QQEVOLUTION²

Quick Start Guide

For Gold and Silver Editions

QQSOLUTIONS™
we provide the answers

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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.

Installation and Setup

Download and Install **QQEvolution 2**

1. Open your internet browser and enter http://www.qqsolutions.com/ into the address bar.

2. Once at the Web site, click on Downloads, then locate the "QQSolutions Updates & Installations" and click on the link.

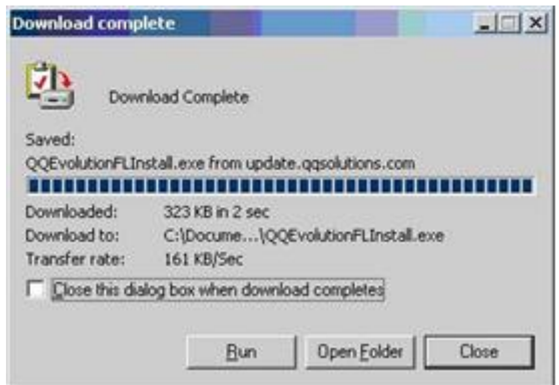
3. On the next screen, you will be required to enter your account login information. The User ID & Password was sent to you in a separate e-mail. Please refer to that e-mail for the required information.

4. Click on the Full Install tab and click Download.

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

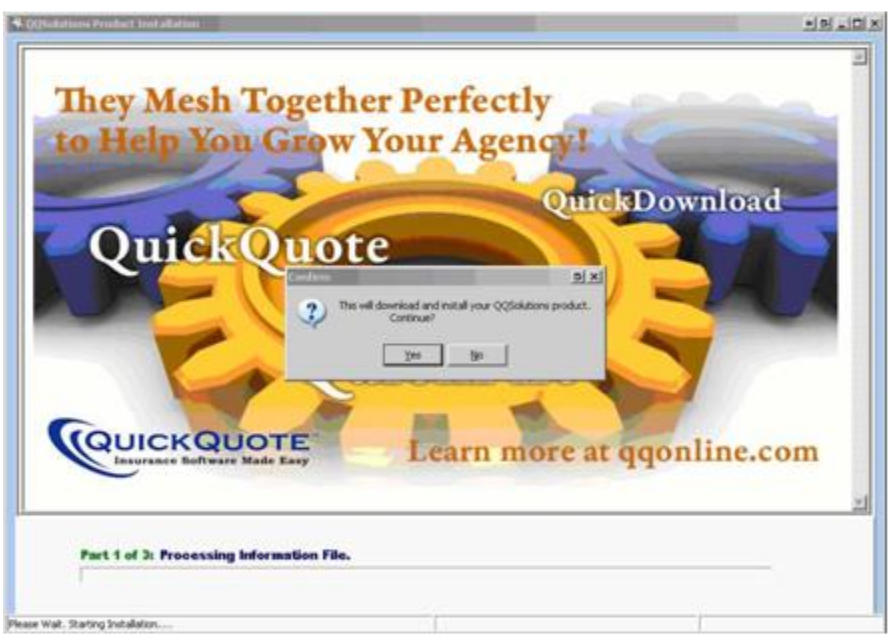
6. Save the file to your “DESKTOP”. This will save the link back to the “Full Install” of QQEvolution 2 on your computer as shown below.

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



8. After clicking “Yes”, QQEvolution 2 will download the necessary files for installation.

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.



9. Once the files have been downloaded, you will see the message “Installation will now execute”, click “OK”

10. If you cancel the installation, look for the following icon on your Desktop. You will 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 have been downloaded. 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. You will need to do a local install and then select to install on the C: drive.

