. In the Payment Info screen, enter the payment amount, the agency fee (if any) and a description. Descriptions can be created in the **Utilities** section under the **Popup Boxes** tab.
4. Enter a forward date (if applicable), select a payment type and enter the **check #** if paid by check.
5. If the payment is split (e.g., part cash, part check), then enter the second payment type information.
6. Enter the date that the payment was received.
7. Enter a memo if desired, a reminder date and select the CSR who is entering the payment information.
8. Make sure to check the box in the middle of the Payment Screen that says “**Create a Debit and Credit for the amount above in the billing screen**”
9. Click OK and a receipt will be printed automatically. If you have chosen to print a receipt, your default receipt will show up here (you can opt not to print a receipt).
10. Automatic memos noting that the receipt letter has been printed and that a payment has been received are created in the client's Memo screen. Click the Memo icon to view and/or add more details to the memo.

11. An entry is also automatically created in the client's billing screen. Click the Billing icon to view this information.

When receiving payments, you can attach the payment to an existing entry. For example, a client has a debit entry (amount) for an additional premium. The client is now paying that additional premium, which would be a credit. Attaching this payment amount to the original debit for the additional premium will create a single entry in the billing screen to reflect this transaction instead of two. If you choose not to attach to an existing entry, you will have an option to create a debit AND credit entry in the amount of the payment. If this option is not checked, only a credit will be created on the billing screen.

### Create a Bill

1. In the Payment/Bill area, select Create a Bill.
2. Select Policy for which you are creating the bill (if the client has more than one policy).

Select Policy						
Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

OK Cancel

**Enter Bill Info**

Billing Type  
☒ Client Bill ☐ Company Bill

Transaction Date 04/08/10

Bill Info  
 Amount \$50.00  
 Description Monthly Payment  
 Due Date 05/01/10

Bill Receipt None

☐ Print the letter selected above to a company. Select a company from the rolodex after pressing OK.

Add the following to the memo section...

Memo Bill Created: \$50.00

Reminder Date CSR bob

OK Real-Time Inquiry: Make Payment Cancel

3. Enter the bill amount, description and due date.
4. Select the desired Bill Receipt to print.
5. If desired, you may print the letter to a company in the QQRolodex by clicking the Print the letter selected above to a company checkbox.
6. To create a Debit and Credit for the bill amount check the Create a Debit and Credit... checkbox.
7. You may enter a memo, reminder date and CSR if desired.
8. Click OK when finished. The bill will be entered on the client's billing screen, and the selected receipt will be printed.

## Forward Monies

This will forward monies to the insurance companies that were received, such as an early renewal payment within the program.

1. In the Payment/Bill area select Forward Monies.
2. Select Policy for which you are forwarding monies (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired

☐ Include Endorsements

OK Cancel

**Enter Payment Info**

Transaction Date 04/08/10

**Double-click entry below to forward monies.**

Date	Description	Debit	Credit
09/17/09	Cancellation Fees	\$0.00	\$100.00
01/04/07	Down Payment	\$156.00	\$276.00

OK Real-Time Inquiry: Make Payment Cancel

**Enter Payment Info**

Transaction Date

**Payment Info**

Amount  Agency Fee

Description  Forward Date

Payment Type  Check #

☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount  Agency Fee

Payment Type  Check #

Add the following to the memo section...

Memo

Reminder Date  CSR

OK Real-Time Inquiry: Make Payment Cancel

## Create a Finance Schedule

This option will allow you to set up a finance schedule for the client's monthly payments.

1. In the Payment/Bill area select Create Finance Schedule.
2. Select Policy for which you are creating a finance schedule (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

☐ Include Endorsements

OK Cancel

**Enter Financing Info**

Billing Type  
☒ Client Bill ☐ Company Bill

Transaction Date 04/08/10

Monthly Amount \$78.25  
Num Payments 10  
1st Due Date 05/01/10

CSR bob

☐ Create Financing Schedule in the Billing Screen

OK Real-Time Inquiry: Make Payment Cancel

3. When creating a schedule, you will enter the payment amount, number of payments and first due date.
4. Check off the box that says Create Financing Schedule in Billing Screen. A debit amount will be created for the total amount of all the payments. When a client makes a monthly payment, you will be able to select which month it applies to from the finance schedule. This monthly amount will be deducted from the total payment amount and the number of remaining payments will be adjusted accordingly.
5. If you do not wish to create an actual finance schedule but keep track of the client's financing do not check Create Financing Schedule. The schedule's information will be placed on the Policy screen but will not create the schedule in the billing area.



## Images Function Button

QCEvolution 2 provides two methods of scanning Images: directly From Scanner and Batch Scanning. You can also Attach images already stored on your computer.

### From Scanner

Scan images directly to your client's record from a scanner. Enter a description of the image and then select the appropriate policy and the number of pages to scan. You should always select Force Black & White as well as selecting it in your scanner's interface. If you are using a flatbed scanner, you can check to be prompt for pages if doing multiple pages.

**Image Info**

Description:

Policy:  ☒

CSR:

Number of pages:

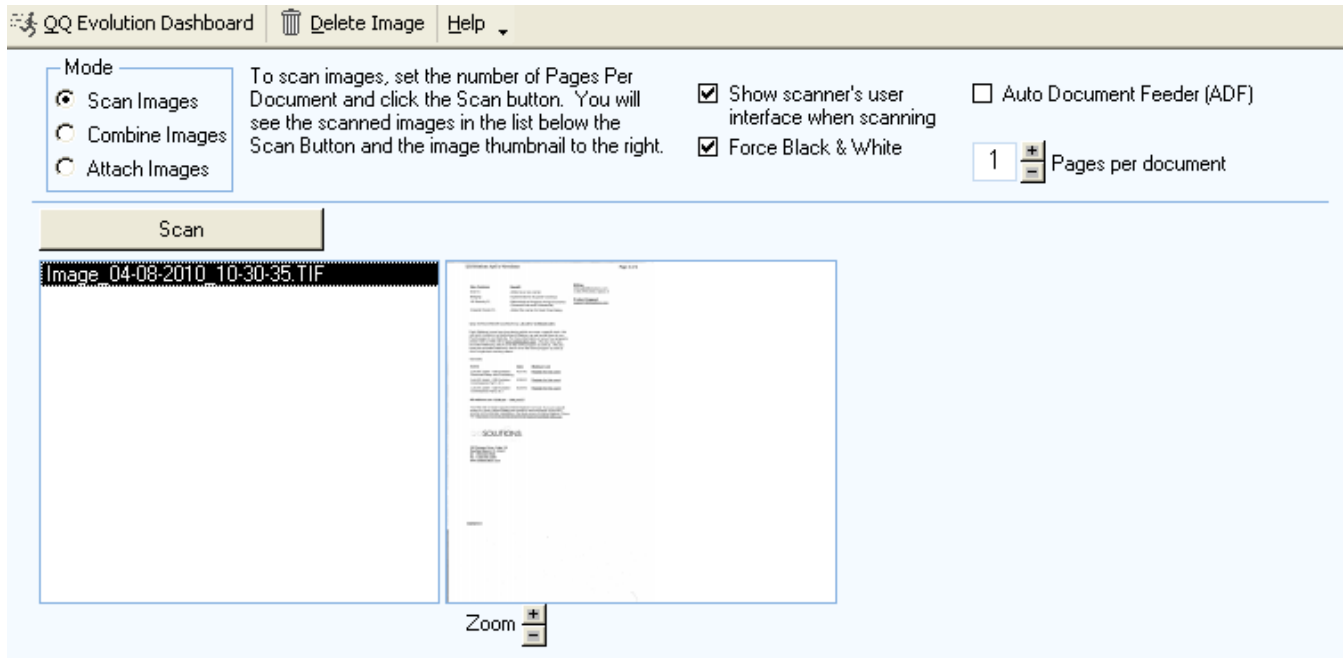
☐ Prompt for pages 2, 3, etc. when scanning (No Sheetfeeder)

☐ Separate Pages

☒ Force Black & White

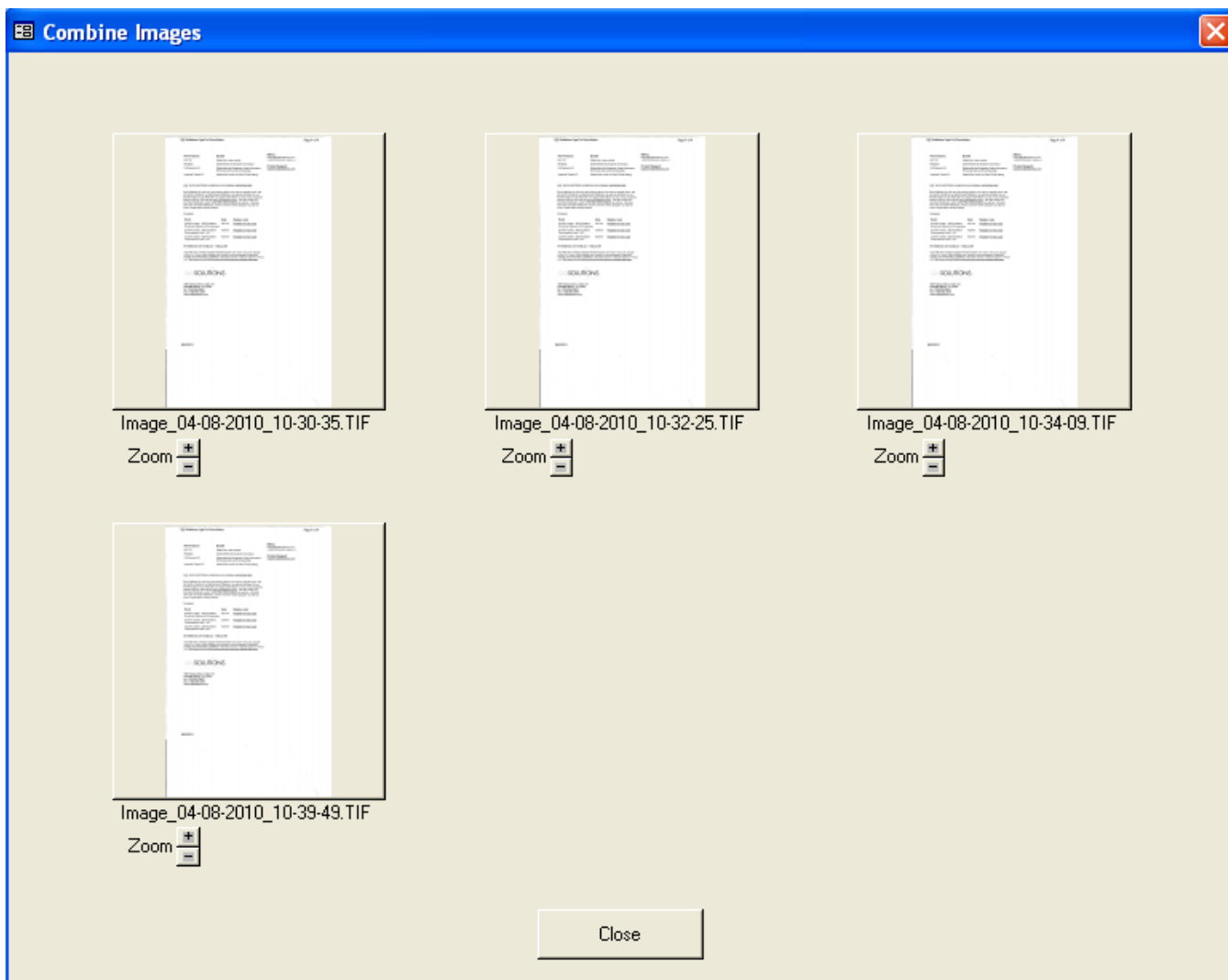
### Batch Scanning

Batch scanning is a quicker way to scan your documents than scanning into each client directly. It involves two steps, scanning images and attaching images. By separating the steps you should be able to process documents more quickly.



**Scan Images Mode:** Select the number of pages for your first document and click the Scan button. Repeat this step for all the documents you want to scan.

**Combine Images Mode:** Make sure that your scanned images are saved as a .TIF file. This file format will allow you to stack and un-stack images before attaching the image to the client file. To stack an image click on the image with your mouse and then drag and drop the image to the other image on this screen you will see a message that will ask you if you want to stack the images. If you click on “Yes”, the image will be stacked and you can now attach that image to the client file.



**Attach Images Mode:** Click the Attach Images radio button to retrieve a list of your clients. While the first image is selected, search for the client to attach the image to, and double-click on the client. The image will be attached to the client and removed from the list of recently scanned images. Repeat until all images have been attached.

**Mode**

☐ Scan Images

☐ Combine Images

☒ Attach Images


To attach images, select (highlight) the image in the list by clicking, then double click the client below after searching. The image will then be attached to the client, and the image will be removed from the list.


Image\_04-08-2010\_10-30-35.TIF

Image\_04-08-2010\_10-32-25.TIF

Image\_04-08-2010\_10-34-09.TIF

Image\_04-08-2010\_10-39-49.TIF



Zoom 

Agency Filter: AW2

Type Insured Name here to populate list: doe

**To attach, Double click on the client while image name is highlighted**

Insured	Home Phone	Street Address	File #
Doe, Jane	800		chip7582QI
Doe, John	(972) -		xxx7378Y
Doe, John	() -		a7354
Doe, John	954 -		chip 7348Q
Doe, John	954 -		chip 7361Q

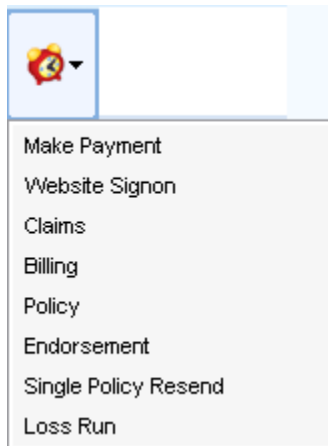
## Attach

Attach images that are stored on your hard drive or other removable media. QREvolution 2 displays all image files found in the \ImageImport subdirectory of the QuickFL, QuickTX, or QuickGA directory. You also have the option to browse your computer for images.



## Inquiry Function Button

### Real-Time Policy Inquiry via Transformation Station



Transformation Station allows you to process insurance company policy transactions, and retrieve insurance company account information, directly from within your QCEvolution 2 Agency Management System with the click of a mouse button, at exactly the time you need it.



**Note: The initial setup and configuration for the Transformation Station must be performed in the Utilities Section of QCEvolution 2.**

Real-Time Policy Inquiry will enable you to retrieve selected policy information through a Real-Time Interface. Real-Time Policy Inquiry will allow you to get the Policy information with one click of the mouse from QCEvolution 2 with no long wait.

You are able to view your Real-Time Inquiry from four different screens in the QCEvolution 2 program. You will be able to source this feature from the Search Screen, Client Screen, Policy Screen and the Billing Screens. When in any of these screens just look for the Inquiry button on the Ribbon or Toolbar.

For Example: From the QCEvolution 2 Dashboard click on the Clients. You will now be in the Search Screen. Search for a particular active client and highlight that individual. Select a particular policy and highlight it. Locate on the Ribbon or Toolbar the Real-Time “Inquiry” button. Choose “**Policy Inquiry**” from the drop down menu. After the **Policy Inquiry** button has been clicked, a secure connection will be made with Transformation Station. The request will be sent to the carrier and once processed the data will be returned back to you and displayed.



**Note: The exact same result is achieved in the Client Screen, Policy Screen and Billing Screens for a particular client.**

### **Real-Time Billing Inquiry via Transformation Station**

Real-Time Billing Inquiry will enable you to retrieve selected billing information through a Real-Time Interface. Real-Time Billing Inquiry will allow you to get the Billing information with one click of the mouse from QCEvolution 2 with no long wait.

You are able to view your Real-Time Inquiry from four different screens in the QCEvolution 2 program. You will be able to source this feature from the Search Screen, Client Screen, Policy Screen and the Billing Screens. When in any of these screens just look for the Inquiry button on the Ribbon or Toolbar.

For Example: From the QCEvolution 2 Dashboard click on the Clients. You will now be in the Search Screen. Search for a particular active client and highlight that individual. Select a particular policy and highlight it. Locate on the Ribbon or Toolbar the Real-Time “Inquiry” button. Choose “**Billing Inquiry**” from the drop down menu. After the **Billing Inquiry** button has been clicked, a secure connection will be made with Transformation Station. The request will be sent to the carrier and once processed the data will be returned back to you and displayed.

### **Real – Time Endorsement Bridge**

The Endorsement Bridge allows you to jump directly from QQEvolution 2 to the client's endorsement on the Insurance Company's Web site. Using this feature will save you time when looking to see if the endorsement is active.



**Note:** The exact same result is achieved in the Client Screen, Policy Screen and Billing Screens for a particular client.

## Real – Time Loss Run Report

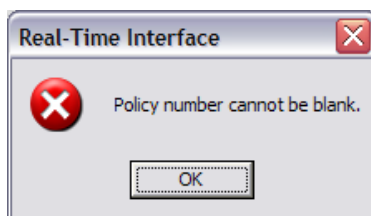
The Real – Time Loss Run report allows you to see the policyholder loss data for a specific period that the carrier makes available through Transformation Station. This new feature is available through QQEvolution 2.

## Single Policy Resend

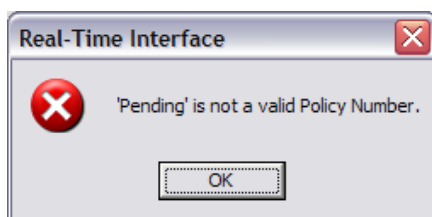
Use the single policy resend button to retrieve one policy transaction from your existing mailbox. You can use this if you cannot find the original transaction in your QQDownload program or it was incorrectly processed. This feature will log you into your IVANS ECS Mailbox on line and show you all of the transactions sent to your mailbox within the past 60 days. Select the policy that you wish to resend and reprocess the transaction in QQEvolution 2.

### There are a number of important things to note.

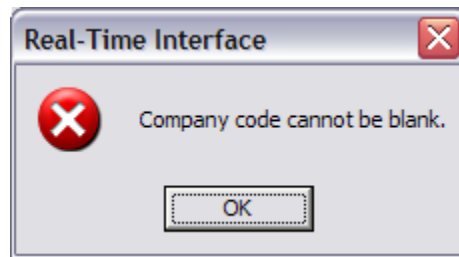
The Policy must have a policy number. If the Policy does not have a policy number the window entitled Real–Time Interface will appear and the message “Policy number cannot be blank” will be displayed and the transaction will be terminated.



If the policy status is “Pending” the window entitled Real–Time Interface will appear and the message “Pending is not a valid Policy Number” will be displayed and the transaction will be terminated.



The Insurance company name must be present on the Policy Screen. If the company is not present, the window entitled Real-Time Interface will appear and the message "Company name cannot be blank" will be displayed and the transaction will be terminated.



The Selected Policy must have valid Effective, Expiration and Binder Dates. If the dates in question are not valid the appropriate windows entitled Real-Time Interface will appear, the appropriate messages will be displayed, and the transaction will be terminated.

It is required that a valid NAIC Code be entered in the QCEvolution 2 Utilities screen for each Insurance company. If the NAIC Code is not present, the window entitled Real-Time Interface will appear, the message "NAIC code cannot be blank" will be displayed, and the transaction will be terminated.

**Commissions**

To set the commissions in this section, select (by clicking) the Line and the Coverage for the commissions you want to enter. Click a question mark for more information.

Agency Filter: All View Company address in Rolodex

Company / Code: Acuity

Broker ID: NAIC Code 14184

Line	Coverage
Agri Sched/Unsched	All
Agriculture Liab	15-Year Term
Agriculture Package	30-Year Term
Agriculture Property	Comp
<b>Auto</b>	Comp/Coll
Boiler And Machinery	Crime
Bop Liability	Dwelling Fire

**Premium Sent**

☐ Net Premium is sent to company minus the commission.

☒ Gross Premium is sent to company including commission. Agent receives commission from company at a later date in one payment.

☐ Monthly Premium is sent to company including commission. Agent receives commission from company at a later date in monthly payments.

**Tiers \***

Commissions	Annual	6 Month	3 Month	Monthly
New Commission	0.00%	0.00%	0.00%	0.00%
Renewal Commission	0.00%	0.00%	0.00%	0.00%
New Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00
Renewal Policy Fee	\$0.00	\$0.00	\$0.00	\$0.00

☐ Policy fee is fully earned on cancel?

\* Tiers Apply Only to the Commission Percentages

Add Edit Delete Company Fee Config OK Cancel

## Using Progressive Real-Time Inquiry

Progressive Real-Time Inquiry is an Internet data exchange, providing a seamless connection between the QCEvolution 2 Agency Management System and Progressive Insurance. Progressive Real-Time Inquiry allows you to conduct policy inquiries, billing inquiries, claims inquiries, FAO Home Requests and Make Payments directly from within your QCEvolution 2 Agency Management System.



**Note:** Setup and configuration for the Progressive Real-Time Inquiry is performed in the Utilities Section, you must be signed up for QCEvolution 2 Downloads and have the NAIC and Broker codes for all Progressive companies entered in the QCEvolution 2 Utilities section in order to activate this feature.

Once the setup is complete click on the Inquiry button and you will have five choices for Progressive Real-Time Inquiry. This feature is available in the Search, Client, Policies, Client and Company Billing screens.

- **Policy Inquiry:** This feature allows you to view detailed information on the client's Progressive policy.
- **Billing Inquiry:** This feature allows you to view detailed billing information on the client's Progressive policy.
- **Claims Inquiry:** This feature allows you to view detailed claims information on the client's Progressive policy.
- **FAO Home Request:** This feature takes you directly to the Progressive Web site without having to log in.
- **Make Payments:** This feature allows you to make payments directly to the client's Progressive policy.



## Linked Accounts

Also available on the Search screen is Linked Accounts. This will allow you to link one client to another for ease of access. Multiple clients can be linked to each other.

### How to link client account

1. You will first look for and select the client you wish to link another client to.
2. Towards the upper right of the screen click the **Linked Accounts** button.

3. In the box that opens select **Show Search**.
4. You can then browse for the client you wish to link to the client you have currently selected.
5. Select the client to be linked and click the **Add to Linked** button. This will move that client to the top half of the screen. You can link multiple clients.
6. If the client(s) you have selected are correct then click the **Save** button. The client's accounts are now linked.

Client	Type	Address	Agency
one, test	P		Jerry Jay Bo...

Hide Search << Remove Link Remove All Links Go To Account

Search by All Agency Filter ALL Browse

Client	Type	Address	Agency
One, Commercial	C	123 Main Street Boca Raton, FL 33319	Jerry Jay Bo...
One, Commercial	C	sss, Suite 123 Coconut creek, FL 00001	Ric 1 Bowell...
One, Commercial	C	123 Main Street Boca Raton, FL 33319	Roger Mazz...
One, Cs	P	1111 1st St One, TX 77050	Coral Springs
One, Employee	P	Houston, TX 77777	A/W2
One, One	P		Roger Mazz...
One, One M	P	1111 Street One, Suite 11111 City One on Planet P12345, A...	
One, One M	P	1111 Street One, Suite 11111 City One on Planet P12345, A...	
one, test	P	11 street asdfg, TX 77701-1111	Roger Mazz...
one, test	P	11 street asdfg, TX 77701-1111	Roger Mazz...
one, test	P	44 dfsgfg fsghfh, TX 77090-	Roger Mazz...
one, test	P	44 dfsgfg fsghfh, TX 77090-	Roger Mazz...
One, Test	C	44 Street Dfdfd, FL 33319	Jerry Jay Bo...
One, Test	P	33 Dfgdf FSGHFHG, FL 33333	Jerry Jay Bo...

Add to Linked Undo Changes Save Cancel

You can access and view any clients linked to another client's account on the Client screen of the original client under the **Linked Accounts** tab.

## Client Screen

## Add New Client

There are two ways to enter a New Client into QCEvolution 2: Manual and Automatic Entry. In the Client or Search Screen, you will click on the New Client button.

Search

Clients

Policies

Claims

Memos

Activities

Client Billing

Company Billing

Images

Letters

Forms

Dashboard

Labels

Envelope

Letters

Screen

Print

New Client

Delete Client

Client

Inactive

Active

Prospect

Change Status To...

Receive a Payment

Create Finance Schedule

Payment/Bill

Forward Monies

Create a Bill

Set Note

Note

ACTIVE POLICY

?

Agency

Homestead

Prospect

Personal

Commercial

X-Date

...

Client Info

Attach Client's Image

Attach

Detach

Last Name

First Name

Middle

DOB

SS#

Driver's License #

State

Primary

Spouse

Insured

URL

Salutation

Client #

Misc

Source

Source Detail

Agent

Since / Language

Contact Info

Home (954)

Work (954)

Cell (954)

Fax (954)

Beeper (954)

Phone 2

Phone 3

Emergency Contact

Email 1

Email 2

Addresses

Mailing Address:

Garage/Property Address Not Available

Policies

Linked Accounts

Other Contacts

Addresses

Employers

Effective

Binder Date

Line

Coverage

MGA / Broker

Company

Binder Num

Policy Num

Description

Status

Premium

## Manual Entry

You will see a blank client screen.

After entering the client's last name, move cursor to the first name position and the screen will go "live". QQEvolution 2 sets the Insured field to last name, first name. QQEvolution 2 uses this field to search your records. It is also displayed on all reports in this format.

To enter a commercial account, enter the contact's last and first name, and then click the Commercial check box (to the right of the insured field). Type the name of the company in the Insured field.

Fill in the rest of the fields such as address, phone numbers, source of business, agent, etc. The more information you enter here, the more information you provide for reporting and accounting.

After you tab from the Since/Lang field, you will be prompted to enter policy information. You can also add a policy by clicking on the Policies Screen. At any time you can switch between the client and policy screens by using the Clients and Policies Screens at the top of the screen. You will notice that the current client's name is displayed to the right of these icons.

The client's name is listed to the right of the QQEvolution 2 icons on all screens except the search screen, which lists the number of clients.

- The salutation can be used when printing letters to the client.
- Select the language that will be used when sending letters, bills, etc.
- Drop-down lists contain entries previously entered in the Utilities section under the Popup Boxes tab.

You can also type entries directly into the drop-down fields and they will automatically be entered into the Popup Boxes in the Utilities section (provided you enabled this feature in the Defaults section of Utilities on the Client Screen tab).

## Automatic Entry

### Using Your Rating System

If you are using QQWebRater or a supported comparative rating system, all your clients can be transferred in to QQEvolution 2. This method saves time by preventing duplicate entry of information and is more practical than manual entry because access to the quote and application are only a click away.

You may also print a Down Payment receipt to your client. You must have a default Down Payment receipt letter already created in QuickWord and selected as a default in the Utilities/Defaults section. You can also use the down payment letter provided with the program.

**From QQWebRater:** To transfer a quote, after quoting and printing the application, click the Transfer to QQEvolution 2 button from the application menu to transfer the quote and application directly into QQEvolution 2. This process will create a new client and policy file in QQEvolution 2.

You have chosen to transfer this quote to QQ Evolution. Certain values are required to complete this transfer. Please fill in the items below and click TRANSFER TO QQ EVOLUTION

Binder Number	<input type="text" value="12906"/>	Agency	<input type="text" value="*QQ Dev FL EVO:"/>
Client Number	<input type="text" value="12311112zz"/>	Agent	<input type="text" value="amytest"/>
Policy Number	<input type="text"/>	CSR	<input type="text" value="0adi1"/>
Contract Number	<input type="text"/>	Client Source	<input type="text" value="Bench Ad"/>
Additional Amount	<input type="text" value="0.00"/>	Source Detail	<input type="text"/>
Additional Company	<input type="text"/>	Policy Source	<input type="text" value="Bench Ad"/>
		Optional Company	<input type="text"/>

Memo

Memo Reminder Date

Coverage Description

---

Premium Quoted	<input type="text" value="1,169.23"/>
Base Premium	<input type="text" value="1,123.00"/>
Fees	<input type="text" value="46.23"/>
Premium Issued	<input type="text" value="1,169.23"/>
Policy Issued	<input type="checkbox"/>
Premium Down Payment	<input type="text" value="237.14"/>
Agency fee	<input type="text" value="0.00"/>
MVR fee	<input type="text" value="0.00"/>
Optional Amount	<input type="text" value="0.00"/>

---

Total Down Payment Due	<input type="text" value="237.14"/>	
IOU Amount	<input type="text" value="0.00"/>	
Down Payment Received	<input type="text" value="237.14"/>	
Due Date	<input type="text" value="04/08/2010"/>	

\*QQWebRater Transfer to QQEvolution 2 screen

**From FSC:** refer to Appendix A Working with FSC.

# Client Screen Top Portion

The Client screen holds all the information pertaining to the named insured and much more. Here is a list of items that can be entered and stored on the client. Some of these items are self-explanatory and will only be listed.


The top portion of the Client screen is broken into four sections. Before the sections you will see the **Agency** in which the client is located, you can select if it is a **Personal** or **Commercial** client, and list an **X-Date** for the named insured. Next to the X-Date is a gray box you can click and list any comments you may have such as the line of business for the X-Date policy.

Agency Main Office

☒ Personal ☐ Commercial

X-Date

1. Client Info - This section allows you to enter the insured name and spouse. It also includes the middle name, date of birth, and social security number. This is where you can also enter a Client number if you wish to have a numbering system associated to the clients. A reoccurring client number sequence can be set up in the Utilities.


Client Info								
	Last Name	First Name	Middle	DOB	SS#	Driver's License #	State	
Attach Client's Image	Primary	Allen	Amy	Lynn	02/10/66	111-11-1111	H112145547744	FL
	Spouse	Allen	Ted		10/21/69	222-22-2222	A65343433	FL
Insured Allen, Amy						Salutation Amy		
Attach	Detach	URL  www.allen.com				Client # 5512		

There are also places for the driver license number and licensed state. If your client happens to have a Web site or this is a commercial client with a Web site, you are able to enter it in the box marked URL. If you click the button to the left of URL, it will take you directly to the Web site listed.

You can also attach a small photo pertaining to the named insured here. This can be used for a photo of the client or maybe the driver's license. You will click on the Attach button, which will allow you to browse your computer to where the photo is stored, and you can choose to attach it. The photo will now display whenever you open the Client screen for that client. The photo you are attaching must be a file type of either .bmp or .jpeg.

**Note:** You must have the photo first stored on your computer in order to attach it. You cannot scan directly into this area.

When you choose to do a commercial client, the Client Info area will slightly change as shown below.

Client Info						
Insured / FEIN Allen, Amy					Salutation Amy	
					Client # 5512	
Last Name	First Name	Middle	DOB	SS#	Business Type	
Primary Allen	Amy	Lynn	02/10/66	111-11-1111	DBA Name	
Business Partner Allen	Ted		10/21/69	222-22-2222	URL  www.allen.com	

For commercial clients you are able to include the FEIN, Business Type, DBA Name, and Business Partner.

**2. Addresses** – Here the mailing and garaging address for the client will be listed. You do not enter the address directly in this area. The addresses will be entered under the tab marked Addresses on the bottom portion of the screen. How to enter these will be explained when we cover that section.







Addresses	
Mailing Address:	No Garage/Property Addr. For Policy #: 1111111111
66 N 14th Ave Coral Springs, FL 33067	

**3. Misc.** – Enter the Source from the drop down list. This is how your client found your agency such as Walk-In or Newspaper Ad. The default list for this is set up in the Utilities section under Source and you can add your default sources to the list. There is an area for Source Detail in case you would like to give a more detailed description. The Agent for the client is also selected here from the drop down. This default list is set up in Utilities under Agent/CSR/Producer. You can also give your client a Since date which would be the date they became your client as well as selecting their primary language of English, Spanish, or French.

Misc	
Source	Internet
Source Detail	
Agent	7test
Since / Language	06/22/09 E

**4. Contact Info** – Enter all the various contact phone numbers, email addresses, and the name of their emergency contact for the named insured. You will note next to some of the phone number entry boxes is a drop down. We provide you with a default list of phone number types but you can change this yourself in the Utilities section under Defaults/ List of Phone Types.

**Contact Info**

Home	(954) 654-7854
Work	(305) 623-5441
Cell	(954) 211-4555
Fax	
Work	
Phone 2	
Phone 3	
Emergency Contact	
Email 1	
Email 2	

## Client Screen Bottom Portion

The lower part of the Client screen allows for quite a bit of information to be entered pertaining to the client. Information entered here such as Other Contacts will also help with marketing campaigns since this information can be reported on.

This part of the Client screen has five separate tabs; we will go through each one.

**1. Policies** – This tab lists all the policies of the named insured. It shows basic information such as Effective Date, Company, and Premium.

Policies		Linked Accounts		Other Contacts		Addresses		Employees		Policy History	
Effective	Binder Date	Line	Coverage	MGA / Broker	Company	Binder Num	Policy Num	Description	Status	Premium	
06/24/2008	06/24/2008	Auto	Comp/Coll		United Auto	7081	111111111...		X	\$1,134.00	

If you would like to print out a basic report from here showing the policies list, select the Policy History button.

**2. Linked Accounts** – Any clients you have linked to the client account you are working on will be displayed here. Linked Accounts can be done from the Search screen but you can also link them here as well. In order to view the client of a linked account, chose the client name and click the Go To Account button. You will then be switched to that client's account.



Policies		Linked Accounts		Other Contacts		Addresses		Employers		Policy History	
Name		Relation		First Name Bob		Middle Initial L		Last Name Smith		Comments	
Bob L Smith		Cousin		Address 66 N 14th Ave		Suite				Has a homeowners policy expiring next year.	
				City Coral Springs		State FL		Zip 33067			
				Driver License S25687455477		Lic. State CA		DOB 04/20/62			
		Relative		Cousin				SSN			
		Occupation		Architect		Marital Status Single		Sex Male			
		Phone 1		(301) 254-2541							
		Phone 2		(954) 213-2145							
		Phone 3									
		Phone 4								X-Date 02/10/10	
		Add		Update		Delete		Email bobsmith@mail.com		Create Client	

To add a new contact click the Add button on the lower left. You will fill in all the information you have pertaining to the contact. When you are done entering the contact please make sure to click the Update button to save the information. You have the ability to change Relative to Non Relative by clicking the drop down to the left of it and selecting the correct relationship. To the right of Relative and Occupation areas are drop downs as well, it is a default list of different relatives and occupations. You can change these lists and add or delete the defaults as you need them. At the bottom an email address can be enter as well as an X-Date for the contact. At any point if this contact becomes an actual contact you can select the Create Client button and they along with all their information will be made a client. On the far right there is a Comment section where you can enter any notes pertaining to the other contact.

**4. Addresses** – Here is where you enter the addresses for the client. You will fill out the address information and if this is the mailing address put a check next to Mailing. It will now be the address for the client in which letters, etc. are addressed to. There can be only one mailing address on the client but you can enter as many addresses as you want. You can also have a separate garage/property address if needed. To add the next address you will click the Add button and enter the information, once entered click Update to save the address. When entering a garage/property address there must be a policy listed on the client. If there is no policy you will not be able to check this box. You do have the ability to enter a garage/property address from the policy screen as well and it will be saved to the Client screen also. When entering this address if the client has multiple policies you will have to select which policy the address goes with. Each policy can have its own garage/property address.

Policies		Linked Accounts		Other Contacts		Addresses		Employers		Policy History	
Address		Type		Address 8526 2nd Ave		Suite				Comments	
66 N 14th Ave. Coral S...		Mailing		City Deerfield Beach		State FL		Zip 33441			
8526 2nd Ave. Deerfiel...		Garage		Mailing <input type="checkbox"/>		Garage/Property <input checked="" type="checkbox"/>					
				Policies Associated With This Mailing/Garage Address							
				Policy Number		Status		Company		Line	
				11111111...		Active		United Auto		Auto	
										Effective 06/22/09	
		Add		Update		Delete		Goto Policy		Assign Address	

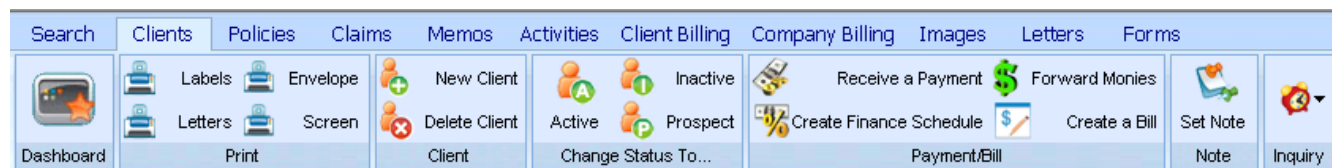
5. Employers – Enter the employer information for the client. In order to enter new employers click the Add button. When you are done entering the information make sure to click the Update button to save what you have entered. In the area labeled Occupation, we give you a default list of occupations but you can alter the list by clicking the gray button and adding or deleting to the list. You can also put in the email address as well as the employers Web site address where it says URL. If at any point this employer becomes your client instead of entering all this information over again, click the Create Client button and they will be moved to an actual client. If you have any notes you wish to store on the employer use the Comment section to the right.

6. Employee – If you are doing a commercial client there will not be an employer section but an employee area instead. You can enter as many employees as needed.

To enter a new employee click the Add button and enter in all their information. Where Occupation is labeled you can click a drop down and select from a default list of jobs. You can alter this list by click the small gray button next to the drop down. An X-Date can be set for each employee and they can also be easily made into a client by clicking the Create Client button.

The following functions are available while in the Clients Screen:

## Client Screen - Ribbon Descriptions



### Change Status To



You can change the status of a client to Active, Inactive or Prospect. A client will only be in the Inactive section if that client has no Active policies (all policies are cancelled or expired). If any policy is reinstated, the client's status automatically becomes Active again. Clients are never actually entered as inactive.

### Delete Client

This button deletes the client from the database. Also deletes all policy information, memos, billing information, letters and forms as well. You can choose if you want to permanently delete any images for this client. If you do not want to delete the images they will be moved to the C:\QuickFL\ImageImport directory. Remember deleting a client is permanent, that is why when you choose to do this we ask the question "Are you Sure."

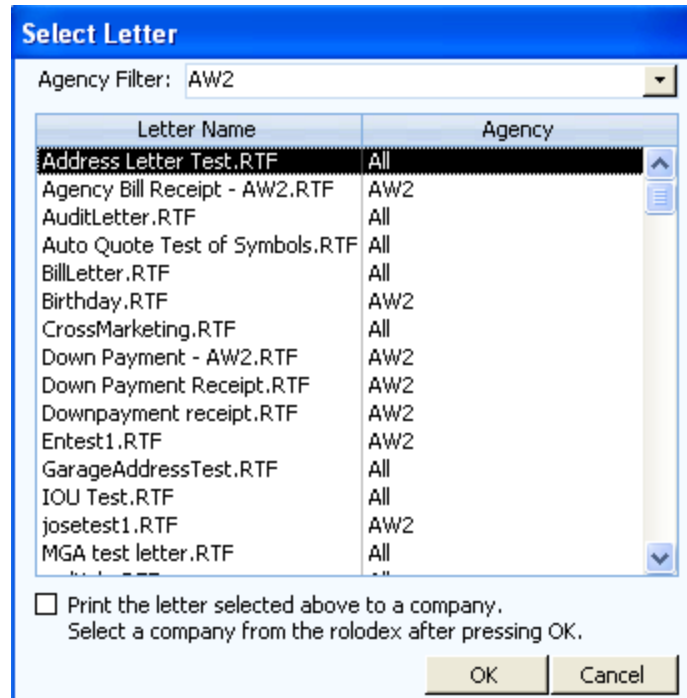


### Print Function Button

QQEvolution 2 provides a Print button in many places throughout the program for your convenience. When using the button here, you not only have the option to print a Letter or a Label (QQEvolution 2 uses Avery labels 5160 or 8160), but you can also Print an Envelope (using a standard #10, 4 1/8 x 9 5/8 size envelope) or Print Screen.

### Print A Letter

1. Click Letters on the Print button area.



2. Select a letter from the list. You can create or customize these letters in QuickWord.
3. You may check the Print the Letter selected above to a Company box if you wish to print the letter to a company in the QQRolodex instead of the client.
4. If the client has multiple policies, you will be prompted to select the policy the letter applies to.
5. To fill in any additional information or do editing before sending the letter (if necessary), you must first have set up the letter's template in QuickWord using the {Type Info Here} or {Preview} field. For instructions on how to create letters refer to the QuickWord section.
6. QREvolution 2 will then display the letter in Preview mode. Click the Print all Pages or Print this pages, depending on the length the letter to print a copy of the letter. A memo box will open where you can enter a memo and a reminder date and/or CSR. If you'd like to email the letter instead of printing, you may select the Email option.
7. The agency name, address, phone number or logo will automatically be included in the letter, along with the client name, address and the date. To set this feature refer to Utilities/Defaults/Letters and set the Letter Defaults.
8. An automatic memo noting that the letter has been sent is created in the client's memo screen. Click the Memo icon to view and/or add more details to the memo.
9. Click the Close button to continue.

10. The letter will be saved in the client's Letters section with the date and time noted.

If you click the Close button without printing the letter, QREvolution 2 will prompt you to print it later, placing it in a print queue. You can print these unprinted letters from the Mailroom section on the Dashboard by clicking the Print Unprinted Letters button. If you do not answer Yes to print it later, the letter will be lost.

## Print A Label

QREvolution 2 can print mailing labels for a specific client or in bulk through the Mail Room.

QREvolution 2 was designed to work with Avery 5160/8160 standard sheet-fed labels (purchased separately).

1. Click the Labels in the Print area on the ribbon.
2. Select the appropriate policy from the Select Policy window if client has multiple policies, and click OK.

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

3. Select label style from Label Style screen.

☒ Put Label in queue for later  
☐ Print Labels Now

☒ Last Name, First  
☐ First Name, Last  
☐ Insured

Example  
Smith, Jon  
100 NE 23 Street  
Suite 200  
Miami, FL 33123

Date type to be printed: No Date

Instead of address, print: ☐ Insurance Company ☐ Phone # ☐ Policy Description  
☐ Policy Number ☐ File #

4. Decide if you want to print the label now or later.
5. Select the naming format you desire.
6. Select a Date type.
7. If you decide to print the labels now, use the layout of your sheet of labels as a guide and select the number of columns and rows to begin printing.
  - a. You will be prompted to enter the row and column specifying where on your sheet of labels you wish to print. This methodology allows you to conserve labels by printing to a specific label location or to a single label.
  - b. For example, if you have a sheet of labels with three rows and three columns and you want to print to the third label on the second row then you would enter a 2 for the row and a 3 for the column.
  - c. If you decide to put the labels In Queue for later, you can print the labels at any time by entering the Mail Room section from the QCEvolution 2 Dashboard. Once in the Mail Room, click the Print UNPRINTED Labels button. When printing from the Mail Room it is meant for bulk printing and you cannot select where to start printing the labels on the sheet. It starts printing at the top of the sheet.
  - d. If you've decided to Print Labels Now, you have the option to use your Dymo label writer if you have one. Check the box labeled Use Dymo Printer.
8. Click the OK button to continue.

### **Print An Envelope**

This feature allows you to print an envelope for the client.

### **Print Screen**

This feature allows you to print the screen you are looking at.



## **Payment / Bill**

On the Ribbon select the function that you want to perform, Receive A Payment, Create A Bill, Forward Monies, or Create a Finance Schedule. All transactions will be posted to the client's Memo and Billing screens and a receipt will be printed when specified.

### **Receive A Payment**

1. Click Receive a Payment from the Payment/Bill area on the Ribbon.

2. Select the appropriate policy from the Select Policy window if client has multiple policies, and click OK.

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

OK Cancel

**Enter Payment Info**

Billing Type  
☒ Client Bill ☐ Company Bill

Transaction Date 04/08/10

Payment Info

Amount \$100.00 Agency Fee \$5.00

Description Monthly Payment Forward Date

Payment Type Check To Agency Check # 5624 ☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount Agency Fee

Payment Type Cash Check #

☒ Create a Debit and Credit for the amount above in the billing screen Receipt None

Add the following to the memo section...

Memo Payment Received: \$100.00 - Agency Fee:\$5.00

Reminder Date CSR 0adi1

OK Real-Time Inquiry: Make Payment Cancel

3. In the Payment Info screen enter the payment amount, the agency fee (if any) and a description. Default descriptions can be created in the Utilities section under the Popup Boxes tab. Please always try to use the descriptions provided to you from the system.
4. Enter a forward date (if applicable), select a payment type and enter the check # if paid by check.

5. If the payment is split (e.g., part cash, part check), then enter the second payment type information.
6. Enter the date that the payment was received.
7. Enter a memo if desired, a reminder date and select the CSR who is entering the payment information.
8. Make sure to check the box in the middle of the Payment Screen that says **“Create a Debit and Credit for the amount above in the billing screen”**
9. Click OK and a receipt will be printed automatically. If you have chosen to print a receipt, your default receipt will show up here (you can opt not to print a receipt).
10. Automatic memos noting that the receipt letter has been printed and that a payment has been received are created in the client’s Memo screen. Click the Memo icon to view and/or add more details to the memo.
11. An entry is also automatically created in the client’s billing screen. Click the Billing icon to view this information.

When receiving payments, you can attach the payment to an existing entry. For example, a client has a debit entry (amount) for an additional premium. The client is now paying that additional premium, which would be a credit. Attaching this payment amount to the original debit for the additional premium will create a single entry in the billing screen to reflect this transaction instead of two. If you choose not to attach to an existing entry, you will have an option to create a debit AND credit entry in the amount of the payment. If this option isn’t checked only a credit will be created on the billing screen.

## Create a Bill

1. In the Payment/Bill area select Create a Bill.
2. Select Policy for which you are creating the bill (if the client has more than one policy).

Select Policy						
Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

OK Cancel

3. Enter the bill amount, description and due date.
4. Select the desired Bill Receipt to print.
5. If desired, you may print the letter to a company in the QQRolodex by clicking the Print the letter selected above to a company checkbox.
6. You may enter a memo, reminder date and CSR.
7. Click OK when finished. The bill will be entered on the client's or company's billing screen depending on which you selected, and the receipt will be printed.

### Forward Monies

This will forward monies to the insurance companies that were received, such as an early renewal payment.

1. Click Forward Monies in the Payment/Bill area.
2. Select Policy for which you are forwarding monies (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Cc	01/04/07	Pending	Expired

☐ Include Endorsements

OK Cancel

**Enter Payment Info**

Transaction Date 04/08/10

**Double-click entry below to forward monies.**

Date	Description	Debit	Credit
09/17/09	Cancellation Fees	\$0.00	\$100.00
01/04/07	Down Payment	\$156.00	\$276.00

OK Real-Time Inquiry: Make Payment Cancel

**Enter Payment Info**

Transaction Date 04/08/10

Payment Info

Amount \$100.00 Agency Fee

Description Returned Premium Forward Date

Payment Type Check To Company Check # 698547 ☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount Agency Fee

Payment Type Cash Check #

Add the following to the memo section...

Memo Monies forwarded: \$100.00

Reminder Date CSR Qadi1

OK Real-Time Inquiry: Make Payment Cancel

## Create A Finance Schedule

This option will allow you to set up a finance schedule for the client's monthly payments.

1. In the Payment/Bill area select Create Finance Schedule.
2. Select Policy for which you are creating a finance schedule (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
QD12889chip	Dwelling Fire		Insurance Usa	09/24/11	107	Pending
QD12888chip	Dwelling Fire		Insurance Usa	09/24/10	107	Pending
QD8328chip	Dwelling Fire		Insurance Usa	09/24/09	107	Pending
QD8329chip	Dwelling Fire		Insurance Usa	09/24/09	Pending	Active
QD8330chip	Crime			09/24/09	Pending	Pending
QD8331chip	Crime		Affirmative Harbor	09/24/09	Pending	Active
QD2770chip				03/01/07	Pending	Expired
QD2197chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2198chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired
QD2201chip	Liability		217 - Granite State Ins. Co	01/04/07	Pending	Expired

☐ Include Endorsements

OK Cancel

**Enter Financing Info**

Billing Type  
☒ Client Bill ☐ Company Bill

Transaction Date 04/08/10

Monthly Amount \$78.25  
 Num Payments 10  
 1st Due Date 05/01/10


CSR bob

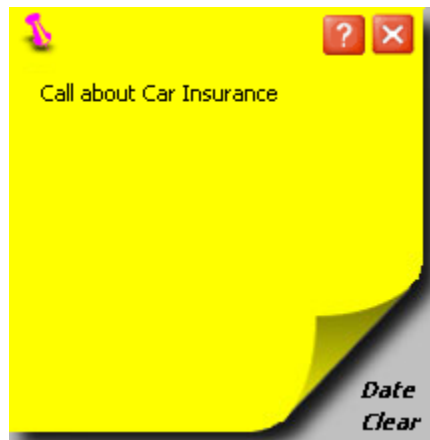
☐ Create Financing Schedule in the Billing Screen

OK Real-Time Inquiry: Make Payment Cancel

3. When creating a schedule, you will enter the payment amount, number of payments and first due date.
4. Check off the box that says Create Financing Schedule in Billing Screen. A debit amount will be created for the total amount of all the payments. When a client makes a monthly payment, you will be able to select which month it applies to from the finance schedule. This monthly amount will be deducted from the total payment amount and the number of remaining payments will be adjusted accordingly.
5. If you do not wish to create an actual finance schedule but keep track of the client's financing do not check Create Financing Schedule. The schedule's information will be placed on the Policy screen but will not create the schedule in the billing area.

