



Quick Start Guide

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IMPORTANT NOTE: Before using this guide, please make sure you have already set up your settings in QQEvolution 2 Utilities. The Utilities' defaults are very important to the entering of clients and policies. Please visit our website for training Webinars or view QQEvolution 2's User's Guide for information on how to configure and set up your system in Utilities.

Introduction

This document will provide basic information needed to set up QQEvolution 2. For more information, please refer to the QQEvolution 2 manual found within the program itself. To view training Webinars on how to setup and use QQEvolution 2, please refer to the Training section of our website <http://www.qqsolutions.com/>.

Prerequisites

To use QQEvolution 2, you will need the following hardware and software:

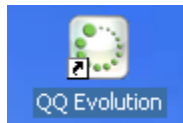
Equipment	Recommended
Operating System	Microsoft Windows 8 (32-bit or 64-bit version), Windows 7 (32-bit or 64-bit version), Windows Vista (32 or 64 bit) Note: UAC (User Account Control) MUST be turned off in Windows 8, Windows 7 and in Windows Vista.
Computer	Windows-based desktop or notebook computer with at least a Pentium class processor.
Memory	2 GB RAM or higher.
Hard Disk	2 GB or more of free disk space.
Internet Access	Broadband
Scanner	TWAIN compliant scanner.

- All computers must have internet access
- UAC (User Account Control) MUST be turned off in Windows Vista, Windows 7, and Windows 8.
- Adobe Reader 9.1.3 or later must be installed.
- Obtain all of your commission structures from your carriers
- Direct and Scan to client records not supported by all scanners

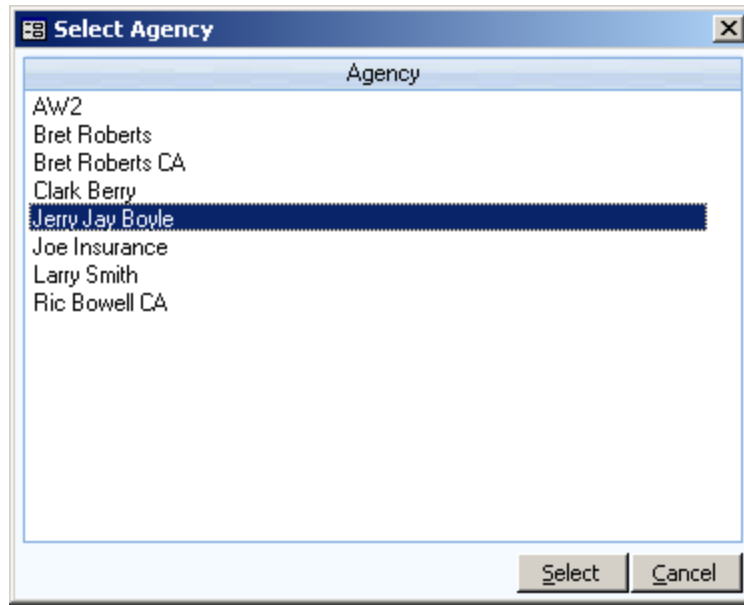
- For QQDownloads you will need to contact one of your carriers to have them set up an IVANS account for your agency. You will have only one IVANS account. Once a carrier has given you one, it will be used for the rest of your carriers.
 - **Note:** While you are waiting for the IVANS account, please proceed with the rest of the setup process.

How to Open QQEvolution 2

1. Go to your computer
2. You will turn on your computer if not already on. If a login is required, enter your computer's user ID and password then click the "OK" button to access your computer.
3. Once you login to your computer, the "desktop" will be displayed.
4. On the desktop, locate the following icon and double click on it



5. A login screen will appear and ask you to login in with a user ID and password. After entering it click "OK"
6. If your agency has multiple offices choose the office you wish to log into from the list and click "Select"



How to do Carrier Downloads

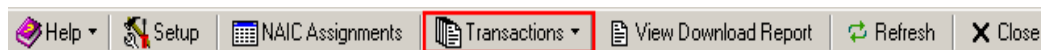
1. Open QQEvolution 2 from the desktop as explained above. If you do not have QQDownload, please proceed to the next topic.