12. Once you complete the installation on your computer, you will see a new QQEvolution 2 icon appear on your desktop.

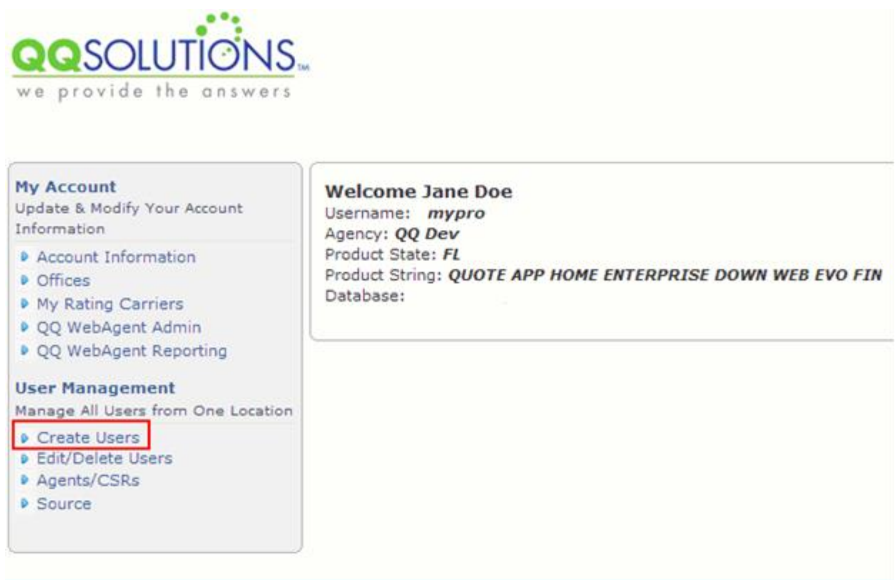
13. Login into QQEvolution 2 with the User ID and Password provided in the previous email you received. Enter the Utilities and complete the setup of all your users, agents, companies, commissions and defaults.

Create Users

1. From the QQEvolution 2 Dashboard click on Utilities.

2. Click on Users Management

3. You will be taken to the Online Account Management System, here select "Create Users."



4. Next, you will enter the user information and create their Username and Password. This login is used to access QQEvolution 2. You may 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 within the programs.

    a. After entering the Username, click "Check Availability" to make sure what you entered is available.

5. When finished entering the required information click on "Next" to continue.

6. The next screen the permissions are set up for your users. You will first assign the user a Permission Level. The available levels are User, Power User, Manager, Local Administrator and Administrator. A User has the lower permission level while an administrator has full permissions.

7. 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.

8. The last item displayed on the screen is the Permissions. Depending on what permission level, the user will already have some permissions marked.

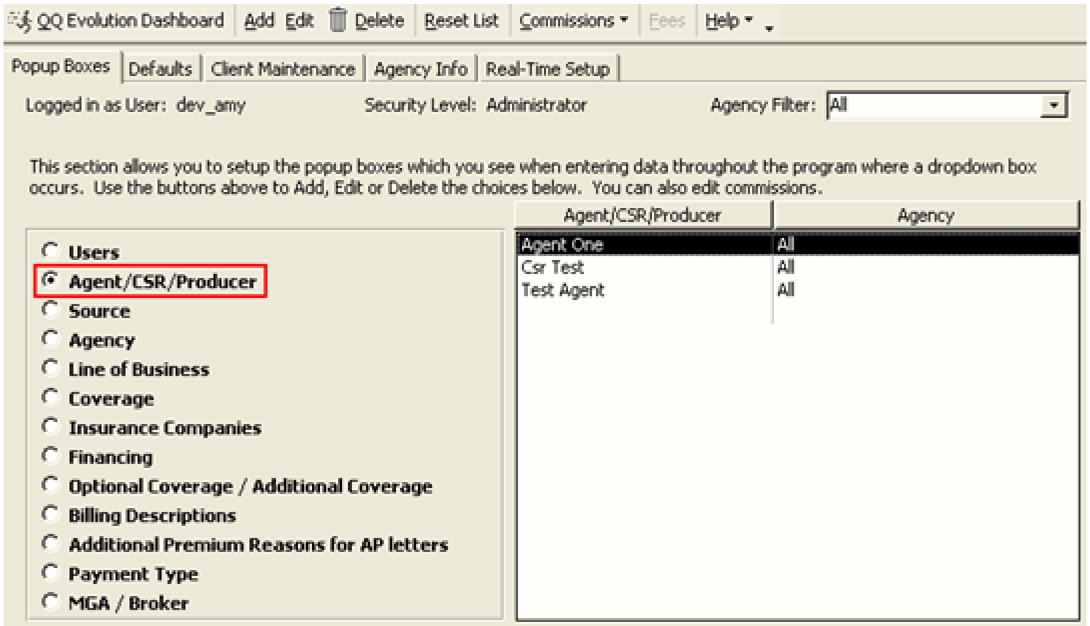
9. A permission level of User would have the least amount of items checked whereas the administrator would have all permissions checked. You can check and uncheck any of the permissions as you see fit.

    a. 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).