## Set Important Note (F11)

The note, once set will always appear in as a yellow sticky type box when you first access any part of the client's record. Once you close the yellow note the message will still appear next to a red push pin  above the client's name on all screens within this client's file. You are able to enter up to 255 characters in this note. To clear the note, enter a blank note. You may run a custom report and set the Important Messages filter to review these entries.



Client: **Berry, Bruce** Call about Car Insurance

Agency: **Deerfield Beach** Personal ☒ Commercial ☐ X-Date: 04/15/09

Client Info								Contact Info	
Attach Client's Image	Last Name	First Name	Middle	DOB	SS#	Driver's License #	State	Home	
	Primary	Berry	Bruce					Work	
	Spouse							Cell	
Insured: <b>Berry, Bruce</b>						Salutation: <b>Bruce</b>		Fax	
Attach <input type="button" value="Attach"/> Detach <input type="button" value="Detach"/> URL <input type="text"/>						Client # <b>a2928</b>		Work	
<b>Addresses</b> Mailing Address: 123 Mail St Mail City, FL 33319 No Garage/Property Addr. For Policy #: Pending								<b>Misc</b> Source: <input type="text"/> Source Detail: <input type="text"/> Agent: <input type="text"/> Since / Language: 07/25/08 E	
								<b>Contact Info</b> Home: <input type="text"/> Work: <input type="text"/> Cell: <input type="text"/> Fax: <input type="text"/> Work: <input type="text"/> Home: <input type="text"/> Beeper: <input type="text"/> Emergency Contact: <input type="text"/> Email 1: <input type="text"/> Email 2: <input type="text"/>	

## Policy Screen Top Portion

The Policy screen is where you enter in all of the information pertaining to the policy. You will start entering the policy information from left to right. The top half of the Policy screen is broken down into three basic sections.

1. **Policy Info** – In this area you will select items such as Line of Business and Insurance Company. This is done by using the drop down arrows in each area and selecting the item from a default list. If you need to modify any of these lists it is done in the Utilities section in their corresponding areas.
  - A. Line – Select the Line of Business for the policy.
  - B. Coverage – The coverage for the line is selected.
  - C. MGA/Broker – If the policy has a MGA/Broker select their name here.
  - D. Company – Chose the company from the default list.

**NOTE:** If an MGA/Broker is selected on a policy the commission structure for the MGA/Broker set up for the specific company will be used. Also when an MGA/Broker is selected the default list of companies available will only be the companies linked to that MGA/Broker.

- E. Financing** – Select if the policy is Direct Bill, Paid in Full, Premium Finance, or Agency Bill. You could have also entered actual finance company names in the Utilities for this section, if so you can select the finance company name instead of choosing Premium Financing.
- F. Contract #** - Enter the finance contract number to be able to easily reference it if ever needed.
- G. Payment Type** – Select how the client is paying.
- H. Check #** - If they are paying by check, enter the check number.
- I. Policy #** - Enter the policy number. This will say Pending until a number is entered.
- J. Binder #** - You can enter the binder number of the policy if you wish. You can have the binder number automatically generated by setting up a default in Utilities\Defaults\Policy Screen.
- K. Binder Date** – This will be defaulted to today's date but can be changed if needed to the actual binder date of the policy.
- L. Period** – Select the policy period.
- M. Effective Date** – This will be defaulted to today's date or the binder date if it has been changed. Enter in the actual effective date of the policy.
- N. Expire Date** – This date is automatically generated based of the policy period entered and the effective date. The expiration date cannot be changed for most policy periods, you must change the period and effective date to do so. If the policy period of Variable is select then the Expire date can be manually changed.
- O. CSR** – Select the CSR for this policy
- P. Type of Business** – Select if the policy is New Business, Renewal, or Rewrite. This is generally automatically done for you.
- Q. Policy Description** – You can manually enter a more detailed description for the policy if you wish.
- R. Policy Source** – Select the source of the policy. This could be something such as cross marketing, because you obtained the business from marketing home policies to your clients with auto policies.

**Policy Info**

? Line Auto

Coverage Comp/Coll

MGA / Broker (None)

Company Insurance Co USA

Financing / Contract # Direct Bill

Payment Type / Check # Check To Company 3465

Policy # / Binder # 3251465440147 10409

Binder Date / Period 12/07/10 Annual

Effective / Expire Date 12/07/10 12/07/11

CSR / Type of Business anytest Renewal

Policy Description classic mustang -- yellow

Policy Source In House

2. Premium Info – Please refer to the Help document within this section of the Policy screen on how to enter the policy premium information.

**Premium Info**

? Quoted Premium \$3,000.00 Premium Sent Gross

Base Premium \$3,000.00 Company Fees \$15.00

Base Non Comm Prem Non Comm Fees \$5.00

Base Comm Premium \$3,000.00 Comm Fees \$10.00

Commissionable Prem \$3,010.00 Commission \$301.00

Premium Issued \$3,015.00 Additional Prem. \$15.00

Endorsements \$0.00 Endorsed Comm \$0.00

Total Premium \$3,015.00 Total Comm \$301.00

### 3. Optional

- A. Optional Coverage – If there is any optional coverage on the policy you can click the drop down and select it from a default list. The amount and commission which was set up in the Utilities will be displayed. You can leave it to saying optional coverage if you wish and manually enter the premium.
- B. Additional Coverage – This is entered the same way as optional coverage.
- C. From Endorsements – If an endorsement is done on a policy and an optional amount was entered on that endorsement, the premium and commission will be displayed here. The box is locked. In order to have the information appear here it must have been done through an endorsement.

- D. Agency Fee and MVR Fee – These boxes are locked. The fees that appear here need to be selected under the “Fees” tab on the lower portion of the policy screen.
- E. Endorsement Agency Fee and Endorsement MVR Fee – These fees are done in the same manner as the agency and MVR fee previously listed but only appear if done through an endorsement.
- F. Premium Down – Enter the amount of the down payment towards the premium.
- G. Total Down – This is the amount of the premium down plus any fees charged by the agency such as the MVR fee. These fees are collected up front along with the premium down. This field is automatically totaled for you based on the fees charged by the agency, premium down, optional, and additional amount.
- H. # Pmts / Mthy Amt – If you are doing in house financing or would like to keep track of a client’s monthly payments, enter the number of payments and the amount the client pays each month.
- I. First Due Date – Enter in the date the first payment is due on the policy.

Optional	Premium	Comm
Optional Coverage ▾	\$25.00	\$0.00
Additional Coverage ▾		\$2.00
From Endorsements	\$0.00	\$0.00
Agency Fee		\$0.00
MVR Fee		\$10.00
Endorsed Agency Fee		\$0.00
Endorsed MVR Fee		\$0.00
Premium Down		\$1.00
Total Down		\$36.00
# Pmts / Mthy Amt		
First Due Date		

## Policy Screen Bottom Portion

The bottom portion of the Policy screen consists of seven tabs. We will go through each tab in order.

1. Policy – Here any policies entered for the client will be listed. To switch between policies simply click on the policy you wish to view.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total			
Effective	Binder Date	Line	Coverage	MGA / Broker	Company	Binder Num	Policy Num	Description	Status	Premium
06/24/2009	06/24/2009	Auto	Comp/Coll		United Auto Co...	7081	111111111...		A	\$1,134.00

2. Endorsements – Any endorsements which have been done for the policy you are viewing will be listed here. If you would like to view a history of the endorsements click the “History” button on the bottom right. The history will appear in a report format and can be printed if needed.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total			
Date	Endorsement Number	What was done	Premium	Optional	Additional	Agency Fee	MVR			
06/22/09	111111111111	Add A Car	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00			

3. Forms – Any forms attached to the policy you’re viewing will be listed under this tab. You can add a form from here when needed by selecting the “Add a Form” button. You can double click a form listed here as well to open it for viewing, editing, or printing.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total	\$970.00
Form Name			Form No.	Date Added	Description			
Auto Quote				7/6/2009	Auto Quote & App - 2007 JEEP			
Auto Supplement			061	7/6/2009				

4. Claims – Any claims on a policy will be listed here. You can double click a claim listed and it will then take you to the claim in the Claims section on the client.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total	\$970.00
Claim No	Policy No	MGA / Broker	Company	Line	Date of Loss	Status	Amount Paid	Damage Description
1022545A	111111111...		United Auto Commercial	Auto	07/01/09	Open	\$3,000.00	front end damage-totally smashed in ...
Pending	111111111...		United Auto Commercial	Auto	07/02/09	Open		

**5. Fees** – The fees which had been set up on the company or MGA/Broker in the Utilities will be listed out here for the company or MGA/Broker selected on the policy. You do have the ability to change the fees here on the Policy screen if needed and it will affect only this policy you are working on. To add, edit, or delete company fees use their corresponding button. You can also do the same to the policy agency fees which are the fees charged by the agency themselves.

**Note:** The icon of the question mark is an explanation of how you can have certain fees apply to other fees you have listed.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total	\$984.00
<b>Company Fees</b>				Base Premium: \$900.00	<b>Policy Agency Fees</b>			
Fee Name	\$ / %	Fee Value	Total		Fee Name	Fee Value		
Florida Hurricane Catastrophe Fund Fee	1.00%	\$9.00			MVR *	\$10.00		
Policy Fee	\$0.00	\$0.00						
SR22 Charge	\$5.00	\$5.00						
Premium Issued			\$914.00					
Total Fees: \$14.00				Total Commissionable Fees: \$0.00	Total Fees: \$10.00			
Add Fee Edit Fee Delete ? ↑ ↓				* Commissionable Fee	Add Fee Edit Fee Delete			
					* Commissionable Fee			

**6. Comm. Breakdown** – The agency commission will display here. The first line listed will be labeled “Default.” This is the default commission structure which was set up in the Utilities for the company or MGA/Broker. When setting up the agency commission structure in Utilities you had the ability to set up the structure by percentage, rules, and tiers. Whatever structure you used will appear here and you can change it on the “fly” if needed. This meaning if you need to change the commission structure for this policy only you can do so.

You can manually change the commission percentage or amount listed if needed and it will recalculate. If the commission was set up by Rules or Tiers, you can add, edit, or delete these items as needed by using the buttons on the lower left.

When you choose to change the commission Rules, make sure to select Rules and then click the “Add” button. The list of Rules you had previously set up in the Utilities will appear, you can choose the Rule and apply it to this policy. You cannot add new Rules directly to the list box of Rules. This has to be done from the Utilities section.

In order to apply Tiers to the policy, Tiers have to first be set up on the company listed on the policy in the Utilities. Then you will be able to apply Tiers if need on the “fly” for the specific policy you are working on.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total	<b>\$984.00</b>
----------	--------------	-------	--------	------	-----------------	-----------	---------------------	-----------------

Entry	Description	Amount	%	Commission
Default	Default Commission From Utilities	\$700.00	7.00	\$49.00

Breakdown by: ☐ Tiers ☒ Rules
Add Delete Reset Commission

Totals: \$700.00 \$49.00

**7. Producers** – Here is where you add your producers who are receiving commission on the policy. Once the producer commission is entered here they can be tracked and reconciled within the program.

Policies	Endorsements	Forms	Claims	Fees	Comm. Breakdown	Producers	Premium Grand Total	<b>\$995.00</b>
----------	--------------	-------	--------	------	-----------------	-----------	---------------------	-----------------

Producer	Commission Type	Total Comm Due	Due To Date	Paid To Date	Due Now	Policy / Endorsement
----------	-----------------	----------------	-------------	--------------	---------	----------------------

Add Agent As Producer Add CSR As Producer

Show History Edit Producer Delete Add Producer

In order to add producers to the policy click the **Add Producer** button on the lower right. The Producer Commission box will open. Here select the producer's name and then the commission will recalculate to reflect their commission structure which was previously set up in the Utilities section. This box is split into two sections. One being the producer's commission based on either the agency's commission or the premium plus fees and the second area is the producer's commission of the agency fees if any are charged. The boxes in gray in both screens are locked. The information in these boxes is based on what was previously entered on the policy. Such as the “Agency Commission” box will automatically display the commission due the agency based on the premium and fees that were entered. The total amounts are also locked and calculated for you. If you need to change the producer's commission for this one policy, you can do so by adjusting the commission amount. If you need to you can edit or delete a producer entered here.

**Producer Commission**

Producer: **Agent Test** Policy/Endorsement: **Policy (111111111111)**

<p><b>Company Commission</b></p> <p>Type: <b>Agency Commission</b></p> <p>Amount: <b>Percentage (%)</b> <b>3.70%</b></p> <p>Available Commission</p> <p>Agency Commission: <b>\$0.00</b></p> <p>Split Percentage (%): <b>100.00%</b></p> <p>Calculated Available: <b>\$0.00</b></p>	<p><b>Agency Fee Commission</b></p> <p>Amount: <b>Percentage (%)</b> <b>3.70%</b></p> <p>Available Commission</p> <p>Agency Fee: <b>\$10.00</b></p> <p>Split Percentage (%): <b>100.00%</b></p> <p>Calculated Available: <b>\$10.00</b></p>
<p><b>Total Commission</b></p> <p>Company Commission: <b>\$0.00</b> Agency Fee Commission: <b>\$0.37</b></p> <p>Total Commission For This Policy: <b>\$0.37</b></p>	

OK Cancel

As stated previously only the producers entered here will have their commission tracked so they can be reconciled as you pay the producer. You have the ability to use the **Add Agent as Producer** and **Add CSR as Producer** buttons if the agent and/or CSR entered on the policy is also the producer. This will reduce the manually entry on the policy. By using these buttons whoever you have listed on the Client screen as the agent will be brought over and filled into the producer section, the same goes for the CSR entered on the Policy screen.

**NOTE:** In order to change any commission structure you will need to be an administrator or the admin will have needed to grant you access in your user's permissions.



## QQEvolution 2 Policy Detail Screens

The Policy Detail screens allow you to enter and store the details of various lines of business such as coverages, drivers, etc. on the Policy screen. These screens currently work with the lines of **Auto**, **Homeowner**, **Commercial Auto**, and **General Liability**. For all other lines of business enter the details of the line on the ACORD form.

Letter	Down Payment Receipt	Print Screen Shot	AP Letter	Memo / Reminder AP	Garage / Property Address	Intent to Cancel	Cancel	Add New	Delete	Renew	Endorse	<b>Policy</b>	Log
Print				AP	Address	Policies				Details			

The Policy Detail screens are integrated with the entire QQEvolution 2 program, giving you the ability to update, archive, and change information from within the Policy Detail screens. QQDownload™ will also update your information in the Policy Detail screen.

## How the Policy Detail Screens Work

These screens import information in several ways:

1. Import information from your existing Auto, Commercial Auto, Homeowners, and General Liability ACORD® Forms.
2. Using the QQDownload program.
3. Manually entering the information.

Once you have downloaded or entered information into an ACORD form, the Policy Detail screens will recognize the information attached to the policy and then allow you to populate the screen. This functionality is available with all of your detail screens. The program is designed to recognize the ACORD form that is attached to your policy and line of business.

If you enter information into the Policy Detail screen and wish to send that information to an ACORD form, you have the ability to transfer the information to the new form using one of two methods. You can use the Data Wizard to transfer that information or the Import Information button at the top of the screen on the Ribbon or Toolbar. Either of these two methods will produce the same results.

Below you will see each one of the Policy Detail screens. We will show you how to populate a detail screen using the following information in an auto policy below. The rest of the Policy Detail screens will function much the same way using different ACORD forms.

## Auto Policy Detail Screen

Policy Detail Screen — Auto - Current - From QuickDownload (Read only)

Combo Drivers Vehicles Coverages Policy Notes Modifications Log Archive

**Drivers**

Last Name	First Name	DOB	Sex	Driver License
Mouse	Morty	09/14/76	SM	EXCLUDED
Mouse	Minnie	01/11/74	SM	EXCLUDED
Mouse	Mikey	10/27/53	SF	M220299538870

Add Edit Delete

**Vehicles**

Year	Make	Model	VIN	Color
2002	NISSA	ALTIMA/S/SL 4D	1N4AL11D82C214325	

Add Edit Delete

**Coverages**

Vehicle	Driver	CSL Cov	CSL Prem	BI Cov	BI Prem	PD Cov	PD Prem	Med Cov	Med Prem
2002NISSAALTIMA/S/SL 4D	Mikey Mouse			10/20	136.00	10/10	124.00		

Edit

Update Create New Undo Update Policy Summary Edit Cancel

Auto Policy Detail Screen Populated from QQDownload

Notice that the Policy Detail screen was populated from the QQDownload Program and that all of the information contained in the ACORD form has been filled in for you. Also note that at the top of the screen, the Policy Detail screen will tell you that the information is Read Only. This is a security feature to protect the current data. If you click on the edit button at the bottom, you will be able to edit the current information and make changes. Once the changes are made, the current information will be archived and a Modifications Log will be created noting which CSR made the change.



**Important Note:** The information contained in the Modifications log will reflect the CSR attached to your user. If you do not attach a CSR to the User Login, then the information attached to the CSR will show the user that has logged in.

### Creating a Policy Detail Screen from Existing Information

To populate your Policy Detail screen, simply go to a client with an Auto policy that has either an ACORD 90 or Generic Auto Quote form attached to it from your downloads or that you may have manually entered. Once you have selected your client and their policy, click on the Policy button found in the Details area on the top Ribbon of the Policy screen. When you open the

Policy Detail screen, the Update box will open because it recognized the forms attached to the policy.

Policy Detail Screen — Auto — Auto

Combo Drivers Vehicles Coverages Policy Notes Modifications Log Archive

**Drivers**

Last Name	First Name	DOB	Sex	Driver License

Add Edit Delete

**Vehicles**

Year	Make	Model	VIN	Color

Add Edit Delete

**Coverages**

Vehicle	Driver	CSL Cov	CSL Prem	BI Cov	BI Prem	PD Cov	PD Prem	Med Cov	Med Prem

Edit

Update **Create New** Undo Update Policy Summary Ok Cancel

**Policy Details Update**

**Policy Details**

Changes affecting the Policy Details

Forms	Date
Auto Quote	10/16/09

When you update your policy details the previous one gets archived. The current policy is updated from the newest available sources, mainly endorsements.

From Client Screen **Update** Cancel

You will select the form from which you want to create your Policy Detail screens and click the Update button. QQEvolution 2 will copy all the information from the form to the Policy Detail screen. This will make it easier for you to create the new Policy Detail screens.

Policy Detail Screen — Auto - Current

Combo Drivers Vehicles Coverages Policy Notes Modifications Log Archive

**Drivers**

Last Name	First Name	DOB	Sex	Driver License
Mouse	Ferdie	12/01/80	SM	EXCLUDED
Mouse	Morty	09/14/76	SM	EXCLUDED
Mouse	Minnie	01/11/74	SM	EXCLUDED
Mouse	Mike	10/27/52	SC	M220200620070

Add Edit Delete

**Vehicles**

Year	Make	Model	VIN	Color
2002	NISSA	ALTIMA/S/SL 4D	1N4AL11D82C214325	

Add Edit Delete

**Coverages**

Vehicle	Driver	CSL Cov	CSL Prem	BI Cov	BI Prem	PD Cov	PD Prem	Med Cov	Med Prem
2002NISSAALTIMA/S/SL 4D	Mike Mouse			10/20	136.00	10/10	124.00		

Edit

Update Create New Undo Update Policy Summary Ok Cancel

## Using the Policy Summary

QCEvolution 2 Policy Detail screens provide a built-in Policy Summary report that allows you to give your client a printout of all the information contained in a policy summary. To produce this report, simply click on the **Policy Summary** button located at the bottom of the screen. Once you click on the button, you will see the following report.

**Policy Detail Screen — Auto**

Combo	Drivers	Vehicles	Coverages	Notes	Log	Archive			
<b>Drivers</b>									
Last Name	First Name	DOB	Sex	Driver License					
Alfred	John	01/12/72	SM	H5124147865144					
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>									
<b>Vehicles</b>									
Year	Make	Model	VIN	Color					
2006	CADDY	DTS	1G54214BK56745987	Blue					
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>									
<b>Coverages</b>									
Vehicle	Driver	CSL Cov	CSL Prem	BI Cov	BI Prem	PD Cov	PD Prem	Med Cov	Med Prem
2006 CADDY				10/20	231.00	10	279.00	NONE	0.00
<input type="button" value="Edit"/>									
<input type="button" value="Update"/> <input type="button" value="Create New"/> <input type="button" value="Undo Update"/> <input type="button" value="Policy Summary"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>									

## Policy Detail Summary

<u>Insured Name and Address</u>		<u>Agency Name and Address</u>			
Mikey Mouse 6510 NW Yellow Brick Rd Miami, FL 33437		Bret Roberts 5300 NW 33rd Ave. #114 Fort Lauderdale, FL 33309			
<u>Policy Line</u>	<u>Policy Number</u>	<u>Effective</u>	<u>Expiration</u>	<u>Company</u>	<u>Premium</u>
Auto	VAD001625482	6/2/2004	12/2/2004	Our Insurance Company	\$1,418.80
<u>Driver Name</u>		<u>Birth Date</u>	<u>Gender</u>	<u>License Number</u>	<u>State</u>
Ferdie Mouse		12/01/80	Male	EXCLUDED	FL
Morty Mouse		09/14/76	Male	EXCLUDED	FL
Minnie Mouse		01/11/74	Male	EXCLUDED	FL
Mikey Mouse		10/27/53	Female	M220299538870	FL
<u>Form</u>		<u>Description</u>			<u>Date</u>
Personal Auto App		Personal Auto Application			5/4/2008
<u>Garage Address</u>					
6510 NW Yellow Brick Rd Miami, FL 33437					

## Policy Detail Summary

<u>Insured Name and Address</u>			<u>Agency Name and Address</u>		
Mikey Mouse 6510 NW Yellow Brick Rd Miami, FL 33437			Bret Roberts 5300 NW 33rd Ave. #114 Fort Lauderdale, FL 33309		
<u>Policy Line</u>	<u>Policy Number</u>	<u>Effective</u>	<u>Expiration</u>	<u>Company</u>	<u>Premium</u>
Auto	VAD001625482	6/2/2004	12/2/2004	Our Insurance Company	\$1,418.80
<u>Veh No</u>	<u>Year</u>	<u>Make</u>	<u>Model</u>	<u>VIN</u>	
1	2002	NISSA	ALTIMA/S/SL 4D	1N4AL11D82C214325	
<u>Coverage</u>			<u>Limit</u>	<u>Deductible</u>	<u>Premium</u>
Combined Single Limit Liability (CSL)					
Bodily Injury Liability (BI)			10/20		\$136.00
Property Damage (PD)			10/10		\$124.00
Medical Payments					
Comprehensive / OTC				\$500.00	\$288.00
Collision				\$500.00	\$344.00
Uninsured Motorists CSL					
Uninsured Motorists BI					
Uninsured Motorists PD					
Underinsured Motorists CSL					
Underinsured Motorists BI					
Underinsured Motorists PD					
Personal Injury Protection			10000		\$454.00
Towing					
Rental					
Custom Equipment					
<b>Coverage Total</b>					<b>\$1,346.00</b>
<u>Lienholder</u>					
NSSN MOTOR ACCEPT					
PO BOX 749050					
DALLAS, TX 75370					

## Homeowners Policy Detail Screen

Policy Detail Screen (Home)

General | Policy Notes | Modifications Log | Archive

**Coverages / Limits Of Liability**

HO Form: |  
Dwelling:  
Other Structures:  
Personal Property:  
Loss Of Use:  
Liability:  
Medical Payments:

**Deductibles**

All Peril:  
Wind / Hail:  
Theft:  
Earthquake:  
Named Hurricane:  
Annual Hurricane:

**Rating Information**

**Construction**

☐ Aluminum Siding ☐ Vinyl Siding ☐ Fire Res ☐ Mfg Home  
☐ Masonry Veneer ☐ Masonry ☐ Frame

**Rating / Underwriting**

Year Built:  
Square Feet:  
Number Of Rooms:  
Number Of Apartments:  
Market Value:  
Replacement Cost:

**Additional Interest**

☐ Additional Interest ☐ Mortgagee

Name  
Address  
City/St/Zip  
Loan #:

**Additional Interest**

☐ Additional Interest ☐ Mortgagee

Name  
Address  
City/St/Zip  
Loan #:

Update | Create New | Undo Update | Policy Summary | Ok | Cancel

## Commercial Auto Screen

Policy Detail Screen (Commercial Auto)

Combo Drivers Vehicles Coverages Notes Modifications Log Archive

**Drivers**

Last Name	First Name	DOB	Sex	Driver License

Add Edit Delete

**Vehicles**

Year	Make	Model	VIN	Body Type

Add Edit Delete

**Coverages**

Business Auto Section Truckers Section Motor Carrier Section

Vehicle	Liability Cov	Liability Prem	Comp/Otc Cov	Comp/Otc Prem	Collision Cov	Collision Prem

Policy Summary Create Acord Form: Ok Cancel

## Commercial General Liability Policy Detail Screen

Policy Detail Screen (General Liability) - Current

Coverages Schedule Of Hazards Additional Interest Remarks Notes Modifications Log Archive

Coverages	Limits
<input type="checkbox"/> Commercial General Liability	General Aggregate
<input type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence	Products & Completed Operations Aggregate
<input type="checkbox"/> Owner's & Contactor's Protective	Personal & Advertising Injury
<input type="checkbox"/>	Each Occurrence
	Damage to Rented Premises (each occurrence)
	Medical Expense (any one person)
	Employee Benefits

Deductibles	Premiums
<input type="checkbox"/> Property Damage	Premises / Operations
<input type="checkbox"/> Bodily Injury	Products
<input type="checkbox"/>	Other
	Total

Other Coverages, Restrictions And/Or Endorsements

Create New Undo Create Policy Summary Create Acord 126 Ok Cancel



## Data Wizard

When adding a form from the Policy screen or the Forms section the Data Wizard may present itself. The Data Wizard allows you to extract information from multiple sources in **QQEvolution 2** and populate the appropriate information into a new ACORD Form. The Wizard eliminates the process of having to print, copy, or go back and forth between forms to fill in the required information for a New Form.

### How It Works

The Data Wizard currently moves information to the following ACORD Forms. (Note: Future version of **QQEvolution 2** will include more ACORD Forms!)

#### ACORD Number

- 23 – Lease Auto Certificate of Insurance
- 24 – Certificate of Property
- 25 – Certificate of Liability
- 27 – Evidence of Property Insurance
- 28 – Evidence of Commercial Property
- 90 – Personal Auto Application for every State
- 80 -- Homeowners

The Data Wizard pulls information from the following sources in **QQEvolution 2**:

1. Existing ACORD forms stored for a client.
2. Policy Detail screens from the Policies screen in your clients.
3. The QQRolodex for populating the Certificate Holders or Lien Holders.

The Data Wizard organizes that information and puts it in an order that will make it easy for you to place in the appropriate fields in the new ACORD form.

# Using the Data Wizard

## Step 1: Introduction

Whenever you choose any of the forms from the list above, you will see the Introduction screen. The introduction screen gives you information regarding the various steps that the Wizard will use in order to populate the new form.



**NOTE:** Once you become familiar with the steps involved in the Data Wizard, you will have the option to skip directly to Step 2 in the Wizard. Simply check the box next to the statement “Don’t show Introduction again”.

In the following example we are going to complete a new ACORD 90 form. This form requires five separate steps to complete the new ACORD form. The amount of steps will vary depending on what information is stored on the client.

**QQ Evolution Data Wizard**

Introduction

**1**  
Introduction

**2**  
Select Policy

**3**  
Drivers

**4**  
Vehicles

**5**  
Electronic Signature

### QQ Evolution Acord Form Data Wizard

#### Introduction to the QQ Evolution Acord Form Data Wizard

This wizard allows you to pre-fill this form with data from other forms. The wizard gives you the option to select data from the following sources:

- ✓ Select the Policy from the Select Policy tab (when there is more than 1 policy).
- ✓ Select the Coverages from other forms - optionally from other policies.
- ✓ Select Certificate/Lienholders from other forms or the Rolodex.
- ✓ Select the Electronic Signature.

☐ Don't show Introduction again (you can re-activate this in the Utilities)

Cancel Previous Next **Finish**

## Step 2: Select Policy

The next step requires you to attach the new form to a policy. Simply highlight the policy and the Wizard will attach the new ACORD form to that policy. At the bottom of the same screen, you will have the option to pull information from an existing policy, a previous policy and any Endorsements, or you can check all the policies you need information from for the new form. The Wizard compiles all the information from the ACORD forms, Policy Detail Screen, and the QQRolodex. This will place the information from these categories into a format that allows you to choose what information you need to move to the new form.

Select Policy

Select the policy to associate this form with

Binder Num	Coverage	Company	Binder Date	Policy Num	Policy Status	Type
8426	Liability-Comp...	USS	10/16/09	108	Active	
	Dwelling Fire	Insurance Co USA	09/05/09	524J4545544	Active	

Select policies you want to import data from

Binder Num	Coverage	Company	Binder Date	Policy Num	Policy Status	Type
<input checked="" type="checkbox"/> 8426	Liability-Comp...	USS	10/16/09	108	Active	
<input type="checkbox"/>	Dwelling Fire	Insurance Co USA	09/05/09	524J4545544	Active	

☐ Include Endorsements

Select the policy for the current form

Cancel Previous Next Finish

Once you select “**Next**”, The Data Wizard will filter the information from the policies selected and take you to the next step.



**Important Note:** If you do not make the correct selections, simply click on the “**Previous**” Button to select the new information.

### Step 3: Drivers

To import Driver Information, you will check which driver(s) you need on the new form. You may select up to 6 drivers to appear on a form, this information could come from the Policy Detail screen, the Auto Quote, Commercial Auto Application or a previous Auto Application. This simplifies the selection process for you to make choices as to who you want to appear on the form. Once you have the correct information, select “Next” to continue.

**QQ Evolution Data Wizard**

1  
Introduction

2  
Select Policy

3  
Drivers

4  
Vehicles

5  
Electronic Signature

Drivers

Select data from one source ☐ Also include Commercial forms

Form name	No	State	Company	Policy	Effective	Status	Description
(None)							
POLICY DETAIL - Driver...			USS	108	10/16/09	A	
Auto Quote (Generic)			USS	108	10/16/09	A	Auto Quote &

<

>

Select Drivers

Drivers

☒ Alfred, John

Import drivers

Cancel

Previous

Next

Finish

### Step 4: Vehicles

This step requires you to select vehicle information. The information for vehicles will come from the following forms, Personal Auto Application, Commercial Auto Application, Auto Quote, and Policy Details screen. Simply choose the vehicles that need to go in the new ACORD form, as shown in the example below.

**QQ Evolution Data Wizard**

**1** Introduction

**2** Select Policy

**3** Drivers

**4** Vehicles

**5** Electronic Signature

Drivers

Select data from one source ☐ Also include Commercial forms

Form name	No	State	Company	Policy	Effective	Status	Description
(None)							
POLICY DETAIL - Driver...			USS	108	10/16/09	A	
Auto Quote (Generic)			USS	108	10/16/09	A	Auto Quote &

Select Drivers

Drivers
<input checked="" type="checkbox"/> Alfred, John

Import drivers Cancel Previous Next Finish

## Step 5: Signatures

The final step in the Data Wizard is to add your signature to the new ACORD form. If you have a signature saved in QQEvolution 2 and the ACORD form accepts a signature, you will be given the option to use that signature. Simply select the signature that you wish to attach to the new ACORD form. Once the signature has been selected, click on the next button to move to finish your new ACORD form. The Wizard will then display a message asking you if you want to complete the form.



**Important Reminder:** You can go back to any step in the selection process at any time by clicking on the step or choosing “Previous”, that you wish to review or change.

**QQ Evolution Data Wizard**

Electronic Signature

1 Introduction

2 Select Policy

3 Drivers

4 Vehicles

5 **Electronic Signature**

Add New Signature From File

Name	Signature
(None)	
Agent 99	<b>Sign Pad Now</b>

Select signature

Cancel Previous Next **Finish**

**QQ Evolution v1.0.10**

?

Is everything ready to import data from the Wizard ?

Yes No

## The Final Product

Once you complete the required steps for your new ACORD 90 form, the Wizard will display the form. There may be a few things left to fill out for your new form, complete the rest of the form with the required information. Once everything is completed you can print, e-mail, or fax, or save this form. The Data Wizard is an important function of your QQEvolution 2 Program, designed to put information into a new form with step – by – step instructions.



AGENCY CUSTOMER ID:

## FLORIDA PERSONAL AUTO APPLICATION SECTION

DATE (MM/DD/YYYY)  
05/04/10

AGENCY Quickquote, Inc		NAMED INSURED(S) John Alfred	
POLICY NUMBER 108S5144555			
CARRIER USS	NAIC CODE 23654		

<b>RESIDENCE</b> CURRENT RESIDENCE IS <input type="checkbox"/> OWNED <input type="checkbox"/> RENTED		<b>GARAGING ADDRESS IF DIFF FROM CURRENT (inc county &amp; ZIP)</b>	
CURRENT ADDRESS 879 S 10th PL Sunrise, FL 33319		VEH # 1	

VEHICLE DESCRIPTION / USE														TOTAL NUMBER OF VEHICLES IN HOUSEHOLD:													
VEH	YEAR	MAKE	MODEL	BODY TYPE	VIN	REG STATE	HP/CC	DATE LEASED	DATE PURCH	NEW/USED	VEH	COST NEW	SYMBOL AGE GRP	TERR	MI/1WAY WK/SCHL	\$ DAYS WEEK	\$ WKS MONTH	USAGE	PER-FORM	MULTH-CAR	CAR-POOL	GAR CODE	ODOMETER READING	ANNUAL MILEAGE	GOVERN DRIVER	DRIVER USE % (Each veh must equal 100%)	CLASS
1	2006	CADDY	DTS		1G6KD579234234234	FL			02/16/06	N																	
VEH	PASSIVE SEAT BELT	AIRBAG DRV/BOTH	ANTI-LOCK BRAKES 2/4	ANTI-THEFT DEVICES	CREDITS AND SURCHARGES	VEH	PASSIVE SEAT BELT	AIRBAG DRV/BOTH	ANTI-LOCK BRAKES 2/4	ANTI-THEFT DEVICES	CREDITS AND SURCHARGES																

## COVERAGES / PREMIUMS

COVERAGES	LIMITS OF LIABILITY		VEHICLE # 1	VEHICLE #	VEHICLE #	VEHICLE #
SINGLE LIMIT LIABILITY (CSL)	\$	EA ACCIDENT	\$	\$	\$	\$
BODILY INJURY LIABILITY	\$ 10,000	EA PERSON \$ 20,000 EA ACCIDENT	\$ 231	\$	\$	\$
PROPERTY DAMAGE LIABILITY	\$ 10,000	EA ACCIDENT	\$ 279	\$	\$	\$
PERSONAL INJURY PROTECTION	\$10,000 BASIC	DED APPLIES TO: <input type="checkbox"/> NAMED INS ONLY <input type="checkbox"/> NAMED INS DEPENDENT RESIDENT RELATIVE				
	DEDUCTIBLE:	<input type="checkbox"/> NO DED <input type="checkbox"/> \$250 <input checked="" type="checkbox"/> \$500 <input type="checkbox"/> \$1000				
	WORK LOSS EXCL:	<input type="checkbox"/> NAMED INS ONLY <input type="checkbox"/> NAMED INS DEPENDENT RESIDENT RELATIVE	\$ 717	\$	\$	\$

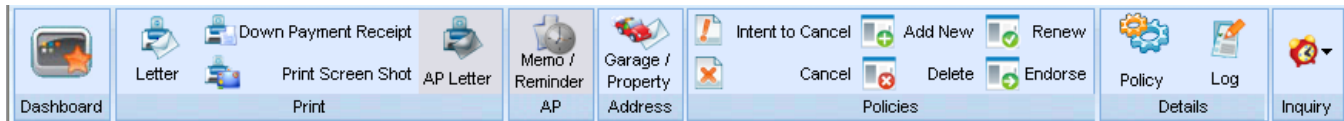
Partial ACORD form

Remember that the ACORD form you chose will determine the number of steps required to complete the new form. The Wizard will also determine the amount of steps required based on the forms and information that you have saved to the client's record. If you do not have any ACORD forms, Policy Details, or previous policy information stored in your client's record then the Wizard will display only the steps available to you with the information available. If at any time while using the Data Wizard you decide that you would rather put the information in yourself or the information you need is not available, you may click on the "Cancel" button and the Data Wizard will display the blank form for you to fill in manually.



**Important Note:** If you decide that you do not want to use the Data Wizard to populate any of the ACORD forms you can disable the Data Wizard in the Utilities Section in QQEvolution 2. To disable the Wizard un-check the box next to the statement that says, "Use Data Wizard when adding new ACORD Forms"

## Policy Screen Ribbons Descriptions



The following function buttons are available while in the Policies Screen:

### Cancel Button

This button cancels this specific policy as of the date that you enter and calculates unearned premium and commission. You can run reports that will contain cancelled policies. If the policy is already cancelled, this button will say Reinstate.

1. Enter the cancellation date.
2. Select Pro Rate, Flat Cancel or Short Rate (based on the rules set by the insurance company).

A screenshot of a 'Cancel Policy' dialog box. It contains the following fields and controls: 'Cancel Date' with a date picker showing '07/16/09', 'Pro/Short/Flat' with a dropdown menu showing 'Pro Rate', 'Memo' with a text box containing 'Policy Cancelled', 'Reminder' with an empty text box, 'CSR' with a dropdown menu showing 'Btest1', and 'Cancellation Letter' with a dropdown menu showing 'Don't print a letter'. There are two checkboxes: 'Print Acord Cancellation Request' and 'Auto-Forward Unearned Commission via EFT', both of which are unchecked. At the bottom right, there are two buttons: 'Cancel Policy' and 'Don't Cancel Policy'.

3. Enter a memo if desired.
4. Enter a reminder, if desired.
5. Identify the CSR and the letter, if used.
6. The Policy Status will now be **"Cancelled"** upon pressing Cancel Policy, and the cancellation date will be displayed above the client's name.

## Reinstating Policy

1. Locate and select the cancelled policy you wish to reinstate.
2. On the Policy Screen, click the Reinstate function button. A message “Are You Sure?” appears. Click “Yes” to reinstate the client's policy. This function can also be performed from the Search Screen.

A client will only be in the Inactive section if he/she does not have an active policy. If ANY policy is reinstated, the client's status automatically becomes Active again.

## Delete Button

This will delete a policy page from the client's file.

1. Click the Delete function button.
2. The message, Are you sure...? will appear. Clicking Yes will permanently delete the policy. Clicking No will allow you to remain in the file.
3. Even though you may delete a policy, any billing, form or memo entries that you have created for that policy will still be listed in the Billing, Forms or Memos screen.

It is your responsibility to remove the bills, memos or forms associated with the policy you just deleted. Once a policy is deleted, it cannot be retrieved.



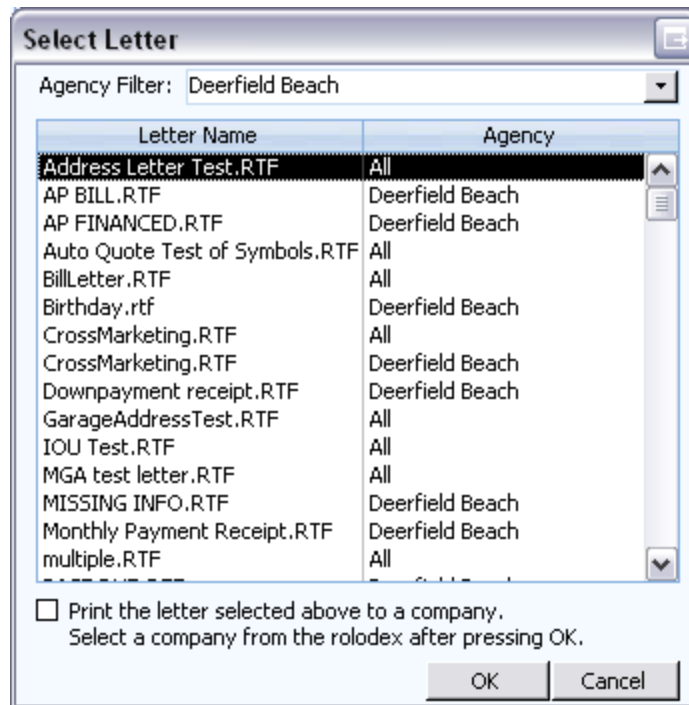
## Print Function Button

QQEvolution 2 provides a Print button in many places throughout the program for your convenience. When using the button here, you have the option to print a Letter, Print Screen or Print Down Payment Receipt.

### Print A Letter

Prints letters created in QuickWord to the selected client. Letters can be sent for any reason (e.g., renewal, cancellation, request for information, etc.) assuming that you have an existing letter created for that reason.

1. Click the Letter button from the Print section on the Ribbon.



2. Select a letter from the list. You can create or customize these letters in QuickWord.
3. You may check the Print the Letter selected above to a Company box if you wish to print the letter to a company in the QQRolodex instead of the client.
4. If the client has multiple policies, you will be prompted to select the policy the letter applies to.
5. To fill in any additional information before sending the letter, (if necessary) you must first set up a letter in QuickWord using the {Type Info Here} or {Preview} field.
6. QREvolution 2 will then display the letter in Preview mode. Click the Print button to print a copy of the letter. A memo box will open where you can enter a memo and a reminder date and/or CSR. Click OK. Select the printer you wish to use and the number of copies to print. Or, instead of selecting a printer, you may select E-mail via Outlook to e-mail this letter to your client (available with Microsoft Outlook only).
7. The agency name, address, phone number or logo will automatically be included in the letter, along with the client name, address and the date.
8. An automatic memo noting that the letter has been sent is created in the client's memo screen. Click the Memo icon to view and/or add more details to the memo.
9. Click the Close button to continue.

**10.** The letter will be saved in the client's Letters screen with the date and time noted.

If you click the Close button without printing the letter, QCEvolution 2 will prompt you to print it later, placing it in a print queue. You can print these unprinted letters from the Mailroom section on the Dashboard by clicking the Print Unprinted Letters button. If you do not answer Yes to print it later, the letter will be lost.

## Print Screen Shot

This feature allows you to print the screen you are currently viewing.

## Down Payment Receipt

This feature allows you to print a completed client down payment receipt.

## Intent To Cancel Button

When an agent receives an "intent to cancel" notice, the agent can flag a policy for cancellation at a later time. The policy will not cancel automatically. After flagging a client for cancellation, their policy screen will have a new field, Cancel On. Now:

1. Click on the Intent To Cancel button in the Policies area on the Ribbon.

**Intent To Cancel**

Date

Memo

Reminder

CSR Btest1

Intent To Cancel Letter Don't print a letter

Lets the system know the date the policy WILL BE cancelled. A report can be run based on this date. The policy WILL NOT cancel automatically.

OK I changed my mind

2. Enter the date the policy will be cancelled on.
3. Enter a memo describing the reason why the policy will be cancelled, a reminder date and the CSR who entered the cancellation.
4. Select the Intent to Cancel Letter to send to the client (if desired).

5. You may click the “I changed my mind” button if necessary.
6. Click OK and the selected letter will be automatically printed.

You can run a custom report based on the Intent to Cancel date.

To remove the Intent To Cancel, enter the client’s policy screen, highlight the date in the red field and hit the Delete or Backspace key on your keyboard. You can also click the Intent to Cancel button and select I changed my mind.

ACTIVE POLICY					
<b>Premium Info</b>				<b>Intent to Cancel On</b> 07/10/10	
Quoted Premium	\$2,557.32	Premium Sent	Gross	<b>Optional</b>	
Base Premium	\$2,507.00	Company Fees	\$50.32	Optional Coverage	\$0.00
Base Non Comm Prem	\$0.00	Non Comm Fees	\$50.32	Additional Coverage	\$0.00
Base Comm Premium	\$2,507.00	Comm Fees	\$0.00	From Endorsements	\$0.00
Commissionable Prem	\$2,507.00	Commission	\$250.70	Agency Fee	\$0.00
Premium Issued	\$2,557.32			MVR Fee	\$9.30
Endorsements	\$0.00	Endorsed Comm	\$0.00	Endorsed Agency Fee	\$0.00
Total Premium	\$2,557.32	Total Comm	\$250.70	Endorsed MVR Fee	\$0.00
				Premium Down	\$2,557.32
				Total Down	\$2,566.62
				# Pmts / Mthly Amt	0
				First Due Date	

## Renew Button

There are two ways to process a renewal for a client. Manual entry is for users of QCEvolution 2 only and Automatic entry is for those who use the QQWebRater comparative rating system. Clicking on the Renew button will give you the option to Renew through QQWebRater. Otherwise, this button will be dimmed.

### Manual Entry

1. From the Client's policy screen, click the Renew function button.
2. The message Are You Sure? will appear. If you click Yes, QCEvolution 2 will prompt you to renew through QQWebRater, click No.
3. Clicking No will display a new policy screen. Some of the information from the original policy will be populated for you. You will complete the rest of the missing information for the policy.
4. QCEvolution 2 will save your data when you leave this screen.

### Automatic Entry

If you renew through QQWebRater, you will have the ability to modify and quote this client. You can print the application and transfer the renewal quote and application back to QCEvolution 2. You will then be prompted to save a copy of the previous quote in the QCEvolution 2 Forms section for this client.



## Endorse Button

A user can manually process an endorsement for a client: within QCEvolution 2.

**Endorsement for Policy: 108**

Endorsement Method

☒ Endorse manually

☐ Endorse manually using Pro Rata calculator

☐ Endorse through QuickQuote?

Endorsement Type

<input type="checkbox"/> Add A Car	<input type="checkbox"/> Add A Driver	<input type="checkbox"/> Add Lienholder	<input type="checkbox"/> Change Coverages
<input type="checkbox"/> Delete A Car	<input type="checkbox"/> Delete A Driver	<input type="checkbox"/> Delete Lienholder	<input type="checkbox"/> Change Address
<input type="checkbox"/> Change A Car	<input type="checkbox"/> Change A Driver	<input type="checkbox"/> Change Lienholder	

After Endorsing...

☒ Don't Print Form

☐ Print Generic Auto Change Form

☐ Print Acord Auto Change Form

Endorse

Don't Endorse

The expiration date of the endorsement will match the expiration date of the policy being endorsed.

## Endorse Manually

The process below describes the use of this screen:

1. Select the policy you wish to endorse. Click the Endorse function button located on the Ribbon.
2. Select the endorsement method you wish to use.
3. Select the endorsement type (e.g., adding a new car, a new driver, etc.). Note these selection boxes will not appear if the policy is not an auto policy. Instead, type in What was Changed.
4. If you would like a form for the endorsement, select the appropriate option under After Endorsing at the bottom of the Endorsement window. If this is not an Auto policy, you will be prompted to use a form when you're done endorsing.

Once you have made your selection, click the Endorse button. You may also click Don't Endorse to cancel without endorsing.

You will need to manually enter the endorsement information into the Endorsement pop-up window. Enter the Endorsement info, Pro Rata premium info, Financing info, and Optional info. Click OK to save.

**Endorsement for Policy: Pending**

PENDING ENDORSEMENT

<b>Endorsement Info</b> What was changed: <input type="text"/> Coverage: 15-Year Term Endorsement Number: Pending Binder Number: 7528 Endorsement Date: 07/16/09 Binder Date: 07/16/09 Type of Business: New Business CSR: Btest1		<b>Premium Info</b> Quoted Premium: \$0.00 Base Premium: \$0.00 Base Non Comm Prem: \$0.00 Base Comm Premium: \$0.00 Commissionable Prem: \$0.00 Premium Issued: <input type="text"/>		Premium Sent: Net Company Fees: \$0.00 Non Comm Fees: \$0.00 Comm Fees: \$0.00 Commission: <input type="text"/>																
<b>Financing</b> Fin Co/Ctrct #: <input type="text"/> Pmt Type/Chk #: Cash Additional Amount to be financed: <input type="text"/>		<b>Optional and Additional Coverage</b> <table border="1"> <thead> <tr> <th></th> <th>Premium</th> <th>Comm</th> </tr> </thead> <tbody> <tr> <td>Optional Coverage: <input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Additional Coverage: <input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Agency Fee: <input type="text"/></td> <td></td> <td>MVR Fee: <input type="text"/></td> </tr> <tr> <td>Premium Down Payment: <input type="text"/></td> <td></td> <td>Total Down Payment: \$0.00</td> </tr> </tbody> </table>					Premium	Comm	Optional Coverage: <input type="text"/>	<input type="text"/>	<input type="text"/>	Additional Coverage: <input type="text"/>	<input type="text"/>	<input type="text"/>	Agency Fee: <input type="text"/>		MVR Fee: <input type="text"/>	Premium Down Payment: <input type="text"/>		Total Down Payment: \$0.00
	Premium	Comm																		
Optional Coverage: <input type="text"/>	<input type="text"/>	<input type="text"/>																		
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Agency Fee: <input type="text"/>		MVR Fee: <input type="text"/>																		
Premium Down Payment: <input type="text"/>		Total Down Payment: \$0.00																		

OK Cancel

## Using Pro-Rata Calculator

When you use this option, QQEvolution 2 calculates the Pro Rata premium. Enter the new full term premium and QQEvolution 2 will then calculate the endorsed premium taking into account the number of days elapsed. Select an endorsement type. Decide what to do after endorsing and then click the Endorse button.

The above image endorsement screen will only appear if you select Endorse Manually or if you select Endorse Manually Using Pro Rata Calculator.

On the client's Policy screen the Endorsements tab will now reflect the changes you have made to the client's policy. Also, clicking on the History button will generate a report that will show the original policy, endorsement history, premiums, effective dates, coverage, company and down payments, finance company, and contract number.