IMPORTANT NOTE: We strongly recommend the processing of downloads be done first in your daily workflow.

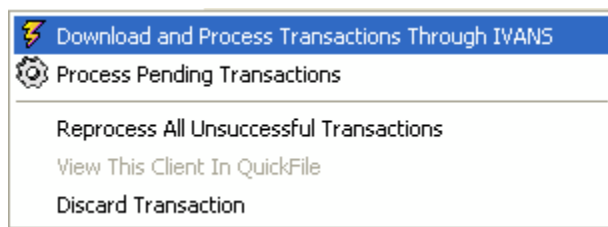
2. On the Dashboard, select Carrier Download.



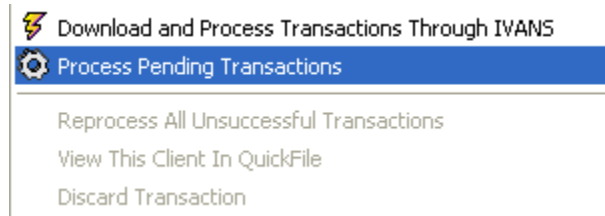
3. Once inside the QQDownload program, click on Transactions located on the top toolbar.



4. Click on "Download and Process Transactions through IVANS."



5. Another window will appear. This is the IVANS Transfer Manager. This will run automatically for you. When it is done, the number of files process will be displayed.
6. In order to process downloads from insurance companies who do not use IVANS, click on "Process Pending Transactions." This will only be enabled if there are files waiting to be processed.



Locating a Client in QQEvolution 2

1. On the QQEvolution 2 Dashboard, click “Clients” located on the left side of the screen.



2. Type the insured’s name starting with the last name in the designated area and click on the “Search” button. You may also just type in the first few letters of the last name.

Search By	Search Mode	Type in a name to search	Search	Browse
Insured	Contains			

3. You will double click the highlighted name to view the insured’s file.

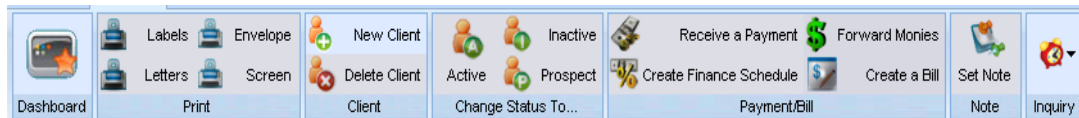
Searching Clients					Record [1] Displaying 1-20 of 60 Clients Matching Search Criteria	
Insured	C	Phone Number	Street Address	Client #	Agency	
Albert Smith		(800) 111-2222	1919 N. Main St.	JERRY836-QQ	Jerry Jay Boyle	
Frances Smith			1206 12th Way	JERRY758-QQ	Jerry Jay Boyle	
Goldsmith, Steven		(608) 839-8899	4603 Baxter Rd	111-1506-Aku	Jerry Jay Boyle	
Jack D Smith Ethel L Smith		(816) 575-2891	785 E Front St	JERRY1065-Q	Jerry Jay Boyle	
Jack, Smith				JERRY279QQ	Jerry Jay Boyle	
Jack, Smith				JERRY281QQ	Jerry Jay Boyle	
Jack, Smith				JERRY283QQ	Jerry Jay Boyle	
Jack, Smith				JERRY353QQ	Jerry Jay Boyle	
Joy, SMITH		(954) 111-2222	33 STREET	JERRY-494-Q	Jerry Jay Boyle	
Joy, Smith		305		JERRY-228-Q	Jerry Jay Boyle	
Larry Joe Smith			RR 5 Box 1098	JERRY694-QQ	Jerry Jay Boyle	
N, Smithseve		(999) 999-999999	123 Anywhere Road	12311972zz	Jerry Jay Boyle	
PRIYA SMITH	C	(222) 222-2222-	44 Gghf	123 10713zz	Jerry Jay Boyle	

Adding a New Client

1. On the QQEvolution 2 Dashboard, click “Clients” located on the left side of the screen.



2. On the Clients screen, click on “New Client” from the toolbar.



3. There are areas provided for you to fill in the insured’s information. Try to enter as much information as possible (the “tab” key can be used to go from box to box.) You can also link accounts, add “Other Contacts,” multiple addresses, and employer or employee information depending on if you are entering a personal or commercial account.

Client: Smith, Driver

Agency: Jerry Jay Boyle ☐ Prospect ☒ Personal ☐ Commercial X-Date:

Client Info								Contact Info	
	Last Name	First Name	Middle	DOB	SS#	Driver's License #	State		
Primary	Smith	Driver	Test	07/07/77	999-99-9999			Home (800)	-
Spouse								Work (800)	-
								Cell (800)	-
Insured	Smith, Driver			Salutation Driver				Fax (800)	-
				Client # JERRY1463-QQE				Work (800)	-
Attach	Detach	URL						Phone 2	
Addresses				Misc				Phone 3	
Mailing Address:				Garage/Property Address Not Available				Emergency Contact	
				Source				Email 1	
				Source Detail					
				Agent zzzzz1					

Adding a Memo to an Insured's File

1. On the QQEvolution 2 Dashboard, click **Clients** located on the left side of the screen.



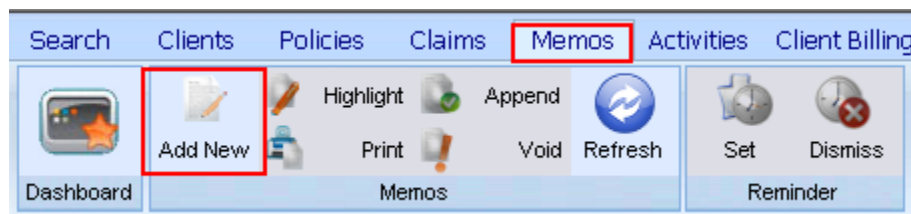
2. Type in the insured name starting with the last name, in the designated area and click on the "Search" button.

Search By	Search Mode	Type in a name to search		Search	Browse
Insured	Contains				

3. You will double click the highlighted name to view the insured's file.

Searching Clients					
Record [1] Displaying 1-20 of 60 Clients Matching Search Criteria					
Insured	C	Phone Number	Street Address	Client #	Agency
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Jack, Smith				JERRY279QQ	Jerry Jay Boyle
Jack, Smith				JERRY281QQ	Jerry Jay Boyle
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PRIYA SMITH	C	(222) 222-2222-	44 Gghf	123 10713zz	Jerry Jay Boyle

4. You will then select the **Memos** button.



5. Once on the Memos screen click on **Add New**.
6. Memos can be used for multiple tasks. Here you can log any information pertaining to the insured and/or the policy. Items such as communications between an agent/CSR and the insurance company or making a note you have spoken with the insured can all be entered as memos.

When creating a memo you may also set a **reminder** for the memo. Reminders can be used for anything from needing a reminder to you to call the client or to send out a renewal notice. A reminder is not required in a memo.

The screenshot shows a software window titled "Enter Memo". It contains several input fields and controls:

- CSR:** A text box containing "zzzzz1".
- Policy:** A dropdown menu.
- Memo Type:** A dropdown menu set to "Memo".
- Reminder Date:** A date selection control.
- Today's Date:** Displays "09/08/11".
- Current Time:** Displays "01:58 PM".
- Text:** A section with a checkbox labeled "Add to To-Do List" (which is unchecked) and a large text area below it.
- Buttons:** At the bottom, there is a button "Commonly Typed Memos...", and "OK" and "Cancel" buttons on the right.

7. When creating a memo reminder you may also add it to your To-Do List.
 - a. NOTE: You must be using a package of QQEvolution 2 that includes the QQEvolution 2 Assistant in order to access the To-Do List

Making payments in QQEvolution 2

1. On occasion, a client may come into your office to make a payment, follow these steps to record it in QQEvolution 2.
2. On the QQEvolution 2 Dashboard, click **Clients** located on the left side of the screen.