On the client's Policy screen you can view details of an endorsement by double-clicking on the endorsement you want to view. You can also change the status of the endorsement by double-clicking on the word Pending Endorsement. A box will pop up and ask you if you want to change the status to Active Endorsement (See Policies Screen: page ? ).

Endorsement for Policy: Pending		PENDING ENDORSEMENT										
<b>Endorsement Info</b> What was changed: CHANGE LIAB COV; ADD 2009 BUICK Coverage: Liability-Comp/Coll Endorsement Number: Pending Binder Number: 1025 Endorsement Date: 05/10/10 Binder Date: 05/10/10 Type of Business: New Business CSR: amytest		<b>Premium Info</b> Quoted Premium: \$1,380.67 Base Premium: (\$25.00) Base Non Comm Prem: \$0.00 Base Comm Premium: (\$25.00) Commissionable Prem: \$0.00 Premium Issued:										
<b>Financing</b> Fin Co/Ctrct #: Direct Bill Pmt Type/Chk #: Cash Additional Amount to be financed: \$430.34		Premium Sent: Gross Company Fees: \$25.00 Non Comm Fees: \$0.00 Comm Fees: \$25.00 Commission:										
		<b>Optional and Additional Coverage</b> <table border="1"> <thead> <tr> <th></th> <th>Premium</th> <th>Comm</th> </tr> </thead> <tbody> <tr> <td>Optional Coverage</td> <td>\$0.00</td> <td></td> </tr> <tr> <td>Additional Coverage</td> <td>\$0.00</td> <td></td> </tr> </tbody> </table>			Premium	Comm	Optional Coverage	\$0.00		Additional Coverage	\$0.00	
	Premium	Comm										
Optional Coverage	\$0.00											
Additional Coverage	\$0.00											
		Agency Fee: \$0.00 MVR Fee: \$0.00 Premium Down Payment: \$414.20 Total Down Payment: \$414.20										
<input type="button" value="Delete"/> <input type="button" value="Show Form"/>		<input type="button" value="OK"/> <input type="button" value="Cancel"/>										

## Garage/Property Address Button

If the client keeps the car, or the insured property is at a location other than the mailing address, click this button to enter the garage/property address.

Garage/Property Address	
123 Garage St Garage, FL 33319	
<input type="button" value="Change &lt;&lt;"/>	
Assign an Address For This Policy	
Address	Type
123 Mail St. Mail City, FL 33319	Mailing
500 New Mailing Address St. Miami, FL 33054	Garage
456 Original St. Mail City, FL 33319	
6500 8 Mile Rd. Detroit, MI 48219	
123 Mail St Mail City, FL 33319	<input type="button" value="New"/> <input type="button" value="Assign"/> <input type="button" value="Cancel"/>

## Add New Policy

1. Click the function button at the upper right side of the screen, Add New in the Policies area. You should now be on a new record and a blank page will be displayed. You may also use the page down key on your keyboard to go to additional policies.
2. Select the appropriate Line and then enter the information for this policy. Click the Dashboard button to save.

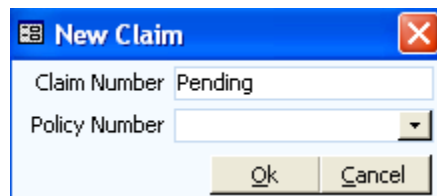
**Adding Policy Details:** In addition to being able to add Line, Coverage and Company, you can also add detailed policy information in the Forms section. The Forms section can be accessed from the Client or Prospects section. Simply highlight the client's name in the search box, click on the Forms Screen, and Add a Form. Highlight the form that you want to use and double-click to open. Type in any additional information that is needed on the form and click to save. You must have a client record and policy record created first before you can fill out a form.

Forms are the containers that hold policy details. Once a form is created and saved, it can be referred to at any time. For example, if you just added a Homeowners policy, you can add an ACORD Homeowners form. You would then enter the details of the policy. This information can be accessed at any time by selecting the appropriate client and then clicking the Forms Screen. You will see a list of all the forms associated with this client. To view one, simply double-click on the form name and it will open. Likewise, if you want to enter driver and vehicle information for an automobile policy, you can add an Auto Quote in the forms section.

## Claims

In QCEvolution 2 you have the ability to input claims on your client's records. To access Claims for a client you will open Clients from the Dashboard. You will then search for the client and select them, on the top Ribbon click on Claims.

When you open Claims you will be asked if you'd like to add a new claim, click "Yes." The **New Claim** box will open. You can enter the Claim Number if you have it or leave it saying the default of "Pending" if you do not have it as of yet. You will also enter the Policy Number. To do so you will click the drop down arrow and a list of your existing policies will be displayed, select the policy the claim belongs to. Then click the "OK" button.



Once the "New Claim" box closes you will be on the **Claim Info** tab. There are six tabs in total which can be filled out for the claim. You will notice the Claim Number, Policy Number, Coverage, Line, and MGA/Company areas have all been pre-filled for you. This was based on which policy you selected in the previously mentioned "New Claim" box. This information is locked here and cannot be changed. You would have to make the changes to these areas on the actual policy on the Policy screen and then they would reflect here. Another thing you will notice is when you move to each area to input the information the label of the box will be displayed in blue. This allows you to easily tell where you are in the information entry process.

When you are entering the **Claim Type** you will click the drop down and choose from the default list of types. If you would like to add, delete, or edit this list click on the **Types** button and change the list. The default list of "Types" already provided for you cannot be changed, only Types you entered can be changed.

You will want to fill out as much information on the tab as you can but you can also come back and edit the claim at any time. There are also areas for you to list the **Risk, Incident Description, and Damage Description**.

One item to note on the Claim Info tab is the **Claim Status**. The status can be changed as needed but once a claim has been set to the status of **Voided** it cannot be changed nor can any part of the voided claim be changed.



You will get a warning message stating this which will allow you to cancel the voiding of the memo. In order to void a memo select the **Void** button on the top Ribbon or Toolbar.

On the top Ribbon there is a box marked **Print**. You will have access to this box on all tabs of the Claims area. If you select **Forms & Images** from here it will open a box allowing you to Print or Email which ever images and forms you select. What forms and images you have to select from is determined by what forms and images you have currently saved on the claim.

**Print/Email/Fax [Selected Claim]**

Printing Options

☒ Print ☐ Email ☐ Fax

Printer: HP Officejet 7300 series

Copies: 1

Select Items to Print

Images Forms

Form Name	Description	Effective
<input checked="" type="checkbox"/> Auto Loss Notice		06/24/08

Select All

Deselect All

Print Cancel

After selecting the email option the box will expand to include the below area.

**Note:** Don't forget in order to email you must be using Microsoft Outlook and have set up the Email setting in the Utilities of QREvolution 2. If you need further information on this please refer to the recorded Webinars available on our Web site which guide you through the whole program. You can also find information on our site in the training videos and Newsletters. The QREvolution 2 manual explains the program as well.

Printing Options

☐ Print
 ☒ **Email**
☐ Fax
 To:

Subject: 
 From:

Body      Cover letter: 
☒ Include Email signature

My Insurance Co  
 99 NW 40 CT  
 Sunshine, FL 33333  
[www.qgonline.com](http://www.qgonline.com)

The Print box also has **Claim Summary**. If you select this option a report will open and it will have all of the information you have entered on this claim contained within it. You can print this report as well.

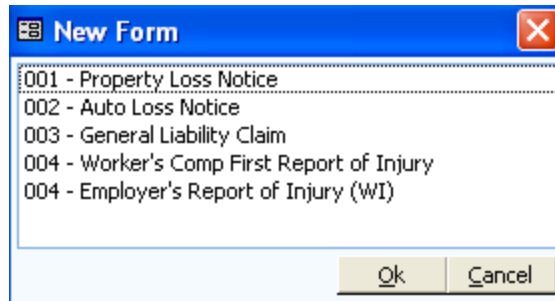
The third tab in the Claim area is **Forms**. In order to add a form to the claim area, click the **Add New** button. A box will appear allowing you add an ACORD form. Only the ACORD forms that can be associated with claims will appear here. When you choose the form it will open and you can fill out the required information. The form(s) will always be stored in the "Forms" section in the Claims area. . To add other ACORD forms to a client record you would use the main **Forms** section.

Dashboard
Add New   Delete   Edit Description   Forms & Images
Change Claim   Claim Summary   Print

**Client: Allen, Amy**  
 OPEN claim 1022545A reported on July 1, 2009

Claim Info
Claim Progress
Forms
Images
Adjusters
Claim Parties

Type of Form	#	Added on	Company	Policy Number	Eff Date	Description
Auto Loss Notice	002	07/02/09	United Auto	111111111111	06/24/08	

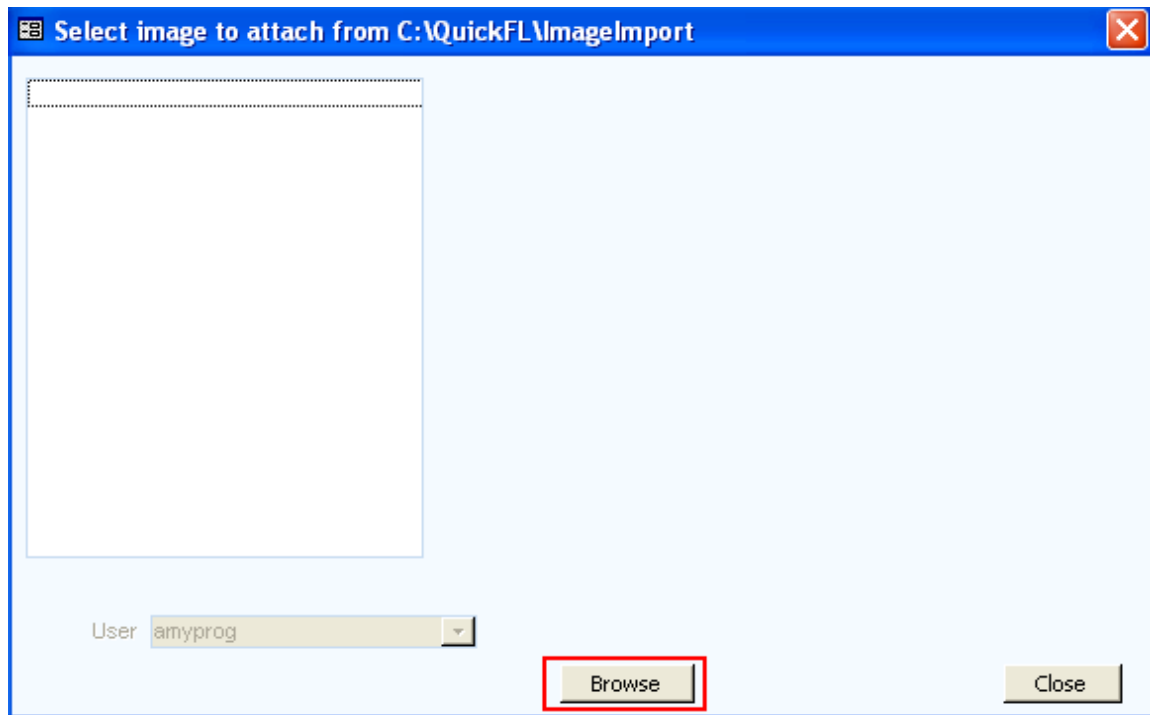


The other options on the top Ribbon for the Claims Forms section are as follows.

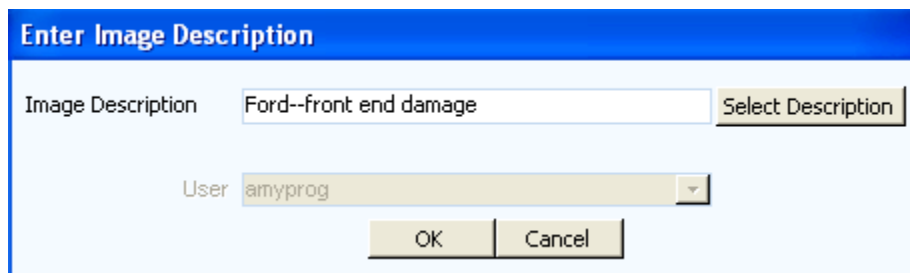
- **Delete** – You would first select the form you wish to remove and then select the “Delete” button. This will permanently delete the form.
- **Edit Description** – If you would like to list a description on an individual form, select the form and then click “Edit Description.” You will then be able to enter in your description.
- **Change Claim** – If you have multiple claims listed on a client you could accidentally enter the form on the wrong claim. If this happens select the form and click the “Change Claim” button and select the correct claim the form goes to and click “OK.” The form will now be associated with the proper claim. If you do not have more than one claim list on a client the “Change Claim” button will be grayed out and not useable.

The fourth tab is **Images**. Here you will attach any images and/or documents you have that are associated with the claim. You do have the ability to attach items already saved on your computer or to scan directly into the Claim’s Image section.

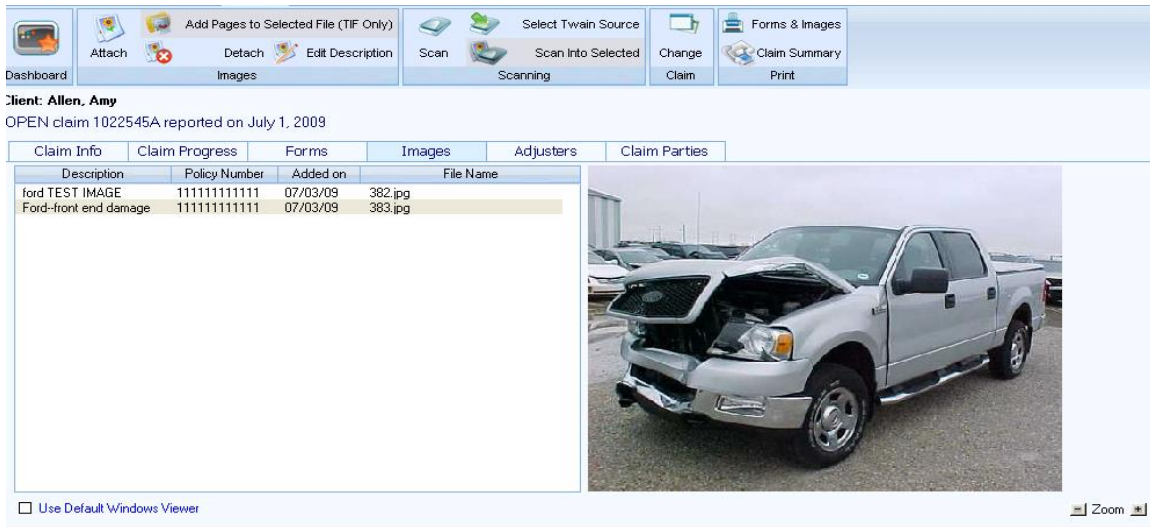
To attach an image you will select the **Attach** button on the Ribbon or Toolbar, the following box will open.



You will click on the **Browse** button which will allow you to search your computer for the image you wish to attach. Once you select the image to attach you will put in a description of what the image is. The image will then be displayed on the claim.

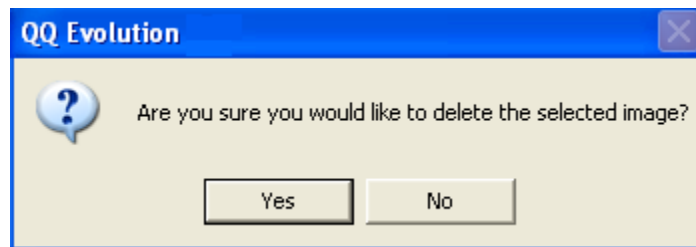


You will note the program associates the image being attached the user who is logged into the program.



You can also remove an image by clicking on the **Detach button**. This will delete an image from the client's claim record.

Before selecting Detach Image, make sure to highlight the correct image file. After clicking the button, you will be asked to confirm that you want to delete the file.



If this is what you would like to do, click **"Yes."** The image will now be deleted.

The **Edit Description** button on the Ribbon allows you to change the description for an image file. The **Change** button would be used if you have an image saved on the wrong claim for the client. You would select the image and click the "Change" button. A box will open; select the correct claim for the image and click "OK." The image will now appear in the Image section for the correct claim on the client. This is for moving images between claims within a single client's record. You cannot move an image to a different client.

You can scan directly into the Image tab in the Claim section. First make sure you have your scanner selected by clicking the **Select Twain Source**. The **Select Source** window will appear and should contain the identification of your scanner. Now, select your scanner.

**Note:** You will only have to do this step the first time you use your scanner within QQEvolution 2.

After selecting the Twain Source you are ready to scan, click the **Scan** button. The **Image Info** box will open. Here, you can enter a description for the image, select the policy it goes with (if the client has more than one.) Check the boxes next to the descriptions that say, “**Show scanner’s interface when**”; and also “**Force Black & White**”. If you are doing a photo and would like it displayed in color do not check this but when you scan the image as color make sure to save it as a smaller size. This will help prevent file size conflicts.

If you are using a flatbed scanner and scanning a multiple-page document, you may enter the number of pages. Then, put a check next to **Prompt for pages**. When the scanner is finished scanning each page, you will be prompted to insert the next page in turn. If you are using an auto document feeder, make sure “Prompt for pages” is unchecked. Also if you are using an auto document feeder and you select “Separate Pages,” each page will be stored as an individual image file. Therefore, if you are scanning a multiple-page document, make sure this is unchecked.

After entering your information in the Image Info window, click the **Scan** button. The user interface window for your scanner will appear. In this window, you should select Black & White scanning unless you are purposely doing color. You can now scan your document or picture. Once scanned, the image file will be stored in the Image section for that specific client’s claim.

**Note:** You can scan your document or image using virtually any file format. Examples are: TIF, .BMP, .JPG, .GIF, .PDF, and .DOC. There is no limit to the amount of images which can be stored on a client. There is however a file size limit, .PDF files cannot be over 6 megabytes (6 MB), .JPG, .GIF, .BMP, .DOC files should not be over 1 MB. .TIF should not be over 2 MB.

**TIP:** If you receive the message **File size too large**, check the settings in your scanner’s user interface window. Make certain that all of the scanning settings are set to default or standard values and you are scanning at a lower resolution especially when doing color.

For more information on scanning images please refer to the Webinars and training material available on our Web site. The scanning feature here in the Claims section is very similar to how scanning is done in the Image section on the client record.

The fifth tab is **Adjusters**. Here you can keep track of all of the different adjusters there may be for the individual claim. When you enter the Adjusters tab for the first time on a claim a box will open asking you if you wish to enter a new adjuster. To add an adjuster at any time you will click the **Add New** button on the top Ribbon or Toolbar. You now need to enter in the adjuster’s information in the box that appears. Once you completed this box click “OK” and save the information. The adjuster will now be displayed. If you enter multiple adjusters on a claim the first three will be displayed on the screen and if you have over three you will need to use the scroll bar to view them.

**Add New Adjuster**

First Name	Toni	Middle Initial		Last Name	Redmond
Company	Adjusters R Us				
Address	542 N 17th Ave			Suite	502
City	Deerfield Beach	State	FL	Zip	33442-
Work	(954) 785-6524-23				
Cell	(561) 254-8954				
Fax	(954) 785-6525				
Email	adjustersrus@internet.com				
Time Zone	Eastern Standard Time	Language	English	Handles	Bodily Injury
Remarks	sw Toni on 5/10 and he said they are finished with their end				

Ok Cancel

Dashboard Add New Edit Delete Forms & Images Claim Summary Print


**Client: Allen, Amy**  
OPEN claim 1022545A reported on July 1, 2009

Claim Info	Claim Progress	Forms	Images	<b>Adjusters</b>	Claim Parties
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Adjuster	Toni Redmond	Work	(954) 785-6524-23	Remarks	sw Toni on 5/10 and he said they are finished with their end
Company	Adjusters R Us	Cell	(561) 254-8954		
Address	542 N 17th Ave, Suite 502	Fax	(954) 785-6525		
City	Deerfield Beach	Email	adjustersrus@internet.com		
State	FL	Language	English		
Zip	33442-	Time Zone	Eastern Standard Time		
Handles	Bodily Injury				

You also have the ability to edit and delete adjusters you have listed.

The final tab is **Claim Parties**. Here you enter any other person(s) involved with the claim. When you enter the Claim Parties tab for the first time on a box will open asking you if you wish to enter a new "Claim Party." To add a Claim Party at any time you will click the **Add New** button on the top Ribbon. You now need to enter in the Claim Party's information in the box that appears. Once you completed this box click "OK" and save the information. The Claim Party will now be displayed. If you enter multiple Claim Parties on a claim the first three will be displayed on the screen and if you have over three you will need to use the scroll bar to view them.

First Name	Todd	Middle Initial	M	Last Name	Linnville
Company					
Address	985 SW Lake Terrace			Suite	
City	Miami	State	FL	Zip	33333-
Home	(305) 654-2874			Relation	Relative
Work	(305) 658-5453-6987			Claimant	<input checked="" type="checkbox"/>
Cell	(954) 873-1591			Amount of Loss	\$500.00
Fax					
Email	linnvilletodd@internet.com				
Remarks	Todd was seen in ER after incident, will be submitting hospital bill.				
<input type="button" value="Ok"/> <input type="button" value="Cancel"/>					

**Note:** If the “Claim Party” happens to be a lien holder and you have them listed in your QQRolodex you can click the gray button to the right of **Company** and it will open the Rolodex. You will select the lien holder and the information for the company will be filled in for you. Also in the **Relation** area there is a default list of relation provided for you, click the drop down box to view the list and select the relationship.

				
Dashboard	Add New	Edit	Delete	Forms & Images
Claim Parties				
Print				

**Client: Allen, Amy**  
OPEN claim 1022545A reported on July 1, 2009

Claim Info	Claim Progress	Forms	Images	Adjusters	Claim Parties
Claim Party	Todd M Linnville	Home	(305) 654-2874	Claimant	<input checked="" type="checkbox"/>
Company		Work	(305) 658-5453-6987	Amount of Loss	\$500.00
Address	985 SW Lake Terrace	Cell	(954) 873-1591	Remarks	Todd was seen in ER after incident, will be submitting hospital bill.
City	Miami	Fax			
State	FL				
Zip	33333-				
Relation	Relative	Email	linnvilletodd@internet.com		
Claim Party	Dottie Mayfield	Home	(305) 698-4657	Claimant	<input type="checkbox"/>
Company		Work	(305) 698-4574-55	Amount of Loss	\$0.00
Address	98 S 89th Way	Cell			
City	Miami	Fax			
State	FL				
Zip	33334-	Email			
Relation	Other				

You can also Edit and Delete “Claim Parties” as needed. Do not forget that deleting something in the program is permanent.

# Memos

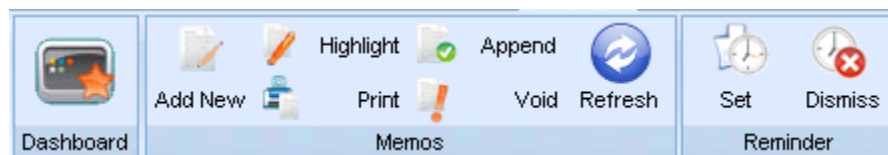
Entering memos is a great way to document transactions and manage your client accounts. All memos that you enter are automatically stamped with the current date and time. The specific wording of the memo is generated in two ways. You may actually enter a memo and it will be stored under the Memos Screen or QCEvolution 2 will enter memos automatically whenever certain events occur, (e.g., entering a payment, endorsing a policy, renewing a policy, etc.) and it will be stored under the Activities Screen in the specific client record.

Client: **Berry, Bruce** Call about Car Insurance

Show Only These Policies: **All** Memo Type Filter ☐ Don't Show Voided Memos

Date	Memo	Reminder	Dismissed	CSR	Policy	Type
06/22/09 10:28 AM	DownPayment values changed: Payment Type: Cash		<input type="checkbox"/>		AIG - Illinois National - 06/22/09 - Pending	Memo
06/22/09 10:24 AM	DownPayment values changed: Payment Type: Cash		<input type="checkbox"/>		AIG - Illinois National - 06/22/09 - Pending	Memo
06/22/09 10:23 AM	DownPayment values changed: Premium Down Payment:555.		<input type="checkbox"/>		AIG - Illinois National - 06/22/09 - Pending	Memo
06/22/09 10:22 AM	DownPayment values changed: Payment Type: Cash		<input type="checkbox"/>		AIG - Illinois National - 06/22/09 - Pending	Memo
06/22/09 10:21 AM	Policy Added		<input type="checkbox"/>	Ojim	AIG - Illinois National - 06/22/09 - Pending	NewPol
06/22/09 10:20 AM	DownPayment values changed: Payment Type: Cash		<input type="checkbox"/>		Access ASI - 06/10/09 - Pending	Memo
06/10/09 8:08 AM	Policy Added		<input type="checkbox"/>	Ojim	Access ASI - 06/10/09 - Pending	NewPol
05/28/09 3:45 PM	Policy Added		<input type="checkbox"/>	Ojim	A.R.A. Casualty - 05/28/09 - Pending	NewPol
04/23/09 5:04 PM	Policy Added - [Reminder date set to 05/01/09] [ Dismissed on 07/02/09 by arodriquez ]	05/01/09	<input checked="" type="checkbox"/>	4test	A nofees - 04/23/09 - Pending	NewPol
04/23/09 1:49 PM	Label Printed		<input type="checkbox"/>	2test	- -	Label
04/23/09 1:49 PM	Label Printed - [Reminder date set to 04/29/09] [ Dismissed on 07/02/09 by arodriquez ]	04/29/09	<input checked="" type="checkbox"/>	hoodafunkit	- -	Label

To type a memo, click on Add a Memo. Enter the Reminder date (if any) and the name of the CSR who entered the memo. You may also assign this memo to a policy and assign it a memo type. Once added, memos cannot be deleted or edited. When using QCEvolution 2 Gold or higher, the memo can also be added to your To-Do List.



**Print Memos:** Prints a list of all memos for the client you are working with.

**Add A Memo:** This feature allows you to add a memo to an existing client record.

**Enter Memo**

CSR: Btest1 Policy: [dropdown]  
Memo Type: Memo Reminder Date: [dropdown]  
Today's Date: 07/16/09 Current Time: 10:52 AM  
Text: ☐ Add to To-Do List  
[Commonly Typed Memos...] [OK] [Cancel]

**Highlight Memo:** Highlights the selected memo in yellow for easier viewing. Use to highlight your important memos.

**Void Memo:** Voids the memo if you made a mistake upon entering it. This action is permanent.

**Refresh:** This button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the memo one agent entered seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.

**Set Reminder or Snooze:** If a memo doesn't have a reminder date, use the Set Reminder button to give it one. If it does have a reminder, but you need to change that reminder, use the Snooze button.

**Append To Memo:** Use the "Append To Memo" button when you need to add additional information to an existing memo.

Enter Memo

Today's Date 07/16/09 ☐ Dismiss Reminder

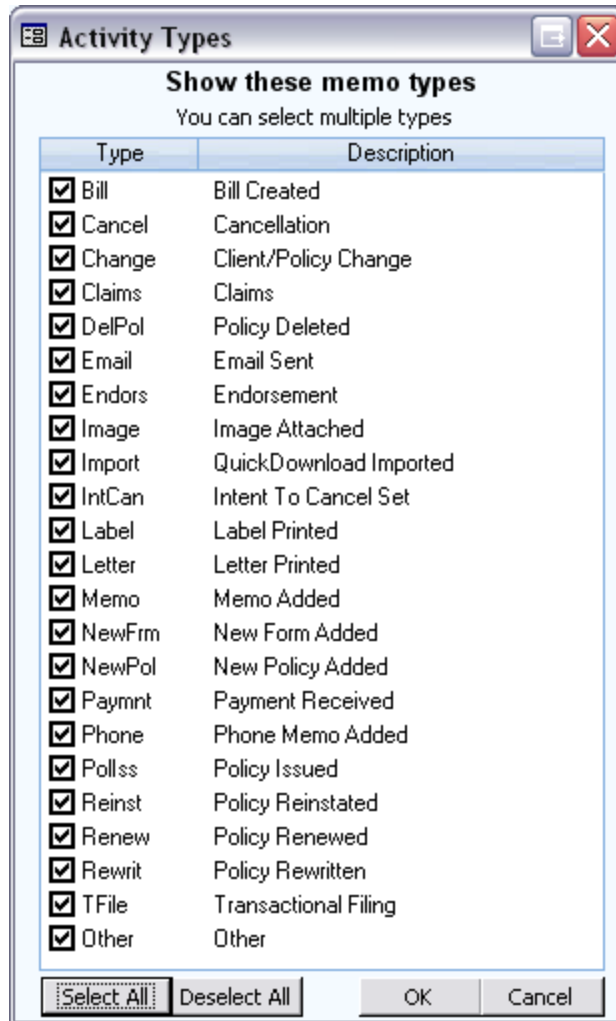
Commonly Typed Memos... OK Cancel

**Dismiss:** If you've already followed up on this memo and you no longer wish to see it on your reminder reports, select it first, then "Dismiss" it.

## Selection Filters

**Show Only These Policies:** If the client has multiple policies, you can choose which policy to see memos. The default is set to ALL.

**Memo Type Filter:** If you want to view memos of a particular type select the type of memos to display.



**Don't Show Voiced Memos:** If you would like to hide your voiced memos you may make this selection.

If you post a Reminder date in a memo, and today is the day you entered, the next time you view the QCEvolution 2 Dashboard, the Memo Reminders area will display how many reminders you have. You will click the "View" button to access your list of memo reminders. To view a report of your reminders, select View as Report. The list can then be printed or exported to Excel.

## Activities Screen

Automatic memos are created when certain events occur (e.g., creating a bill, printing a letter, renewing a policy, etc.) and will be stored under the Activities Screen section of the program. These are system generated memos.

Client: **Berry, Bruce** Call about Car Insurance

Show Only These Policies: **All** Activity Type Filter ☐ Don't Show Voiced Activity

Date	Time	Memo	CSR	Policy	Type
06/22/09	10:28 AM	DownPayment values changed: Payment Type: Cash	wally5	AIG - Illinois Natio	Memo
06/22/09	10:24 AM	DownPayment values changed: Payment Type: Cash	wally5	AIG - Illinois Natio	Memo
06/22/09	10:23 AM	DownPayment values changed: Premium Down Payment:555.	wally5	AIG - Illinois Natio	Memo
06/22/09	10:22 AM	DownPayment values changed: Payment Type: Cash	wally5	AIG - Illinois Natio	Memo
06/22/09	10:21 AM	Policy Added	wally5	AIG - Illinois Natio	NewPol
06/22/09	10:20 AM	DownPayment values changed: Payment Type: Cash	wally5	Access ASI - 06/10/0	Memo
06/10/09	8:08 AM	Policy Added	wally5	Access ASI - 06/10/0	NewPol
05/28/09	3:45 PM	Policy Added	wally5	A.R.A. Casualty - 05	NewPol
04/23/09	5:04 PM	Policy Added - [Reminder date set to 05/01/09]	wally5	A_nofees - 04/23/09	NewPol

## Selection Filters

**Show Only These Policies:** If the client has multiple policies, you can choose which policy to see activities. The default is set to ALL.

**Activity Type Filter:** If you want to view activities of a particular type select the type of activities to display.

Activity Types

Show these memo types

You can select multiple types

Type	Description
<input checked="" type="checkbox"/> Bill	Bill Created
<input checked="" type="checkbox"/> Cancel	Cancellation
<input checked="" type="checkbox"/> Change	Client/Policy Change
<input checked="" type="checkbox"/> Claims	Claims
<input checked="" type="checkbox"/> DelPol	Policy Deleted
<input checked="" type="checkbox"/> Email	Email Sent
<input checked="" type="checkbox"/> Endors	Endorsement
<input checked="" type="checkbox"/> Image	Image Attached
<input checked="" type="checkbox"/> Import	QuickDownload Imported
<input checked="" type="checkbox"/> IntCan	Intent To Cancel Set
<input checked="" type="checkbox"/> Label	Label Printed
<input checked="" type="checkbox"/> Letter	Letter Printed
<input checked="" type="checkbox"/> Memo	Memo Added
<input checked="" type="checkbox"/> NewFrm	New Form Added
<input checked="" type="checkbox"/> NewPol	New Policy Added
<input checked="" type="checkbox"/> Paymnt	Payment Received
<input checked="" type="checkbox"/> Phone	Phone Memo Added
<input checked="" type="checkbox"/> Pollss	Policy Issued
<input checked="" type="checkbox"/> Reinst	Policy Reinstated
<input checked="" type="checkbox"/> Renew	Policy Renewed
<input checked="" type="checkbox"/> Rewrit	Policy Rewritten
<input checked="" type="checkbox"/> TFile	Transactional Filing
<input checked="" type="checkbox"/> Other	Other

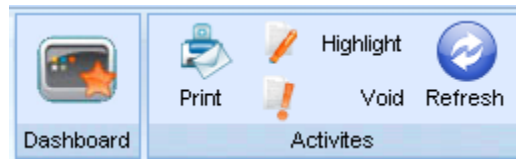
Select All

Deselect All

OK

Cancel

**Don't Show Voided Activity:** If you would like to hide your voided activity you may make this selection.



## **Print Activity**

Prints a list of all activities for the client you are working with.

## **Highlight Activity**

This button highlights the selected activity in yellow for easier viewing. Use this to highlight your important activities.

## **Void Activity**


This button voids the activity if you made a mistake upon entering it. This action will permanently void this item.

## **Refresh**

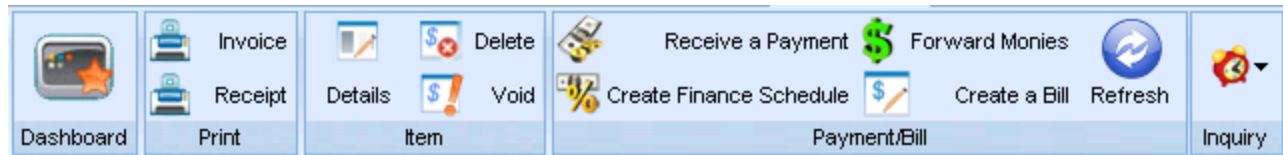
This button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the activity generated by one agent seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.

## Client Billing Screen

Items in the Billing screen are created automatically whenever certain events occur (e.g., payments, down payments, additional premiums, etc.). To add billing items, click the Payment/Bill button.

Client: <b>Berry, Bruce</b>		 <b>Call about Car Insurance</b>							
<b>Client Billing</b>		Show Only These Policies: <input type="text"/>		Show Only These Bill Descriptions: All		<input type="checkbox"/> Don't Show Voided Bills			
Date	Company	Description	Debit	Credit	Due	CSR	Rcpt	Pmt Type	Check #
06/22/09	AIG - Illinois National	Down Payment	\$555.00	\$555.00		0jim		Cash	
	<input type="text"/>	<input type="text"/>							
09/12/08		Down Payment	\$55.00	\$55.00		Wally's Csr	196	Cash	
	<input type="text"/>	<input type="text"/>							
08/11/08		Premium Due	\$55.00	\$0.00					
	<input type="text"/>	<input type="text"/>							

- A client's balance (e.g., unpaid additional premiums, IOUs, etc.) will appear at the bottom of the billing screen, and on the client screen in red as an AR balance (if this feature has been activated in the Utilities section).
- You can choose to show billing entries that apply to all policies or to specific policies only. Click the down arrow key to the right of Show only these policies to make your selection.
- You can also choose to show billing entries of a certain description (e.g., AP paid, down payment etc.). Click the down arrow to the right of Show only these Bill Descriptions to select which type of billing transactions to see.



## Delete Function Button

To delete an entry in the Billing section, click anywhere in the row you want to delete and then click the Delete button. You will be prompted to confirm deletion. Click “Yes” if you are sure; click “No” to cancel.

## Print Function Button

This button will allow you to print either a standard invoice or custom receipt for any item that you have created.

## Print Invoice

This feature allows you to print a completed client invoice.

**Invoice Preview**

Check the items that you want to be included in the invoice and click Print. By default, all items are checked.

Show only these policies:  Starting Date:  Ending Date:  ☒ All Dates

Print	Date	Policy	Description	Debit	Credit	Due
<input checked="" type="checkbox"/>	06/22/09	AIG - Illinois National	Down Payment	\$0.00	\$555.00	
<input checked="" type="checkbox"/>	06/22/09	AIG - Illinois National	Down Payment	\$555.00	\$0.00	

**Balance = \$0.00**



Bruce Berry  
123 Mail St  
Mail City, FL 33319

Invoice #	Date
On Printout	07/16/09

Date	Policy Number	Company	Coverage	Description	Debit	Credit	Due Date
06/22/09	Pending	AIG - Illinois Natic	15-Year Term	Down Payment ▾	\$0.00	\$555.00	
06/22/09	Pending	AIG - Illinois Natic	15-Year Term	Down Payment ▾	\$555.00	\$0.00	
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
					<b>Balance = \$ 0.00</b>		

Invoice styles can be found in Utilities > Defaults > Letters.

## Print Receipt

This feature allows you to print a completed client receipt.

## Void Item

Click in the row you want to void and then click the Void Item button to void the transaction. Once voided, the line will be highlighted in yellow.

Voiding a billing transaction eliminates any dollar amounts from the balance, reports, letters and the balance sheet. You may run a voided report to create a list of all voided billing transactions. This action is permanent.



## Payment/Bill

You can receive a payment, create a bill, forward monies and create a finance schedule.

### Receive Payment

1. Click on Receive a Payment in the Payment/Bill area.
2. Select the appropriate policy from the Select Policy window, if client has multiple policies, and click OK.

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term		A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term	Abc	A_no fees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

Enter Payment Info	
Transaction Date 07/16/09	
<b>Payment Info</b>	
Amount	Agency Fee
Description	Forward Date
Payment Type Cash	Check #
<input type="checkbox"/> EFT To Company	
If payment is split (i.e. Cash/Check), list second payment info	
Amount	Agency Fee
Payment Type Cash	Check #
<input type="checkbox"/> Create a Debit and Credit for the amount above in the billing screen	
Receipt Payment.RTF	
Add the following to the memo section...	
Memo Payment Received: \$0.00	
Reminder Date	CSR Btest1
OK	Real-Time Inquiry: Make Payment
Cancel	

3. In the Payment Info screen enter the payment amount, the agency fee (if any) and a description. Descriptions can be created in the Utilities section under the Popup Boxes tab.
4. Enter a forward date (if applicable), select a payment type and enter the check # if paid by check.
5. If the payment is split (e.g., part cash, part check), then enter the second payment type information.
6. Enter the date that the payment was received.
7. Enter a memo if desired, a reminder date and select the CSR who is entering the payment information.
8. Make sure to check the box in the middle of the Payment Screen that says **“Create a Debit and Credit for the amount above in the billing screen”**
9. Click OK and a receipt will be printed automatically. If you have chosen to print a receipt, your default receipt will show up here (you can opt not to print a receipt).
10. Automatic memos noting that the receipt letter has been printed and that a payment has been received are created in the client’s Memo screen.
11. An entry is also automatically created in the client’s billing screen. Click the Billing icon to view this information.

When receiving payments, you can attach the payment to an existing entry. For example, a client has a debit entry (amount) for an additional premium. The client is now paying that additional premium, which would be a credit. Attaching this payment amount to the original debit for the additional premium will create a single entry in the billing screen to reflect this transaction instead of two. If you choose not to attach to an existing entry, you will have an option to create a debit AND credit entry in the amount of the payment. If this option isn’t checked only a credit will be created on the billing screen.

### **Create a Bill**

1. Click Create a Bill in the Payment/Bill area.
2. Select Policy for which you are creating the bill (if the client has more than one policy).

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term		A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term	Abc	A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

Enter Bill Info

Transaction Date 07/16/09

Bill Info

Amount

Description

Due Date

Bill Receipt

☐ Print the letter selected above to a company. Select a company from the rolodex after pressing OK.

Add the following to the memo section...

Memo Bill Created

Reminder Date  CSR Btest1

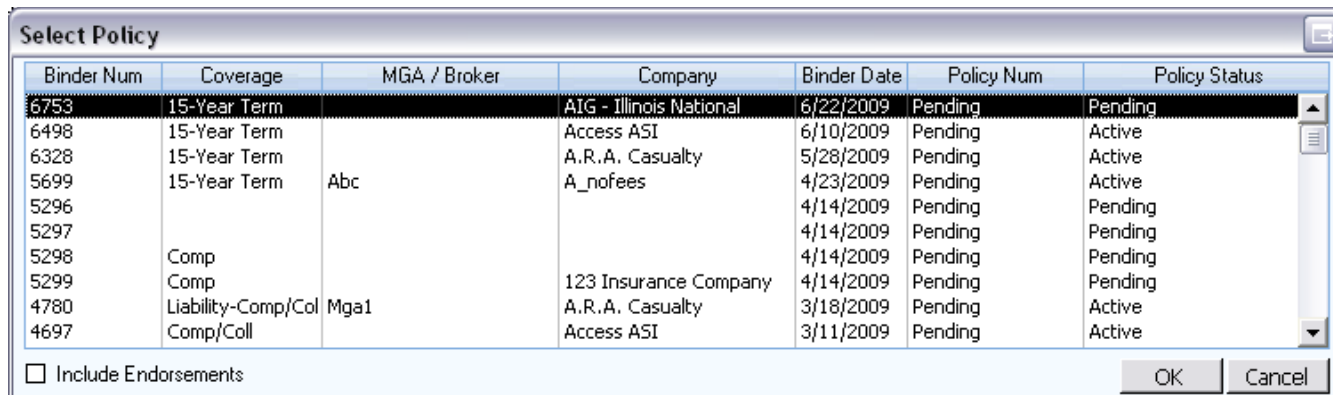
OK Real-Time Inquiry: Make Payment Cancel

3. Enter the bill amount, description and due date.
4. Select the desired Bill Receipt to print.
5. If desired, you may print the letter to a company in the QQRolodex by clicking the Print the letter selected above to a company checkbox.
6. You may enter a memo, reminder date and CSR if desired.
7. Click OK when finished. The bill will be entered on the client's billing screen, and the selected receipt will be printed.

## Forward Monies

This button will forward monies to the insurance companies within QCEvolution 2 that were already received, such as an early renewal payment.

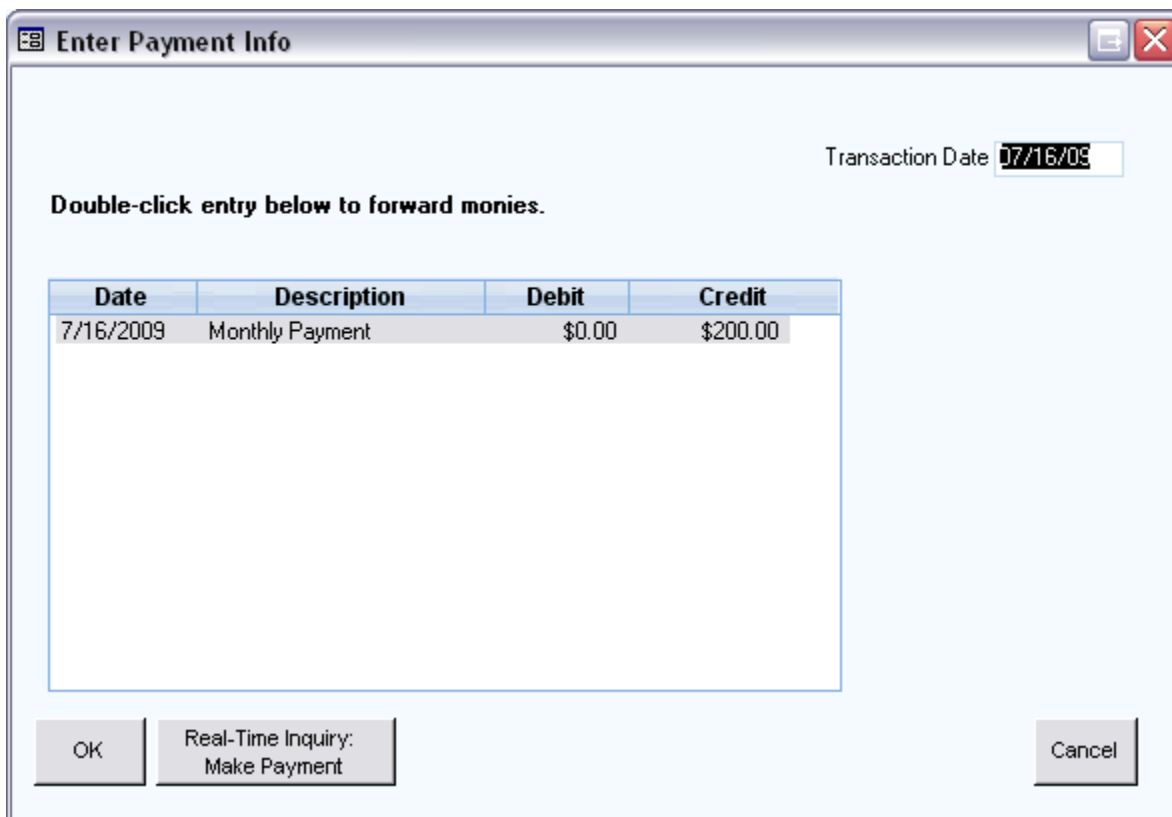
1. Click Forward Monies in the Payment/Bill area.
2. Select the policy for which you are forwarding monies (if the client has more than one policy).



The 'Select Policy' dialog box displays a table of policies. The first row is highlighted. Below the table is a checkbox for 'Include Endorsements' and 'OK'/'Cancel' buttons.

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term		A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term	Abc	A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements      OK      Cancel



The 'Enter Payment Info' dialog box includes a 'Transaction Date' field, a double-click instruction, a table with one entry, and 'OK', 'Real-Time Inquiry: Make Payment', and 'Cancel' buttons.

Transaction Date: 07/16/09

Double-click entry below to forward monies.

Date	Description	Debit	Credit
7/16/2009	Monthly Payment	\$0.00	\$200.00

OK      Real-Time Inquiry: Make Payment      Cancel

**Enter Payment Info**

Transaction Date

**Payment Info**

Amount  Agency Fee

Description  Forward Date

Payment Type  Check #

☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount  Agency Fee

Payment Type  Check #

Add the following to the memo section...

Memo

Reminder Date  CSR

OK Real-Time Inquiry: Make Payment Cancel

## Create Finance Schedule

This option will allow you to set up a finance schedule for the client's monthly payments.

1. Click Create Finance Schedule in the Payment/Bill area.
2. Select the policy for which you are creating a finance schedule (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term	Abc	A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term		A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

**Enter Payment Info**

Transaction Date

Double-click entry below to forward monies.

Date	Description	Debit	Credit
11/21/2007	Monthly Payment	\$0.00	\$200.00

OK Cancel

3. When creating a schedule you will enter the payment amount, number of payments and first due date.

Enter Financing Info

Transaction Date 07/16/09

Monthly Amount

Num Payments

1st Due Date

CSR Btest1

☒ Create Financing Schedule in the Billing Screen

OK Real-Time Inquiry: Make Payment Cancel

4. Check off the box that says Create Financing Schedule in Billing Screen. A debit amount will be created for the total amount of all the payments. When a client makes a monthly payment, you will be able to select which month it applies to from the finance schedule. This monthly amount will be deducted from the total payment amount and the number of remaining payments will be adjusted accordingly.
5. If you do not wish to create the actual billing entry but keep track of what the customer's payments are, do not check Create Financing Schedule in Billing Screen. This way on the Policy screen you will see the financing information but no bill was created.

## Refresh

This button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the billing entry one agent entered seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.



## Details

This gives you details on the transaction.

**Debit Details**

Debit Date06/22/09

DescriptionDown Payment

Due Date

Debit Amount\$555.00

PolicyAIG - Illinois National

CSR0jim

Receipt #

Payment TypeCash

Check #

EFT To Co.No

Description	Credit	Credit Date	Payment Type	Check #	EFT To Co.	CSR		
Down Payment	\$555.00	06/22/09	Cash		No	0jim	Void	Delete

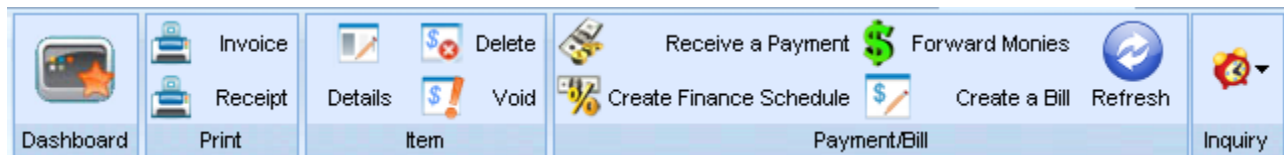
Balance = \$0.00   Net: \$555.00 (\$555.00 Down minus \$0.00 Commission)

OK

## Company Billing Screen

Items in the Company Billing Screen are also created automatically when certain events occur. The functionality is the same as that of the Client Billing Screen. Entries such as Commission and Debit to Company will be found here.

Client: <b>Berry, Bruce</b>			Call about Car Insurance						
<b>Company Billing</b>			Show Only These Policies		Show Only These Bill Descriptions	All	<input type="checkbox"/> Don't Show Voided Bills		
Date	Company	Description	Debit	Credit	Due	CSR	Rcpt	Pmt Type	Check #
06/22/09	AIG - Illinois National Pol	Down Payment	\$555.00	\$555.00		0jim		Cash	
06/10/09	Access ASI Pol	Commission Received	\$0.00	\$100.00		0jim			



## Delete Billing Entry


To delete an entry in the Billing section, click anywhere in the row you want to delete and then click the Delete button. You will be prompted to confirm deletion. Click "Yes" if you are sure; click "No" to cancel.