3. Type in the insured name starting with the last name, in the designated area and click on the "Search" button.

Search By	Search Mode	Type in a name to search	Search	Browse
Insured	Contains			

4. Once the client is located, make sure it is highlighted, then towards the top of the screen select the **Policies** button.

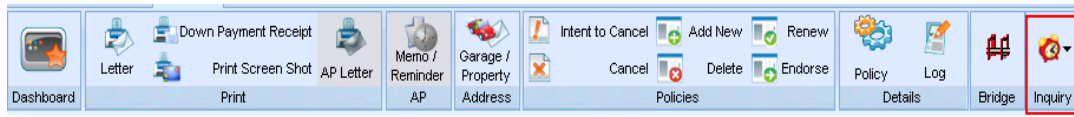


5. If the client has multiple policies, select the policy you are receiving the payment on. Then click on the globe icon to the right of insurance company name, this will open the company's website. Login into their website as you would normally. Make the payment in the company's website. Do not print a receipt.

Policy Info	
Line	Auto
Coverage	Comp/Coll
MGA / Broker	(None)
Company	AssuranceAmerica
Financing / Contract #	Direct Bill
Payment Type / Check #	Cash
Policy # / Binder #	1111
Binder Date / Period	09/28/10
Effective / Expire Date	09/28/10
CSR / Type of Business	New Business
Policy Description	
Policy Source	

Note: In order to use the globe icon as a direct link to an insurance company's web site, the web address must have been entered into the Rolodex. The Rolodex can be accessed from the QQEvolution 2 Dashboard.

6. When dealing with companies who participate in Real-Time Inquiry, from the Policy screen click the **Inquiry** button located to the right on the top toolbar. You will select “Make payment.” This will launch you directly to the company’s web site and take you to the payment area for the company. There is no need to login or locate the client once on the company web site; the program does that for you.



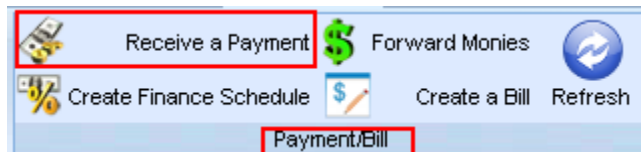
NOTE: In order to use the Inquiry feature you must have QQDownloads and have previously set up the Real-Time Inquiry. In addition, not all companies participate in the “Make Payment” option. For information on setting up this feature, please refer to the Real-Time & Data Solutions section on our web site <http://www.QQSolutions.com>

7. Next, you will go back to the client in QQEvolution 2s and click on **Client Billing**. From the top tool bar, select “Payment/Bill.” Then proceed with receiving a payment.