## Print Function Button

This button will allow you to print either a standard invoice or custom receipt for any item that you have created.

### Print Invoice

This feature allows you to print a completed company invoice.

**Send To** 

ABCO Insurance  
PO Box 141029

Coral Gables , FL 33314-1029

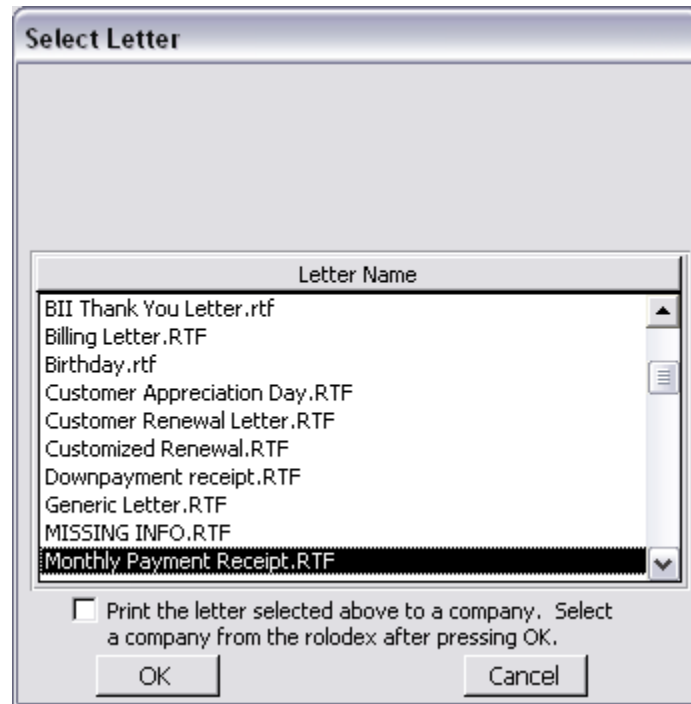
Invoice #	Date
On Printout	11/27/07

Date	Policy Number	Company	Coverage	Description	Debit	Credit	Due Date
11/27/07	ACC-5547854E	ABCO Insurance	Homeowners	Commission Due ▾	\$200.40	\$0.00	
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
				▾			
					Balance = \$ 200.40		

Invoice styles can be found in Utilities > Defaults > Letters.

## Print Receipt

This feature allows you to print a completed client receipt.



## Void Item

Click in the row you want to void and then click the Void Item button to void the transaction. Once voided, the line will be highlighted in yellow.

Voiding a billing transaction eliminates any dollar amounts from the balance, reports, letters and the balance sheet. You may run a voided report to create a list of all voided billing transactions. This action is permanent.



## Payment/Bill

You can receive a payment, create a bill, forward monies and create a finance schedule.

### Receive Payment

1. Click Receive A Payment in the Payment/Bill area.

2. Select the appropriate policy from the Select Policy window, if client has multiple policies, and click OK.

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term		A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term	Abc	A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

**Enter Payment Info**

Transaction Date 07/16/09

Payment Info

Amount  Agency Fee

Description  Forward Date

Payment Type Cash  Check #

☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount  Agency Fee

Payment Type Cash  Check #

☐ Create a Debit and Credit for the amount above in the billing screen

Receipt Payment.RTF

Add the following to the memo section...

Memo Payment Received: \$0.00

Reminder Date  CSR Btest1

OK Real-Time Inquiry: Make Payment Cancel

3. In the Payment Info screen enter the payment amount, the agency fee (if any) and a description. Descriptions can be created in the Utilities section under the Popup Boxes tab.
4. Enter a forward date (if applicable), select a payment type and enter the check # if paid by check.

5. If the payment is split (e.g., part cash, part check), then enter the second payment type information.
6. Enter the date that the payment was received.
7. Enter a memo if desired, a reminder date and select the CSR who is entering the payment information.
8. Make sure to check the box in the middle of the Payment Screen that says **“Create a Debit and Credit for the amount above in the billing screen”**
9. Click OK and a receipt will be printed automatically. If you have chosen to print a receipt, your default receipt will show up here (you can opt not to print a receipt).
10. Automatic memos noting that the receipt letter has been printed and that a payment has been received are created in the client's Memo screen.

When receiving payments, you can attach the payment to an existing entry. For example, a client has a debit entry (amount) for an additional premium. The client is now paying that additional premium, which would be a credit. Attaching this payment amount to the original debit for the additional premium will create a single entry in the billing screen to reflect this transaction instead of two. If you choose not to attach to an existing entry, you will have an option to create a debit AND credit entry in the amount of the payment. If this option isn't checked only a credit will be created on the billing screen.

## Create Bill

1. Click Create a Bill in the Payment/Bill area.
2. Select the policy for which you are creating the bill (if the client has more than one policy).

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term		A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term	Abc	A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

3. Enter the bill amount, description and due date.
4. Select the desired Bill Receipt to print.
5. If desired, you may print the letter to a company in the QQRolodex by clicking the Print the letter selected above to a company checkbox.
6. You may enter a memo, reminder date and CSR if desired.
7. Click OK when finished. The bill will be entered on the company's billing screen, and the selected receipt will be printed.

## Forward Monies

This button will forward monies to the insurance companies that were already received, such as an early renewal payment.

1. Click Forward Monies in the Payment/Bill area.
2. Select the policy for which you are forwarding monies (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term		A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term	Abc	A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

**Enter Payment Info**

Transaction Date

**Double-click entry below to forward monies.**

Date	Description	Debit	Credit
7/16/2009	Monthly Payment	\$0.00	\$200.00

OK Real-Time Inquiry: Make Payment Cancel

**Enter Payment Info**

Transaction Date

**Payment Info**

Amount  Agency Fee

Description  Forward Date

Payment Type  Check #

☐ EFT To Company

If payment is split (i.e. Cash/Check), list second payment info

Amount  Agency Fee

Payment Type  Check #

Add the following to the memo section...

Memo

Reminder Date  CSR

OK Real-Time Inquiry: Make Payment Cancel

## Create Finance Schedule

This option will allow you to set up a finance schedule for the client's monthly payments.

1. Click Create Finance Schedule in the Payment/Bill area.
2. Select the policy for which you are creating a finance schedule (if the client has more than one policy).

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status
6753	15-Year Term		AIG - Illinois National	6/22/2009	Pending	Pending
6498	15-Year Term		Access ASI	6/10/2009	Pending	Active
6328	15-Year Term	Abc	A.R.A. Casualty	5/28/2009	Pending	Active
5699	15-Year Term		A_nofees	4/23/2009	Pending	Active
5296				4/14/2009	Pending	Pending
5297				4/14/2009	Pending	Pending
5298	Comp			4/14/2009	Pending	Pending
5299	Comp		123 Insurance Company	4/14/2009	Pending	Pending
4780	Liability-Comp/Coll	Mga1	A.R.A. Casualty	3/18/2009	Pending	Active
4697	Comp/Coll		Access ASI	3/11/2009	Pending	Active

☐ Include Endorsements

OK Cancel

**Enter Payment Info**

Transaction Date

Double-click entry below to forward monies.

Date	Description	Debit	Credit
11/21/2007	Monthly Payment	\$0.00	\$200.00

OK Cancel

3. When creating a schedule you will enter the payment amount, number of payments and first due date.

4. Check off the box that says Create Financing Schedule in Billing Screen. A debit amount will be created for the total amount of all the payments. When a client makes a monthly payment, you will be able to select which month it applies to from the finance schedule. This monthly amount will be deducted from the total payment amount and the number of remaining payments will be adjusted accordingly.
5. If you do not wish to create the actual billing entry but keep track of what the customer's payments are, do not check Create Financing Schedule in Billing Screen. This way on the Policy screen you will see the financing information but no bill was created.

## Refresh

This button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the billing entry one agent entered seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.

## Details

This gives you details on the transaction.

Credit Details

Credit Date

09/12/08

Description

Down Payment

Forward Date

Credit

\$55.00

Policy

CSR

Wally's Csr

Receipt #

196

Payment Type

Cash

Check #

EFT To Co.

No

Description	Debit	Debit Date	Payment Type	Check #	EFT To Co.	CSR		
Down Payment	\$55.00	09/12/08	Cash		No	Wally's Cs	Void	Delete

Balance = \$0.00

OK

## Images Screen

QCEvolution 2 allows you to scan documents and attach images to your client's policies for easy viewing. Attach vehicle pictures, copies of your client's driver's license, etc. You need a digital image device such as a scanner or digital camera (sold separately).


QCEvolution 2 can read most popular graphic file formats, including BMP, JPEG/JPG and TIFF/TIF. In most cases, TIFF/TIF should be used for forms and letters, while JPEG or JPG should be used for photographs.

There are disk space limitations to the image files you scan or attach. Please see Appendix D for more information.

**Client: Doe, Jane**

Description	Policy	Date	File Name
ford truck - gray	Insurance Co USA	05/11/10	4816.jpg
aaaa		02/17/10	4475.TIF
aaaa		02/17/10	4476.TIF
QFWinScan Attach		02/05/10	4455.JPG
New1		02/05/10	4456.JPG
New 2		02/05/10	4457.JPG
QFWinScan 1.0.9 - Attach 1		02/05/10	4460.JPG
QFWinScan 1.0.9 - Attach 2		02/05/10	4461.TIF
QFWINSCAN 3.8L ATTACH1		02/05/10	4467.JPG
QFWINSCAN 3.8L ATTACHED		02/05/10	4468.JPG

Show Only These Policies: All



Double Click Image for Larger View

☐ Use Default Windows Viewer

☐ Load TIF and PDF Files 1 Page at a Time

Zoom

**Dashboard** | **Attach** | **Images** | **Scanning**

Add Pages to Selected File (TIF Only) | Detach Image | Select Twain Source

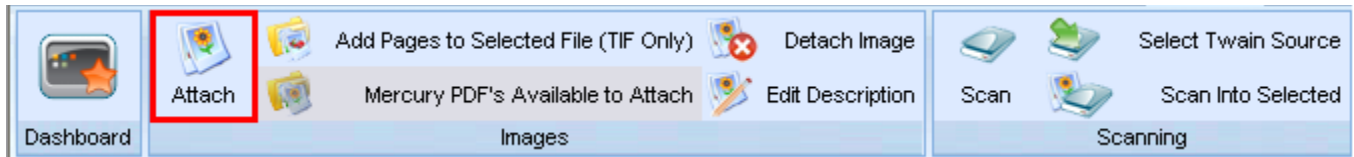
Mercury PDF's Available to Attach | Edit Description | Refresh | Scan | Scan Into Selected

## Attach Button

There are several methods of attaching images, involving scanning and manual attachment.

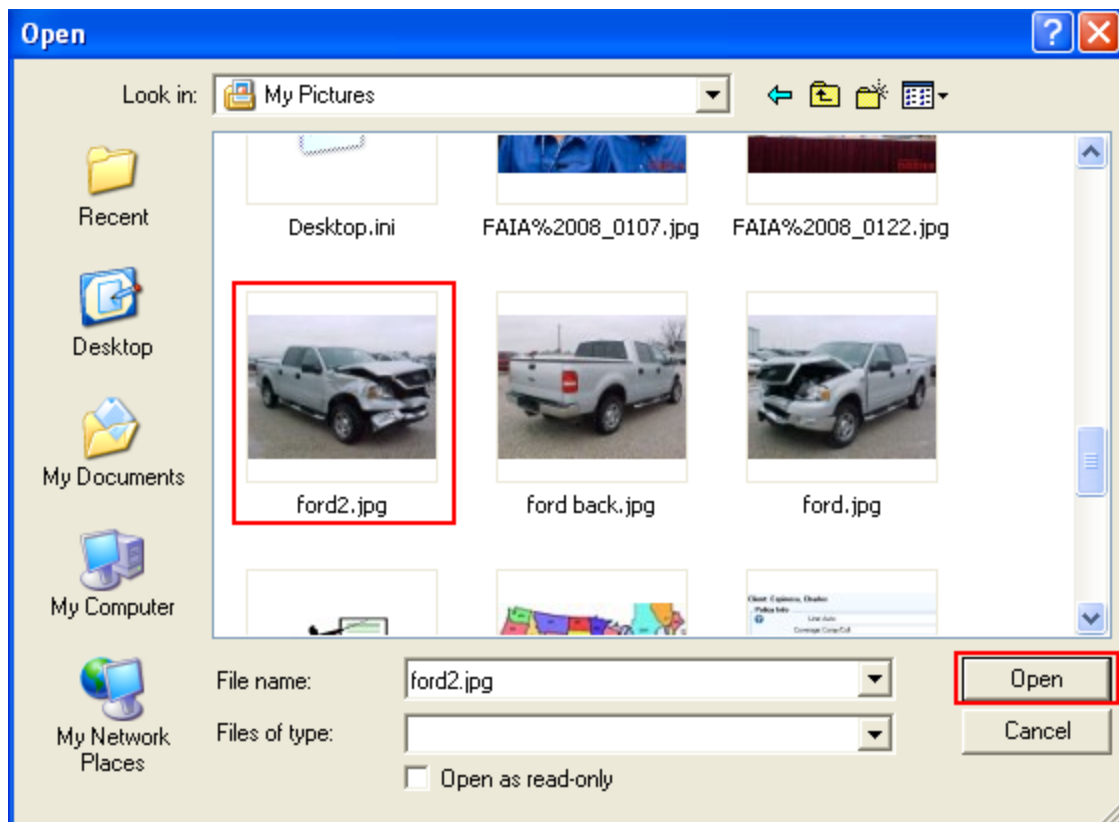
## Attach Image Manually

1. Select a client from the Search screen and then click the Images Screen.



2. Click the Attach button on the Ribbon and choose one of the following: Attach or Add Pages to Selected File. Add Pages to Selected File (the new image you are attaching to the selected image must be in TIF format) will add an additional image page to whichever image is already highlighted on the image screen. When there are multiple images in a file, two arrows will appear at the bottom of the screen as well as the number of pages the file contains. Click on the arrows to move through the pages.





**Enter Image Description**

Image Description front end damage Select Description

CSR amytest

OK Cancel

**Select Policy**

Binder Num	Coverage	MGA / Broker	Company	Binder Date	Policy Num	Policy Status	Status
QD8736chip	Comp/Coll		Insurance Co USA	11/04/09	1042564877	Active	Pol
	Comp/Coll		04	11/04/09	Pending	Active	End

☒ Include Endorsements

OK Cancel

Client: Doe, Jane

Description	Policy	Date	File Name
ford truck - gray	Insurance Co USA	05/11/10	4816.jpg
front end damage	Insurance Co USA	05/11/10	4817.jpg

Show Only These Policies: All



3. A list of all images found in the QuickFL (or QuickTX/GA)\ImageImport directory will be displayed. Select the image you wish to attach and click the Attach button (this will move the image to the Images directory. You can browse to any directory on your computer, if the image is not in this folder (this will copy the image). When you find the picture, click the Open button.
4. Enter the description in the description field or choose one from a commonly typed list.

### To View Attached Image

1. Select a client from the Search screen and then click on the Images Screen.
2. The left hand window displays a list of attached images.
3. Highlight the image you wish to view, and double-click in the window that displays the preview of the image. The image will open up in a larger window.

## **Detach Image**

1. Select a client from the Search screen, click the Images Screen.
2. Select the attached image you wish to detach from the list and then click the Detach function button.

When detaching an image, you will be asked if you want to delete it permanently. If you choose No, the image will be removed from the client but stored in your Image Import directory. You can then attach it to a different client if needed.

## **Edit Description**

Once the image has been selected, you may edit the description of the image by selecting this button.

## **Refresh**

This button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the image one agent entered seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.

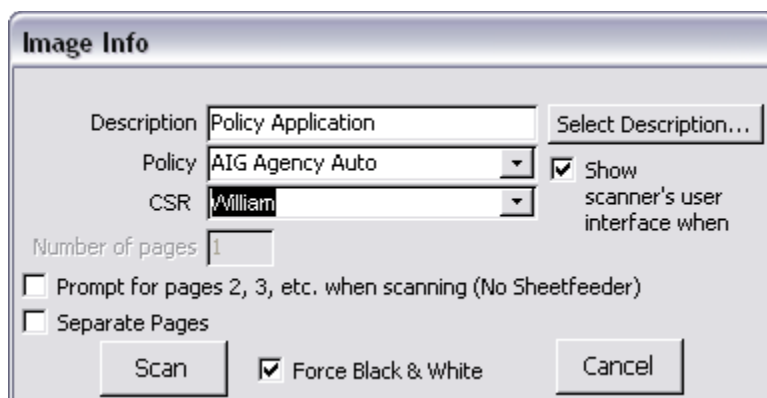
## **Select TWAIN Source**

In addition to the ability to scan directly into a client's file using any TWAIN compatible scanner or a digital camera, QCEvolution 2 easily integrates with the Scan Soft/PaperPort software that comes with the Visioneer scanner. This integration allows you to easily attach scanned images to QCEvolution 2 clients. Once installed, you will see a QCEvolution 2 icon on the bottom link bar. If you do not see the bar, you will need to display it and add the QCEvolution 2 link. For more information, see Appendix B.

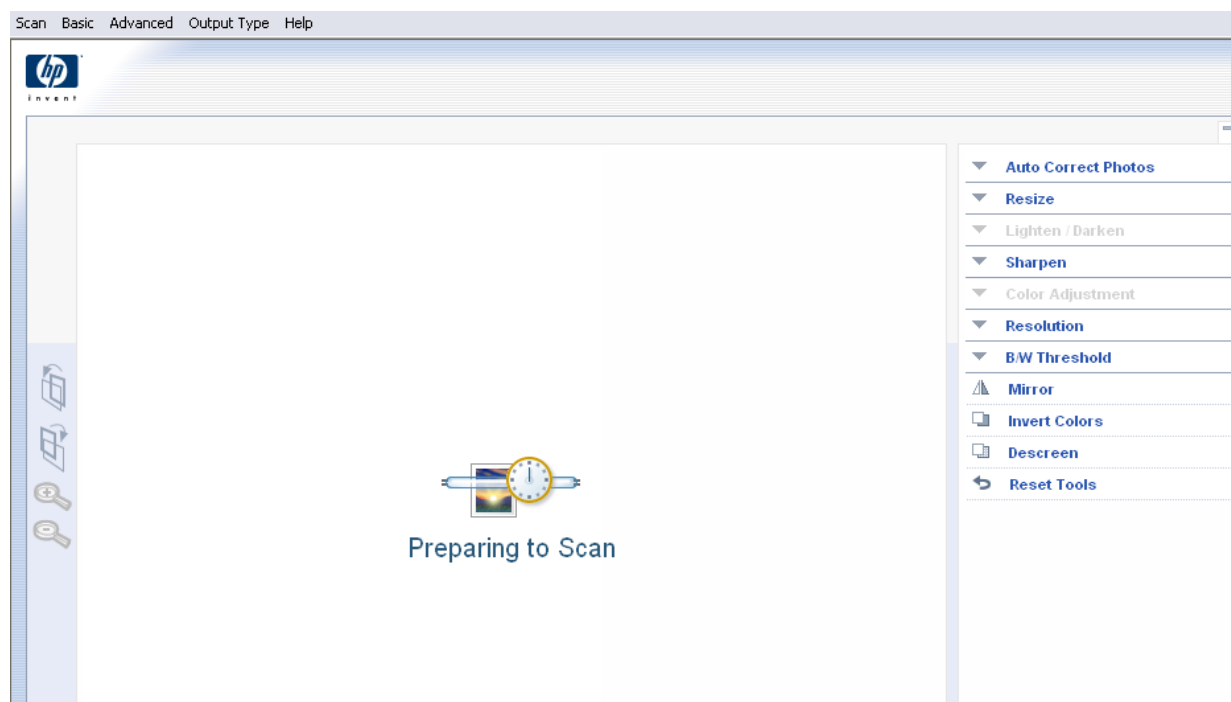
## **Scan**

1. Click the Scan button on the Ribbon and choose one of the following: Scan or Scan into selected Image. You can only scan into selected image if the selected image is in .TIF format. Scanning into an existing image will add an additional page to whichever image is already highlighted on the image screen.
2. If Scan into Selected Image is selected, skip to step 3. If Scan New is selected, you will be prompted to enter a description or select one from a common list, then select a policy the image should be attached to (if there is more than one).

3. If the document has multiple pages and you are using a flatbed scanner, check the box that says Prompt for Pages 2, 3, etc., when scanning. Also, enter the number of pages.
4. Click the Scan button.

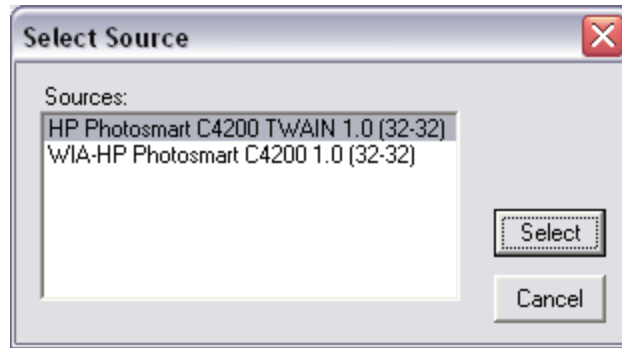


5. Your scanner's TWAIN interface will be displayed. Change the scan size and resolution if necessary, and follow the directions from your scanner to complete the scan.



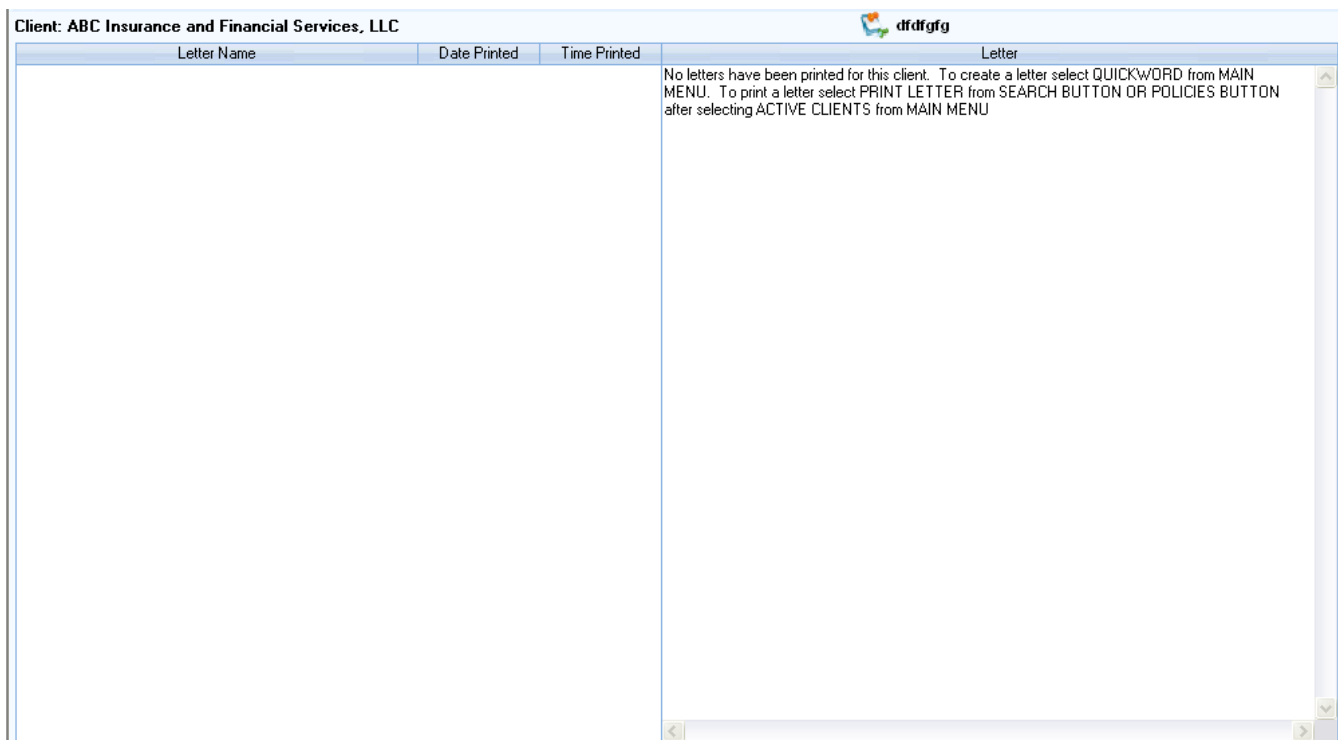
6. Your image will now be displayed in QREvolution 2.

It may be necessary to select the correct scanner (or TWAIN source/ device). Click the Select TWAIN Source function button to select your device from the list.



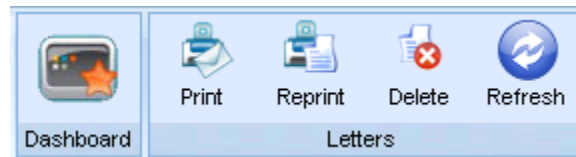
## Letters Screen

The Letters section is used to view, print and reprint letters that have been sent or need to be sent to your customers. To view a letter that was already printed, select it from the list on the left side of the screen. The contents of the selected letter will be displayed on the right side of the screen. Once a letter has been printed the original is locked. It can be reprinted if needed but not modified.



## Print, Reprint, Delete, and Refresh Buttons

Using the function buttons on the Ribbon, you may Print a Letter, Reprint Letter, or Delete the selected letter. The screen displays the date and time a letter was printed. If the name of the letter appears in the list but the date and time do not, then the letter is in the print queue, waiting to be printed at a later time. To access the print queue, click the Mailroom button from the Dashboard.



You can print letters to customers to notify them of their policy status, upcoming renewals, request that they contact your agency, etc. The receipts that you print out for down payments and general payments are letters.


QREvolution 2 comes with many pre-formatted letters and you will be presented with a list of these letters as well as the letters you have created in QuickWord. You can create new letters or edit existing letters in the QuickWord section as needed.

QREvolution 2 can print out client letters, notices and bills in English, Spanish or French. While in the Client screen, select the client's language. You must have Spanish and French letters saved in QuickWord in order to send them. The Spanish/French letter must have a corresponding English letter.

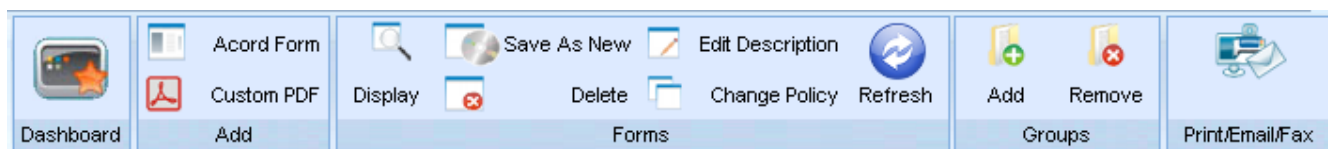
The Refresh button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the letter one agent entered seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.

## Forms Screen

You can print, store, e-mail and retrieve ACORD forms and quotes directly from QREvolution 2.

Client: ABC Insurance and Financial Services, LLC						 dtdtfgg
Type of Form	#	Form Added	Company	Policy Num	Eff Date	Description
Certificate Of Liabi	025	06/22/2009	A.R.A. Cas	Pending	04/13/2009	
Auto ID Cards	050	06/04/2009	A.R.A. Cas	Pending	04/13/2009	

1. Retrieve the client for which you wish to create a form.
2. Click on the Forms Screen.



3. In the Add area you can select either ACORD Form or Custom PDF.

## Add ACORD Form

**Select Form**

Click a column header to sort on that column

☐ Show FL ☒ Show forms for ALL states

Form Name	Number	State	Edition Date
Property Loss Notice	001		02/09
Auto Loss Notice	002		02/09
General Liability Claim	003		02/09
Worker's Comp First Report of Inj...	004		01/09
Employer's Report of Injury	004	WI	04/03
Intermodal Interchange Certificat...	022		02/07
Automobile Certificate of Insurance	023		05/07
Certificate Of Property	024		09/09
Certificate Of Liability	025		09/09
Certification Log	026		01/02
Evidence Of Property	027		07/06
Evidence Of Commercial Property	028		07/06
Cancellation Request	035		01/97
Agent Change	036		01/07
No Loss	037		01/08
Notice of Information Practices	038		04/08
Notice of Information Practices	038	AZ	10/03
New York Personal Insurance Sup...	038	NY	04/05
Residential Property Repl Cost	042		05/01
Additional Interest	045		04/09

Form Name	Number	State	Edition Date
Workers Comp	130		11/07
Workers Comp - Florida	130	FL	07/02
Umbrella App	131		02/09
Truck/Motor Carriers Section	132		09/08
WC Assigned Risk	133		11/07
Workers Comp - Addendum to Ac...	133	FL	07/07
Workers Comp App	133	MI	02/09
Workers Comp - Designation	133	NJ	09/08
Worker's Comp Ins Plan	133	TN	10/05
Instruction For Compl. Acord 130...	134	FL	07/09
Workers Comp - Notice of Election	134	NJ	07/01
Workers Comp - Designation	135	NC	10/07
Commercial Auto App	137	AK	08/05
Commercial Auto App	137	AL	04/04
Commercial Auto App	137	AR	05/04
Commercial Auto App	137	AZ	04/06
Commercial Auto App	137	CA	01/07
Commercial Auto App	137	CO	01/08
Commercial Auto App	137	CT	11/05
Commercial Auto App	137	DC	07/07

Enter coverage description of Acord form and click Add Form:

CSR Qadi1

1. You may sort the list of ACORD forms either alphabetically or by the ACORD Form number, by State or by edition number.
2. Select a form by either double-clicking the form name or by clicking the form name once and clicking on the Add Form button.
3. If the client has multiple policies, you will be presented with a list of Active policies. Select the policy for which the form will apply to.
4. QREvolution 2 will now load the selected ACORD form. Enter all required information (highlighted yellow). Some forms will have multiple pages.

You do not need to print the form in order to save the information. You can view this form at any time. If you don't type anything on a form the form will not be saved.

Some ACORD forms (e.g., Certificate of Liability, Certificate of Property and Evidence of Property) can hold multiple Certificate Holders or Lien holders. Click on the Add Certificate Holder button in the Certificate Holder section of the form. The lien holder/certificate holder list is retrieved from the information stored in the QQRolodex.

## Certificate Of Liability Form

To add the Certificate Holder to the form click the Add Certificate Holder button at the bottom of the Certificate Holder form (see below).

CERTIFICATE HOLDER	
Certificate Holder	<div>← →</div> <div>Print</div>
From #126	
From #45	

When you add your Certificate Holder either you will have the option to add a brand new holder, or you will have the opportunity to choose from the holders already stored in your QQRolodex as shown below to add a new holder.

Add Certificate Holder

Show Holders for THIS FORM

Show ALL Holders

Search

State of Florida Department of Transportation

Free Entry

The following five lines are displayed as Certificate Holders:

Line 1: State of Florida Department of Transportation

Line 2: 605 Suwannee Street

Line 3: Tallahassee, Florida 32399-0450

Line 4:

Line 5:

Remarks Section

The following forms will be prefilled from the text box below:

- Acord # (23, 24, 25, 27 and 28)

Additional Insured

☐ Keep description and notice days the same for all holders in this form.

Cancellation Section

☒ Strike "Endeavor To"

☒ Strike "Failure To"

30 days written notice

OK

Cancel

Add New

Remove Holder From This Form

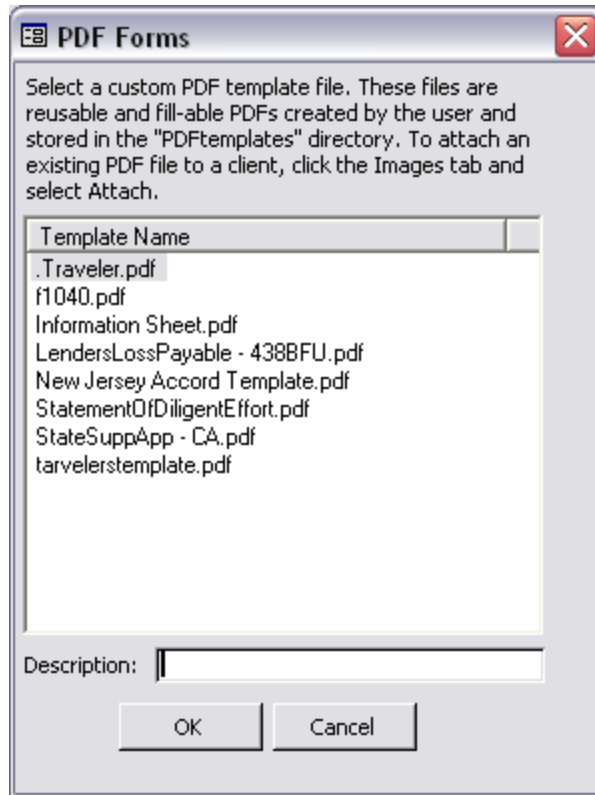
Some forms will have an Add Lienholder button instead. You can also add multiple lien holders/certificate holders as needed. Use the arrow buttons to scroll through the certificate holders, if several exist. Also, these forms will allow you to pull information from other ACORD forms, if they exist.

When printing an ACORD form that has multiple Certificate Holders listed, you may either print it for the currently selected certificate holder or to all certificate holders that are listed (provided that the Print Form checkbox is selected). After you choose a print option, QCEvolution 2 will ask you if you want to print to all Certificate Holders that have the Print Form checkbox selected in the Certificate Holder list. If you select Yes the form will be printed for all certificate holders, if you select No the form will only print for the current certificate holder.

### **Add Custom PDF**

QCEvolution 2 will allow you to store your fill-able PDF forms here in the Forms sections. To do so:

1. You must first create the Custom PDF using a program such as Adobe Acrobat. (Adobe Reader cannot CREATE PDF files, as it is only used for viewing PDFs).
2. Once you've created your form, save it on your server's hard drive in the correct directory X:\QuickFL\PDFTemplates (or X:\QuickTX\PDFTemplates if you're a Texas user or X:\QuickGA\PDFTemplates if you're a Georgia user)
3. Retrieve the client for which you wish to add a Custom PDF.
4. Click on the Forms screen and then Custom PDF from within the Add area.



5. Select the form from your list of available Custom PDF forms. Give it a description first if necessary. Fill in the form - the fill-able fields will not be yellow as they are in the QCEvolution 2 ACORD forms.
6. When finished, you can print the form and/or exit the form by clicking Return to Forms. The form will be saved to your client's Forms section.

## Auto Quote Form

<b>AUTO QUOTE</b>				Drivers <input type="button" value="2"/> <input type="button" value="+"/>		Cars <input type="button" value="3"/> <input type="button" value="+"/>		Vehicle Inspection		Pre Inspection	
<b>Client</b>	JOHN M Smith		Mary Smith								
<b>Driver # / Use</b>	#1 Principal		#2 Principal								
<b>DOB / Status - Sex</b>	03/06/45 MM		02/10/47 MF								
<b>Social Sec #</b>	223-33-1234		122-33-4567								
<b>Occupation</b>	CONTRACTOR		CONTRACTOR								
<b>Driver License #</b>	S53047345086		S53058547550								
<b>Violations</b>											
<b>Year/Make</b>	2004 MERCEDE		2007 BMW		2006 BUICK						
<b>Model/Symbol</b>	CL600 K		750i J		LaCrosse CXS 9						
<b>VIN Number</b>	WDBPJ76J		WBAHL835		2G4WE587						
	<b>Limit</b>	<b>Premium</b>	<b>Premium</b>		<b>Premium</b>						
<b>Bodily Injury</b>	25/50	\$212.00	\$204.00		\$206.00						
<b>Property Damage</b>	25	\$156.00	\$160.00		\$168.00						
<b>Personal Injury</b>	1000	\$138.00	\$118.00		\$190.00						
<b>Medical Payments</b>	NONE	\$0.00	\$0.00		\$0.00						
<b>Uninsured Mot.</b>	10/20	\$56.00	\$68.00		\$84.00						
<b>Comprehensive</b>	100	\$626.00	100	\$524.00	100	\$210.00					
<b>Collision</b>	100	\$574.00	100	\$484.00	250	\$244.00					
<b>Towing / Day</b>	NONE	\$0.00	NONE	\$0.00	NONE	\$0.00					
<b>Rental / Day</b>	None	\$0.00	None	\$0.00	None	\$0.00					
<b>Custom Equip</b>	0	\$0.00	0	\$0.00	0	\$0.00					
	<b>Sub 1</b>	\$1,762.00	<b>Sub 2</b>	\$1,558.00	<b>Sub 3</b>	\$1,102.00					
<b>Policy Fees: Liability / Phys:</b>	25	\$0.00					<b>Total</b>	\$4,491.22			
<b>FHCF Fees: Liability / Phys:</b>	44.22										

Besides all of the ACORD forms, QQEvolution 2 comes with a special easy-to-use form for automobile quotes. This form displays a snapshot of the quote and application for data modification, renewals and endorsements. If the client has multiple policies, you can select which policy to work with. Once you select a listed policy, QQEvolution 2 will prompt you to either create an Auto Quote through QQWebRater (where applicable) or to create the form immediately.

The Auto Quote form screen includes driver and vehicle information, coverage, premiums, loss payee and employer information.

To add or remove additional cars or drivers to this form, click the plus (+) or minus (-) sign. New fields will appear where you can enter additional information for up to four drivers and/or vehicles.

Vehicle Inspection Form (Florida QQEvolution 2 only): Displays the vehicle inspection form. You can check off any additional features or optional equipment on a vehicle. You can also mark any damage that a vehicle may have.

Pre-Inspection Form (Florida QQEvolution 2 only): Lists the name of the insured and all vehicles, as well as the effective date of coverage. Use the Ellipsis button (the gray button with three dots) to add a Lien holder from the QQRolodex section.

## **Delete Form**

1. Once you have retrieved the client and clicked on the Forms Screen, a list of the client's forms will be displayed.
2. Select the form you wish to delete and then click the Delete Form button. The form will be permanently deleted.

## **Display Form**

1. Once you have retrieved the client and clicked on the Forms Screen, a list of all of the client's forms will be displayed.
2. Double-click the specific form you wish to view and it will be displayed. You can also edit and print the form as well.

## **Save As New Form**

To make a copy of an existing form, select the form and click on the button "**Save as New Form**". This will make a copy of your existing form and prompt you to enter a description so that it will stand out from the original.

## **Add/Edit Description**

Allows you to Add or Edit a form description.

## **Change Policy**

Allows you to change the policy you associated the form to in case you made a mistake or if the form now applies to a different policy (such as a renewal).

## **Refresh**

This button is for in cases where two agents are on separate computers but entering information on the same client at the same time. In order to see the image one agent entered

seconds ago the other agent will click the Refresh button. This button will be rarely if ever used.

## **Print/E-mail/Fax**

Allows you to Print, E-mail and Fax the form from QCEvolution 2.

## **Print Batch**

If you'd like to print several forms at a time, rather than one at a time, you can use this option. If you have selected in your Defaults to use the Print/E-mail/Fax option, you will always have this option anyway, but here is another spot in the program where you will see this functionality. Using the Print Batch button, you can only e-mail from here if your settings are already correct in the Defaults section.

## **Forms Groups**

To organize your forms per Line or Policy, or however you'd like to organize them, you can create form "groups." Name your groups appropriately and organize your forms as you would windows files in a folder on your computer. Here you can also Add a Group and Remove A Group.

# Chapter 5 – Prospects

## Entering Prospects



### Prospects

- A potential buyer or customer
- Something that is awaited or expected

Use the QQEvolution 2 Prospect Button to manage and market your future customers!

The Prospects works just like the Clients Section; it has all of the same features and buttons.

**QQEVOLUTION™**

Refresh Dashboard | Search | Use QuickSearch | Log Off

**Prospects**

**To Do List** | Active | Agency Filter: All

Task	Due Date
In Progress: Memo Reminder for 0, Delete Me: Here is my new memo	07/12/2011
In Progress: Here is another task	07/12/2011

**Policies Expiring/Intent to Cancel** | Past 3 days and Next 7 days

Policy Name	Status	Expiration Date
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdafdg	Auto (11111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Messages**

Date	Time	From	Message
8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

**Memo Reminders**

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote - QQ Download - Renewal Quote - QQ Download - Renewal Quote -

[View All](#)

**Help and Information**

- Instant Support
- Training Webinars
- Newsletters
- Self Service Portal
- What's New

**Recent Clients**

- Cataldo, Cory
- Q, Perico
- Brown, James
- Stryker, Ted
- Babcock, Allen
- Aqboan Gqkfaoc
- Pat, Nisha A Jr
- Test
- Zimmermann, Erich
- Price, Randy

You enter a Prospect by clicking the Prospects Button from the Dashboard.

Search Clients Policies Claims Memos Activities Client Billing Company Billing Images Letters Forms [Report Issue](#) ?

Dashboard Labels New Prospect Intent to Cancel Receive a Payment Forward Monies From Scanner  
 Letters Print Add New Issued Cancel/Reinstate Create Finance Schedule Create a Bill Attach Batch Scanning Images Inquiry

Client: **USB ss, Test** ACTIVE POLICY

Client Status: ☐ Active Clients ☐ Inactive Clients ☒ Prospects ☐ All Clients Agency Filter: Deerfield Beach

Search Type: Insured Type in Insured Name Search Browse Linked Accounts

Browsing Clients Record [ 1 ] Displaying 1 of 1 Client Matching Search Criteria

Insured	C	Phone Number	Street Address	Client #	Agency
USB ss, Test		321		3252	Deerfield Beach

Policies for USB ss, Test

Effective	Binder Date	Line of Business	Coverage	MGA / Broker	Company	Binder Num	Policy Num	Description	Status	Premium

Enter new data on the Add New Prospect button. When you return to the Dashboard, that client will now be in the Prospect section. You can also change the status of a prospect to Active or Inactive. When a prospect becomes a client and you are ready to make them active, go to the Prospect's Client screen and click on Active in the Change Status area from the menu bar at the top of the screen. The prospect will be moved into your active client list.

## Transferring Prospects From Comparative Rater

When using a supported comparative rater, such as QQWebRater or WinFSC, you can quote the prospective client like you normally would and transfer this client to QQEvolution 2 (See Appendix A).

You have chosen to transfer this quote to QQ Evolution. Certain values are required to complete this transfer. Please fill in the items below and click TRANSFER TO QQ EVOLUTION

Binder Number	<input type="text" value="12906"/>	Agency	<input type="text" value="*QQ Dev FL EVO:"/>
Client Number	<input type="text" value="12311112zz"/>	Agent	<input type="text" value="amytest"/>
Policy Number	<input type="text"/>	CSR	<input type="text" value="0adi1"/>
Contract Number	<input type="text"/>	Client Source	<input type="text" value="Bench Ad"/>
Additional Amount	<input type="text" value="0.00"/>	Source Detail	<input type="text"/>
Additional Company	<input type="text"/>	Policy Source	<input type="text" value="Bench Ad"/>
		Optional Company	<input type="text"/>

Memo	<input type="text" value="Client/Policy Added"/>
Memo Reminder Date	<input type="text"/>
Coverage Description	<input type="text" value="2008 ACURA 3.2TL"/>

Premium Quoted	<input type="text" value="1,169.23"/>
Base Premium	<input type="text" value="1,123.00"/>
Fees	<input type="text" value="46.23"/>
Premium Issued	<input type="text" value="1,169.23"/>
Policy Issued	<input type="checkbox"/>
Premium Down Payment	<input type="text" value="237.14"/>
Agency fee	<input type="text" value="0.00"/>
MVR fee	<input type="text" value="0.00"/>
Optional Amount	<input type="text" value="0.00"/>

Total Down Payment Due	<input type="text" value="237.14"/>
IOU Amount	<input type="text" value="0.00"/>
Down Payment Received	<input type="text" value="237.14"/>
Due Date	<input type="text" value="04/08/2010"/>
Number of Payments	<input type="text" value="5"/>
Monthly Payments	<input type="text" value="200.40"/>
First Due Date	<input type="text" value="05/10/2010"/>

Payment Type	<input type="text" value="Cash"/> <input type="checkbox"/> Split Pay <input type="checkbox"/> EFT To Company
--------------	--

**Please note:** This client will be transferred as a prospect until the policy has been bound or bridged. If bridging, remember to enter the Premium Issued Amount after the bridge.

Transfer to QQ Evolution (With Receipt)

Transfer to QQ Evolution (No Receipt)

On the Transfer to QQEvolution 2 screen in QQWebRater the client will automatically be transferred to QQEvolution 2 unless the Policy Issued box is checked. This client is now accessible from the Prospect section.

When a Prospect becomes a client and you are ready to make them active, go to the Prospect's client screen and click on Active in the Change Status area from the menu bar at the top of the screen, then select Make Active.

## Chapter 6 – Mailroom



The mailroom is used to send various types of letters and labels to clients in batches, as opposed to sending them one at a time from the Client screen. This is useful for sending renewal letters, birthday letters, etc.

**QQEVOLUTION™**

Refresh Dashboard Search ☐ Use QuickSearch Log Off

**Mail Room**

**To Do List** **Active** **Agency Filter:** All

In Progress Memo Reminder for 0, Delete Me: Here is my new memo 07/12/2011  
In Progress Here is another task 07/12/2011

**Policies Expiring/Intent to Cancel** **Past 3 days and Next 7 days**

~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdfd, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdfd, Dasdafdg	Auto (1111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expired on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Clients** **X-Date** **Comments** **Past 3 days and Next 7 days**

**Messages**

8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

**Memo Reminders**

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00  
This is a memo with a reminder  
QQ Download - Renewal Quote -  
QQ Download - Renewal Quote -  
QQ Download - Renewal Quote -

**View All**

**Help and Information**

Instant Support  
Training Webinars  
Newsletters  
Self Service Portal  
What's New

**Recent Clients**

Cataldo, Cory  
Q, Perico  
Brown, James  
Stryker, Ted  
Babcock, Allen  
Aqboan Gqkfaoc  
Pat, Nisha A Jr  
Test  
Zimmermann, Erich  
Price, Randy

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

Enter the Mailroom by clicking the Mailroom from the Dashboard.

## Sending a Batch Of Letters

You can select the type of letters to print based on different criteria. Letters will be printed to all clients that fit the criteria that you select, and an automatic memo will be put into each client's memo screen.



### General Info Tab

This is where you enter the basic criteria for your letters or labels.

Click the radio button for either letters or labels.

## Print Letters

General Info | Filters

☒ **Print Letters** ☐ Print Labels ☐ Use Cross Marketing

Date Type:  Starting Date:  Ending Date:

Client Status:  Policy Status:  Sort By:  Letter:  Agency:

Print/Email Options

☒ **Print to printer only**  
☐ Email only if email address is entered - no printer output  
☐ Email if address is entered, otherwise print to printer  
☐ Print to printer and email if email address is entered  
☐ Email letter as attachment

☐ Use Garage Address

Queue

To print the letters or labels in queue, click print Unprinted above. To put letters or labels in queue, print a single label or letter and select Put Letter/Label in queue.

Letters in queue: 6  
Labels in queue: 5

The Print Options feature allows you to send your letters in a variety of formats. Options include, printing to your printer only, e-mailing only, e-mail or print, e-mail and print or e-mail letter as an attachment. In order to email the email address must be entered on the Client screen of the client's record.

## Print Labels

1. If you choose labels, you will notice that a few more options will be displayed, which will allow you to specify what basic information will be printed on the label.

The screenshot shows the 'Filters' tab in the QQEvolution 2 software. At the top, there are two tabs: 'General Info' and 'Filters'. Below the tabs, there are two radio buttons: 'Print Letters' and 'Print Labels' (which is selected and highlighted with a red box). To the right of these is a checkbox for 'Use Cross Marketing'. Below this, there are three date fields: 'Date Type' (set to 'Binder Date'), 'Starting Date' (set to '06/04/10'), and 'Ending Date' (set to '06/04/10'). To the left of these are three dropdown menus: 'Client Status' (set to 'All'), 'Policy Status' (set to 'All'), and 'Sort By' (set to 'Alphabetically'). Below these is an 'Agency' field with the value 'AW2'. To the right of the date fields are four radio buttons: 'Last Name, First' (selected), 'First Name, Last', 'Insured', and 'Insured + Contact'. To the right of these are four checkboxes: 'Insurance Company', 'Policy Number', 'Phone #', and 'File #'. To the right of these is an 'Example' address: 'Smith, Jon', '100 NE 23 Street', 'Suite 200', 'Miami, FL 33123'. Below the date fields is a 'Date type to be printed' dropdown menu set to 'No Date'. Below this are two checkboxes: 'Use Garage Address' and 'Use DYMO Printer'. At the bottom, there is a 'Queue' section with a text box containing instructions: 'To print the letters or labels in queue, click print Unprinted above. To put letters or labels in queue, print a single label or letter and select Put Letter/Label in queue.' Below this text box are two labels: 'Letters in queue: 2' and 'Labels in queue: 0'.

2. Select the Date Type, Client Status, Policy Status, Sort By Method and the letter to print (if applicable).
3. Enter the Starting and Ending date range for the time period you wish to use. This range corresponds to the Date Type that you selected in step 2.
4. If these criteria meet your needs you can click the Print Letters or Print Labels (whichever is applicable) button.

## Filters Tab

This section will allow you to be more specific with your letter/label criteria. QQEvolution 2 will generate the letters or labels for clients who meet the general criteria you selected above, but only if they also meet the filters that you set here.

Select any criteria that you want to filter by in the drop-down boxes. You can also select up to five different coverage, companies, and billing descriptions by clicking on the appropriate button. Also, there are four check boxes that you can check off if you want to include these options in the search:

General Info		Filters
<b>Client Source</b>	All	<p>Click on buttons below to select multiple choices</p> <p><b>Line of Business</b> All</p> <p><b>Coverage</b> All</p> <p><b>Company</b> All</p> <p><b>Billing Description</b> All</p> <p><b>MGA</b> All</p>
<b>Agent</b>	All	
<b>Finance Co</b>	All	
<b>Optional</b>	All	
<b>Additional</b>	All	
<b>New or Renewal</b>	All	
<b>Policy Source</b>	All	<p><b>Options</b></p> <p><input type="checkbox"/> Exclude Endorsements</p> <p><input type="checkbox"/> Exclude Direct Bill</p> <p><input type="checkbox"/> Finance Payment Due</p> <p><input type="checkbox"/> One Label/Letter per Client per Binder Date.</p> <p><input type="checkbox"/> One Label/Letter Per Client</p>
<b>Zip Code</b>		

- Exclude Endorsements
- Exclude Direct Bill
- Finance Payment Due
- One Label/Letter per client per Binder Date
- One Label/Letter per client

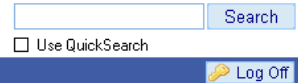
Selecting any filters will limit the number of matches that are returned. Only use filters if you are certain that all of the records that you want will be returned.

## Chapter 7 – Videos



### Training By Video

Computer video instruction is available from within the QREvolution 2 program.



## Chapter 8 – QQRolodex



### Introduction to QQRolodex

QQRolodex offers you the most comprehensive contact management capabilities in the industry. Go to the Dashboard of QREvolution 2 and click on the QQRolodex.

**QREvolution 2**

Refresh Dashboard | Search | Use QuickSearch | Log Off

**Left Sidebar:**

- Clients
- Prospects
- Mail Room
- Reports
- Rolodex**
- QuickWord
- Forms
- Videos
- Carrier Download
- Utilities
- Batch Scanning
- QQ Evolution Assistant
- QQ Evolution Update
- QQ WebRater

**Main Content Area:**

**To Do List** (Active) | Agency Filter: All

- In Progress: Memo Reminder for 0, Delete Me: Here is my new memo (07/12/2011)
- In Progress: Here is another task (07/12/2011)

**Policies Expiring/Intent to Cancel** (Past 3 days and Next 7 days)

Policy Name	Description	Expires on
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdaldg	Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdaldg	Auto (11111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Memo Reminders**

You have 681 reminders!

- QQ Download - Renewal Quote - Bill Created: \$100.00
- This is a memo with a reminder
- QQ Download - Renewal Quote -
- QQ Download - Renewal Quote -
- QQ Download - Renewal Quote -

[View All](#)

**Help and Information**

- Instant Support
- Training Webinars
- Newsletters
- Self Service Portal
- What's New

**Recent Clients**

- Cataldo, Cory
- O, Perico
- Brown, James
- Stryker, Ted
- Babcock, Allen
- Aqboan Gqkfaoc
- Pat, Nisha A Jr
- Test
- Zimmermann, Erich
- Price, Randy

**Messages**

- 8/30/2011 08:59 AM bincy\_ladmin1 Appointment created by bincy\_ladmin1
- 8/30/2011 08:27 AM bincy\_pu Appointment created by bincy\_pu
- 8/25/2011 09:50 AM bincy\_ladmin1 Appointment updated by bincy\_ladmin1
- 8/25/2011 09:50 AM bincy\_ladmin1 Appointment created by bincy\_ladmin1
- 8/24/2011 04:26 PM bincy\_dev Appointment updated by bincy\_dev
- 8/24/2011 04:23 PM bincy\_dev Appointment created by bincy\_dev

[View All](#)

**Footer:**

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

You are able to run QQRolodex independently from the QREvolution 2 program, giving you constant access to all your contacts at any time. Not only can you continue to store your company, certificate holder and Lienholder information, but now you are also able to store employee information, multiple contacts, multiple phone numbers, multiple e-mail address, web addresses and much more!

QQRolodex features includes:

- Separate section to enter Employee Information with unique format
- For all entries, multiple phone number, e-mail, and Web site fields
- For each entry, multiple contacts can be added, giving you even more space for extra phone numbers and e-mail addresses
- Attach image files to your contacts records
- Enter memos
- For Certificate Holders, save the “description” section per certificate holder for your Certificate of Liability
- QuickBridge – Allows you to move to the company Web site from QQEvolution 2

**QQ Evolution Rolodex Version 1.0.11**

Search Add New Delete Import Print

**Rolodex Companies**

Southern Group AW2  
 Star Casualty Insurance AW2  
 Star Casualty Insurance AW2  
 United Auto AW2  
 United Auto AW2

**Company Info** Contacts Attachments QuickBridge Memos Acord Form Options

Company Name: United Auto FEIN:  
 NAIC Code: QQ Abbr: UAI Rating: C+ Broker ID:  
**Address**  
 Street: P.O. Box 601637  
 Suite:  
 City/State/Zip: North Miami Beach FL 33160-  
**Contact**  
 Name: Seth Meyers  
 Department: underwriting  
 Toll Free: (800) 551-2110- Local Phone: (305) 940-5022-  
 Claims Phone: ( ) - - Binder Phone: (305) 949-3642-  
 Cell Phone: ( ) - - Fax: (305) 940-8492  
 Email 1: smeyers@uainternet.c Email 2:  
 Website: www.testcompany.com  
 Note: Is MGA  
 Update

Agency: AW2  
[www.QQolutions.com](http://www.QQolutions.com)

123  
A  
B  
C  
D  
E  
F  
G  
H  
I  
J  
K  
L  
M  
N  
O  
P  
Q  
R  
S  
T  
U  
VW  
XYZ

First, make your selection from the left hand side of the QQRolodex window. You can view QQRolodex Companies, Lien holders, Certificate Holders, Employees, or Other Contacts. Once you have made your selection, the list of entries will appear toward the top of the QQRolodex, and the detail of the entry currently highlighted will appear in the rest of the screen.

The Search feature allows you to simply type in the first few letters of the QQRolodex Companies, Lien holders, Certificate Holders, Employees, or Other Contacts you are looking for in the window next to the Search button and click Search. The list of entries with similar names will appear toward the top of the QQRolodex, and the detail of the entry currently highlighted will appear in the rest of the screen.

To look at a list of entries that begin with the letter C, for example, click on the C button located in the right margin. Likewise for entries that begin with the letter "R", you will click on the "R" in the right margin. It could not be easier!

The Add New button on the Toolbar allows you to add new entries to QQRolodex. Make your selection from the left hand side by choosing QQRolodex Companies, Lien holders, Certificate Holders, Employees, or Other Contacts. Click on the Add New button and choose your selection from the drop down window. Simply fill in the appropriate screen.

Take a look at all the info that can be listed for each entry! The tabs include Company Info, Contacts, Attachments, QuickBridge, Memos, and ACORD Form Options. For the topic of Employees you have Personal, Licenses, Attachments, Photo, and Notes. Nothing could be more complete!

## Company Info

This tab provides fields to enter the basic information for the company. Notice a place for the NAIC code, the FEIN, more phone number fields, e-mail fields and a field for web address. Also, with e-mail and web addresses, the buttons provided next to the fields allow you to e-mail from here, or visit the Web site from here.

**QQ Evolution Rolodex Version 1.0.11**

Search Add New Delete Import Print

**Rolodex Companies**

- Lienholders
- Certificate Holders
- Employees
- Other Contacts
- QQ WebRater
- QuickQuote
- QQ Evolution
- Options

Agency: AWW2

[www.QQolutions.com](http://www.QQolutions.com)

Southern Group	AWW2	123
Star Casualty Insurance	AWW2	A
Star Casualty Insurance	AWW2	B
United Auto	AWW2	C
United Auto	AWW2	D

**Company Info** Contacts Attachments QuickBridge Memos Acord Form Options

Company Name: United Auto FEIN:

NAIC Code: QQ Abbr: UAI Rating: C+ Broker ID:

**Address**

Street: P.O. Box 601637

Suite:

City/State/Zip: North Miami Beach FL 33160-

**Contact**

Name: Seth Meyers

Department: underwriting

Toll Free: (800) 551-2110- Local Phone: (305) 940-5022-

Claims Phone: ( ) - - Binder Phone: (305) 949-3642-

Cell Phone: ( ) - - Fax: (305) 940-8492

Email 1: smeyers@uainternet.c Email 2:

Website: www.testcompany.com

Note: Is MGA

Update

Vertical Index: 123, A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, VW, XYZ

# Contacts Tab

This tab allows you to enter in multiple contacts per QQRolodex entry and store all of that contact info.

Company Info

Contacts

Attachments

QuickBridge

Memos

Acord Form Options

John Smith

Contact Name: John Smith

Department: Marketing Rep

Street: P.O. Box 430370

Suite:

City/State/Zip: MiamiFL3243-0370

Additional: ( ) - -Work: (305) 461-2665-

Additional: ( ) - -Cell: ( ) - -

Additional: ( ) - -Fax: ( ) - -

Email 1:

Email 2:

Website:

Note 1:

Note 2:

Note 3:

Update

# Attachments Tab

This tab allows you to attach scanned documents or images to each entry using the Attach Image button. The documents and/or images must be scanned and saved to your computer first.

Company Info

Contacts

Form View

Attachments

QuickBridge

Memos

Description	Date	File Name
One	07/25/06 5:23:13 PM	1153862593.jpg
Two	07/25/06 5:23:24 PM	1672869614.jpg
Three	07/25/06 5:23:35 PM	-1739179049.jpg
PDF	07/25/06 5:24:51 PM	-617020963.pdf


Attach File

Detach File

Edit Description

Double Click Image to see larger.

☐ Use default Windows viewer



## QuickBridge Tab

This tab allows you to enter company Web site information so that you can jump easily from QQEvolution 2 to a company Web site.

The screenshot shows the 'QuickBridge' tab selected in a menu bar. Below the menu bar, there are two sections: 'Company Websites' and 'Website Requires'.

**Company Websites**

Main Website:	<input type="text" value="http://www.aracasualty.com"/>	<input type="button" value="Bridge"/>
Login Website:	<input type="text" value="http://www.aracasualty.com/secure/login.aspx"/>	<input type="button" value="Bridge"/>
Policy Inquiry:	<input type="text"/>	<input type="button" value="Bridge"/>
Billing Inquiry:	<input type="text"/>	<input type="button" value="Bridge"/>
Claims Inquiry:	<input type="text"/>	<input type="button" value="Bridge"/>

**Website Requires**

<input type="checkbox"/>	Broker ID	<input type="text"/>
<input checked="" type="checkbox"/>	User Name	<input type="text" value="arauser"/>
<input checked="" type="checkbox"/>	Password	<input type="text" value="*****"/>

## Memos Tab

This tab allows you to add memos, or notes, to your QQRolodex entries. Use the Add New button at the top and select Add Memo. Where it says Details, enter your memo. Memos are automatically saved and can be deleted if necessary.

The screenshot shows the 'Memos' tab selected in a menu bar. Below the menu bar, there is a table with columns 'Date', 'Time', and 'Memo'. Below the table, there is a 'Details:' section with a text area for entering a memo.

Date	Time	Memo
12/03/2007	12:51 PM	Spoke with Underwriter regarding Sally's Policy, shou...

**Details:**

Spoke with Underwriter regarding Sally's Policy, should be issued by the end of the week.




## ACORD Form Options Tab

This tab allows you to type the information the way you would like to see it on a form. Additionally, because the remarks or description of a Certificate Holder or Lienholder often need to “move” or “follow” that holder from form to form and be unique, we give you the option to store and associate distinct remarks with each.

The screenshot shows a software interface with a tabbed menu at the top: Company Info, Contacts, Attachments, QuickBridge, Memos, and **Acord Form Options**. The main content area is divided into three sections:

- Certificate Holders Information**: A section titled "The following 5 lines are displayed as Certificate Holders:" containing five text input fields. Line 1 is "State of Florida Department of Transportation", Line 2 is "605 Suwannee Street", Line 3 is "Tallahassee, FL 32399-0450", Line 4 is "(866) 374-3368", and Line 5 is empty. A small icon of a document with a pencil is to the right of the fields.
- Acord Form Section**: A section titled "The following forms will be prefilled from the text box below:" containing a list of five items, each with a blue "Example" link to its right:
  - Acord #23 - Leased Auto Certification of Insurance: Remarks Section
  - Acord #24 - Certification of Property: Location of premises Section
  - Acord #25 - Certification of Liability: Description of operations Section
  - Acord #27 - Evidence of Property: Remarks Section
  - Acord #28 - Evidence of Commercial Property: Remarks SectionBelow the list is a text input field containing "Additional Insured" and a scroll bar.
- Cancellation Section**: A section containing two checked checkboxes:
  - ☒ Strike "Endeavor To"
  - ☒ Strike "Failure To"To the right of these checkboxes is a numeric input field with "30" and a scroll bar, followed by the text "days written notice". A blue "Update" button is located to the right of this section.

The tabs for Employees entries are different. Here you will have the option to enter Personal Information, License Information, Attachments (scanned documents) Photos and Notes. This works in the same way as the rest of the QQRolodex.

Personal	Licenses	Attachments	Photo	Notes
First Name: <input type="text" value="Natalie"/>		SSN: <input type="text" value="654-61-3213"/>		
Last Name: <input type="text" value="Woods"/>		Date Hired: <input type="text" value="08/16/06"/> 		
<b>Address</b>				
Street: <input type="text" value="138 Newcastle ave"/>				
Suite: <input type="text"/>				
City/State/Zip: <input type="text" value="Coral Springs"/>		<input type="text" value="FL"/>	<input type="text" value="33212-"/>	
<b>Contact Info</b>				
Extension: <input type="text" value="345"/>		Cell Phone: <input type="text" value="(954) 987-6546-"/>		
Home Phone: <input type="text" value="(786) 544-6546-"/>		Addl Phone: <input type="text" value="(654) 621-3213-"/>		
Fax: <input type="text" value="(954) 984-6546"/>				
Email 1: <input type="text" value="eward@qqonline.com"/>				
Email 2: <input type="text"/>				

# Chapter 9 QuickWord

## Introduction to QuickWord



QuickWord is the QREvolution 2 word processor. Go to the Dashboard of QREvolution 2 and click on the QuickWord.

**QREVOLUTION™**

Refresh Dashboard Search ☐ Use QuickSearch Log Off

**Left Sidebar:**

- Clients
- Prospects
- Mail Room
- Reports
- Rolodex
- QuickWord**
- Forms
- Videos
- Carrier Download
- Utilities
- Batch Scanning
- QQ Evolution Assistant
- QQ Evolution Update
- QQ WebRater

**Main Content Area:**

**To Do List:** Active | Agency Filter: All

Status	Task	Due Date
In Progress	Memo Reminder for 0, Delete Me: Here is my new memo	07/12/2011
In Progress	Here is another task	07/12/2011

**Policies Expiring/Intent to Cancel:** Past 3 days and Next 7 days

Policy	Expiry Date
~aw2policy, ~aw2only Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhh Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdaldg Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdaldg Auto (1111)	Expires on 9/10/2011
Aku, Aku Auto (QQ0002)	Expired on 9/5/2011
Ayala, Cesar Auto (2222)	Expires on 9/10/2011
Ayala, Cesar Auto (2222)	Expires on 9/10/2011

**QuickWord Section:**

**Clients:** X-Date | Comments | Past 3 days and Next 7 days

**Messages:**

Date	Time	From	Subject
8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

**Right Sidebar:**

**Memo Reminders:** You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

[View All](#)

**Help and Information:**

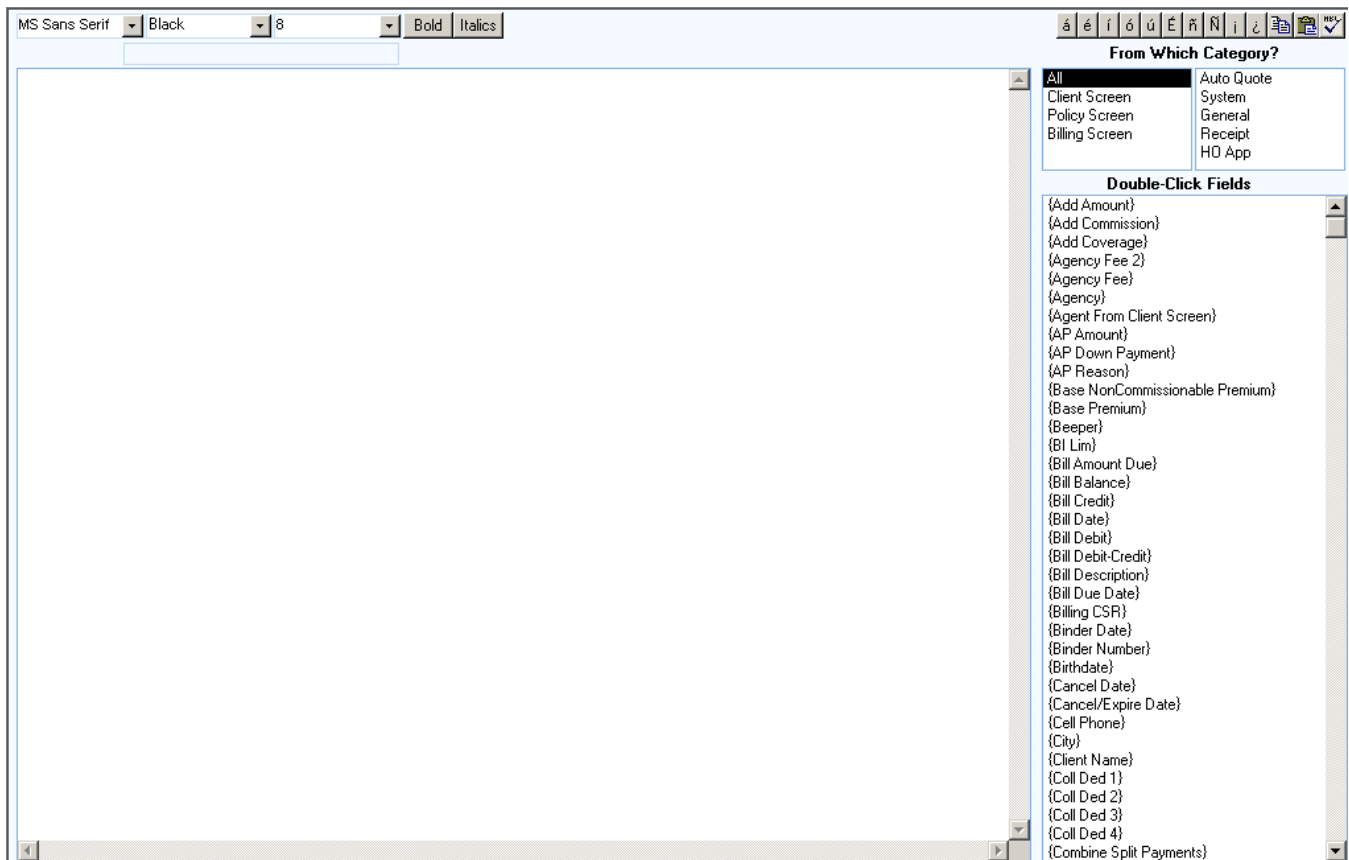
- Instant Support
- Training Webinars
- Newsletters
- Self Service Portal
- What's New

**Recent Clients:**

- Cataldo, Cory
- O, Perico
- Brown, James
- Stryker, Ted
- Babcock, Allen
- Aqboan Gqkfaoc
- Pat, Nisha A Jr
- Test
- Zimmermann, Erich
- Price, Randy

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

You can create or edit letters or receipts in this section. Since QuickWord is only used to create letters, it cannot print any letters. You must use the Mailroom or the print options from the Search, Client, Policy or Letters screen within the Client section to print a letter to a client.



## Creating A Letter

Using the QuickWord section, you can create generic letters or by using QuickWord fields, the letter will be merged with the client's specific information in it. This is necessary when you print letters in batches (from the Mailroom) or to individual clients because each letter will be personalized for the client.

1. Click New to create a new letter or click Open to select a previously saved letter.
2. Begin creating the letter by typing the contents on the blank screen. When creating your letter, you will not have to worry about typing your agency information, the date or the client's name and address. All of that will automatically appear on the letter when printing, provided you have these options enabled on the Defaults tab in the Utilities section. You will just need to type the actual body of the letter.
3. Customize the letter by selecting fonts, text colors, text sizes, etc.
4. From the QuickWord fields list, double-click the field you wish to insert. The field will be inserted wherever you left the cursor. These fields allow client and policy information to

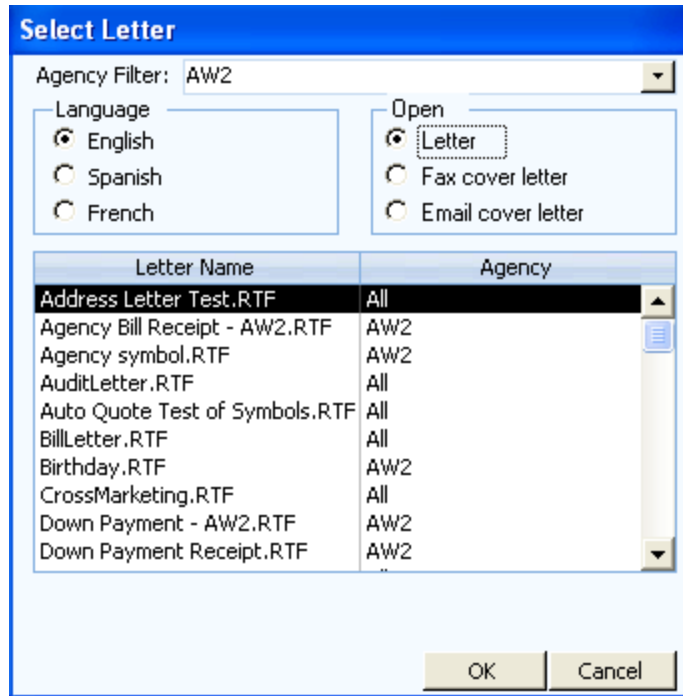
be inserted automatically into the letter when it prints. QuickWord fields are distinguishable from regular text by the {braces} that surround them.

5. To spell check your letter, use the little button at the top right of the screen, next to the Spanish accented letters button and the copy and paste buttons.
  - You can filter the QuickWord field list to only display fields from a particular category or you can view all of the fields at once. When you click a field a brief description of that field will appear in the bottom left hand corner of the screen in blue text.
6. You can insert Spanish accented letters and punctuation by clicking on the appropriate button above the categories section.
7. Click the Save button to save the letter.
8. Select the language you used to compose the letter, type in a name for the letter and then click OK.

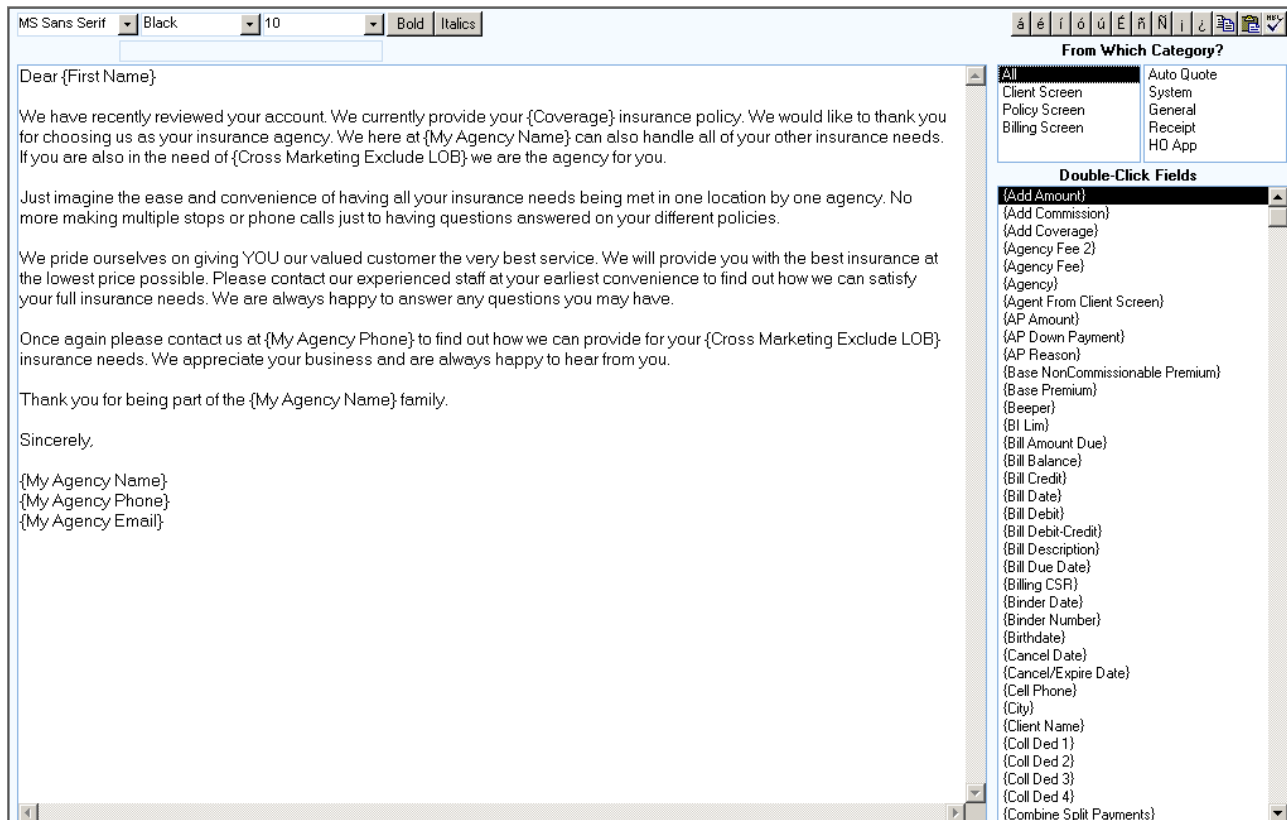
In order to save letters in Spanish or French, there **MUST** be a corresponding letter in English. You will be presented with a list of letters to choose from. Letters are not automatically translated from English to Spanish or French. You must do this manually.

## **Opening And Editing A Saved Letter**

1. Enter QuickWord and then click the Open button. Select the language of the letter you wish to open and then select the letter by name.



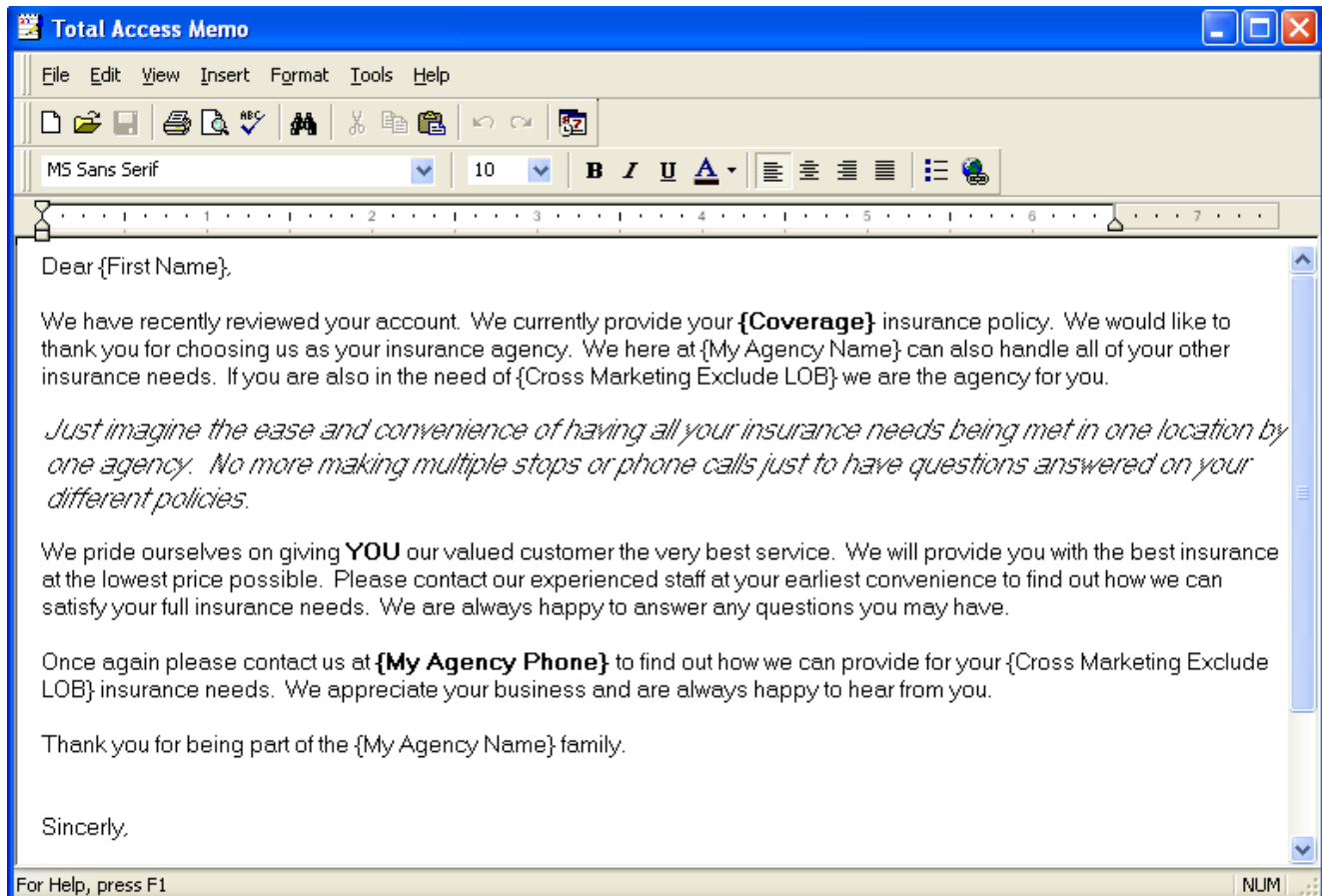
- When the letter is on the screen, you may make any changes using the proper keys on your keyboard. To add text, type it in anywhere you desire.



3. Click the Save button to save your changes.

## Advanced Editor

To further customize your letters, click the Advanced Editor button. The Advanced Editor uses multiple fonts, paragraph styles, bullets, etc. It also allows you to insert images into your letter as well as Web site URLs (links). Click Advanced Editor, make the necessary changes, and close the Advanced Editor. Your changes will be displayed in QuickWord.



## Creating A Receipt Letter

You can use QuickWord to create your own receipts with auto incrementing receipt numbers. Begin by typing the text of your receipt letter. You can insert different fields such as, {Down Payment}, {Payment Amount}, {Payment Type}, and {Receipt Number} into your letters. Save this letter as Receipt or Receipt Letter. Receipt numbers can initially be set up in the Utilities section under the Defaults tab.

## To Set Up A Receipt Letter

1. Select the Defaults tab in the Utilities section. **Please refer to the Utilities Section in Chapter 2**
2. In the Letters section, select the Receipt letter that will be used and enter the Last Receipt #.
3. The receipt number will begin incrementing from the number entered.

## About Letters

- You can use the QCEvolution 2 fields in Microsoft Word. Start Word, click on Tools, Options and then the File Locations tab. Under File locations note the Location of the File type Startup. Copy the file QFWinTemplate.dot (located in your QCEvolution 2 folder) to the Startup Location you noted above. The next time you start Word, you will see a new button, QCEvolution 2 Fields. Use these Fields to insert QCEvolution 2 data into your Word document.
- If you want to be able to edit a letter before it prints, add either the **{Type Info Here}** or **{Preview}** fields to the letter when you create it. When using the **{Type Info Here}** field, the letter will open in edit mode and the **{Type Info Here}** field will be highlighted in blue exactly where you placed it in the letter. You can then type any information as needed. If you have more than one **{Type Info Here}** in your letter, you can use the Go to next **{Type Info Here}** button to move to the next one. When you use the **{Preview}** field the letter will also open in edit mode, and you can change/add information as needed.

## Chapter 10 Reports



The Reports is accessed by going to the Dashboard of QCEvolution 2 and just click on the Reports.

[Search](#)  
☐ Use QuickSearch [Log Off](#)

[Refresh Dashboard](#)

[Clients](#)

[Prospects](#)

[Mail Room](#)

**[Reports](#)**

[Rolodex](#)

[QuickWord](#)

[Forms](#)

[Videos](#)

[Carrier Download](#)

[Utilities](#)

[Batch Scanning](#)

[QQ Evolution Assistant](#)

[QQ Evolution Update](#)

[QQ WebRater](#)

QQ Dev FL EVO3  
350 Fairway Dr., Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

To Do List Active

In Progress Memo Reminder for 0, Delete Me: Here is my new memo 07/12/2011

In Progress Here is another task 07/12/2011

Agency Filter: All

Memo Reminders

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

[View All](#)

Policies Expiring/Intent to Cancel

Policy	Status	Expires
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdfd, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdfd, Dasdafdg	Auto (11111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expired on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

Past 3 days and Next 7 days

Clients X-Date Comments

Past 3 days and Next 7 days

Messages

8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

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[Self Service Portal](#)

[What's New](#)

[f](#)
[v](#)
[in](#)

[Recent Clients](#)

Cataldo, Cory

Q, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

QQEvolution 2 comes with many Standard Reports. In addition, you can create any custom report you wish, using the Report Builder tab. If you would like to change or edit any of the criteria for a standard report, right mouse click on the standard report you wish to customize. Not all standard reports are customizable.

# Reports Dashboard

The screenshot shows the 'Reports' section of a software interface. At the top, there are tabs for 'Reports', 'Report Builder', and 'Scheduled Reports'. The main area is divided into four columns: 'Financial Reports', 'Client Reports', 'Company Reports', and 'Reconciliations'. Each column contains a list of report names. To the right of these columns is a 'Report Templates' section with a list of template numbers (002, 005, 006, 007, 008, 009, 1). Below the templates is a form for selecting an 'Agency' (Jerry Jay Boyle), 'Predefined Dates' (This Month), and 'Binder Date' (06/01/10 to 06/30/10). A 'Note: Dates are inclusive' is displayed. At the bottom right, there are 'Run Report' and 'Schedule' buttons.

Financial Reports	Client Reports	Company Reports	Reconciliations
Agency Fees	Additional Contacts	Claim List	Billing Reconciliation
Agency Payments	Additional Contacts by Age	Company Report	Carrier Reconciliation Report
App / Endorsement Transmittal	Clients by X-Date	Cross Marketing Report	Commission Reconciliation
Balance Sheet	Commercial Clients	Finance Transmittal	Producer Reconciliation
Company Fees	Coverage Report	MGA Report	Today's Memos
Daily Closeout	Detailed Coverage	Moving Annual Total	
Depositing Agency Report	Policies of Interest	Optional Coverage Report	
Detailed Transaction	Receipt Report	Revenue Report	
Detailed Transaction By Company	Renewal Report	Top 10 Agencies	
End of Day Report (Advanced)			

Report Templates: 002, 005, 006, 007, 008, 009, 1

Agency: Jerry Jay Boyle

Predefined Dates: This Month

Binder Date: 06/01/10 to 06/30/10

Note: Dates are inclusive

Run Report | Schedule

## Financial Reports Section

Here are a few of the reports found in the Financial section.

**Daily Closeout:** Displays all payments broken down by payment type.

**Application Endorsement Transmittal:** Displays a report of Application and Endorsement transmittals.

**Agency Payments:** Searches by Bill Date: Lists Client, Policy Number, Company, Bill Date, Payment Method and Payment Amount. It is grouped by Policy Status or Type (such as Endorsement, Fees, New Business, and Renewal).

**Detailed Transaction:** Searches by Bill Date: Lists Client, Policy Number, Company, Bill Date, Payment Method, (broken down to separate Cash, Check to Agency and Check to Company). It is grouped by detailed Policy Status or Type (such as New Business, Additional Premium, Agency Fee New Business, Agency Fee Renewal Business, Commission Received New Business, Commission Received Renewal Business, Down Payment Endorsement, Down Payment New Business, etc.)

**Balance Sheet:** The Balance Sheet screen will appear as follows.

<b>Binder Date Range</b> Starting Date: <input type="text"/> Ending Date: <input type="text"/>		Agent: <input type="text"/> Client Source: <input type="text"/> Finance Co: <input type="text"/>
<input type="checkbox"/> Include Opt & Add <input type="checkbox"/> Include Agency Fee & MVR Fee <input type="checkbox"/> Exclude Endorsements		Click buttons to select multiple choices <b>Line of Business</b> : <input type="text"/> <b>Coverage</b> : <input type="text"/> MGA: <input type="text"/> <b>Company</b> : <input type="text"/> <b>Agency</b> : <input type="text"/>
Starting Date: <input type="text"/> Ending Date: <input type="text"/>	Increase or Decrease <b>Clients</b> <b>Policies</b> <b>Premium</b> <b>Commission</b>	

## Company Reports Section

Here are a few of the reports found in the Company section.

**Company Report:** This report gives you a breakdown by Company name of all business performed for a specified date range.

**Optional Coverage Report:** This report gives you a breakdown of Optional Coverage that was sold to a client for a specified date range.

**Finance Company Report:** This report gives you a breakdown of all Finance Companies that were used for the date range specified.

**Revenue Report:** This report gives you a breakdown of all revenue generating business written for the date range specified. It can be broken down by New Business, Renewal, and/or Rewrites.

**Cross Selling Report:** This report is a tool which can be used to market new lines of business to your existing customers or market to prospects. The report runs based on which line of business the customer has versus which one they do not have. This way you can target your marketing campaigns.

The screenshot shows a dialog box titled "Cross Selling Report". It contains two columns of checkboxes for selecting lines of business, each with a "With this line of business:" label. The left column includes options: ., 10104, 10106, A11, Acord Description, Agri Sched/unsched, Agri Sched/Unsched1, and Agriculture Liab. The right column includes the same options. Below these columns, there are date selection fields: "Date Type:" set to "Expiration", "Predefined Dates:" set to "This Month", and a date range from "9 / 1 / 2011" to "9 / 30 / 2011". There is also an unchecked checkbox for "Include all active policies for a Client with the given Criteria" and a "Note: Dates are inclus" label. At the bottom, there is an "Agency:" dropdown set to "All", a "Reset" button, and "OK" and "Cancel" buttons. A checkbox for "Show one entry per Client" is also present.

## Reconciliation Section

Here are a few of the reports found in the Reconciliation section.

**Today's Memos:** The QCEvolution 2 Dashboard displays the message Memos Today when a client's account has a memo reminder. Run this report to print and view those memos.

Return Append View As Report Snooze Dismiss Help ▾

Agency Jerry Jay Boyle

Search Specific Dates

CSR A ▾

Type All ▾

Displaying 97 memos in selected date range.

Memo Date	Client	Memo	Reminder	CSR	Type
05/19/10	0044, 4	Email sent: Letters: abc'.RTF Images: abc' (4842.rtf)	12/30/1899	abd	Email
05/19/10	0044, 8	Email sent: Letters: aaaaa*.RTF	12/30/1899	Jerry Jay Boy	Email
04/30/10	L1	Email sent: Letters: 231.RTF Forms: Auto Loss Notice	12/30/1899	Jerry Jay Boy	Email
05/19/10	Adrian Insurance	Email sent: Letters: aaaaa.RTF Images: aaaaa (4811.jpg), aaaaa (4822.jpg), aaaaa (4824.pdf), aaaaa	12/30/1899	aaaaa	Email

**Billing Reconciliation:** Searches by Bill Date or Bill Due Date: Lists payments that have not been received by your clients, and can also be configured to list monies that have been received by your clients, but haven't been paid to the Company or Finance Company yet. This allows the agent to enter the payment amount when the payment is being made.

To show a list of clients with outstanding debits (debit > 0, credit = 0), fill-in the 'Billing Date' range and click Show Records. The 'Client Billing Screen' will be searched.

Enter 'Billing Date' range ☐ Search By 'Due Date' instead ☒ Show Commission Due

Starting 04/01/10 Ending 06/04/10

Company All

Agency Jerry Jay Boyle

Reconcile ☒ Outstanding Debits ☐ Unforwarded Credits

Billing Screen ☒ Client Billing ☐ Company Billing

Sort By ☒ Client ☐ Company ☐ Policy Number

Show Records Update Database Show As Report

Enter payment amount and payment date and click Update Database to update the Billing Screen

Client	Company	Policy Number	Bill Date	Description	Debits	Credits So Far	Due Date	Credits	Payment Received Date	Payment Method
0, 2	ACA INS CO	12	05/07/10	Down Payment	\$14.00	\$13.00		\$0.00	06/04/10	
0, 2			05/06/10	Additional Premium	\$10.01	\$0.00		\$0.00	06/04/10	

**Commission Reconciliation:** Displays all clients where commissions are due to the agency from the insurance company. When you receive your statement from the insurance company, run this report and enter the commissions received directly onto the screen. Each client's account will be automatically updated.

Return Search Apply All Payments Apply and Print Reset Policy Commission Summary Help

Search For Policies: Predefined Dates: Specific Dates Agency: AW2 MGA: All Company: All Show: ☒ UnPaid ☐ Paid ☐ All Insured: Policy Number:

Effective: 06/01/09 to 06/07/10 Note: Dates are inclusive

Use the "Search" button on the toolbar and these filters to find policies to reconcile.

Policy Number	Insured	Company	Effective Date	Type	Premium	Total Comm	Received to Date	Comm Due
SAP 000272225	Adams, Joyce	Apollo	08/03/2009	P/C: 04/14/2010	\$1,255.00	\$695.19	\$999.00	(\$303.81)
Pending	Duck, Donald	Links Select	06/04/2010	P	\$4,850.93	\$476.80	\$0.00	\$476.80
Pending	Tangooo, Mangooo	Links Select	06/03/2010	P	\$1,542.17	\$149.20	\$0.00	\$149.20
Pending	Tango, Mango	Links Select	06/03/2010	P	\$1,532.17	\$149.20	\$0.00	\$149.20
Pending	Tango, Mango	Links Select	06/03/2010	P	\$1,532.17	\$149.20	\$0.00	\$149.20
Pending	Tango, Mango	Links Select	06/03/2010	P	\$1,532.17	\$149.20	\$0.00	\$149.20
Ren-links-01	smitha, Evo I	Links Select	06/02/2010	P	\$15,951.94	\$1,892.28	\$0.00	\$1,892.28
0602-01	shah, Evo	Links Select	06/02/2010	P	\$10,387.75	\$820.00	\$0.00	\$820.00
1111-06-01	evo, FLWR	Ocean Harbor	06/01/2010	P	\$2,144.13	\$313.20	\$0.00	\$313.20
AFQ600010425	Wilson, Nancy	Links Select	06/01/2010	P	\$5,491.27	\$432.16	\$0.00	\$432.16
2222	inspectionform, Mira	Links Select	05/28/2010	P	\$6,044.75	\$476.00	\$0.00	\$476.00
Pending	ZZZccc, Cccccc	Adrian MGA3 - Adrian Insuranc...	05/26/2010	P	\$5,044.00	\$1,505.00	\$0.00	\$1,505.00
Pending	ZZZccc, Cccccc	Adrian MGA1 - Adrian Insuranc...	05/26/2010	P	\$3,010.10	\$33.00	\$0.00	\$33.00

Payment Date: 06/07/10 Payment Type: EFT

Use these arrow buttons to move policies between the lists.

Policies to be Reconciled: This information will be used with all payments below.

**Producer Reconciliation:** Like the Commission Reconciliation and Billing Reconciliation tools, this feature allows you to keep track of monies paid to your Producers. Be sure that their commission structure is set up first, under Agent/CSR, in the Utilities section, and that you also use the Producers button on each policy screen to indicate which Producer will be due commission for that policy.

Return Search Apply All Payments Apply and Print Producer History Policy's Producer History Help

Use Effective Dates For Search Predefined Dates: This Month Agency: AW2 Producer: 0ad1 Show: ☒ UnPaid ☐ Paid ☐ All Insured: Policy Number:

Dates: 06/01/10 to 06/30/10

Commission due to 0ad1: After searching, check each item you wish to pay now. Double click an item to edit the payment amount.

Policy Number	Insured	Company	Effective Date	Type	Total Comm	Due To Date	Paid to Date	Due Now	Paid Now
<input type="checkbox"/> 121	00, 0j	Access General Agency	08/14/2009	P/C: 11/09/2009	\$1.85	\$1.85	\$0.00	\$1.85	\$0.00
<input type="checkbox"/> 12545	Zzzz124, Aaaa123	21st Century GA Limited - Edit	08/20/2009	P/C: 11/09/2009	\$0.37	\$0.37	\$0.00	\$0.37	\$0.00
<input type="checkbox"/> 12545	test, test	Access General Agency	01/01/2001	P	\$0.00	\$0.37	\$0.00	\$0.37	\$0.00
<input type="checkbox"/> 12545	Zzzz124, Aaaa123	21st Century GA Limited - Edit	11/06/2009	E/C: 11/09/2009	\$0.02	\$0.09	\$0.00	\$0.09	\$0.00
<input type="checkbox"/> Pending	qw, Erit	American S/W Legacy	11/09/2009	P	\$0.00	\$0.04	\$0.00	\$0.04	\$0.00
<input type="checkbox"/> 121	00, 0j	Access General Agency	11/09/2009	E/C: 11/09/2009	\$0.26	\$0.15	\$0.00	\$0.15	\$0.00

## Client Reports Section

Here are a few of the reports found in the Client section.

**Commercial Clients:** Lists Commercial Clients, Coverage, Company, Effective Date, Agent, Premium, Commission, and Down Payment. It is sorted alphabetically. Commercial clients must have the Commercial check-box on their client screen checked to show on this report.

**Renewal Report:** Displays a listing of all policies that are coming up for renewal. This report searches by expiration date.

**Coverage Report:** Displays premiums/commissions grouped and totaled by coverage.

**Detailed Coverage:** Displays a breakdown of all coverage within a selected binder date range. If a quote is found in the Policies section, the limits are broken down in this report.

**Receipt Report:** Displays all receipts generated.

## Export To QuickBooks®

Transferring information to QuickBooks has been made easy with a one click transfer button. In order to take advantage of the transfer, you must understand what info is transferred.

Information is gathered from QQEvolution 2 in the Billing Screen of each client. When you select a date range for data to be transferred, QQEvolution 2 searches all billing lines for matching bill dates. It also searches for keywords in the description field in the billing section for the following words:

- Down Payment
- Commission Received
- Additional Premium
- Returned Premium
- AP Paid
- DP of AP
- Short Down
- Short Down Paid
- Monthly Payment
- Cancellation

Each of the above keywords creates different entries in QuickBooks using any or all of these three entries: Deposits, Checks, and Accounts Receivable. For example, one down payment listed on the billing screen may create a Deposit entry as well as a Check entry. Another down payment listed on the billing screen may create all three entries, Deposit, Checks, and Accounts Receivable.

Transactions have different entries depending on the type of insurance company selected. We define two:

- Net (Usually Premium Financed)
- Gross (Direct Bill Companies)

Below is an explanation of what takes place in the transfer with the appropriate description.

### Down Payment

When QQEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, the following transactions are created:

#### 1. **Deposits:** Broken down as follows:

- If the Insurance Company is **NOT** direct bill, the commission amount and the amount to be sent to the Finance Company are extracted.
- If the Insurance Company **IS** direct bill, just the down payment associated with the Company will be extracted.

- Optional Coverage (e.g., Motor Clubs), which are usually **NOT** financed, are subtracted from the Down Payment showing commission and amount to the Optional Coverage Company.
  - Additional Coverage (Medical), which can be financed, is subtracted from the Down Payment showing commission and amount to the Additional Coverage Company.
  - Agency Fees are subtracted and shown as commission.
  - MVR Fees are subtracted and shown as commission.
2. **Checks:** Checks are entered. Direct bill companies receive the entire down payment. Policies that are premium financed create a check entry by subtracting the commission from the down payment.
  3. **Accounts Receivables:** Direct Bill Companies create General Journal Entries as Accounts Receivable entries. These entries are keyed as Other Current Assets in QuickBooks. A balance sheet report will show these outstanding assets.

## Commissions Received

When QCEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, this transaction is created:

- A deposit is made and matched to the earlier Accounts Receivable entry for this policy. This zeros out the receivable and adds it to the checkbook balance.

## Additional Premium

When QCEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, this transaction is created:

- For Direct Bill companies, an Accounts receivable is created for the additional commission.

## Returned Premium

When QCEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, the following transaction is created:

- For Direct Bill Companies, an Accounts payable is created for the returned commission.

## AP Paid and DP (Down Payment) of AP

When QCEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, the following transactions are created:

1. The payment is handled exactly like DEPOSITS above (under the DOWN PAYMENTS section.)
2. The checks are handled exactly like CHECKS above (under the DOWN PAYMENTS section.)

### **Short Down**

When QCEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, the following transactions are created:

1. For financed policies, when transferring from QCEvolution 2 to QuickBooks, if the Down Payment is less than the commission, an entry will automatically be entered into the billing Screen of QCEvolution 2 showing the Short Down amount.
2. A Deposit debit as an Accounts Receivable is created. It will be displayed as Due From Short Down. A balance sheet report will show these outstanding assets.

### **Short Down Paid**

When QCEvolution 2 encounters a line in the Billing Screen within the selected date range and this description, the following transaction is created:

A deposit is made and matched to the earlier policy Accounts Receivable. This zeros out the receivable and adds to the checkbook balance.

To transfer the information to QuickBooks, follow these steps:

1. Run the QuickBooks report.
2. View Preview.
3. Click the Send to QuickBooks button.
4. View records to be sent to QuickBooks.
5. Click Create QuickBooks Import File.
6. Run QuickBooks.
7. Select File, Utilities, Import, and then select QFWinChecks.IIF.
8. Your files have now been imported into QuickBooks.