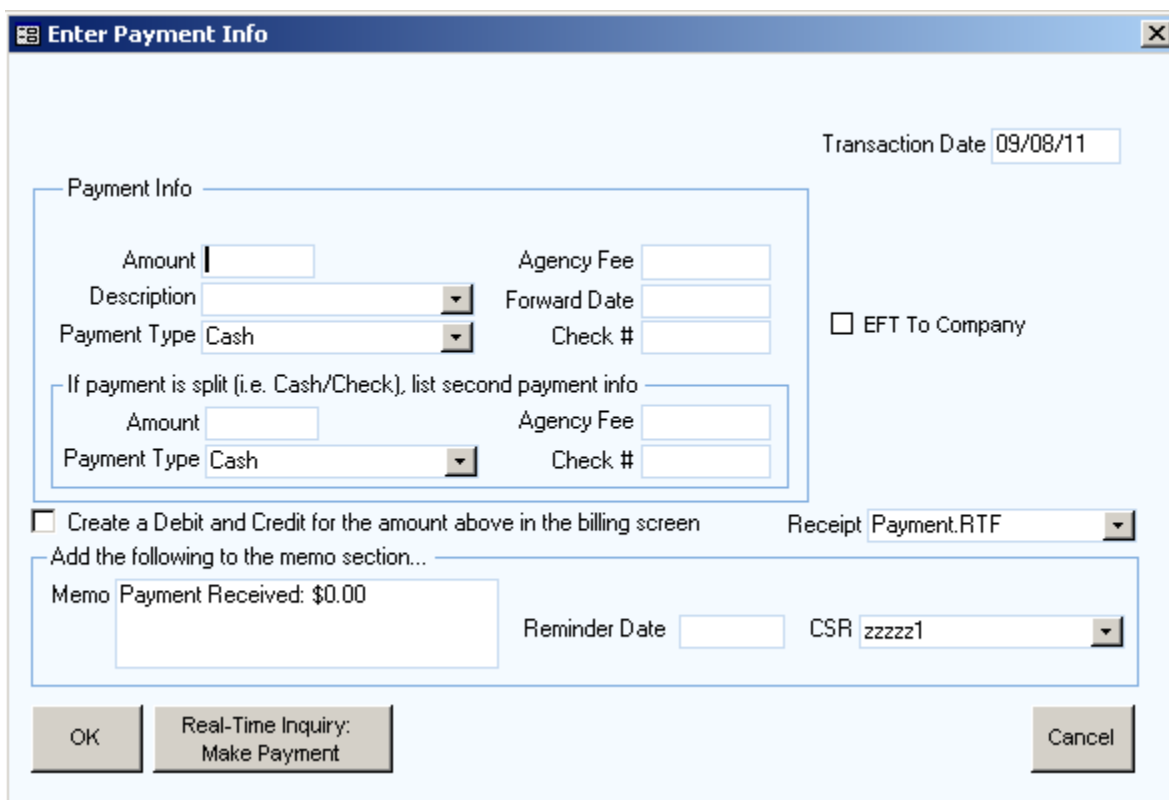


Recording the payment in QREvolution 2

1. After clicking Payment/Bill, select "Receive a Payment."



2. If the client has multiple policies you will be asked to select the policy to which the payment you are receiving pertains to.
3. The "Enter Payment Info" box will open. You will fill in the amount and payment description. Please make sure there is a check mark placed in the box next to "Create a Debit and Credit for the amount above in the billing screen." After completing the payment information, click "OK." Also, make sure there is a receipt already selected in the area marked "Receipt."



4. After clicking OK a preview of your receipt will display, click "Print This Page." The receipt will print which you will then give to your client. A Memo and Activity will automatically be processed for record keeping.

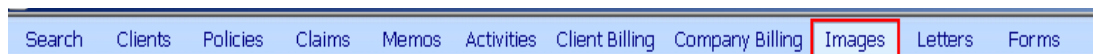
How to find if your Scanner is TWAIN Compliant

In order to scan directly into QQEvolution 2, your scanner must be Twain compliant. You can easily find this information out directly from within QQEvolution 2.

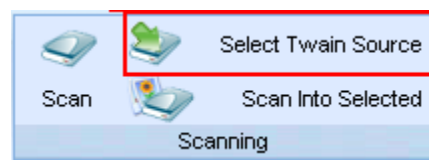
1. On the QQEvolution 2 Dashboard, click **Clients** located on the left side of the screen.



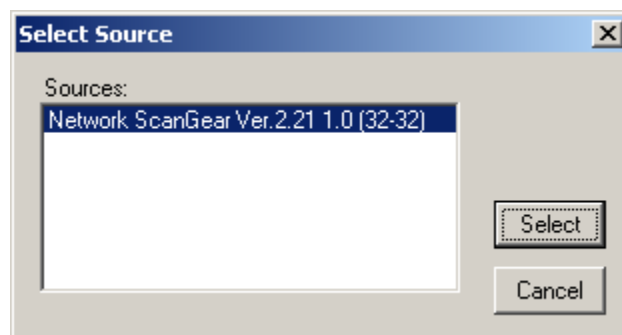
2. Then from any client click on the **Images**.



3. Once on the Image screen click "Select Twain Source."



4. If your scanner is listed in the Select Source box, your scanner is Twain compliant. You will select your scanner and then click "Select." You will now be able to scan directly into a client's record in QQEvolution 2.



How to scan in to QQEvolution 2

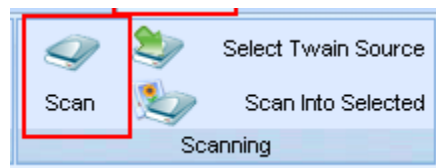
1. On the QQEvolution 2 Dashboard, click **Clients** located on the left side of the screen.



2. Find and select the client you would like to scan an image and/or document into.
3. Then click on the **Image** button.



4. From the top toolbar, select **Scan**.



5. The **Image Info** box will appear. Please complete the information requested.

A screenshot of the "Image Info" dialog box. It contains the following fields and options:

- Description: Image Description (with a "Select Description..." button)
- Policy: AssuranceAmerica (dropdown menu)
- CSR: James (dropdown menu)
- Number of pages: 1 (text input)
- ☐ Prompt for pages 2, 3, etc. when scanning (No Sheetfeeder)
- ☒ Separate Pages
- ☒ Force Black & White
- ☒ Show scanner's user interface when scanning
- Buttons: Scan, Cancel

6. If you have a flatbed scanner select "Prompt for pages 2, 3 etc. when scanning (no sheet feeder)". This tells the program to prompt when the current item is done scanning and to now insert the next item into the scanner. If you are using a sheet or auto feeder there is no need to select this. Also, make sure there is a check mark next to **Force Black & White**.

Note: Direct scanning to client records is not supported by all scanners.

Attaching an image in to QQEvolution 2

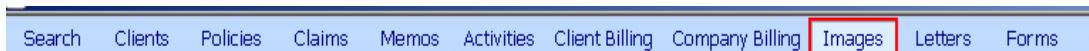
You have the ability to “attach” an item already stored on your computer into a client’s record in QQEvolution 2. If the item is not already stored on the computer and needs to be scanned, please do so following your scanner’s instructions.

NOTE: When scanning an item to your computer make note of where on your computer you are saving it. This makes it easier to find when you are ready to attach it.

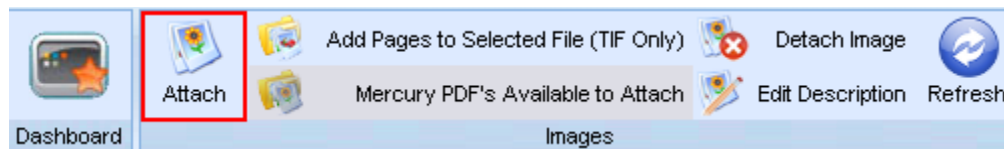
1. On the QQEvolution 2 Dashboard, click **Clients** located on the left side of the screen.



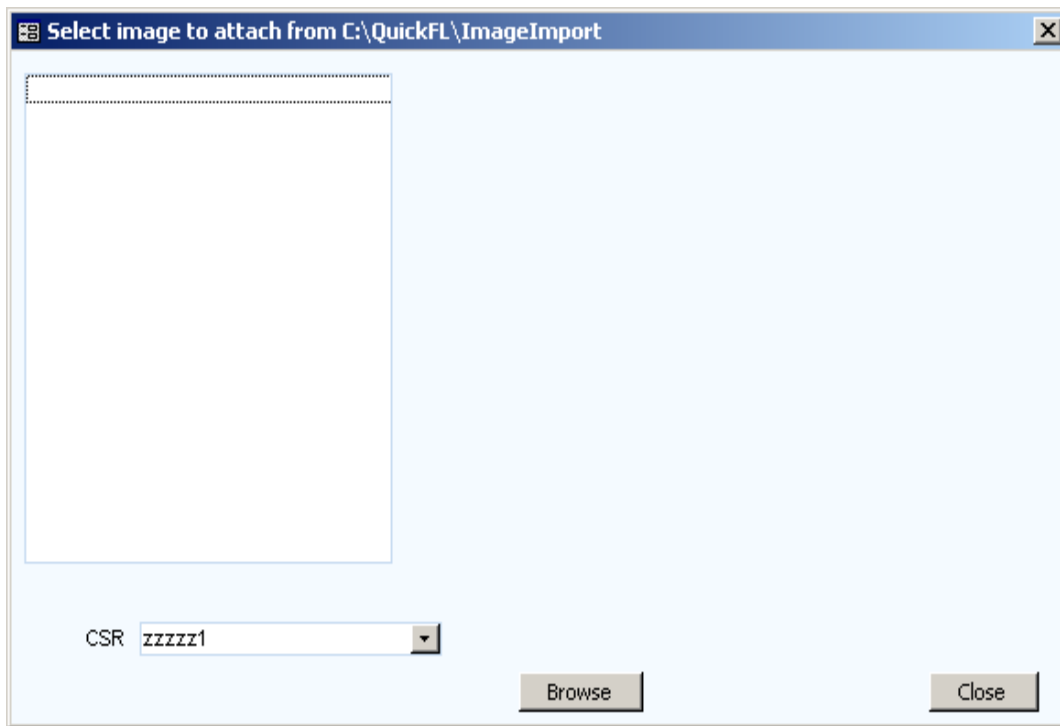
2. Find and select the client you would like to scan an image and/or document into. Then click on the **Image** button.