# Scheduling Reports

You have the ability to schedule reports to run automatically at a set time. You can schedule both standard and customized reports. There are two ways to set a report to run automatically, one is to select a report and select the **Schedule** button and a wizard will walk you through setting it up or you can do it manually without the wizard.

1. Select your report, it can either be a standard report or a customized report you have listed to the upper right. In order to schedule a customized report it must have already been created and saved. If any information such as the Date Range and Agency need to be selected please do so, then click the “Schedule” button.

The screenshot shows the 'Scheduled Reports' tab in a software application. The interface is divided into several sections:

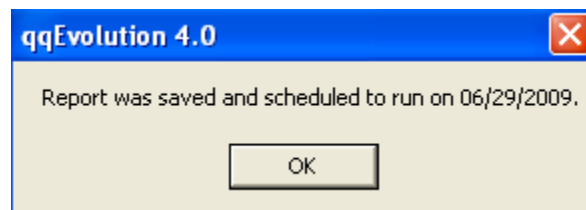
- Financial Reports:** A list of reports including Agency Fees, Agency Payments, App / Endorsement Transmittal, Balance Sheet, Company Fees, Daily Closeout, Depositing Agency Report, **Detailed Transaction** (selected), Detailed Transaction By Company, and End of Day Report (Advanced).
- Client Reports:** A list of reports including Additional Contacts, Additional Contacts by Age, Clients by X-Date, Commercial Clients, Coverage Report, Detailed Coverage, Policies of Interest, Receipt Report, and Renewal Report.
- Company Reports:** A list of reports including Claim List, Company Report, Cross Marketing Report, Finance Transmittal, MGA Report, Moving Annual Total, Optional Coverage Report, Revenue Report, and Top 10 Agencies.
- Reconciliations:** A list of reports including Billing Reconciliation, Carrier Reconciliation Report, Commission Reconciliation, Producer Reconciliation, and Today's Memos.
- Report Templates:** A list of templates with values 1, 10, 100, 101, 1010, 102, and 105.
- Configuration Area (highlighted with a red box):**
  - Agency:** Main Office
  - Predefined Dates:** This Month
  - Date Range:** 06/01/09 to 06/30/09
  - Note:** Dates are inclusive
  - ☐ Separate Page for Each Agency
- Buttons:** Run Report and **Schedule** (highlighted with a red box).

2. The **Schedule Report Wizard** will appear. It will already be on the **Options** tab. In **Report Options** there will be a Display and Report name already shown. You can change the display name if you wish but we recommend you keep the report name as is.

In **Output Options** you can check mark **Email** and enter an email address, this will email the report after it runs. You also can check mark **Save** and select where you would like to save the report to after it is ran. This will save the report to your computer. We do highly suggest you leave the default path already listed there. The file name of the report is shown here as well. The name shown in the picture below is RR-MM-DD-YYYY, this stands for the name of the report, the month, day, and year the report was ran. In the Utilities section under Defaults/Dashboard is where this name is set up. You can change how the file is named. We do suggest you stick with one of our defaults that are listed. When you are running the wizard it does show an example of how the file will be named.

After you have finished on the Options tab select the **Recurrence** tab. Here you will set how often and when you would like the report to run. In the **Recurrence Pattern** select what time you would like the report to run at and what date you would like it to start running. You can have the report run daily, weekly, monthly, or yearly. When you choose “Daily” you can enter if you’d like the report to run every two days or maybe you’d like it to run every fifth day. You can also have the report run only on weekdays. If you choose “Weekly” you can check which days of the week you would like the report to run on. You can select all of them if you wish. The “Monthly” option will allow you to enter what day of the month you want to run the report and with “Yearly” you select what month and day of the month to run the report.

In the **Recurrence Length** area you can have the report stop running after it has been generated so many times by marking **End After** and enter the number of times you’d like the report to run before stopping. You can instead enter an ending date in the **End By** area and input a date when the report should stop running. If this is a report you run often you would want to choose **No End Date**. After you have finished with your selections click the **Finish** button. A message will appear asking if you want to proceed with creating the scheduled report, click “Yes.” Another message will appear telling you the report was saved and the date it is scheduled to start running.



You will then be taken to the **Scheduled Reports** section. Here you can look over the settings for the report you just saved as well as any other report you have scheduled to automatically run.

qqEvolution Dashboard | Report Finder | Delete Report Schedule | Save Settings | Open Recent Report | Help

Detailed Transaction  
Detailed Transaction

Next scheduled run date: 06/29/2009

Report Options  
Display Name: Detailed Transaction  
Report Name: Detailed Transaction

Output Options  
☒ Email Email Address: jaallen@qqonline.com   
☒ Save Directory: C:\QuickFL\Reports\ File Name: RR-MM-DD-YYYY  
Example File: C:\QuickFL\Reports\Detailed\_Transaction-06-29-2009.pdf

Recurrence Pattern  
Time: 08:00 PM Start Date: 06/29/09  
☒ Daily ☒ Every 1 day(s)  
☐ Weekly ☐ Every weekday  
☐ Monthly  
☐ Yearly

Recurrence Length  
☐ End After 5 occurrences  
☒ End By 06/29/10 ☐ No End Date

Report Details  
Date Preset: This Month  
Agency: Jerry Jay Boyle  
Separate Page for Each Agency: No

Recently Saved Reports

C:\QuickFL\Reports\Detailed_Transaction-06-28-2009.pdf	06-29-2009 12:38 PM
C:\QuickFL\Reports\Detailed_Transaction-06-27-2009.pdf	06-29-2009 12:38 PM
C:\QuickFL\Reports\Detailed_Transaction-06-26-2009.pdf	06-29-2009 12:37 PM
C:\QuickFL\Reports\Detailed_Transaction-06-25-2009.pdf	06-29-2009 12:32 PM
C:\QuickFL\Reports\Detailed_Transaction-06-24-2009.pdf	06-29-2009 12:32 PM
C:\QuickFL\Reports\Detailed_Transaction-06-23-2009.pdf	06-29-2009 12:32 PM
C:\QuickFL\Reports\Detailed_Transaction-06-22-2009.pdf	06-23-2009 08:45 AM
C:\QuickFL\Reports\Detailed_Transaction-06-20-2009.pdf	06-22-2009 06:16 PM
C:\QuickFL\Reports\Detailed_Transaction-06-19-2009.pdf	06-22-2009 06:16 PM
C:\QuickFL\Reports\Detailed_Transaction-06-18-2009.pdf	06-22-2009 06:16 PM
C:\QuickFL\Reports\Detailed_Transaction-06-17-2009.pdf	06-22-2009 06:11 PM
C:\QuickFL\Reports\Detailed_Transaction-06-16-2009.pdf	06-22-2009 06:10 PM
C:\QuickFL\Reports\Detailed_Transaction-06-15-2009.pdf	06-22-2009 06:10 PM
C:\QuickFL\Reports\Detailed_Transaction-06-14-2009.pdf	06-15-2009 09:49 AM
C:\QuickFL\Reports\Detailed_Transaction-06-13-2009.pdf	06-15-2009 09:49 AM
C:\QuickFL\Reports\Detailed_Transaction-06-12-2009.pdf	06-15-2009 09:29 AM
C:\QuickFL\Reports\Detailed_Transaction-06-11-2009.pdf	06-15-2009 09:29 AM
C:\QuickFL\Reports\Detailed_Transaction-06-10-2009.pdf	06-15-2009 09:29 AM
C:\QuickFL\Reports\Detailed_Transaction-06-09-2009.pdf	06-10-2009 02:18 PM

3. The second way to set up scheduled reports is by opening the “Scheduled Reports” tab and manually entering the information. The information you need to enter is the same as shown when walking through the wizard. Once you have entered the report information click the **Save Settings** button to save the report.

If you change the settings on any of the already saved scheduled reports you will also click the “Save Settings” button to be the changes into effect.

On the “Scheduled Reports” screen you will also see a list of the **Recently Saved Reports** which have run. You can use the **Delete Report Schedule** button to delete the report you have selected. The **Open Recent Report** button will open a PDF version of whichever report you have selected in the “Recently Saved Reports” section. You can print this report by clicking the printer icon once it is open.

**IMPORTANT NOTE:** Scheduled reports are saved and emailed in the PDF format. Also QQEvolution 2 must be open for the reports to run. The scheduled reports are meant to be run

off office hours so they will be ready for you the next day and you will not have to take up precious time during business hours. To this end the scheduled reports will not run in certain areas of QCEvolution 2 if you are currently using the program and inputting data. These sections are Client, Policy, Claims, Reports, Batch Scanning, Images, Utilities, and the Important Note display.

## Report Template Section

When on the Reports tab there is also a list of saved customized reports. You can simply double click on the report you wish to run or select the report and click the Run Report button.

The screenshot shows the 'Reports' tab in the software interface. It contains four main sections of reports:

- Financial Reports:** Detailed Transaction By Company, End of Day Report (Advanced), Export to Quickbooks, Lost Premium Amount, Monthly Payments / Transmittals, Production Analysis, Production Analysis Carrier, Sales Report, Short Down / IOU.
- Client Reports:** Additional Contacts, Additional Contacts by Age, Clients by X-Date, Commercial Clients, Coverage Report, Detailed Coverage, Policies of Interest, Receipt Report, Renewal Report.
- Company Reports:** Claim List, Company Report, Cross Marketing Report, Finance Transmittal, MGA Report, Moving Annual Total, Optional Coverage Report, Revenue Report, Top 10 Agencies.
- Reconciliations:** Billing Reconciliation, Carrier Reconciliation Report, Commission Reconciliation, Producer Reconciliation, Today's Memos.

A red box highlights the **Report Templates** section, which includes:

- Birthday Test
- Cancellations
- custom yesterdaysept24
- CustomBirthDayJanuary
- CustomLastMonthAprilorig
- CustomSpecificDates52008to9200
- Depositing Agency Custom

At the bottom right, there are two buttons: 'Run Report' and 'Schedule'.



## Report Builder Tab

If you require more detailed information in your reports, you can build a custom report. These types of reports permit you to select specifically the information you want to be included. Most of the entries that you enter for clients and policies can be retrieved for reporting purposes.

## Report Builder Procedure

Reports **Report Builder** Scheduled Reports

Report Type Filters Show These Fields

On this tab, select the general options such as Date Type, Client and Policy Status, Sorting and Print Mode. Then click on the FILTERS tab to narrow down your search. You may click on the Wizard below to help you design this report.

Predefined Dates: This Month

Report Date: 06/01/10 to 06/30/10

Note: Dates are inclusive

Select AW2

Date Type Binder Date

Client Status All

Policy Status All

Sort By Alphabetically

New/Renew All

Endorsements All

☐ Commercial Clients Only ☐ Group each 'Sort By'

Orientation  
Portrait Landscape

Need help creating a custom report? Click the QuickWizard for help.

1. You can select a pre-defined date range or specify the date range. All clients/policies that fall within this date range and who meet the specified criteria will be included in the report.
2. Select a Report Type: Date Type, Client Status, Policy Status, Sort By, and New/Renewal, Endorsements.
3. To narrow down your search, apply filters on the Filters tab. For example, you can limit your report to include only specific companies or policies. You can also select up to five companies, multiple coverage, and billing descriptions. To do so, click the appropriate button, select multiple choices and then click OK.

Reports

Report Builder

Scheduled Reports

Report Type

Filters

Show These Fields

On this tab, you can narrow down your search as well as include certain fields. For example, if you want to narrow your search to include Yellow Pages as your only Source, select it from the list below or select ALL to show the source on the report. Click Show These Fields next.

Client Source

Not On Report

Agent

Not On Report

CSR

Not On Report

Finance Company

Not On Report

Optional

Not On Report

Additional

Not On Report

Policy Period

Not On Report

Important Notes

Not On Report

Voided Bills

Don't show voided bill

☐ Billing Credit
☐ Exclude Direct Bill

☐ Billing Debit
☐ Prorate Commissions

☐ Depositing Agency

Click buttons to select multiple choices

Line of Business

Not On Report

Coverage

Not On Report

Company\*

Not On Report

Billing Description

Not On Report

Payment Type

Not On Report

Memo Type

Not On Report

Producer

Not On Report

MGA\*

Not On Report

Policy Source

Not On Report

Zip Code

☐ EFT To Co.

\*Please note that if filtering by Company, policies with an MGA will be excluded from the report if the MGA filter is "Not on Report".

- Select Show These Fields to add specific information to your report.

Reports | Report Builder | Scheduled Reports

Report Type | Filters | **Show These Fields**

On this tab, click all the fields you want to see on your report. Click on Run Report when finished. You may also click Save Report Template to re-run the report at a later date.

<input type="checkbox"/> Premiums	<input type="checkbox"/> Receipt Number
<input type="checkbox"/> Commissions	<input type="checkbox"/> Additional Premiums
<input type="checkbox"/> Home Phone	<input type="checkbox"/> Earned Commissions
<input type="checkbox"/> Work Phone	<input type="checkbox"/> Unearned Commissions
<input type="checkbox"/> Agency Fee	<input type="checkbox"/> File Number
<input type="checkbox"/> Premium Down Payment	<input type="checkbox"/> Finance Contract Number
<input type="checkbox"/> Total Down Payment	<input type="checkbox"/> Finance Payment Info
<input type="checkbox"/> Address	<input type="checkbox"/> EMail
<input type="checkbox"/> Policy Number	<input type="checkbox"/> MVR Fee
<input type="checkbox"/> Binder Number	<input type="checkbox"/> AR Balance
<input type="checkbox"/> Agent Commissions	<input type="checkbox"/> Financed Amount Due
<input type="checkbox"/> CSR Commissions	
<input type="checkbox"/> Show Policy Type	

Additional Date

- Click Run Report and then either Print this Page or Print Entire Report.

QQ Evolution Dashboard

## Open Report Template

If you decide to run the same report at a later date, click the Open Report Template button which is found under Templates. A list will appear displaying all saved report templates. Select the one you wish to use. QQEvolution 2 will prompt you to re-enter the dates.

## Save Report Template

When you select different criteria for a specialized report and you want to save it, click on the Save Report Template button to save the report format. Give the report a descriptive name that you will recognize later. This comes in handy if you plan to run the same report weekly, monthly, etc.

## **Delete Report Template**

If you no longer require a report you saved, click the Delete Report Template button. Once you delete a report template it cannot be retrieved. You may, however, recreate the report and then save it again.

## **Clear Report**

Click the Clear Report button to remove selected criteria and start over.

## **The Report Wizard**

If you are not sure what type of report to run or you would like assistance, use the QCEvolution 2 Report Wizard. The Report Wizard walks you through each step of the report process prompting you to select the specific information you are requesting. Once completed, you will be prompted to save the report as a template for later use. To use the Report Wizard, click the green Wizard icon located on the Report Builder tab under the Report Type tab.

## **Select Date Tab**

- Select the Date Type you wish to use when searching for matching records.
- Enter the date range you wish to use. All clients/policies that fall within this date range and who meet the specified criteria will be included.

## **The Filter Data Tab**

Apply filters to narrow down your search. For example, you can limit your report to include only cancelled policies that were written by a specific agent for a specific company.

## **The Show Fields Tab**

Select the fields you wish to appear on your report. Select as many as needed.

## **The Page Layout Tab**

Select the sort order and the orientation (page layout).

- Portrait: the page will be printed using 8.5" by 11" margins.
- Landscape: the page will be printed using 11" by 8.5" margins.

## The Save Report Tab

QCEvolution 2 can remember your report so that you may run it later. When you want to run the report next time, enter the Reports section and on the upper right side there will be a list of all of the saved report templates. You can simply choose the saved report you wish to run.

## The Report Finder

The Report Finder is a utility to enable you to rapidly locate reports, customize and generate new reports.

**Report Finder**

I want my report to include the following fields (Client's Name is automatically included)...

Client Screen	Policy Screen	Billing Screen	Miscellaneous
<input type="checkbox"/> Phone Numbers	<input type="checkbox"/> Premiums	<input type="checkbox"/> Coverages	<input type="checkbox"/> Billing Debit
<input type="checkbox"/> Agents	<input type="checkbox"/> Commissions	<input type="checkbox"/> Down Payment	<input type="checkbox"/> Billing Credit
<input type="checkbox"/> Commercial	<input type="checkbox"/> Companies	<input type="checkbox"/> Policy Number	<input type="checkbox"/> Payment Type
	<input type="checkbox"/> Agent Commissions	<input type="checkbox"/> Binder Number	<input type="checkbox"/> Billing Description
	<input type="checkbox"/> Optional Coverage	<input type="checkbox"/> CSR	<input type="checkbox"/> Memos
	<input type="checkbox"/> Finance Company	<input type="checkbox"/> Policy Period	<input type="checkbox"/> Auto Quote Cvg
	<input type="checkbox"/> Renewals	<input type="checkbox"/> Fees	

Matching Reports (double-click to run report)

Check All    Un-Check All    Close

The initial screen provides you with a list of fields to check for report options. As you check the options, you will see stored reports appear by name in the Matching Reports dialog box. From a matching report, you can then run a report by double-clicking the displayed report.

### **Procedure To use Report Finder**

1. Click on Report Finder
2. Select those options you wish to include.
3. Select and double-click the report in the dialog box (See Figure above).
4. Follow the prompts to print the report.

# Chapter 11 QQOffice Assistant

☐ Use QuickSearch

Clients

Prospects

Mail Room

Reports

Rolodex

QuickWord

Forms

Videos

Carrier Download

Utilities

Batch Scanning

**QQ Evolution Assistant**

QQ Evolution Update

QQ WebRater

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

To Do List

Active

Agency Filter: All

In Progress

Memo Reminder for 0, Delete Me: Here is my new memo

07/12/2011

In Progress

Here is another task

07/12/2011

Policies Expiring/Intent to Cancel

Past 3 days and Next 7 days

~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdfd, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdfd, Dasdafdg	Auto (11111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

Clients

X-Date

Comments

Past 3 days and Next 7 days

Memo Reminders

You have 681 reminders!

QQ Download - Renewal Quote - Bill Created: \$100.00

This is a memo with a reminder

QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

View All

Help and Information

Instant Support

Training Webinars

Newsletters

Self Service Portal

What's New

Recent Clients

Cataldo, Cory

Q, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

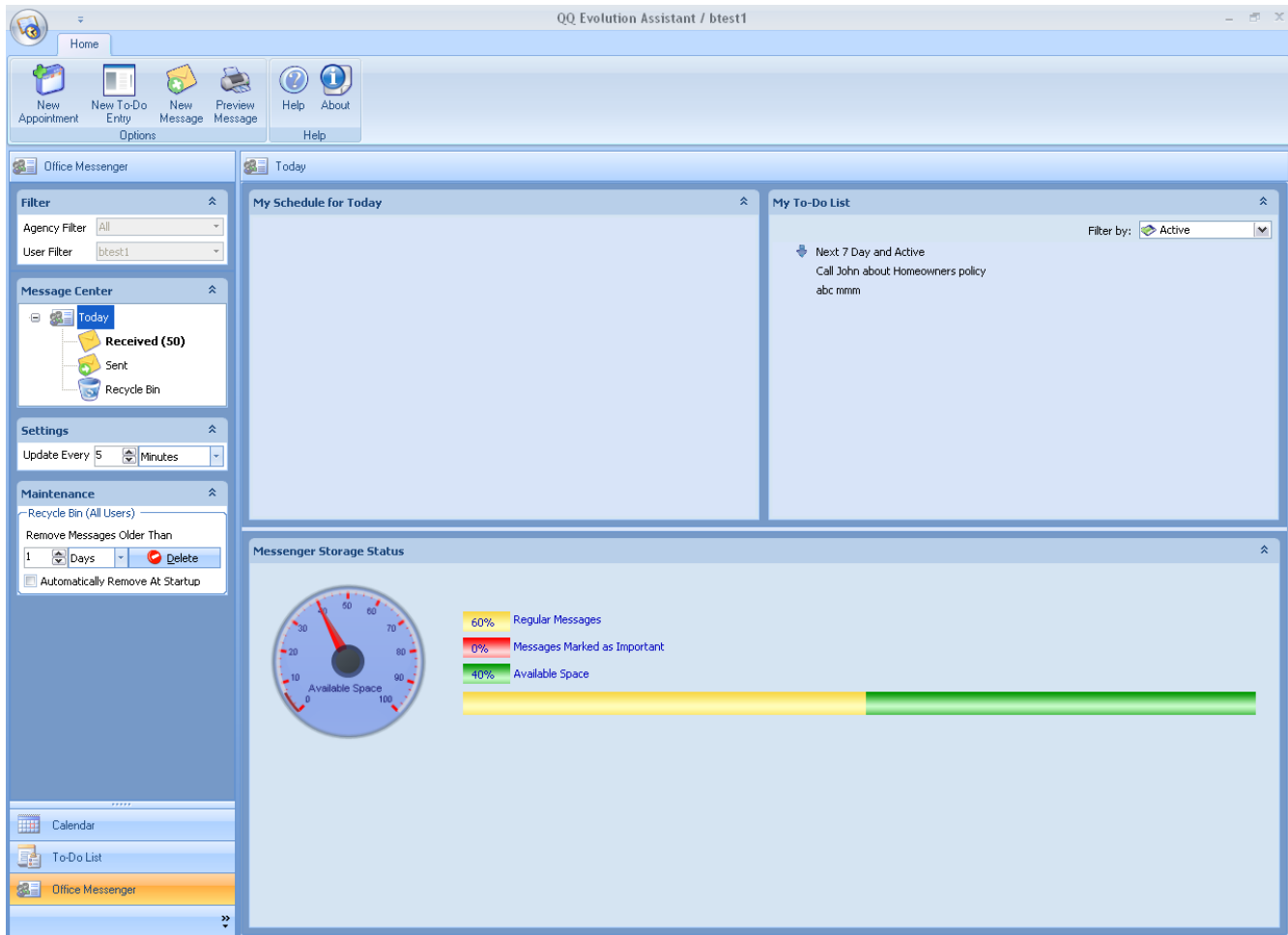
Messages

- 8/30/2011 08:59 AM bincy\_ladmin1 Appointment created by bincy\_ladmin1
- 8/30/2011 08:27 AM bincy\_pu Appointment created by bincy\_pu
- 8/25/2011 09:50 AM bincy\_ladmin1 Appointment updated by bincy\_ladmin1
- 8/25/2011 09:50 AM bincy\_ladmin1 Appointment created by bincy\_ladmin1
- 8/24/2011 04:26 PM bincy\_dev Appointment updated by bincy\_dev
- 8/24/2011 04:23 PM bincy\_dev Appointment created by bincy\_dev

View All

## About the QQOffice Assistant™

The QQOffice Assistant is your Calendar, To Do List, and Messenger System. This feature gives you the power to manage your tasks, schedule appointments, send important messages to the CSRs in your office and reminders for important items. You can also attach clients, policies and claims to any task or messages assigned to Agents or CSRs in your office.

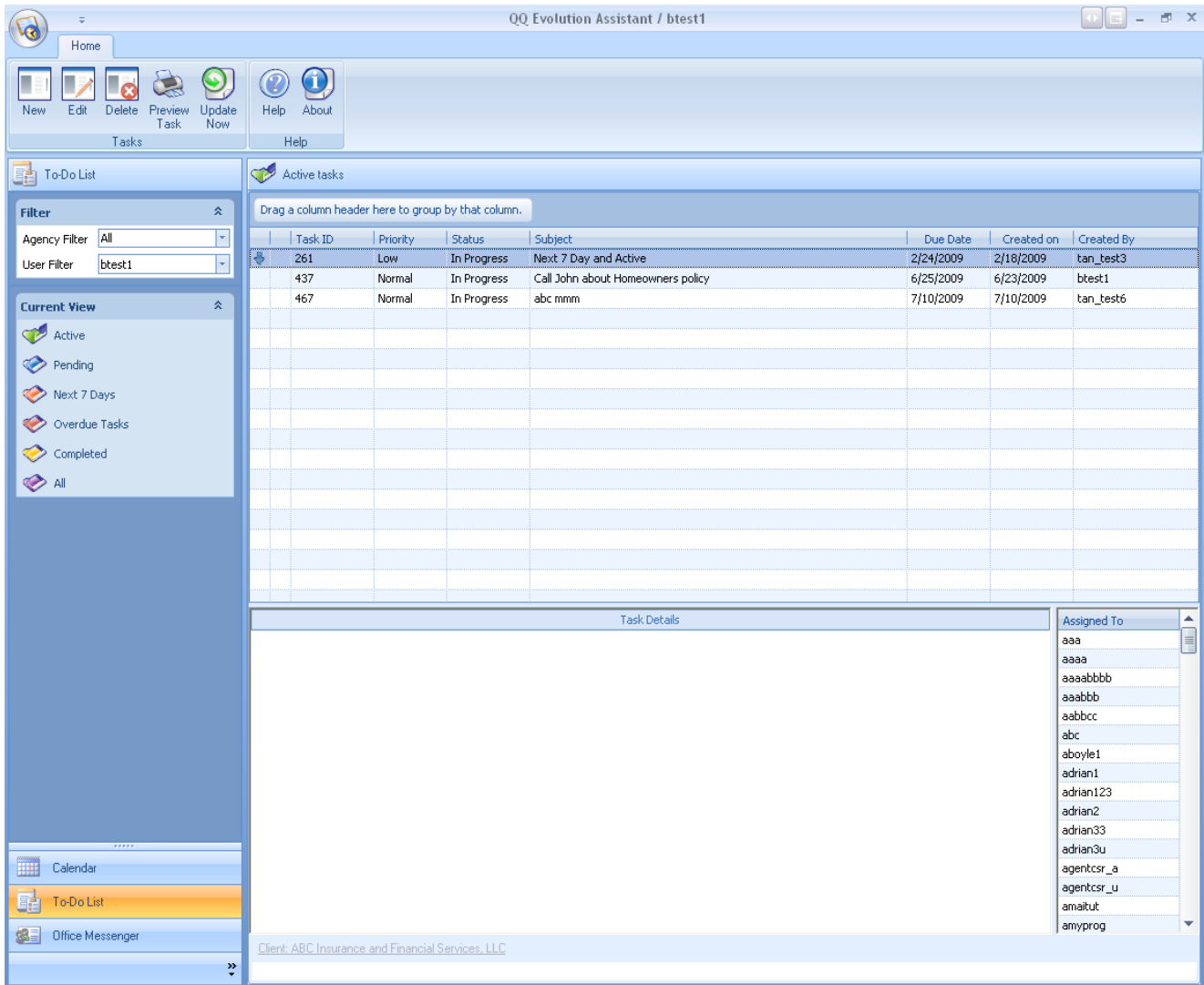


## To Do List

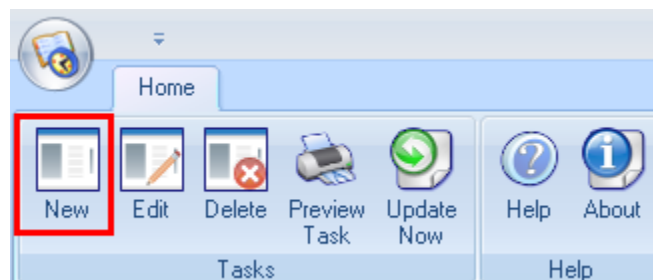
The To Do List allows Agents and CSRs to schedule tasks and set reminders for important items. This feature also allows any memos to be added to the To Do List.

## How to add a task

1. From the Dashboard of your QQEvolution 2 Assistant click on the button on the lower left that says To Do List.



2. On the Ribbon select **New** and you will see the following screen appear.



**New Task**

Task Id: 475    Status: In Progress    Priority: Normal    Due Date: 7/21/2009    Agency: All

Subject: [Empty text area]

**Assigned To:**

- ☒ btest1
- ☐ aaa
- ☐ aaaa
- ☐ aaaabbbb
- ☐ aaabbb
- ☐ aabbcc
- ☐ abc
- ☐ aboyle1
- ☐ adrian1
- ☐ adrian123
- ☐ adrian2
- ☐ adrian33
- ☐ adrian3u
- ☐ agentcsr\_a
- ☐ agentcsr\_u
- ☐ amaitut
- ☐ amyprog
- ☐ arod
- ☐ arodriquez
- ☐ asctest1
- ☐ asctest2
- ☐ bety1

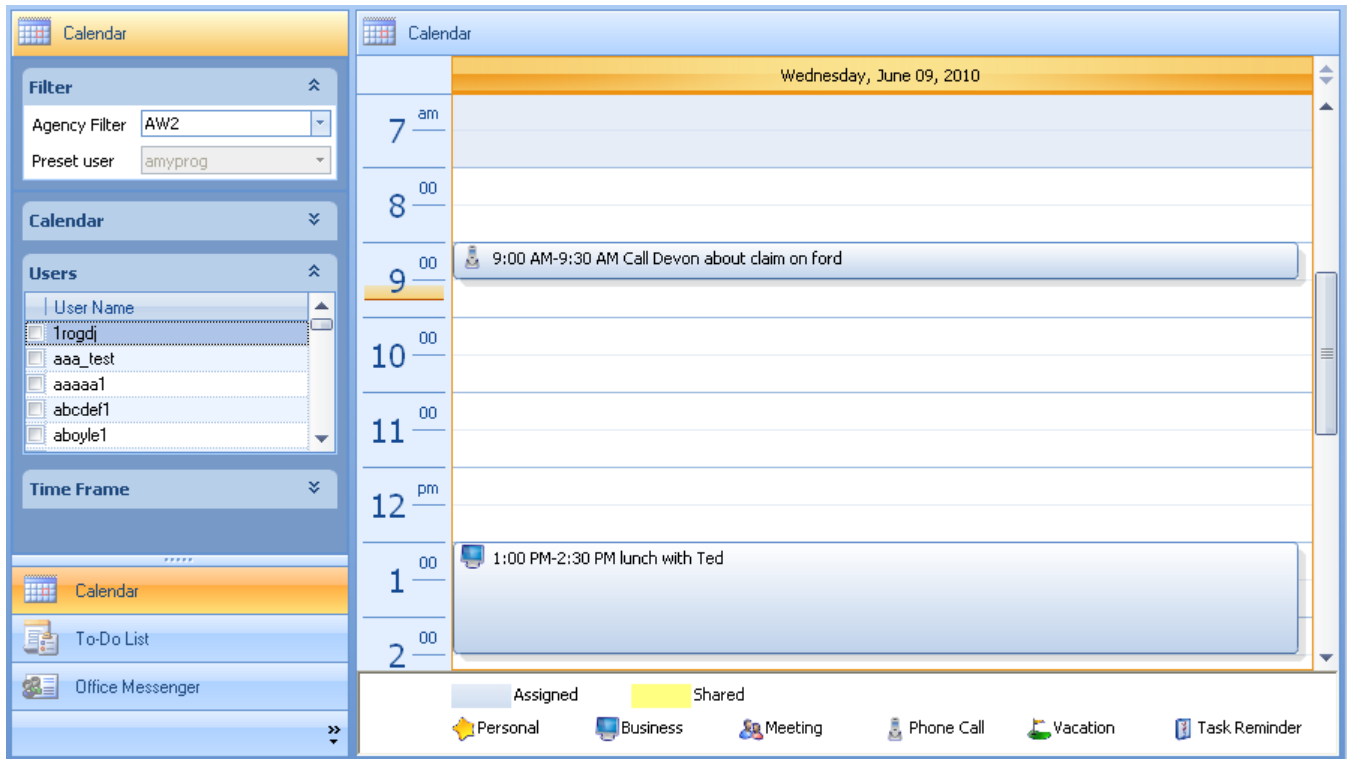
Click to Attach a Client, Policy or Claim    ☐ Remind me on 7/21/2009 10:03 AM    ☐ Do not send notification

Select All    Deselect All       

3. Enter the information for your task and you will have the ability to assign it to any CSR in the office. The CSR may also enter tasks for themselves.
4. Now select the person that you want to assign the task to in QQEvolution 2. The person creating the task is always checked by default.
5. If this task relates to a Client, Policy or Claim you may also attach them to the task. To do this click on the link on the lower right hand side of the screen "Click to Attach a Client, Policy or Claim". Another screen will appear and you can search for the client, policy or claim to attach.

## QQEvolution 2 Calendar

The calendar in QQEvolution 2 will allow you to set appointments, schedule staff meetings, and place other important events into the calendar itself. Please follow these steps to enter an appointment in the Calendar.



1. On the Ribbon, click on the icon that says **New**
2. You can now enter the appointment and schedule the attendees.

**New Appointment**

Subject: \_\_\_\_\_

Start Time: 7/21/2009 8:00 AM Category: None

End Time: 7/21/2009 8:30 AM Created by: btest1

Shared Calendars:

- ☐ Antonio Antonio A...
- ☐ AW1
- ☐ AW2
- ☐ AW3
- ☐ Bret Roberts
- ☐ Bret Roberts 2
- ☐ Clark Berry
- ☐ Coconut Cave
- ☐ Coral Springs

Assigned Users:

- ☒ btest1
- ☐ aaa
- ☐ aaaa
- ☐ aaaabbbb
- ☐ aaabbb
- ☐ aabbcc
- ☐ abc
- ☐ aboyle1
- ☐ adrian1
- ☐ adrian123
- ☐ adrian2

☐ Locked? ☐ Important? Reminder: None

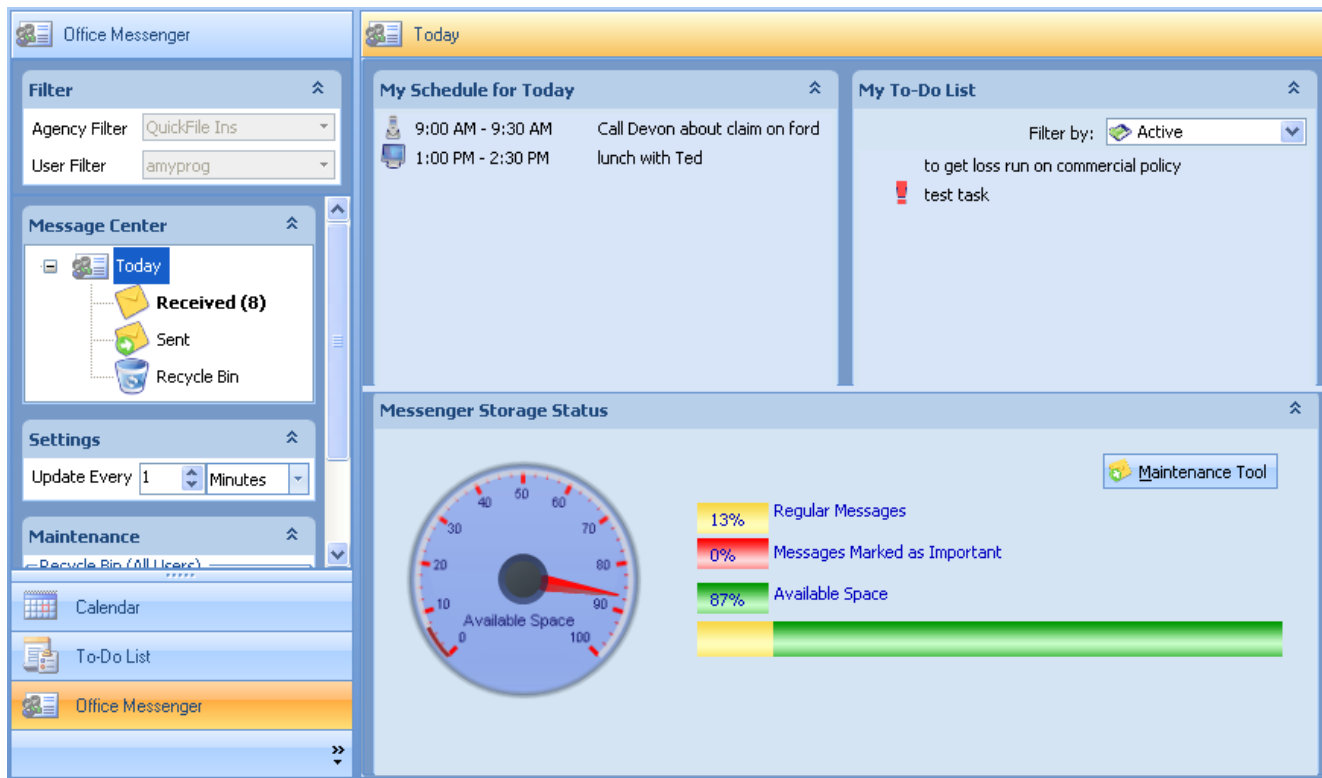
[Click to Attach a Client Policy or Claim](#) ☐ Do not send notification

☒ Ok ☐ Cancel

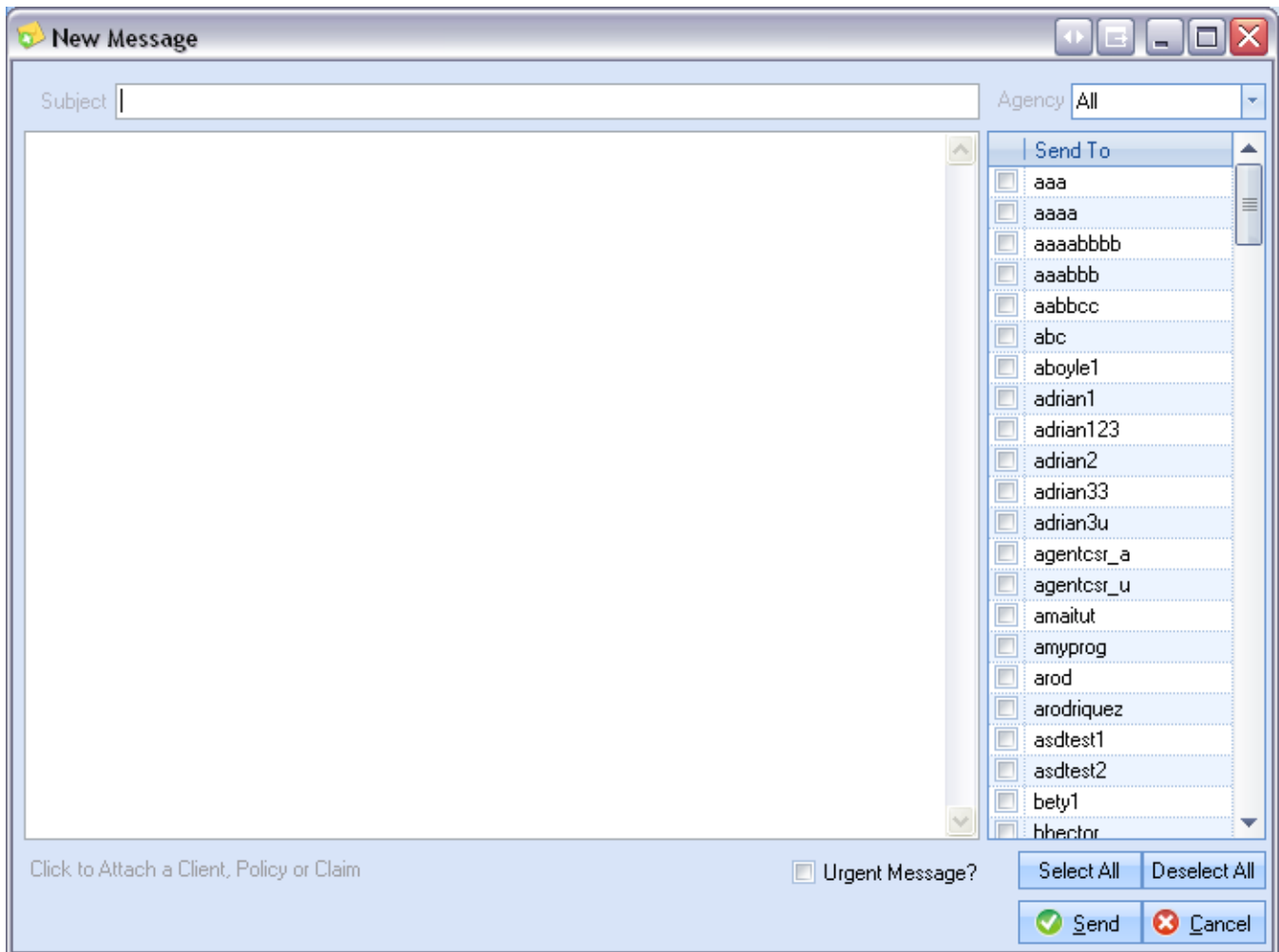
3. When you click “Ok”, QQEvolution 2 will insert the appointment in your calendar. If you have assigned any attendees then they will receive a notification that a new appointment has been scheduled in their calendar.
4. Administrators have the ability to view everyone’s calendar.

## Office Messenger

The office messenger allows you to communicate instantly through our messenger system. While this is not an instant messenger program, it will behave similar to an in house e-mail system, between you and the people in your office. Follow these instructions to send a message.



1. On the Ribbon, click on the icon that says **New Message** this icon will open a new message.
2. Enter your message



3. Select the agent or CSR that you are sending the message to and attach any clients, policies or claims to the message.
4. When QQOffice Assistant is open and you receive a message, a received message icon will appear in the lower right toolbar.

# Chapter 12 QQDownload™

The screenshot displays the QQEVOLUTION™ software interface. The left sidebar contains a list of navigation options: Clients, Prospects, Mail Room, Reports, Rolodex, QuickWord, Forms, Videos, **Carrier Download** (highlighted with a red box), Utilities, Batch Scanning, QQ Evolution Assistant, QQ Evolution Update, and QQ WebRater. The main content area is divided into several sections: 'To Do List' with a table of tasks, 'Policies Expiring/Intent to Cancel' with a table of policy details, 'Memo Reminders' with a list of reminders, 'Help and Information' with links to support resources, and 'Recent Clients' with a list of client names. The 'Carrier Download' option is highlighted with a red box in the left sidebar.

**QQEVOLUTION™**

Refresh Dashboard | Search | Use QuickSearch | Log Off

**Carrier Download**

**To Do List** | Active | Agency Filter: All

In Progress	Task	Due Date
In Progress	Memo Reminder for 0, Delete Me: Here is my new memo	07/12/2011
In Progress	Here is another task	07/12/2011

**Policies Expiring/Intent to Cancel** | Past 3 days and Next 7 days

Policy	Auto	Expires on
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdfd, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdfd, Dasdafdg	Auto (11111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expires on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

**Memo Reminders**

You have 681 reminders!

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QQ Download - Renewal Quote -

QQ Download - Renewal Quote -

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**Recent Clients**

Cataldo, Cory

Q, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

Price, Randy

**Messages**

Date	Time	From	Subject
8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

View All

## About QQDownload

QQDownload is an optional QQEvolution 2 add-on that works seamlessly with QQEvolution 2 to download and import your transactions from your participating insurance carriers into your QQEvolution 2 system.

## Getting Ready To Use QQDownload

QQDownload works with most personal and commercial lines of business. A list of the insurance carriers who participate in the IVANS service is available on our Web sites: <http://www.qqsolutions.com/solutions/realtime/downloadcarriers.aspx> . We can also process downloads from companies such as Progressive Insurance, who bypass IVANS to download the files to your computer, as long as they are using the AL3 file type. If you do not see one of your carriers on the IVANS list, you can call them to see if they use their own program to download the AL3 files to your computer.

Most insurance companies download through the IVANS service, and QQDownload is designed to process these using the universal **AL3** (ACORD Automation Level 3) standard or XML. QCEvolution 2 can download from any company that uses the IVANS service. We are adding new carriers to our approved partner list every day; if you do not see one of your primary carriers on our list, just ask. We are willing to work with any insurance company that is interested in downloading in to QCEvolution 2.



## How to get started with QQDownload

1. Contact your QCEvolution 2 sales representative to have the QQDownload feature activated on your account. If you are a Bronze, Gold, or Platinum subscriber, you automatically get QQDownloads included.
2. Contact each carrier you wish to do downloads with and let them know your agency management system is QCEvolution 2. The first carrier you speak with should be able to get you set up with an **IVANS** profile (i.e., an account, 'mailbox,' user ID, and password). This process can take between two to five business days. Ask them for their **NAIC** (National Association of Insurance Commissioners) codes; you must have these to process files in QQDownload. This code will be entered into the Utilities section of QCEvolution 2, under Popup Boxes and Insurance Companies. The NAIC code is used to match the carrier to the corresponding insurance company in QCEvolution 2.
3. Once you have completed the above step you will contact our **Product Support department** at 1-800-330-8000 option 1, to assist you in configuring your IVANS mailbox account.
4. Now the program is all set to start receiving your files from the participating insurance companies. You will contact the original carrier who set up your IVANS account and let them know you are ready for the initial download of your transactions. After this you can then contact your other carriers and give them your existing IVANS account information so they can also start sending your transactions to the IVANS mailbox.

## To Download With Progressive

Progressive Insurance Companies use an FTP site for company downloads, not IVANS. The program is called the "Progressive Internet Scheduler." For setup, please contact Progressive Download Support at 1-800-763-6002, and select option #3, from 8:00 a.m. to 6:00 pm Eastern Standard Time, Monday through Friday. The connection is made via the internet and will place the transactions into our QuickFL, QuickTX, or QuickGA directory.

## To Download with Mercury

Mercury Insurance Companies do not use IVANS to send downloads. Their download software, called Mercury Agent Application can be obtained from Mercury's Web site [www.mercuryinsurance.com](http://www.mercuryinsurance.com) . To download it, the agent must have an "administrator"

password from Mercury. If you do not have the password please contact them at 1-800-637-2175.



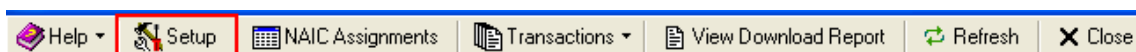
**NOTE: Remember to ask Progressive and Mercury for their list of NAIC codes, so they can be entered into QCEvolution 2.**

## How to Setup and Process Mercury Downloads

The feature of being able to download files from Mercury has now been added to QCEvolution 2. This document will explain how to set this feature up and how to use it. You must be using QCEvolution 2 version 1.0.0 or higher in order to access this exciting functionality. The reason processing files from Mercury has always been an issue for agency management systems is because their files are not in the standard AL3 file format used for Downloads. Mercury sends their files as a PDF file format. QCEvolution 2 is now able to process these files but they are done and saved differently from the regular Downloads.

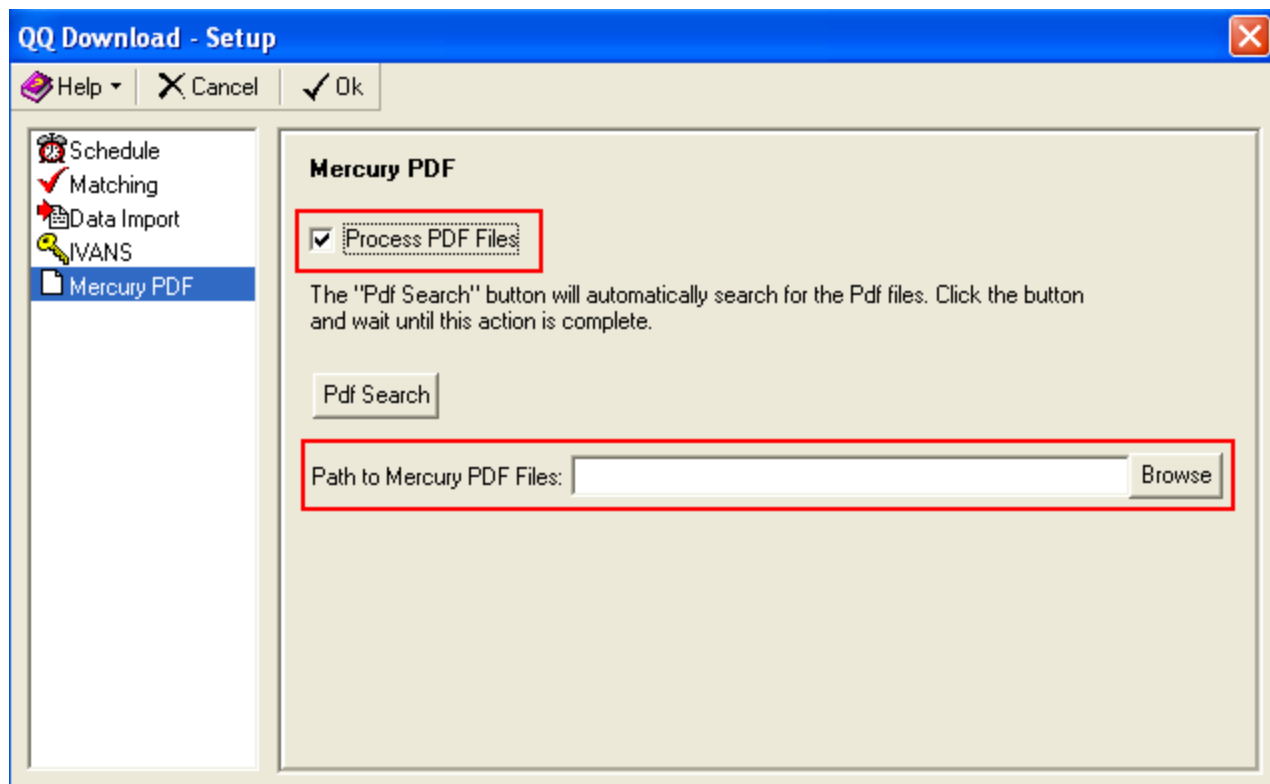
You will need to first contact Mercury and explain to them you would like to start doing downloads. Mercury will install a tool on your computer which will enable them to get their files to you. Make sure you have this installed on the same computer you are currently processing downloads through or you plan on doing your downloads on.