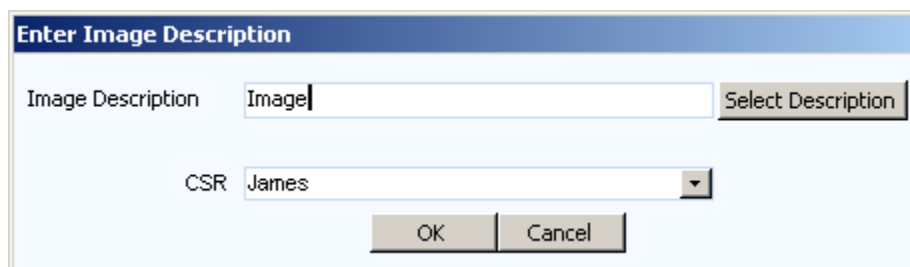
3. Once on the Image screen select **Attach**.



4. The “Select image to attach” box will appear. You will click on “Browse” to locate the item you wish to attach on your computer. Once you find the item, select it and click the “Open” button.



5. The “Enter Image Description” box will open. You will fill in the requested information and click “OK.” The image and/or document is now stored on the client’s record.



How to update your QQEvolution 2 software

QQEvolution 2 does do automatic updates but on occasion you may need to manually update.

1. Open Internet Explorer (your web browser) and in the address bar type our web site of www.QQSolutions.com . You will be taken to the main (home) page of our company web site.
2. You will select **Downloads** from the navigation bar.



3. On the next screen click on the link that reads, "Download the latest version of QQEvolution 2 and QuickFile."



QQ Solutions Updates & Installations

[Download the latest version of QQ Evolution and QuickFile](#)

4. Then you will need to enter your User ID and Password (which is the QQ00 number) and select "Log into My Account." If you do not have your User ID and Password, ask your office administrator for it.

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.

QQ User ID:

Password:

[Forgot your password?](#)

5. After logging in, on the
6. next screen locate the download for QQEvolution 2 and click **Download**.

[Updates](#) [Full Install](#)