Now you will need to setup Downloads inside of QCEvolution 2 to accept these files. First you will open the QQDownload button from the Dashboard. Once it opens click on the Setup button on the top Ribbon.

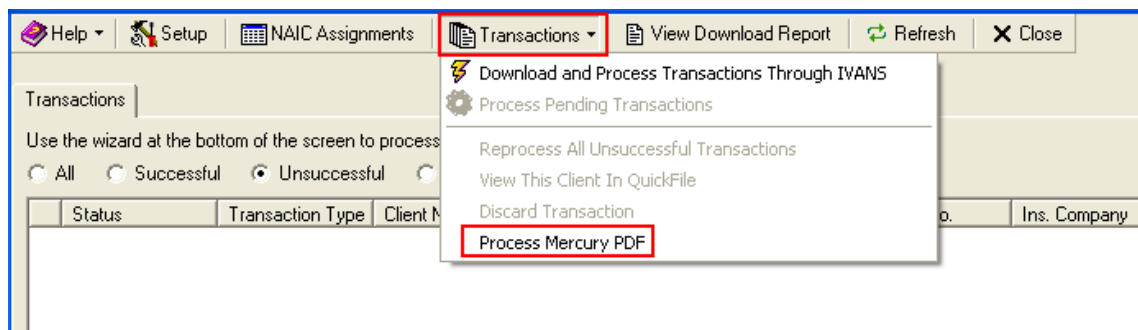


The following Setup screen will appear, click “Mercury PDF.” You will need to place a check mark next to Process PDF Files. You will then need to click the “Browse” button and locate the Mercury PDF files. This will insert the path to the Mercury PDF files into the Setup area.

**Note: When Mercury installs their previously mentioned tool in order to receive their PDF files; they will generally insert the path to which their files will be located on your computer. Please make note of this because that is the path you will need to insert into the Setup area.**



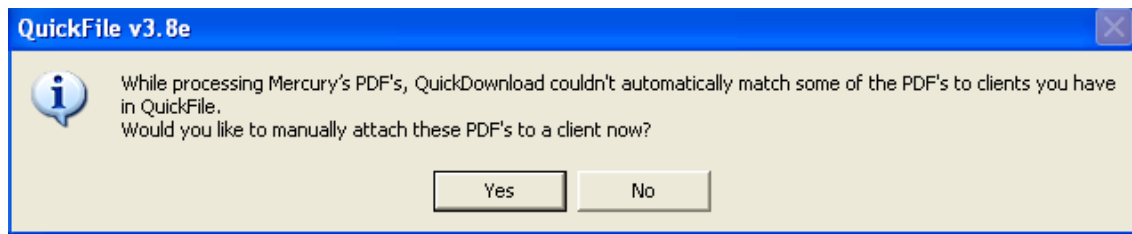
There are two different ways to process the Mercury Downloads. You can check the Enable Automatic Downloads in the Setup screen. This will process the Mercury files automatically at the time you have selected along with the rest of your downloads from the other carriers. You can also choose to manually download them. This will be done by clicking the Transactions button on the top Ribbon and then from the drop down list select Process Mercury PDF.



Since Mercury uses PDF files when they are processed they are stored in the Image section of the client.

When processing the Mercury PDFs there may be certain PDFs that are downloaded that are not associated to a client currently in your QCEvolution 2 program. This could be due to some type of difference in the insured name on the PDF to how it is listed in QCEvolution 2 or it's simply a new client. When this occurs you will need to manually match the PDF to the client.

When a file needs to be manually attached to a client, the following prompt will appear every time you open QREvolution 2 until the file(s) have been processed.



You will click “Yes” to open the Attach PDF to Clients box. If you do not wish process the files at this time you can click “No” and then process them another time.

Once the “Attach PDF to Clients” box opens, the PDF(s) waiting to be attached will be listed. You can select a PDF and view it to see what client the document belongs to. You can use the “Zoom” feature to find the insured’s name or you can double click the name of the PDF to view the actual file. If you choose to view the actual PDF you will need to close it before you will be able to proceed with attaching it to the client. Now that you have the insured’s name you will search for the client. You can search by “All” clients, Personal, or Commercial. Type in the client’s last name or a few letters of it and click the “Search” button to find your client. You will select the client and make sure you have the correct PDF chosen and then click the Attach button.

**Attach PDF to Clients**

**PDFs available to Download**

- PFL05210580C07000006302006.PDF
- PFL05286718C05000006302006\_0.PDF
- PFL05427118D01000006302006\_0.PDF

**Search by Client Name**

Search by:

Client	Type	Address	Agency
Borne, Amy	P	5854 NW 14 St Nowhereville, FL 33061-	1 S. Main St.
Brown, Deb	P	5521 NW 15 St Sunshine, FL 33333-	1 S. Main St.
Doe, Jane	P	555 NW 40th Ct Any Town, FL 12345	1 S. Main St.
Doe, John	P	622 NW 13th St, Suite 30 Ft Lauderdale, FL 33319	Agency 1
Jones, Mic	P	FL 33333-	
Man, Sarah	P	20 NW 15th St, FL 33555-	
Montag, Abby	P	123 Mainstreet, Suite 123 Hollywood, CA 90069-	1 S. Main St.

**Zoom**

After clicking the “Attach” button a box will appear allowing you to type in a description and CSR for the document you are attaching. After entering the description click “OK.”

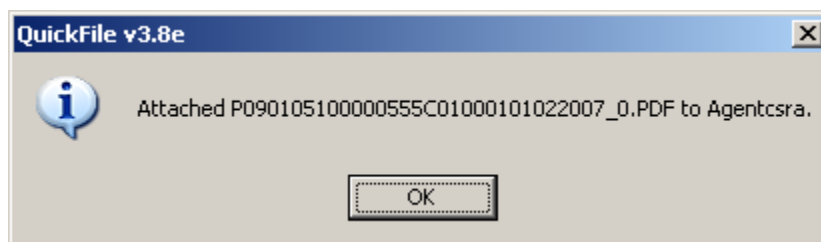
**Enter Image Description**

Image Description

CSR

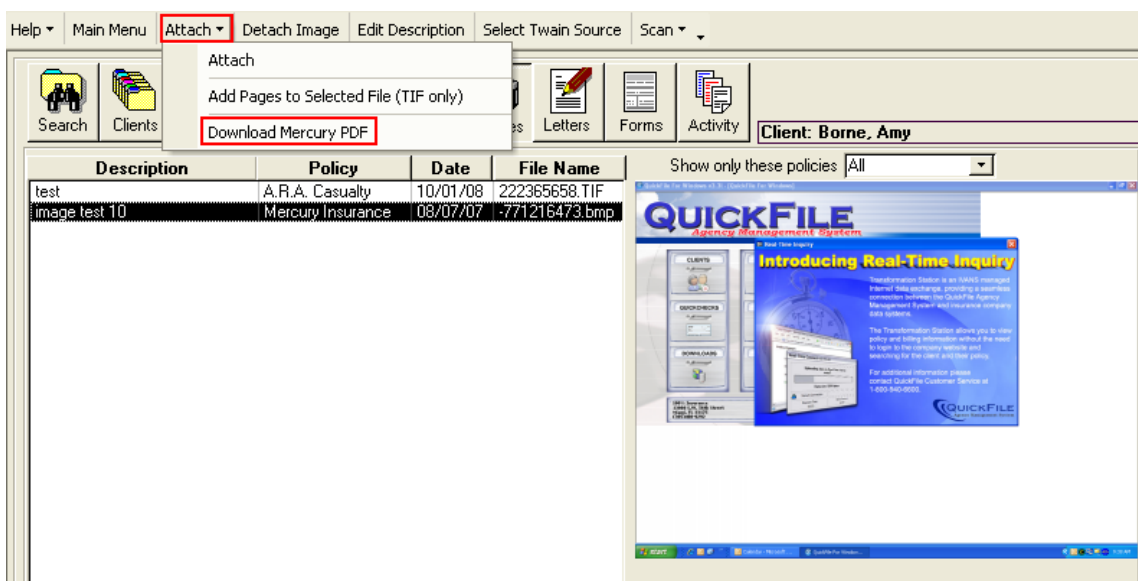
**Note:** If the client has multiple policies you will be prompted to select which policy the document you’re attaching belongs to.

QQEvolution 2 will then process the PDF and add the document into the Image section of the client you selected, displaying a message upon successful completion.



You will repeat this process until you have attached all the PDFs.

You do also have the ability to attach a PDF which has been downloaded directly from within the client's record. In order to do this you would open the Clients Section on the Dashboard and then search for the client. Once you have found and selected your client, click the Image button. Once there select Attach on the top Ribbon and from the drop down list choose Download Mercury PDF.

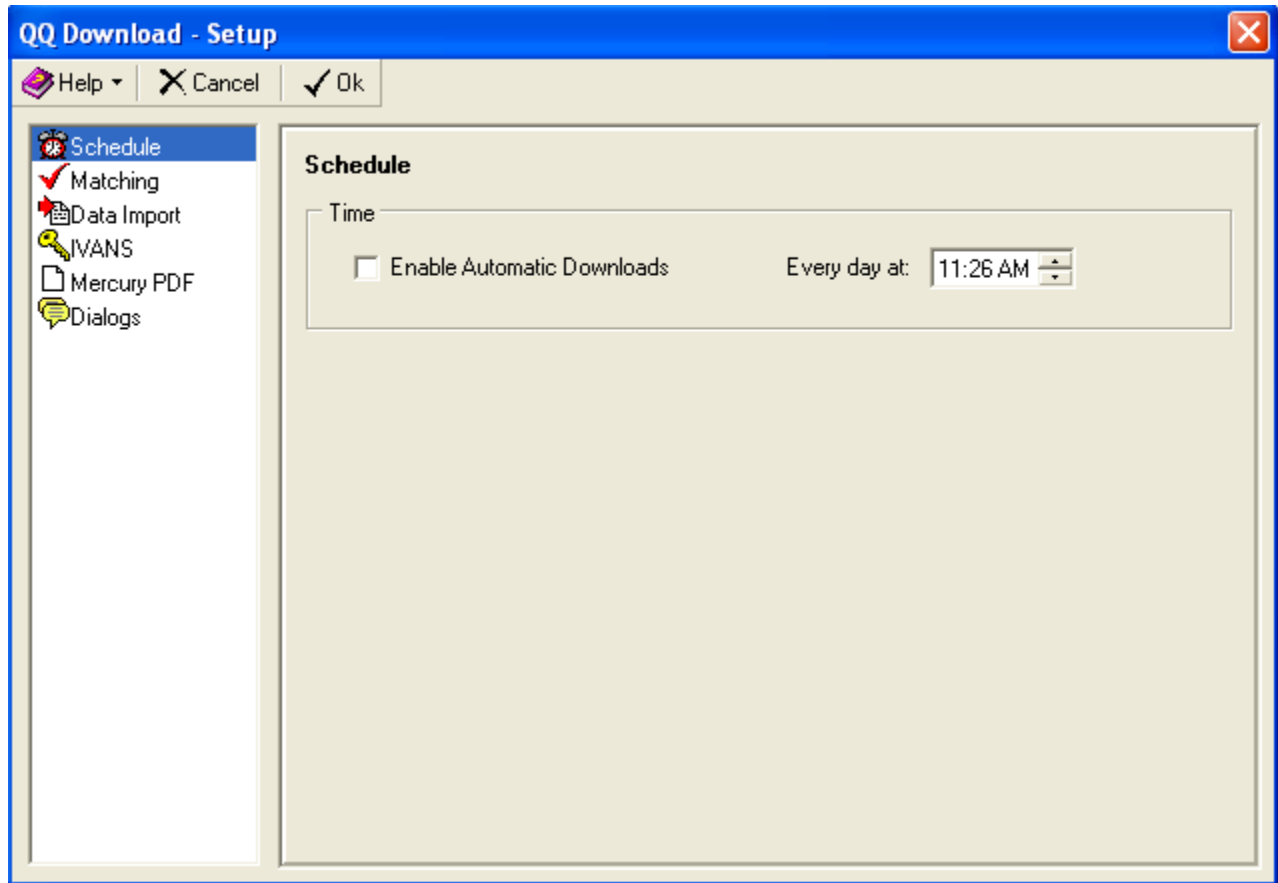


This will start the process of manually attaching the PDF to the client as explained above. The difference here is you do not need to search for the client since you are already in their record.

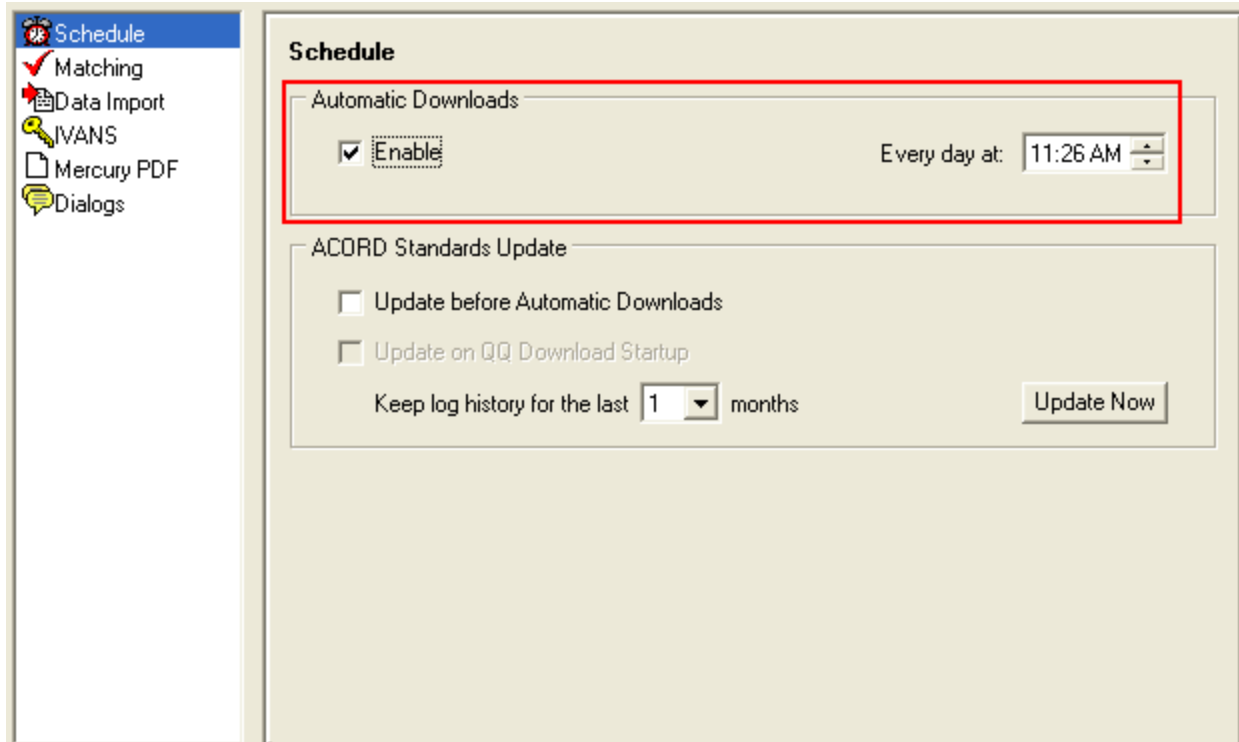
## Initial Setup

Now that we have the IVANS account set up and the insurance carriers ready to process the transactions, it's time to set up QQDownload. The program can be accessed from the

Dashboard of QCEvolution 2 by clicking on the **Carrier Download** button. Once in the program click on the **Setup** button at the top left of the screen. It will open the box below.

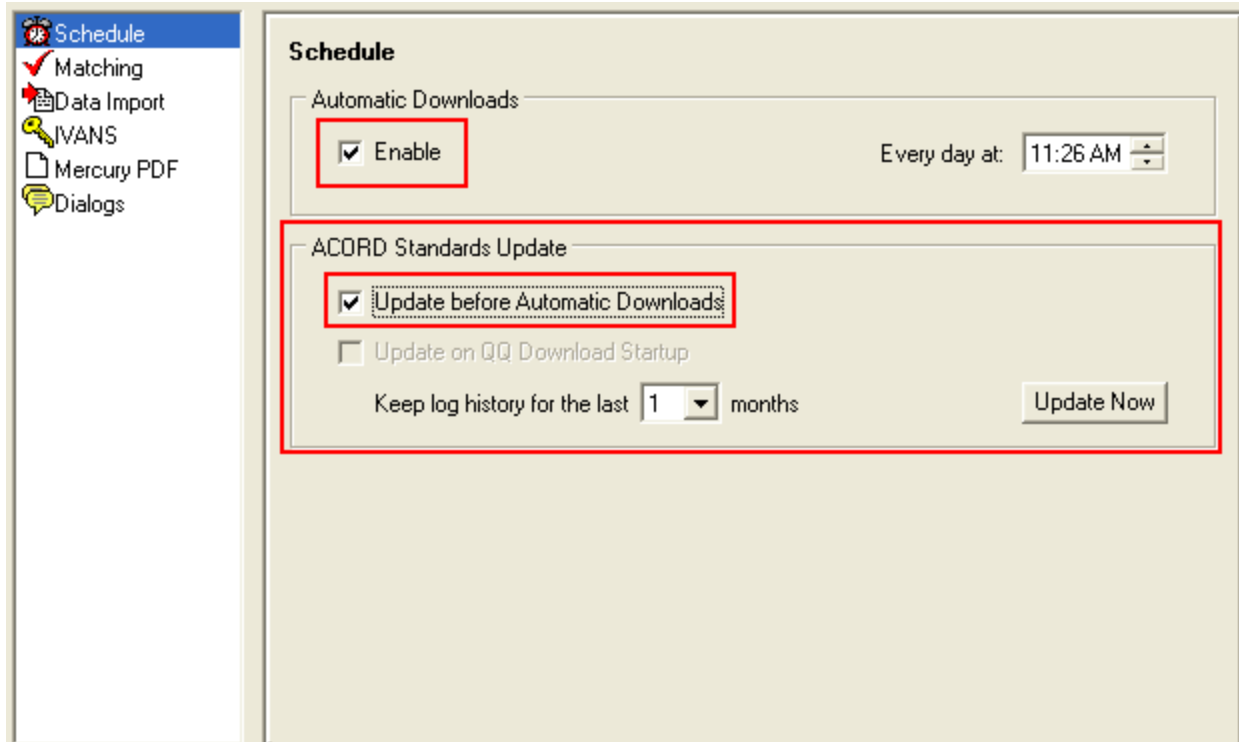


QQDownload can be configured to download transactions automatically every day at a specific time by checking **Enable Automatic Downloads**. QQDownload can also process the transactions at any time by clicking the **Transactions** button then selecting **Download and Process Transactions Through IVANS**.



ACORD is continuously updating the standard for ACORD groups. In order to help users obtain the most current ACORD groups you can check our database for any additions or changes made to the groups without having to wait for the next product update. This feature will help prevent a user from receiving an error message stating an ACORD group is missing when processing transactions.

When you have checked “Enable” for automatic processing of the download you will have the option to check “**Update before Automatic Download**” under the ACORD Standards Update section. With this checked, every time the download runs automatically at the specified time it will first check for any new ACORD groups and update your system.

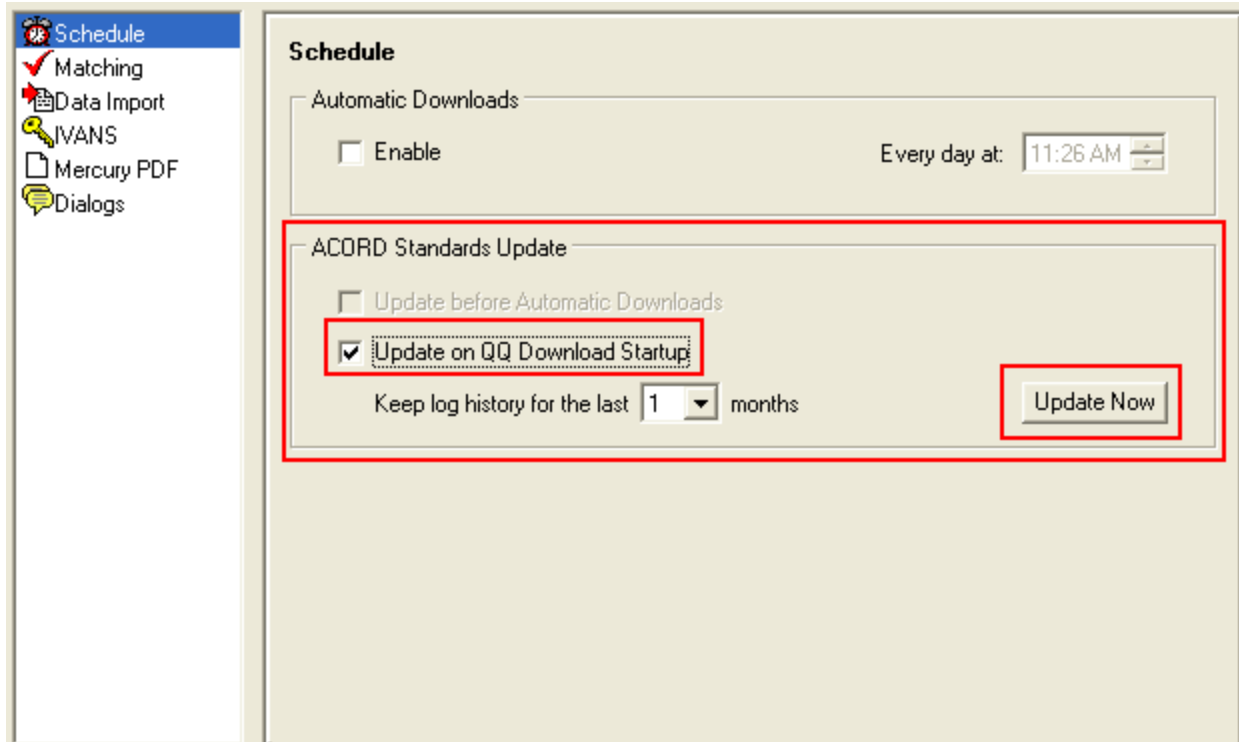


If you are not running your download automatically you will have the option to check “**Update on QQDownload Startup.**” This will check for new ACORD groups every time QQDownload is opened.

You can also choose to manually check for updated groups by clicking the “**Update Now**” button.

**NOTE:** A log history is kept locally on the user’s computer which details what was done during the ACORD group update. This log holds a very small amount of data and does not take up much computer space. You can set how many months worth of the log history you would like stored on your computer before having it removed and a new log started.

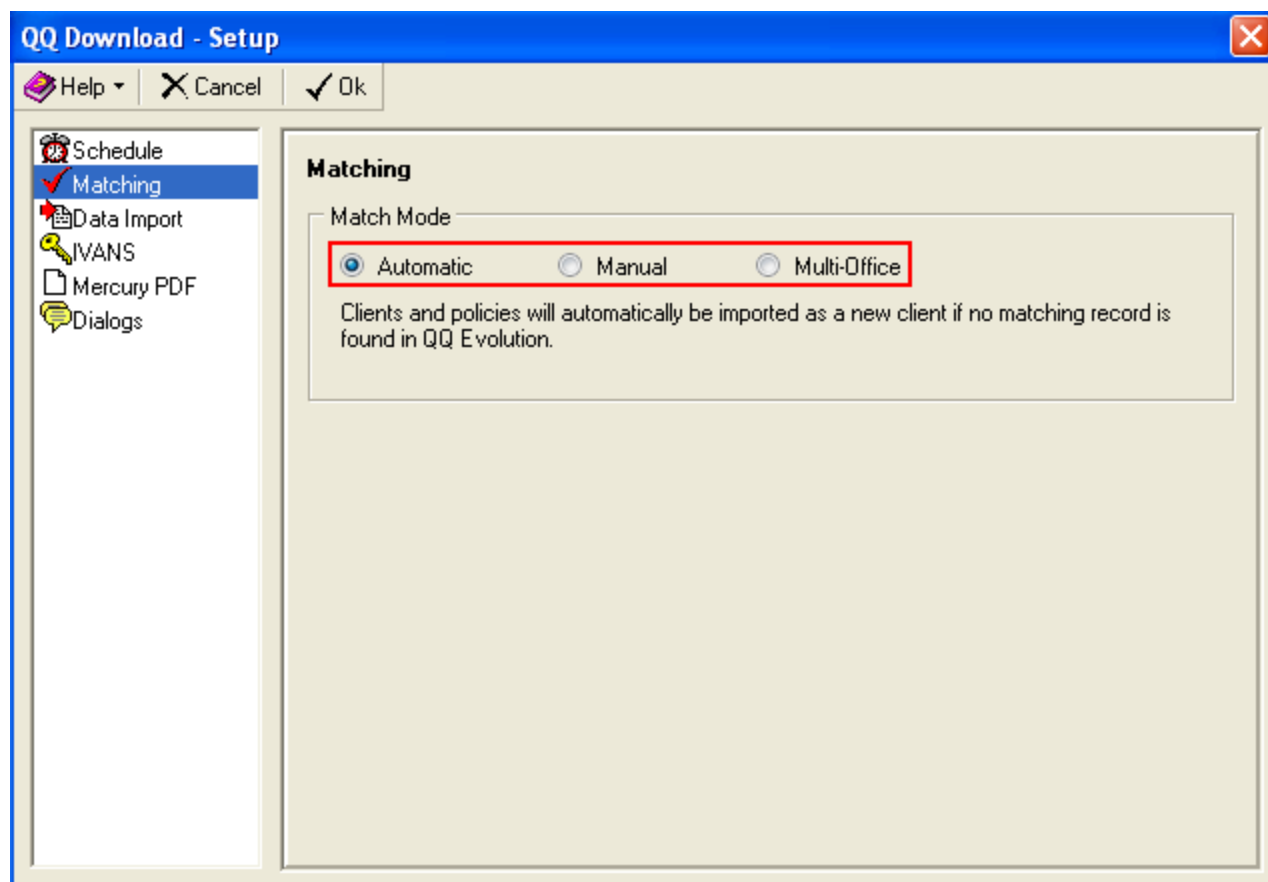
The very first time you run the update for ACORD groups it may take a few minutes but every time after that it will take a matter of seconds. When you are automatically running the update it will simply appear for a few seconds and nothing else needs to be done. If you choose to run the update manually you will have to click “OK” to close out the process when it is finished.



Now we would choose which **Match Mode** to use when importing the clients into QCEvolution 2.

- In **Automatic** mode, if there is no match found (e.g., name, policy number, address, etc.) in your existing clients and/or policies, QCEvolution 2 will add the transaction as a new record.
- In **Manual** mode, if no match is found the transaction will be marked as Unsuccessful. It will give you a message telling you why the transaction is Unsuccessful and a note such as Client Not Found.
- A third mode is available, **Multi-Office**. This feature can be used by agencies with multiple offices which process downloads from carriers with ONE agent code for all offices. You will be able to download the transactions for all offices to one location. Transactions with a match found within QCEvolution 2 will automatically be sent to the correct office. If there is no match you will then be able to send the transaction to the correct office manually. When selecting Multi-Office an additional box will open allowing you to set the default offices you wish to process downloads for.

**NOTE:** Additional information on processing Multi-Office transactions is listed towards the end of this section.



The **Data Import** section contains three different options. The first is **Update Mode**.

- **From Company** -- This will overwrite certain client and policy information on the client's record with the information sent by the carrier.
- **Keep Information** -- With this selected no information on the client or policy will be overwritten.

The screenshot shows the 'Data Import' dialog box. On the left is a sidebar with icons and labels: Schedule, Matching, Data Import (highlighted), IVANS, Mercury PDF, and Dialogs. The main area is titled 'Data Import' and contains several sections. The 'Update Mode' section is highlighted with a red rectangle. It contains two radio buttons: 'From Company' (selected) and 'Keep Information'. Below these is the text 'The client information will be updated from the company files.' Other sections include 'Agent/CSR Update' with checkboxes for 'Overwrite Agent Name' and 'Overwrite CSR Name', 'Create Form for Auto Transactions' with radio buttons for 'Generic Auto Quote', 'Acord Personal Auto App' (selected), and 'Both', and 'Add Producer' with radio buttons for 'Add agent from Client screen' (selected), 'Add CSR from Policy screen', and 'Add both'.

The second option available in Data Import is **Agent/CSR Update**. If you check mark “**Overwrite Agent Name**” the agent’s name on the Client screen will be overwritten with whatever agent is sent through the download transaction. If you wish to always keep the agent you manually entered on the Client screen do not mark this. If you check mark “**Overwrite CSR Name**” the CSR’s name on the Policy screen will be overwritten with the name of the CSR doing the download. If you wish to always keep the CSR you manually entered on the Policy screen do not mark this.

This screenshot is similar to the first one, showing the 'Data Import' dialog box. The 'Update Mode' section remains highlighted with a red rectangle. The 'Agent/CSR Update' section is now highlighted with a red rectangle. It contains two checkboxes: 'Overwrite Agent Name' and 'Overwrite CSR Name', both of which are currently unchecked. The other sections ('Create Form for Auto Transactions' and 'Add Producer') are the same as in the first screenshot.

The third option in Data Import is choosing if you would like to automatically **Create Form for Auto Transactions**. This will automatically put either the **Generic Auto Quote** form (for FL, TX, and GA) or the **ACORD Personal Auto App** into the Forms section for the client. In order to select the form simply click on it and the radio button will be placed next to it.

The fourth option is **Add Producer**. This allows you to choose the Producer who receives the commission on the policy for policies that come through download.

- **Add Producer** – If you check the box next to “Add Producer” whichever selection you make here will apply to all policies done through QQDownload. If you do not wish to have either the agent or CSR or both automatically listed on policies do not check this box.
- **Add agent from Client screen** – This will pull the **agent** listed on the Client screen of the client and make them the producer of the policy. If the default commission structure for producers is setup in the Utilities the commission will be calculated for you.
- **Add CSR from Policy screen** -- This will pull the **CSR** listed on the Policy screen of the client and make them the producer of the policy. If the default commission structure for producers is setup in the Utilities the commission will be calculated for you.
- **Add both** -- This will pull the **agent** listed on the Client screen of the client and make them the producer of the policy. It will also pull the **CSR** list on the Policy screen of the client and make them the producer of the policy. **Both** the agent and CSR will be listed for the one policy. If the default commission structure for producers is setup in the Utilities the commission will be calculated for you.

**Data Import**

Update Mode  
☒ From Company      ☐ Keep Information  
 The client information will be updated from the company files.

Agent/CSR Update  
☐ Overwrite Agent Name      ☐ Overwrite CSR Name

Create Form for Auto Transactions  
☐ Generic Auto Quote      ☒ Acord Personal Auto App      ☐ Both

☒ Add Producer  
☒ Add agent from Client screen      ☐ Add CSR from Policy screen      ☐ Add both

The next thing to do in the Setup is to enter your IVANS account information. The account information is entered in the **IVANS** section.

**QQ Download - Setup**

Help | Cancel | Ok

**IVANS Account Information**  
 This information should be provided to you by one of your participating insurance carriers.

Mailbox  
 Account: y6343  
 User ID: yd44454  
 Password: yd44454  
 ECS Support: ☒      IE Support: ☐

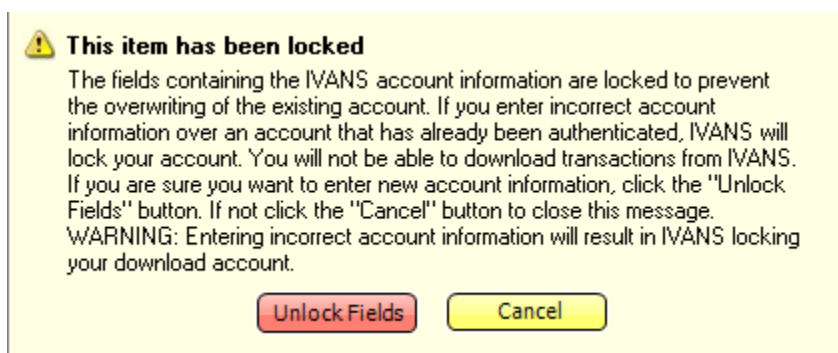
Modem Dial Information  
 Account: y6343  
 User ID: 44454  
 Password: 44454  
 Phone 1:  Find  
 Phone 2:  Find

Connection  
☒ Use the Internet (i.e. DSL)  
☐ Use Modem:

IVANS Download Folder  
 Path: C:\QUICKFL\QUICKDOWNLOAD\PENDING\

Please note that once the IVANS account information is entered and you click “OK” at the top of the Setup box the account information will be locked. The reason being, if someone enters incorrect account information and tries to process the download from IVANS, the account will be locked by IVANS. When an account is locked you will have to contact IVANS to have it unlocked.

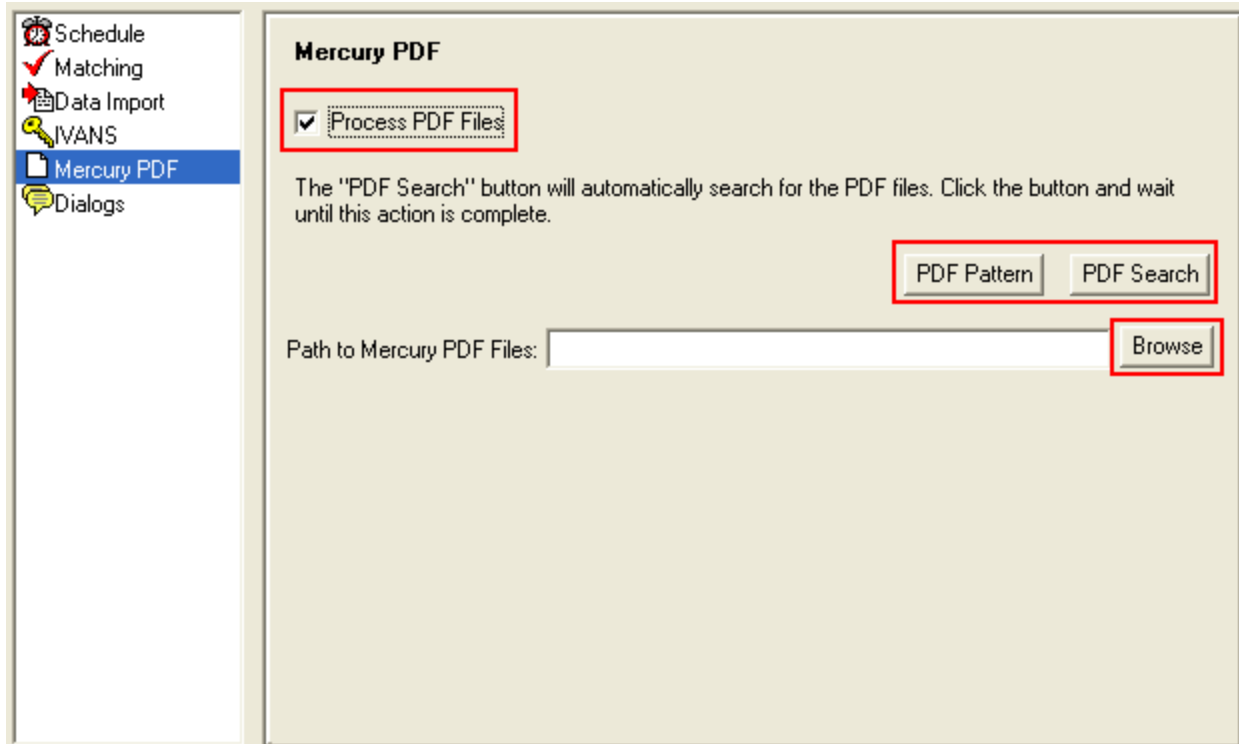
You are allowed to unlock the account information within the Setup screen and enter the correct mailbox. Please make sure IVANS has unlocked and activated your account with them first. In order to unlock the IVANS screen click on any area that is grayed out. A warning message will appear stating your account could possibly be locked if incorrect information is entered. If you wish to re-enter the account click “Unlock” or if you would like to simply close it click “Cancel.”



If you are doing downloads with Mercury Insurance in their .pdf format select the next Setup item: **Mercury PDF**.

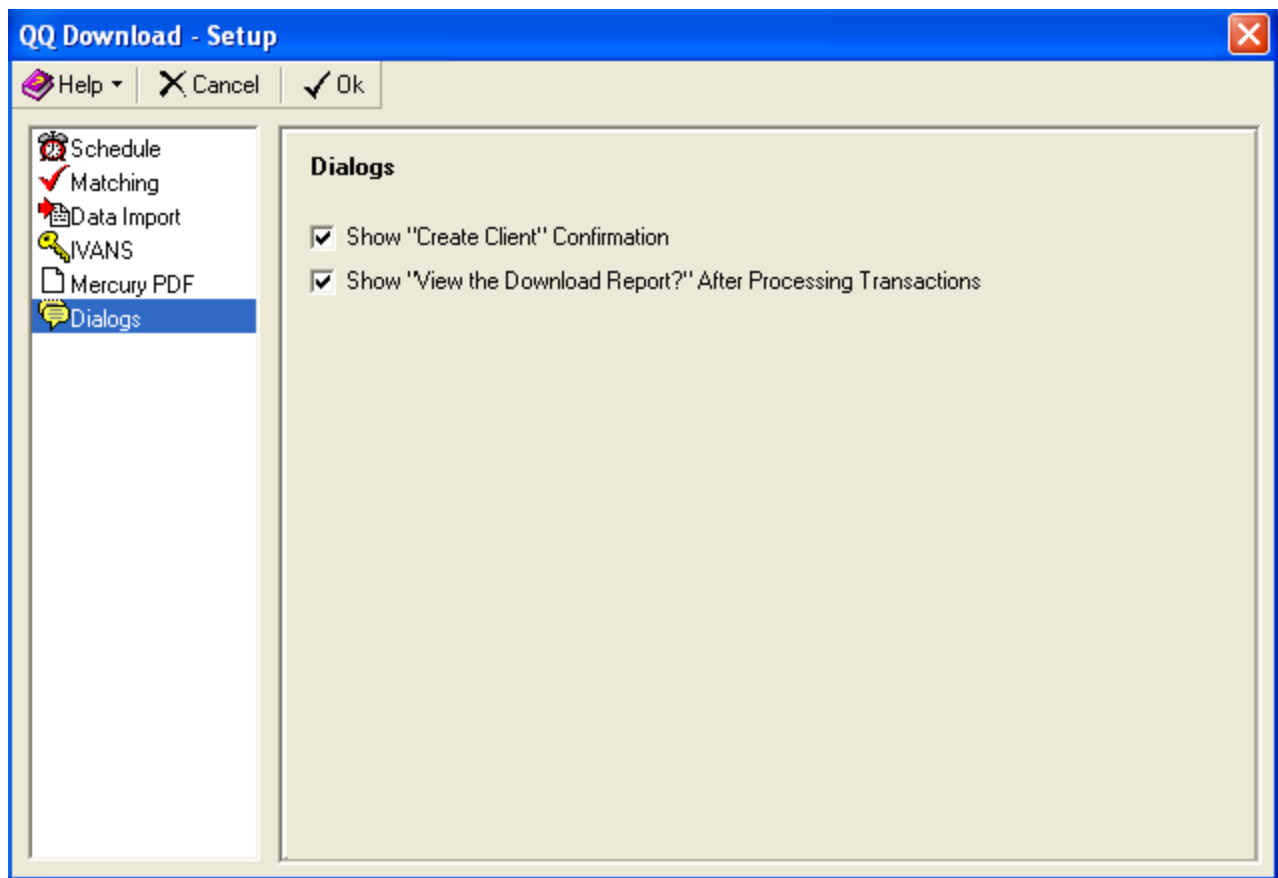
You will need to place a check mark next to Process PDF Files. You will then need to click the “Browse” button and locate the Mercury PDF files. This will insert the path to the Mercury PDF files into the Setup area.

You can click on the **PDF Search** button if you do not know where the Mercury files are stored. This will search your computer for all PDF files. Once you find the PDF files that are from Mercury you can browse to this location and set it as the above mentioned path. To cut down the search time you can use the **PDF Pattern** button to enter in the pattern Mercury uses for the PDF file name they send to you to. This way the search feature will only look for the PDF files with this type of pattern. More than one pattern can be entered.

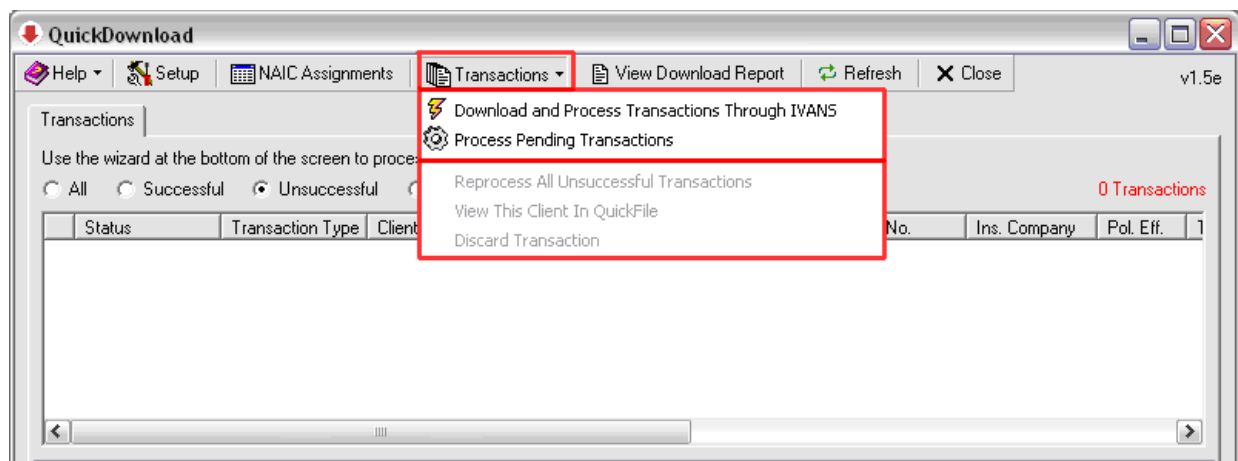


The last item in the QQDownload Setup box is **Dialogs**. While processing downloads message boxes will appear from time to time. Some of these messages will allow you to check “Do not show this message again” and the message will no longer appear. If at any time, you would like any message that is listed under Dialogs to appear again you will place a check next to that message.

Not all message boxes have this option and we will be adding more of them to the Dialogs area as QQEvolution 2 progresses.



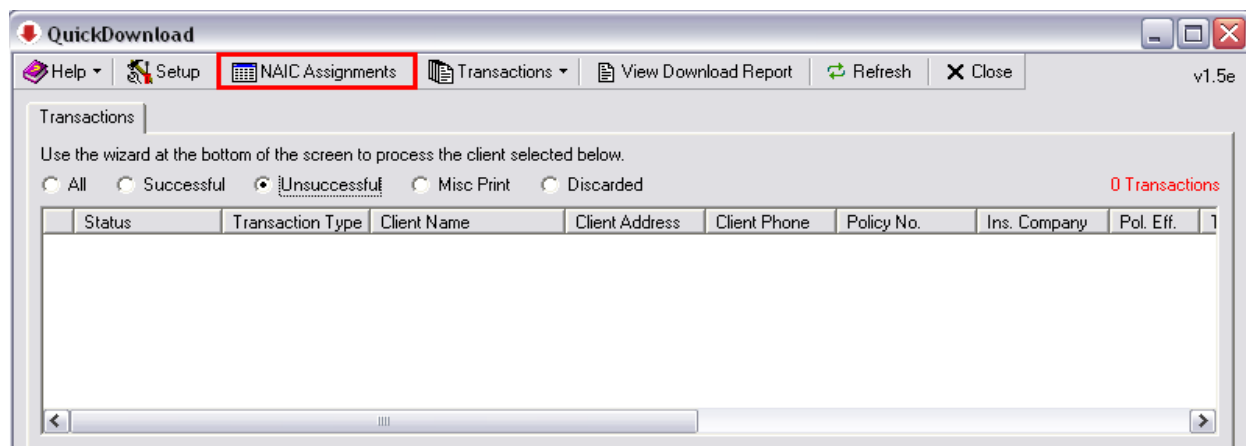
Now you are ready to start processing your transactions. We will be doing this by clicking on the button labeled **Transactions**.

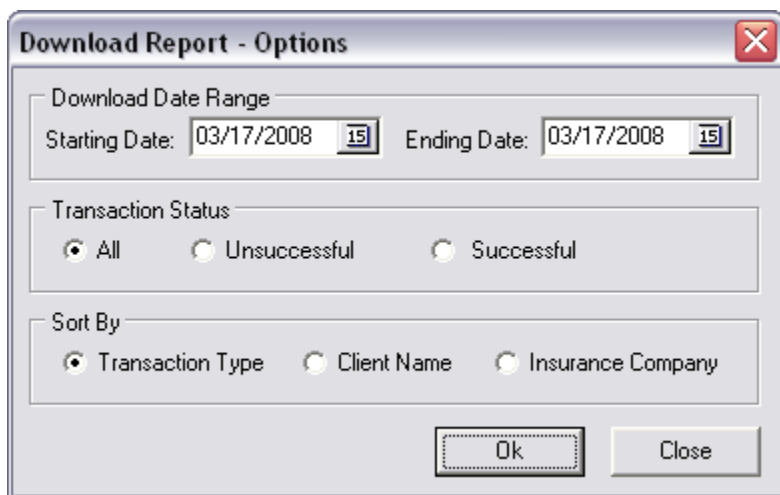
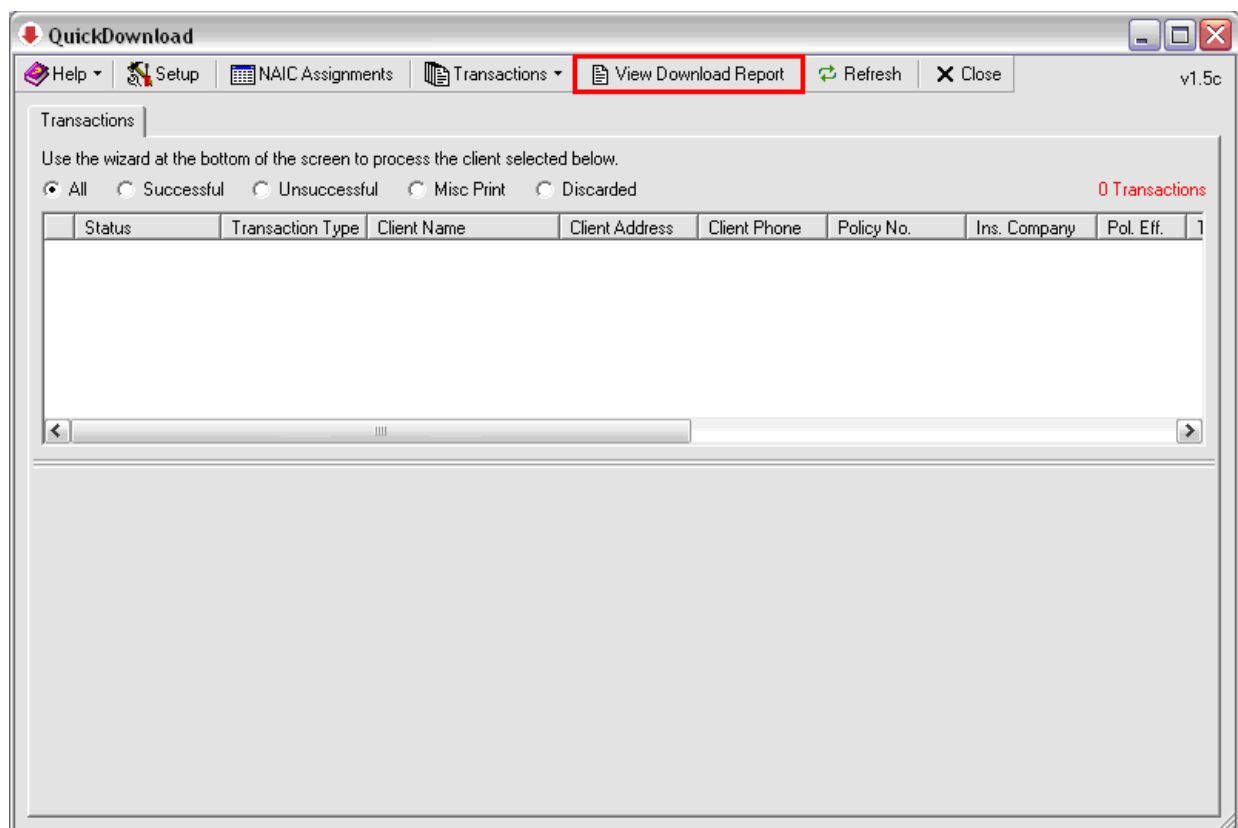


If you are obtaining your transactions from IVANS you will click on the option “**Download and Process Transactions Through IVANS.**” To process the files from the insurance carriers who use their own program like Progressive, you will click on “**Process Pending Transactions.**” In manual mode you may have some transactions listed that require your

attention and were marked as Unsuccessful. After you have used the wizard to correct the issue most of the transactions will automatically reprocess. Some of the transactions will require you will choose the option **Reprocess All Unsuccessful** under the Transaction button. This will reprocess the transactions that were missing information such as the NAIC code or insurance company name.

The other buttons across the top of the screen are **NAIC Assignments**, which if you already have the insurance company listed in the Utilities of QCEvolution 2 but not the NAIC code you can enter it here. The next button is **View Download Report**. When you click on it the 3rd box below appears.



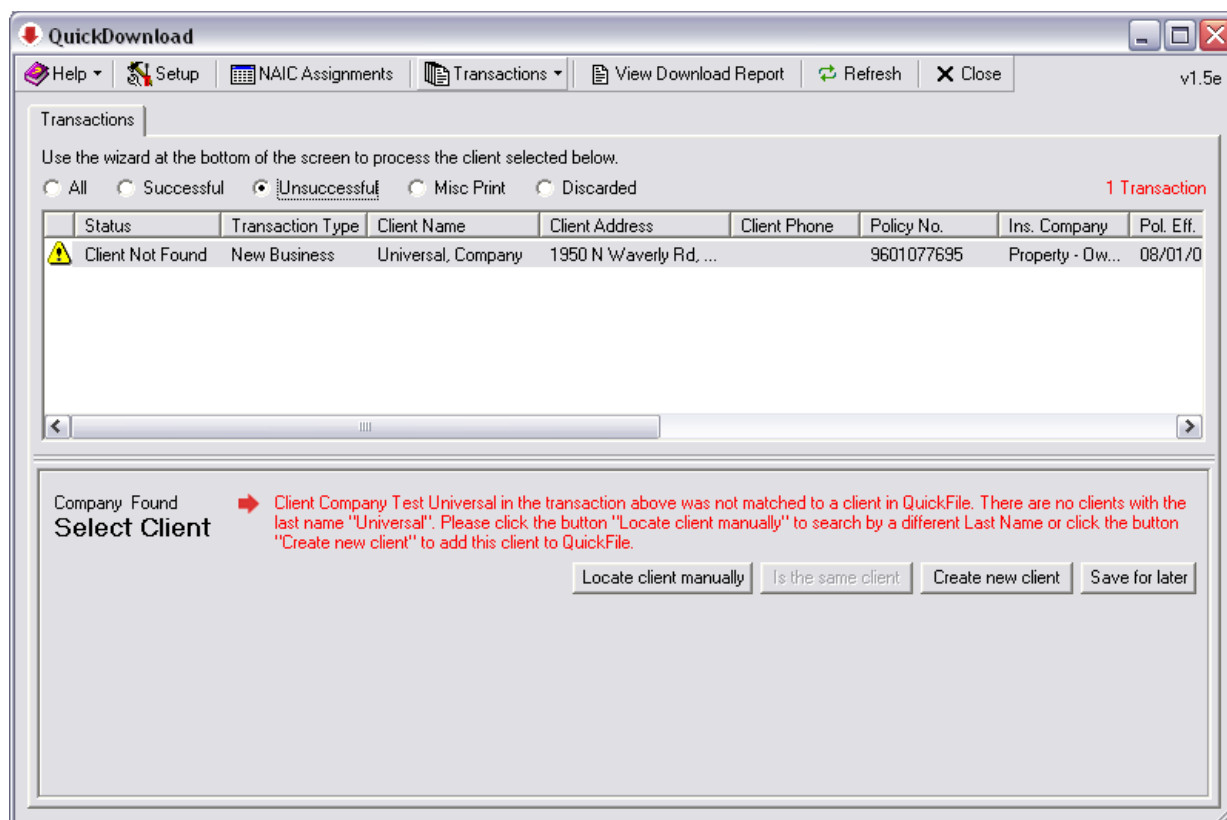


Select your Date range, Transaction Status, and Sort By and click OK, a report will appear listing your transactions.

If you are using the “Multi-Office” mode there will be an additional button on the tool bar labeled **Select Offices**.

On the QQDownload screen you will also see radio buttons labeled **All**, **Successful**, **Unsuccessful**, **Misc. Print**, and **Discarded**. These allow you to view your transactions. The files marked as Unsuccessful will require your attention, use the wizard to match and update

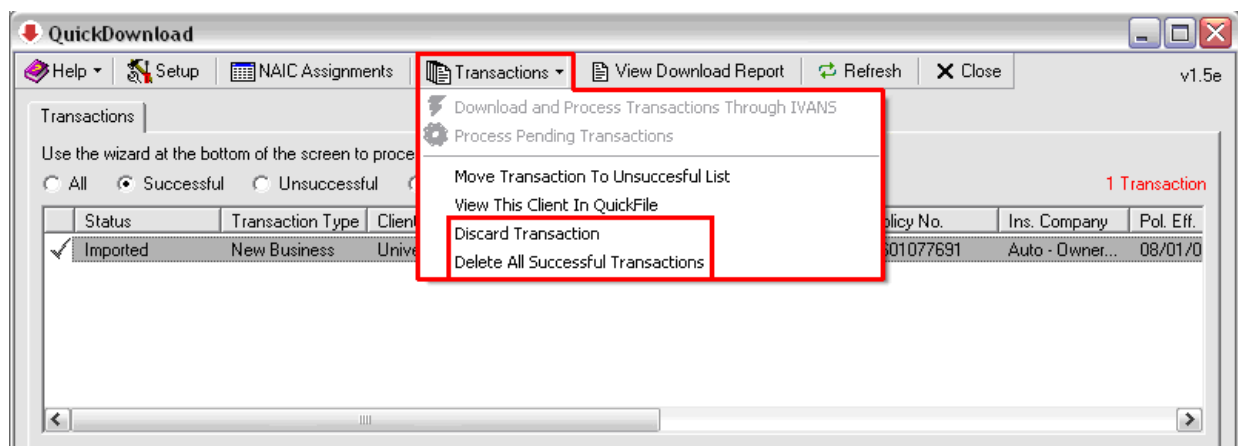
the transactions. If the client and/or policy did not match, QQDownload will provide you with some possible matches. If there are no possible matches, you will have the option to add the client and/or policy as new. The example shown below is what you will see if the client is not found in QCEvolution 2.



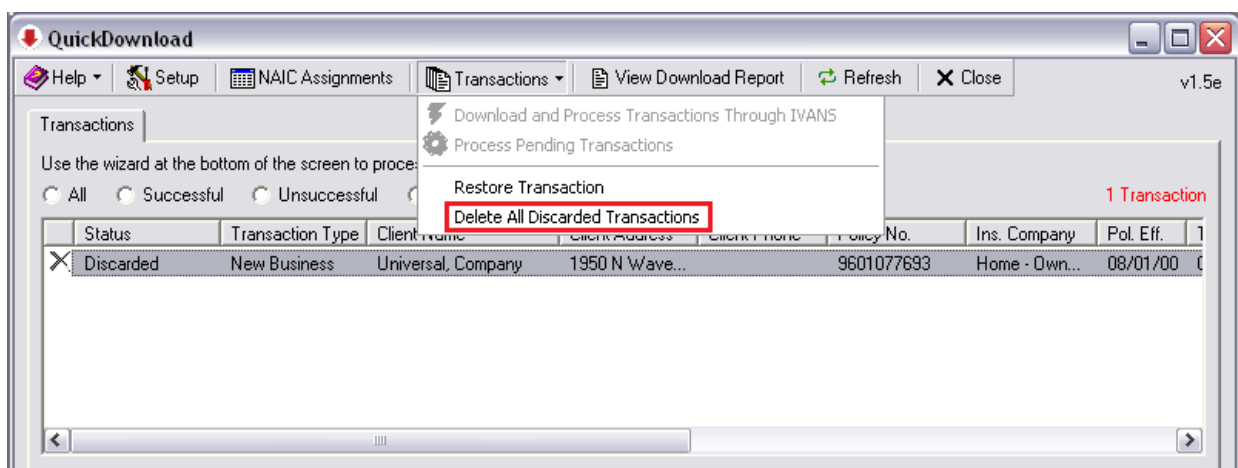
You may also see transactions listed under **Misc. Print**. These are transactions with information that can only be printed. They can be added to the client's record in QCEvolution 2 in the form of a letter. The letter is stored in the Letter section of the client.

To view a client you have processed in QCEvolution 2, double click on the client. You will be taken to the client's record in QCEvolution 2 and you will see the transaction you just processed.

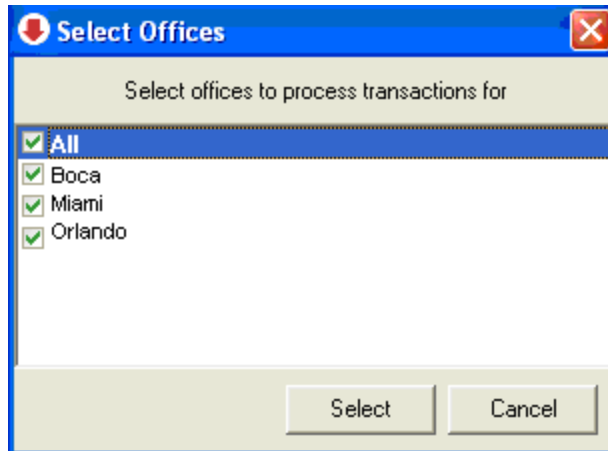
When you are through with your transaction you will need to discard them in order to clear out the list of transactions in QQDownload. You will put the radio button next to **Successful**, click on the client. Next, click the **Transactions** button at the top of the screen and choose either **Delete All Successful Transactions** or **Discard Transaction**.



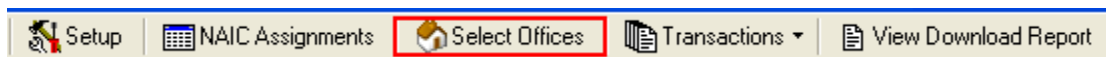
The Delete All Successful Transactions will simply delete the files, if you choose Discard Transaction it move the Successful transaction to the Discarded Transactions section. If you decide to move the file to Discarded, to remove it from that section you will need to click on **Transactions** and **Delete All Discarded Transactions**.



Multi-Office mode has a few slight differences when processing transaction. When you first select in the "Setup" screen Multi-Office mode a box will open listing your offices. Here you will select the offices you wish to process downloads for. You can choose "All" offices or as many as you'd like. If you are a user and do not have permission to access all offices, only the offices you have permission to will appear in the **Select Office** box. The offices selected here will be stored as the default office(s) for the user who is logged into the program. If a different user logs in they will also need to select their default office(s). After you check the offices to process please click "Select."



Follow the same process listed above for processing the transactions. Also, if you want to change which offices you are processing for you can click the “Select Office” button on the top tool bar. You can then choose which offices to process the transactions for.



More information on the Multi-office mode can be found at the following link:  
<https://support.qgsolutions.com/scripts/texcel/customwise/kinfo.dll?SD?eqxwexwrrr>

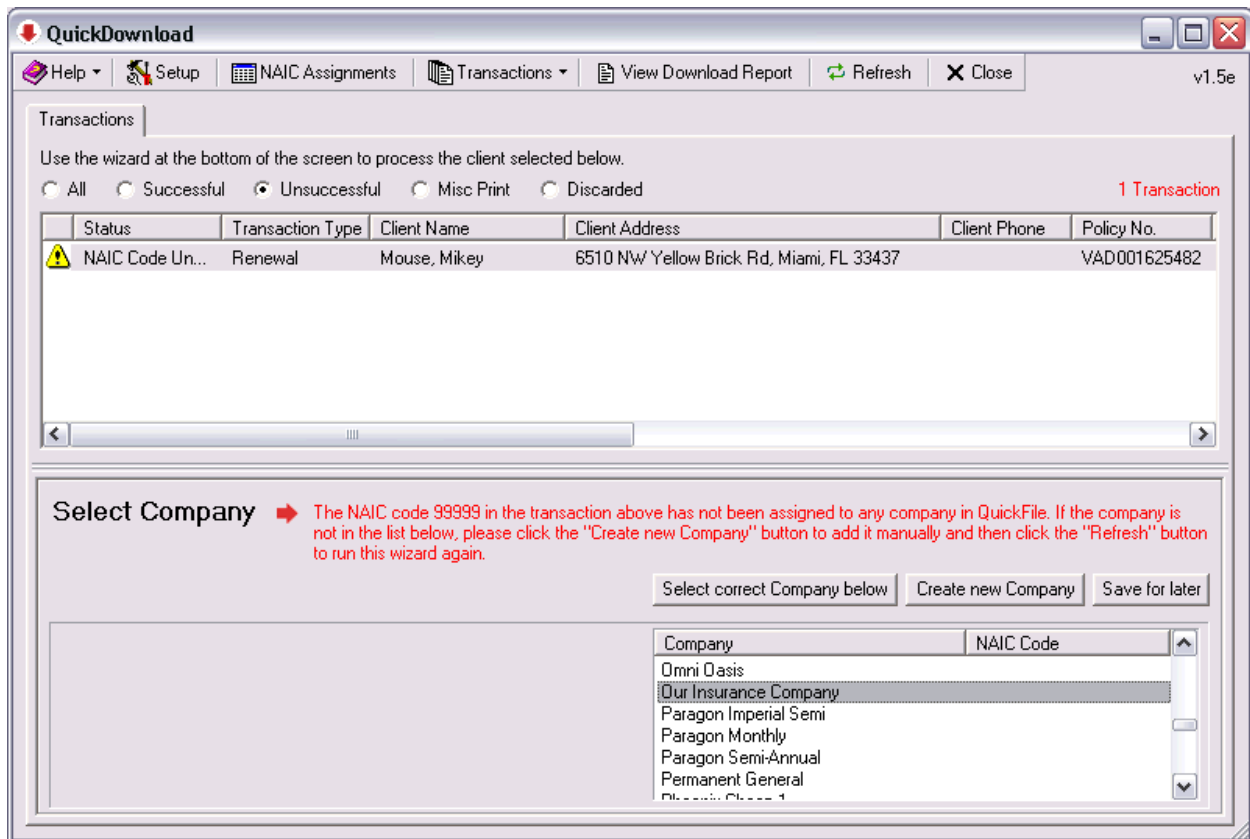
As you can see QQDownload is truly a fantastic feature. Since the transactions are processed, then sent into QQEvolution 2, it will limit the amount of manual entry you will have to do in QQEvolution 2. This will free you up to do what you are truly meant to do which is writing more business.

## Advanced Uses of QQDownload

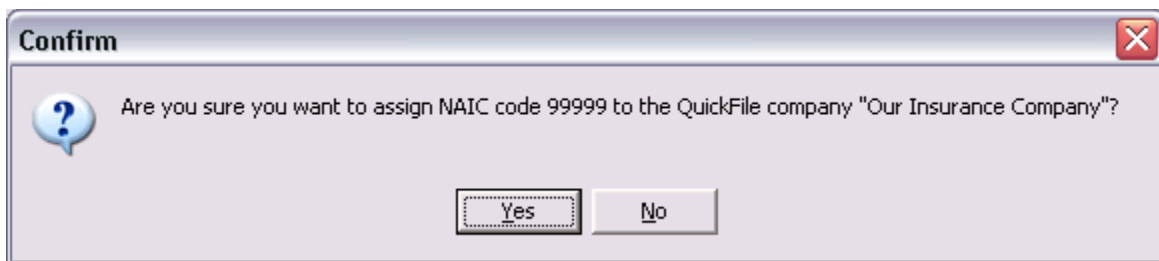
### Missing NAIC Codes

In order for transactions to be processed into QQEvolution 2, the insurance company name and NAIC code are required. The insurance companies will provide the **NAIC** (National Association of Insurance Commissioners) codes; you must have these to process files in QQDownload. This code will be entered into the Utilities section of QQEvolution 2, under Popup Boxes and Insurance Companies. The NAIC code is used to match the carrier to the corresponding insurance company in QQEvolution 2.

If the NAIC code and/or insurance company is missing from QQEvolution 2, the below message will be displayed.



If you already have the insurance company listed in QREvolution 2, you will be able to find it in the list of companies. You will first click on the company name and then click the button **Select correct Company below**. Then the following message will appear.

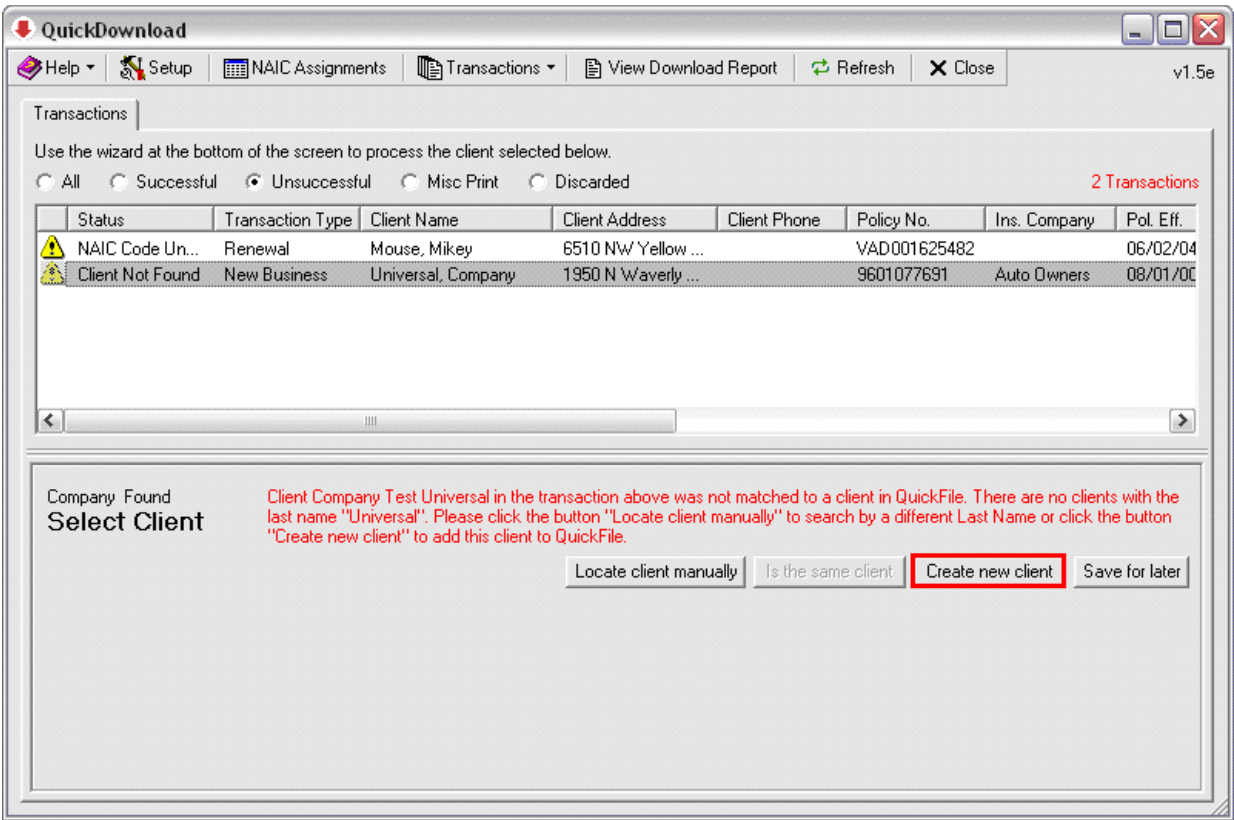


If you are sure you have chosen the correct insurance company for the NAIC code click on Yes. The NAIC code will automatically be added into QREvolution 2 for you.

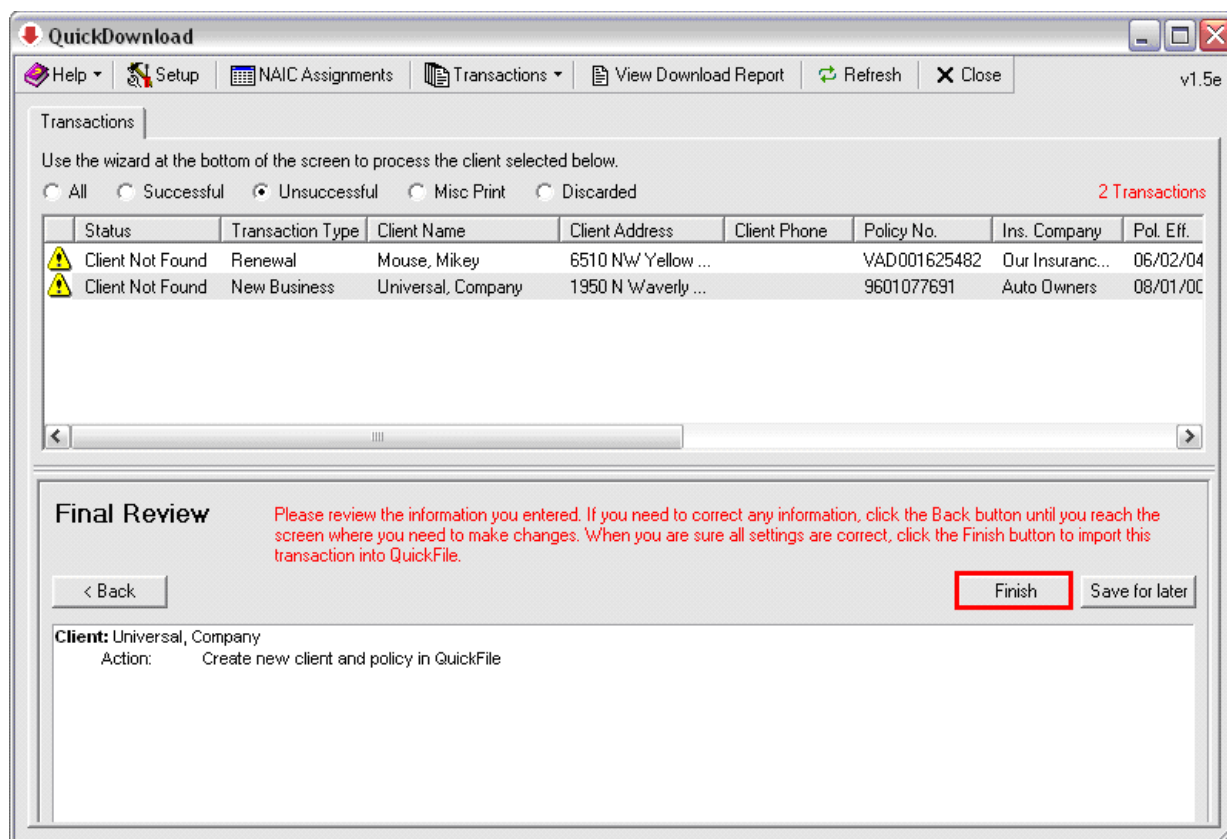
If an insurance company is not listed you will click on the **Create new Company** button. This will take you into the Utilities section of QREvolution 2, which will allow you to add the insurance company name and NAIC code. Then in QREvolution 2 all you need to do is click Transactions and then Reprocess All Unsuccessful Transactions. The transaction will be processed and sent to QREvolution 2.

# No Client Match

Below is an example of what you will see in manual mode when the client is not found in QCEvolution 2.



If this is a new client you would click on **Create new client**. To have the client automatically sent to QCEvolution 2 click the **Finish** button. If you wish to decide on this client at a later time, simply click the **Save for later** button. QCEvolution will move on to the next client listed in the Unsuccessful section.



If this is not a new client, click on **Locate client manually**. This will allow you to search for your client based on their last and first name.



QQDownload will display the client record that matches the last and first name you entered. If you are searching by using just the last name or first, any client with the name you entered will be displayed. The program will allow you to select the matching client, then click on **Is the same client**. The client will then be automatically saved into QCEvolution 2. If there is no matching client, select **Create new client** and the client will be saved into QCEvolution 2 as a new client.

Company Found  
**Select Client**

Client Mikey Mouse in the transaction above was not matched to a client in QuickFile. This is sometimes the result of a misspelled name, different phone number or address, or when there are multiple client records that match. Please select a client from the list below.

**Locate client manually**   Is the same client   Create new client   Save for later

Mouse, Mikey	6510 NW Yellow Brick Rd, Miami, FL 33437			<-- Transaction From Above
--------------	--	--	--	----------------------------

Client	Address	Phone	Status
Mouse, Mickey	6510 Yellow Brick Rd, Miami, FL 33437	954	Active

## No Policy Match

When in Manual Match Mode, if QQDownload finds no matching policy, the following message will appear:

**QuickDownload** v1.5e

Help Setup NAIC Assignments Transactions View Download Report Refresh Close

Transactions

Use the wizard at the bottom of the screen to process the client selected below.

☐ All ☐ Successful ☒ Unsuccessful ☐ Misc Print ☐ Discarded 1 Transaction

Status	Transaction Type	Client Name	Client Address	Client Phone	Policy No.
Client Not Found	Renewal	Mouse, Mikey	6510 NW Yellow Brick Rd, Miami, FL 33437		VAD001625482

Company and Client Found  
**Select Policy**

Policy VAD001625482 in the transaction above was not matched to a policy in QuickFile for client Mouse, Mickey. Please select the policy from the list below. NOTE: only select the policy that corresponds to the one described above and "not" the one that was in effect previous to that one.

< Back   Is the same policy   Create new policy   Save for later

VAD001625482	06/02/04	12/02/04	Our Insurance Company	Liability-comp/	Auto	1,418.80	<-- Transac
--------------	----------	----------	-----------------------	-----------------	------	----------	-------------

Policy Number	Effective Date	Expiration Date	Company	Coverage	LOB	Premium
VAD001625482	12/02/03	06/02/04	Our Insurance Company	Liability-Co...	Auto	1,418.80

You can now add the policy as new. If there are any similar policies already existing for this client, they will be displayed. In the above image, the policy listed in green is the transaction you just downloaded into QQDownload. Then, listed below there are any existing policies in QQEvolution 2 for this client that are close match. It will show the best possible match first. If the new transaction actually matches one of the existing policies, you can click on "Is the same

policy”. The policy will then be updated with any new or missing information provided by the transaction.

### No Office Match – Multi-Office Mode Only

This status means the client could not be found in any of the offices you processed the transaction for. If you know what office the client belongs to, select it from the office list on the bottom right of the screen and then click **Select correct Office below**. If the office the client belongs to is not displayed in the list you will need to either choose the office by using the “Select Office” button or you are a user who does not have permission to the office and the office will not be displayed. When it is the case of the user not having permission, the user will need to speak to their office administrator for the program to gain access if the administrator wishes to allow this. If you would like to process this transaction later and do nothing to it, you can select **Save for Later**.

3 Transactions

Status	Transaction Type	Client Name	Client Address	Client Phone	Policy No.	Ins. Company	Pol. Eff.	Tran
Endorsement N...	Endorsement	Doe, Jane	54 NW 14th..	(954)986-3256	14214577542...	Assurance	07/13/09	01/0
Office Not Found	Endorsement	Williams, Todd	4222 S Lak...	(305)987-6325	99874B25411...	Assurance	12/14/09	12/7
Prev. Policy No...	Renewal	Juno, Alexis	101 N Circl..	(407)333-9999	FL-63254111...	Assurance	01/02/10	01/0

Select Office ➔ Client Todd Williams in the above transaction was not found in any office currently being processed. Please select the correct office from the list below. If the office is not listed click Select Office on the top toolbar and reprocess the transaction. If the office is not listed you may not have permission to this office, contact your office admin regarding this.

Select correct Office below    Save for later

Office

- Boca
- Miami
- Orlando
- Sunrise
- Tampa

QQDownload is a powerful tool for any size agency that will reduce the amount of time that is spent on maintaining your database. If you have not yet used QQDownload to help manage your client database, call your QQSolutions’ sales representative today to add the power of QQDownload.

## Chapter 13 – Updating QCEvolution 2

QQEVOLUTION™

Refresh Dashboard Log Off

Search

Use QuickSearch

Clients

Prospects

Mail Room

Reports

Rolodex

QuickWord

Forms

Videos

Carrier Download

Utilities

Batch Scanning

QQ Evolution Assistant

QQ Evolution Update

QQ WebRater

QQ Dev FL EVO3  
350 Fairway Dr. Ste 501  
Deerfield Beach, FL 33441  
(800) 940-6600

To Do List Active Agency Filter: All

In Progress Memo Reminder for 0, Delete Me: Here is my new memo 07/12/2011

In Progress Here is another task 07/12/2011

Policies Expiring/Intent to Cancel Past 3 days and Next 7 days

Policy	Auto	Expires on
~aw2policy, ~aw2only	Dwelling Fire (Pending)	Expires on 9/10/2011
~aw3policy, ~aw3only	Auto (Pending)	Expires on 9/10/2011
Aaaaaa, Hhhhhhhhhhh	Auto (Pending)	Expires on 9/8/2011
Aasdd, Dasdafdg	Auto (Pending)	Expires on 9/10/2011
Aasdd, Dasdafdg	Auto (1111)	Expires on 9/10/2011
Aku, Aku	Auto (QQ0002)	Expired on 9/5/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011
Ayala, Cesar	Auto (2222)	Expires on 9/10/2011

View All

Help and Information

Instant Support

Training Webinars

Newsletters

Self Service Portal

What's New

Recent Clients

Cataldo, Cory

Q, Perico

Brown, James

Stryker, Ted

Babcock, Allen

Aqboan Gqkfaoc

Pat, Nisha A Jr

Test

Zimmermann, Erich

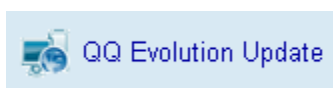
Price, Randy

Messages

Date	Time	User	Action
8/30/2011	08:59 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/30/2011	08:27 AM	bincy_pu	Appointment created by bincy_pu
8/25/2011	09:50 AM	bincy_ladmin1	Appointment updated by bincy_ladmin1
8/25/2011	09:50 AM	bincy_ladmin1	Appointment created by bincy_ladmin1
8/24/2011	04:26 PM	bincy_dev	Appointment updated by bincy_dev
8/24/2011	04:23 PM	bincy_dev	Appointment created by bincy_dev

View All

## Updating Your QCEvolution 2 Software



Our programmers are continually updating and enhancing our products to give our users more new features and improving existing features when needed. In order to get these changes to you, we make updates available from our Web site which you can download to upgrade your software to the latest version. We do have automatic updates to help with this process but sometimes you will need to go to our Web site to update.

## How To Update QCEvolution 2

From the Dashboard of QCEvolution 2 click on the “QCEvolution 2 **Update**” button. You will be asked if you are connected to the Internet.

Click on the “**Downloads**” tab and select “**QQSolutions Updates & Installations.**” Enter your QQSolutions User ID and Password that you received when you first purchased your software.

### Login to your Account

Login to download QQ Solutions software

Please enter your QQ Solutions User ID and Password to access & manage your account & take advantage of resources available on this Web site.

User ID:

Password:

[Log Into My Account](#) [Forgot your password?](#)



**Note:** If you do not know your QQSolutions Password, use the Password Retriever to the right of the logon screen.

When you enter your User ID and Password, you will be presented with the following screen. Once you click on your product it will take you to the update page on the Web site.

### QQ Solutions Download Center

Your software is registered to: Quickquote, Inc

<div><div>Updates</div><div>Open Beta Updates</div><div>Full Install</div></div>					
Product	Release	Last Update			
QQ Evolution	1.0.10	3/23/2010	Download	<a href="#">Release Notes</a>	
QuickQuote	20.9.1	3/30/2010	Download	<a href="#">Release Notes</a>	
QuickHome	7.7a	4/29/2009	Download	<a href="#">Release Notes</a>	

Click the “Download” button to begin the update download.

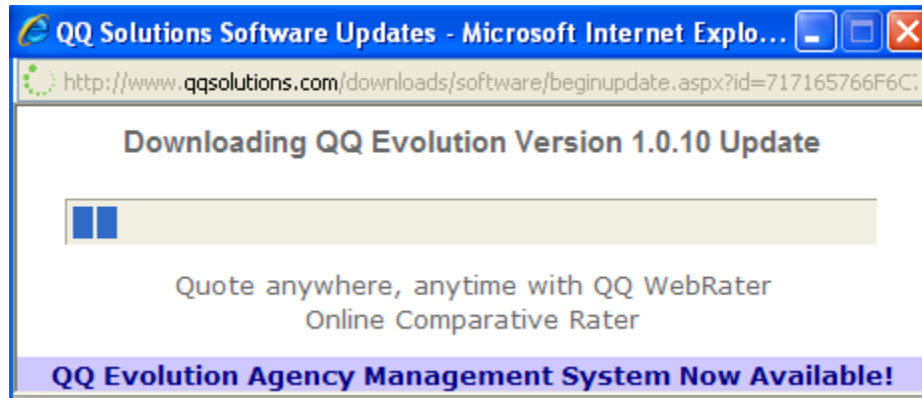
You will see the following window appear when you start downloading the new version of your QCEvolution 2 Software.



**Important Note:** Download times will vary depending on your internet connection speed.



**Note:** Microsoft Internet Explorer 9.0 or higher is highly recommended when visiting [www.QCSolutions.com](http://www.QCSolutions.com).



Once the download has completed, you will be required to follow setup instructions.

If the computers in your office are networked, you will download the latest version of our software to one machine in the office and when the other computers in the office open QCEvolution 2 the program will detect the newer version of QCEvolution 2 and ask the User to update his/her machine before opening QCEvolution 2.

If you are not networked, you will update all of the machines in your office separately so that each computer is on the same version of QCEvolution 2. If you have any problems with updating your software, please call our Product Support Department at **1-800-940-6600** and press option # 1.



**Tip:** Before beginning the update, verify that the version posted online is more current than the version on your computer.



**The version number is located on the QCEvolution 2 Title Bar. Check this number against the number posted on the update page of our Web site.**

# FAQ

## Frequently Asked Questions

**Q:** Where do I find ACORD Form 75?

**A:** To fill out an ACORD form, any ACORD form, for one of your clients, you must first enter the client into QCEvolution 2, and then add a policy to their record. Once you've done this, click on their Forms Screen, then click on the button **Add a Form**. Look through the list of ACORD forms and double-click the one you would like to fill out for this client. Clicking on Return will save this form to the client's file. Accessing FORMS from the Dashboard will give you access to blank forms that you can use, fill out and print only. They will not be saved to any client's file.

**Q:** My agency information is incorrect. How do I correct it?

**A:** Corrections can be made on our Web site, [www.QQSolutions.com](http://www.QQSolutions.com). Click on **My Account** and then enter your User ID and Password. Click on **Edit Profile** at the bottom of the screen. Enter the correct information, and click **Submit Changes**. You will need to re-register your software 24 hours later in order to see the changes that you made.



**Note:** The QQSolutions' Web site is updated every weekday at 5:30 pm ET. Changes made after this time will be processed the next business day.

**Q:** How do I make a policy Commercial?

**A:** You can mark that on the Client Screen for that policy. To the upper right hand side of the Client Screen you can select Personal or Commercial. If you select Commercial, this client and its policies will show as "Commercial". Enter the name of their business in the Insured field.

**Q:** How do I add a Prospect?

**A:** There are two ways to add a Prospect.

**Option 1:** From the Dashboard, click on the Prospects, and then click on the Add New Prospect function button. Enter any necessary information. Click on the button **"Dashboard (Save)"**. You can now access this client by clicking on the Prospect Button. You can print letters and work with this client just like you would an Active client. You can also change the client's status from the Client screen.

**Option 2:** Go to the Clients. Select Prospects radio button and click on Add New Prospect button.

**Q:** While working with a client I saved a letter/label to print later. How can I easily pull this letter up to print?

**A:** From the Dashboard click on the Mailroom button. Click the Print Unprinted Letters/Label button. To print, click the Print button. When entering the mailroom, you can see the number of letters/labels that need to be printed towards the bottom left side of the QQEvolution 2 window.

**Q:** Is there any way to create a letter on the fly when working with clients without going into the QuickWord section?

**A:** Yes, to do this you will need to create a new generic letter.

1. Enter QuickWord. The white text box should be blank. Insert the {Preview} field into your letter from the list of fields on the right side of the screen.
2. Save the letter and give it a name such as, Generic Letter.
3. Now, when you want to create a letter on the fly, all you need to do is go through the process that you normally would take to print a letter. When the box pops up to select a letter to print, select the letter that you just created. In this scenario, it would be Generic Letter. A blank white box will open up, and you can type the body of your letter and print it out. This letter will always be blank, so you can always type information as it pertains to the client you are working with.

**Q:** When working in the mailroom sometimes I get multiple letters or labels for a client when I go to print. Can't I print just one letter/label if a client has multiple policies?

**A:** Yes, after you fill out the criteria on the General Tab, click on the Filters tab. On the right side of this screen there is a box next to One Label/letter per client if client has multiple policies within the same date range. Check this box off and now only one letter/label will print.

**Q:** There are a lot of reports in the report section. How do I know what each one does?

**A:** From the Reports menu you will click on the Help button in the upper left corner. Select Report Descriptions. A window will open that will have a brief description of each standard report. You also have the option of using the Report Finder. Also, refer to page 83 for the Report Finder section.

**Q:** On the policy screen I have the premium entered. Why I can't see the AP?

**A:** In order for QQEvolution 2 to calculate an additional premium, there must be a value in the Premium Quoted AND the Base Premium field.

**Q:** How do I reinstate a voided transaction on the billing screen?

**A:** Once a transaction has been voided it cannot be un-voided.

**Q:** My agency already has letters that we use that are in Word (or some other format). How can I get these letters in QuickWord?

**A:** Copy the body of each existing letter and paste it into QuickWord as a new letter. Remember, you can use the QuickWord fields to customize your letters. Then save the letter.

**Q:** What type of labels should I use when printing labels?

**A:** QQEvolution 2 was designed to work with Avery 5160/8160 standard sheet fed labels.

**Q:** On the policy screen it says that the policy is Pending, but the policy is Active. Why is this?

**A:** The policy status will be Pending until a value is entered in the Base Premium field.

**Q:** Can I print an image that I attached to a client?

**A:** Yes, from the Images screen highlight the image that you want to print, and double click on the image in the image preview area of the screen. A large version of the image will open up, and you will be able to print from this screen.

**Q:** Why do logos it gets chopped off or doesn't show up at all when I print my letters?

**A:** When creating a logo with a program such as MS Paint, you need to create the logo in the center of the page towards the bottom of the MS Paint window the same way you would position the addressee information on an envelope. The logo must also be the size stated in the Utilities.

## **QQEvolution 2 Office Assistant FAQ's**

**Q:** What is the Messenger Storage Status in the QQEvolution 2 Assistant for?

**A:** It shows the amount of storage space you have left on our server for your messages.

**Q:** What is the "Settings" section for on the Office Messenger?

**A:** You will set your refresh rate here. Meaning, if you set it for 1 Minute, it will check for new messages every minute.

**Q:** What is the Maintenance section for on the Office Messenger?

**A:** Every user can remove unwanted or unneeded messages and they will be put into the Recycle Bin of the assistant. Administrators ONLY can then permanently delete them from the program within the "Maintenance" section.

**Q:** How do I create a new message?

**A:** By clicking the “New Message” button on the top toolbar.

**Q:** If I am on the Office Messenger, how do I change over to my calendar?

**A:** Towards the bottom of the left side tool bar click the button labeled “Calendar.”

**Q:** Do I have to be in the calendar to create a new appointment?

**A:** No, from the office messenger within the assistant on the top tool bar you can select “New Appointment.”

**Q:** Can I access a client referred to in a To-Do item?

**A:** Yes, when creating a new To-Do item, calendar entry, or message you have the ability to link a client, policy, or claim to the entry. Then when you have the To-Do item open click on the link and it will take you to the client, policy, or claim, whichever was chosen to link.

**Q:** Can I see other users’ calendars?

**A:** Only an administrator has the permission to do this.

**Q:** Do I have the ability to print out my calendar?

**A:** Yes, when on the calendar on the top tool bar select “Print Preview.” This will take you to another screening showing a preview of what the calendar will look like when it prints and you can then print it.

**Q:** Can calendar entries be shared with other users?

**A:** Yes, when you create the entry if you have multiple offices, on the right you can choose other offices to share the entry with by checking their name. Under there you can also assign the entry to a user.

**Q:** When I make a calendar entry I would like to mark it as a “meeting,” how can I do this?

**A:** When creating the entry where it states “Category” click the drop down and choose one from the list. If it is for a meeting select “Meeting.” When you view the entry on the calendar itself it will have an icon for meeting.

**Q:** When there is an icon on a calendar entry how do I know what it is for?

**A:** When on the calendar at the bottom of the screen is a legend showing each icon and what they stand for.

**Q:** When I set up a To-Do list item can I set a reminder for it?

**A:** Yes, when doing the entry at the bottom you can set a reminder with a date and time.

**Q:** Can I assign To-Do items to other users?

**A:** Yes, when doing the entry on the right is a column marked “Assigned To.” The user creating the To-Do item will automatically be checked but this can be changed and you can add other users.

**Q:** Can I set a priority level for a To-Do list item?

**A:** Yes, when creating the entry where it states “Priority,” you can click the drop down and choose between Normal, Low, and High.

**Q:** Do I have to go into the QQEvolution 2 Assistant to view my messages?

**A:** No, the messages will also be displayed on the Dashboard.

**Q:** Do I have to go into QQEvolution 2 Assistant to view my To-Do list?

**A:** No, it will also be displayed on the Dashboard.

**Q:** What if I only want to see the To-Do items that are due in the next seven days?

**A:** If you are viewing the items on the Dashboard on the upper right of the To-Do list is a place marked “View.” Click the drop down and choose Pending. If you are viewing the items while inside the assistant, to the left click on the folder marked “Pending.”

## Appendix A – Working With FSC

### QCEvolution 2 Integration with FSC

From WinFSC: After quoting, click the Bridge button from the Rating Results Screen. Select the Bridge to QCEvolution 2 Agency Management System. The FSC Conversion to QCEvolution 2 screen will appear. Enter as much information as possible in order to complete the automatic entry process.

**FSC Conversion to QuickFile (Client-Server)**

**Enterprise Edition**

You have chosen to transfer this quote to the QuickFile Agency Management System. Certain values are required to complete this transfer. Please fill in the items below and click **TRANSFER TO QUICKFILE**.

Client: Smith, John

Agency: Ft. Lauderdale

Effective / Binder Date: 12/06/07 ☒ Save client as a PROSPECT

Source: Test

Cell: ( ) - \_\_\_\_

Optional Coverage:

Beeper: ( ) - \_\_\_\_

Additional Coverage:

Additional Amt: \$0.00

Premium Down Payment: \$392.80

Optional Amt: \$0.00

Agency Fee: \$0.00

MVR Fee: \$0.00

**Total Down Payment: \$392.80**

Type: Check To Ager Check #: 1111

☐ Split Pay

New/Renewal: New Business

File Number:

Spouse:

Line of Business: Auto

Binder Number:

Memo: Policy Added

If you are using the WinFSC rater or another supported rater, most of the information on the policy screen will be filled in for you once you transfer the quote to QCEvolution 2.

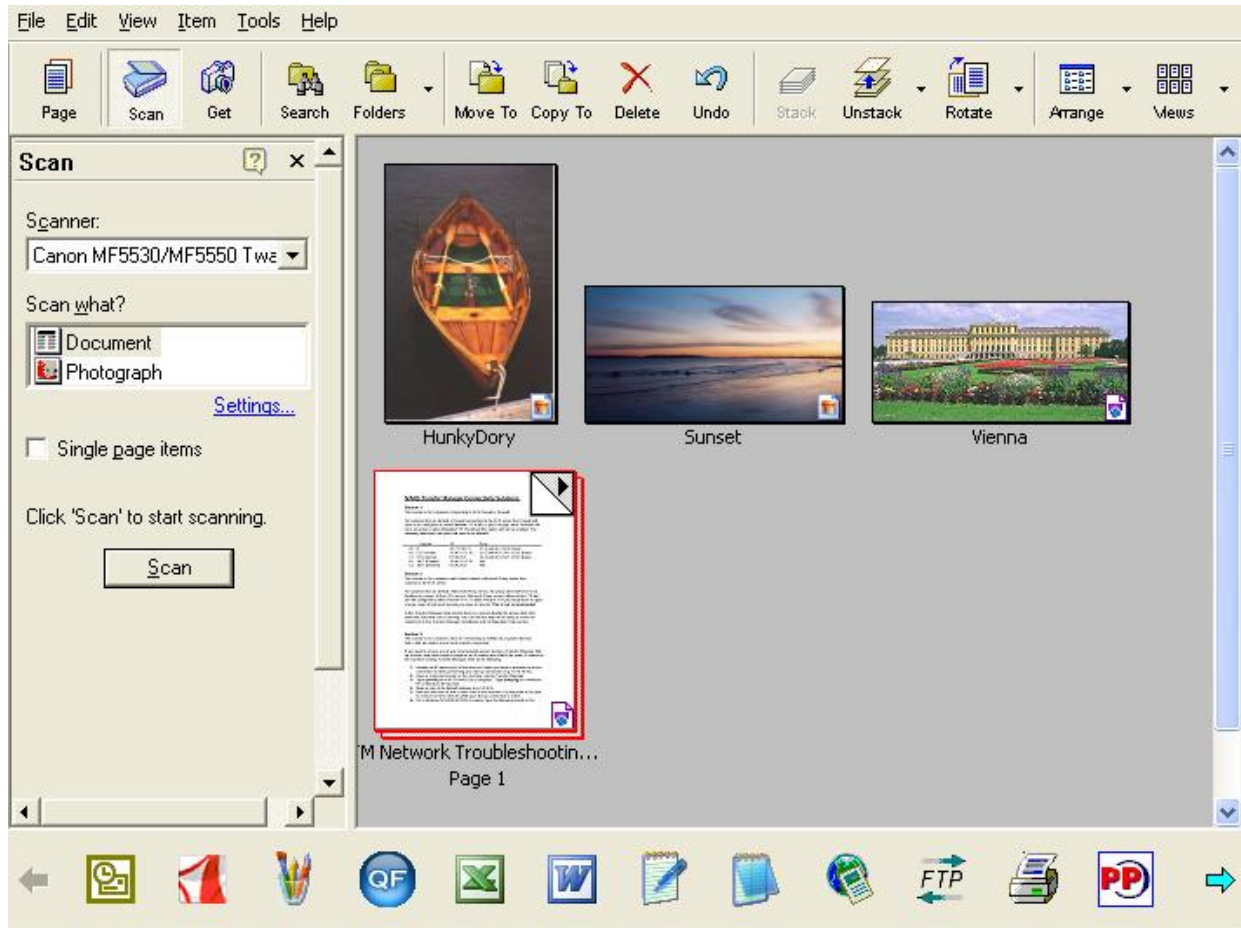
The following is the list of required QCEvolution 2 Lines and Coverage for WinFSC. These Lines and Coverage must be set up in your QCEvolution 2 Popup Boxes in order to bridge quotes effectively from Win FSC.

## **WINFSC Line of Business**

<b>Line</b>	<b>Coverage</b>
Auto	Liability - Comp / Collision
Personal	Homeowners
Personal	Fire - DP1
Personal	Fire - DP3
Personal	Renters
Personal	Condo
Mobile Home	Mobile Home
Motorcycle	Liability - Comp / Collision

## Appendix B – QREvolution 2 & PaperPort® Software

1. Open the PaperPort software. If the link bar is not displayed, click on View and select Link Bar.
2. Right-mouse click in an empty gray area at the bottom of the link bar.
3. Choose Create New Link, select Image when prompted to choose what type of application you wish to create a new link.
4. Browse to the QREvolution 2 application file QFWinscan.exe or Enterprise users must select QFWinscanCS.exe. The file will be in your \QuickFL or \QuickTX directory. Click the Next button.
5. Enter a name for the new link, such as QREvolution 2 or QF. Click the Next button.
6. When prompted to select the file format that the application can accept, choose Multi-Page TIFF- Uncompressed (\*.TIF). Click Next button.
7. Select handling of the temporary image file when the Linked Application closes, the default is Delete it only if it hasn't been modified.
8. Click the Next button on the screen that prompts you for the minimum and maximum resolutions.
9. Click External when prompted to select the type of icon you want PaperPort to display for this link. Click the Next button.
10. Browse to the location of the icon QFFL.ico, which is located in the \QuickFL, \QuickTX, or \QuickGA directory. Click the **Next** button. Click the **Finish** button.



## Attach Using ScanSoft/PaperPort ® Software

1. Start the ScanSoft/PaperPort software and scan the image.
2. Once scanned, drag the image and drop it onto the QCEvolution 2 icon.
3. A window will appear with a list of your Active Clients. Select a client and click the Attach button.
4. The client's Images screen will now display the graphic.

## Appendix C – Lines and Coverage

The following is the list of required QCEvolution 2 Lines and Coverage for QQWebRater and WinFSC.

An agent who uses one of these comparative raters must have the following lines and coverage input in the Popup Boxes section of Utilities in order for the rater and QCEvolution 2 to communicate effectively.

### FLORIDA

Line	Coverage
Auto	Comp / Collision Liability PIP / PD PIP / PD-Comp / Collision Liability - Comp / Collision Comp PIP/PD-Comp

### TEXAS

Line	Coverage
Auto	QC & C Only Liab / PIP / UBI Liab / C & C Liab / PIP / UBI / C & C Liab / Med Liab / PIP / UBI / UPD Liab / Med / UBI Liab / PIP / UBI / UPD / C & C Liab / Med / UBI / C & C Liab / UBI Liab / Med / UBI / UPD Liab / UBI Liab / Med / UBI / UPD / C & C Liability Only Liability / PIP

## WINFSC

Line	Coverage
Auto	Liability - Comp / Collision
Personal	Homeowners
Personal	Fire - DP1
Personal	Fire - DP3
Personal	Renters
Personal	Condo
Mobile Home	Mobile Home
Motorcycle	Liability - Comp / Collision

## Appendix D – QQEvolution 2 Shortcut Keys



### About Short Cut Keys

Shortcut keys will help you move through the system without having to click on the mouse several times to get to where you are going. You can print this page and use it as a reference guide until you become familiar with all of the short cut keys available in QQEvolution 2. The following shortcut keys are available in QQEvolution 2 at Help > Quick Help.