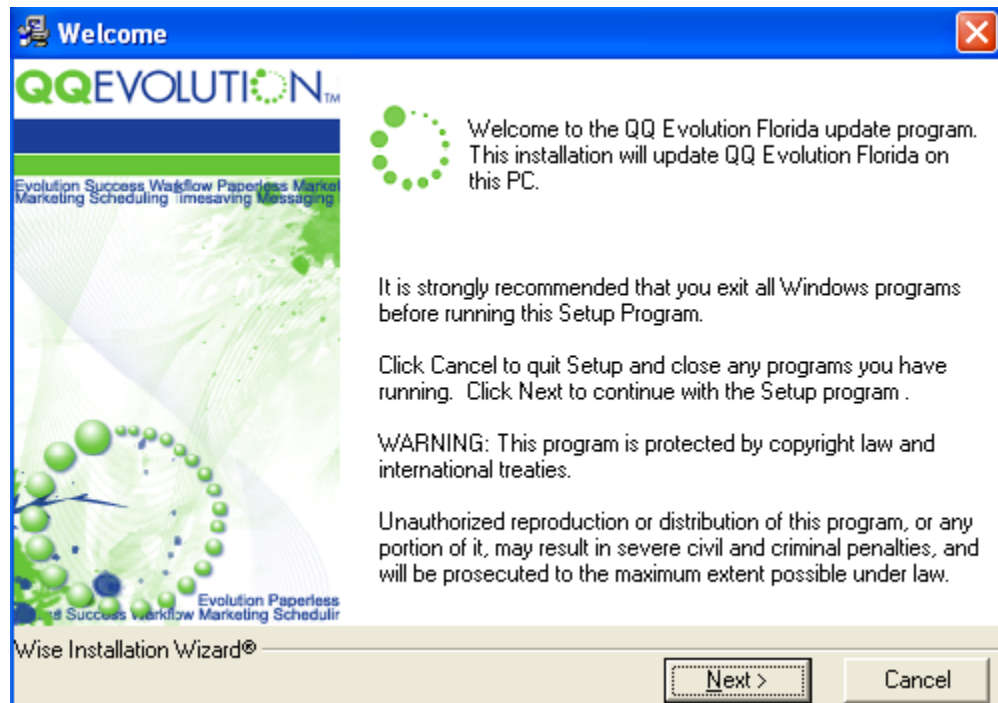
Product	Release	Last Update		
QQ Evolution	1.5.16	8/22/2011	Download	Release Notes ▼

7. A window will appear showing the progress of your update. This window will be open until the download has completed.

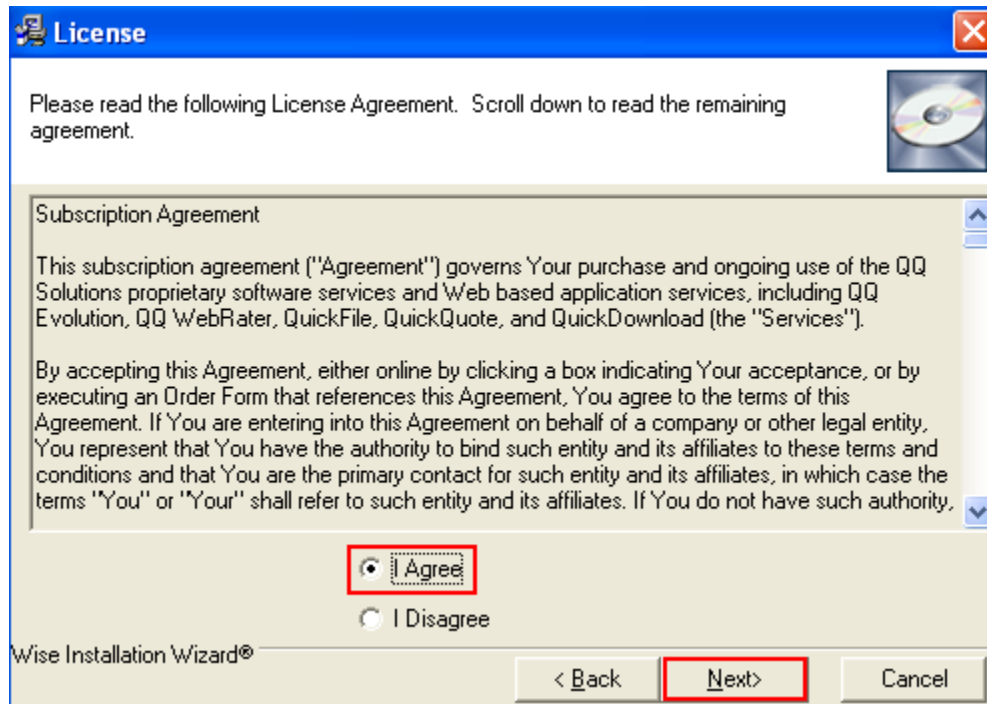
Downloading QQ Evolution Version 1.5.16 Update



8. After the download of the update is completed, a “Welcome” box will open. Here you will click on “Next”



9. The next box will display, select "I Agree" and then click "Next."



10. The update will then finish installing on the computer. When it is done, you will click the "Finish" button. The update has now been completed.