10. Once you have finished setting the permissions you will click Create User. The new user 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 Agent/CSR/Producer

1. In the Utilities, select **Agent/CSR/Producer**.

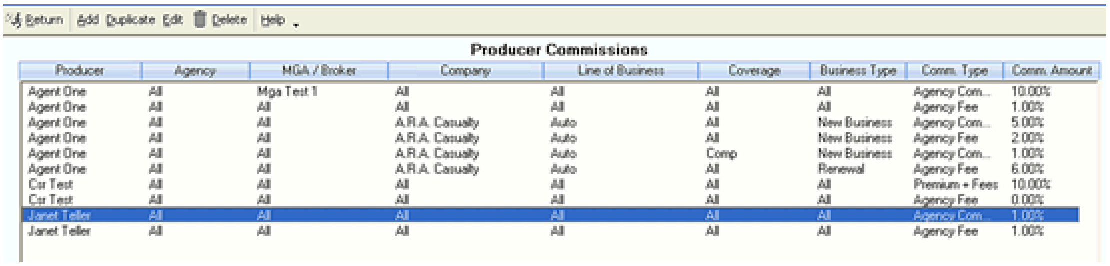


2. To add a new Agent/CSR/Producer, click the Add button on the top Ribbon. An area will appear on the lower right for you to type in the producer's name and to select what agency the producer belongs to.

3. After entering this information click, Add to List and the name will be added to the default list. Repeat this process if you have more Agent/CSR/Producers you would like to add, when you are finished click Done Adding. Setting up the commission structure for a producer is shown later in this document.

Setup Default Producer Commission Structure

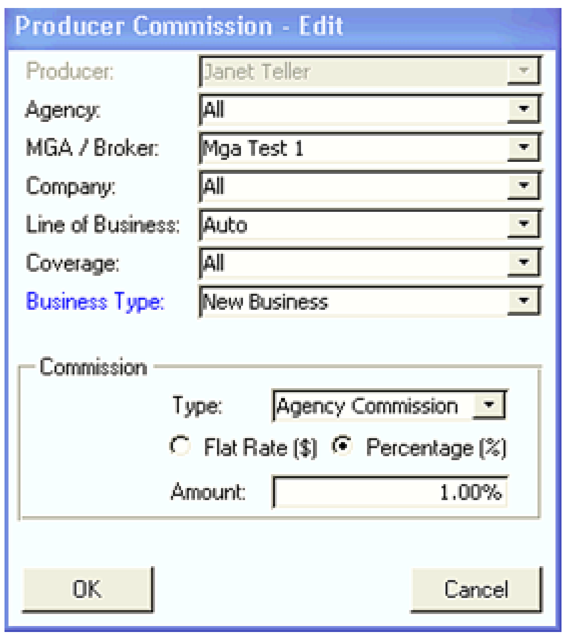
In order to now set up the commission structure for the producer, make sure the correct producer name is chosen and click the Edit button on the top Ribbon. Another smaller "Producer Commission" box will open. You will notice the producer's name is grayed out and locked, that is because we already chose the specific producer.



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%



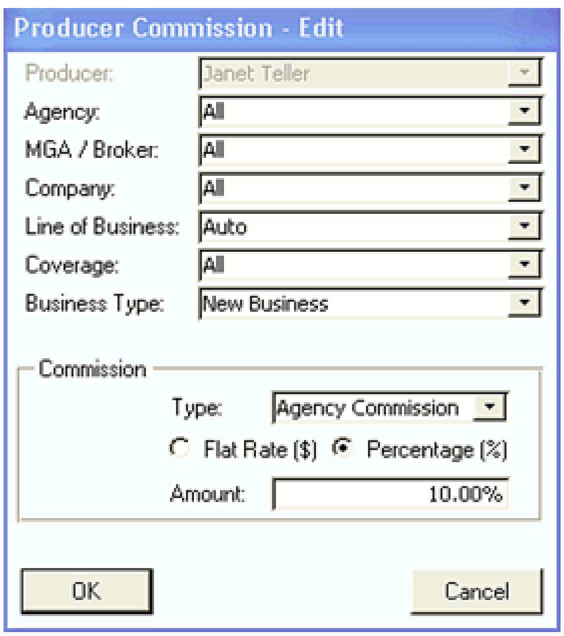
You can set up numerous commission structures for one producer.

- **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.
    - **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.
    - **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.
    - **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.

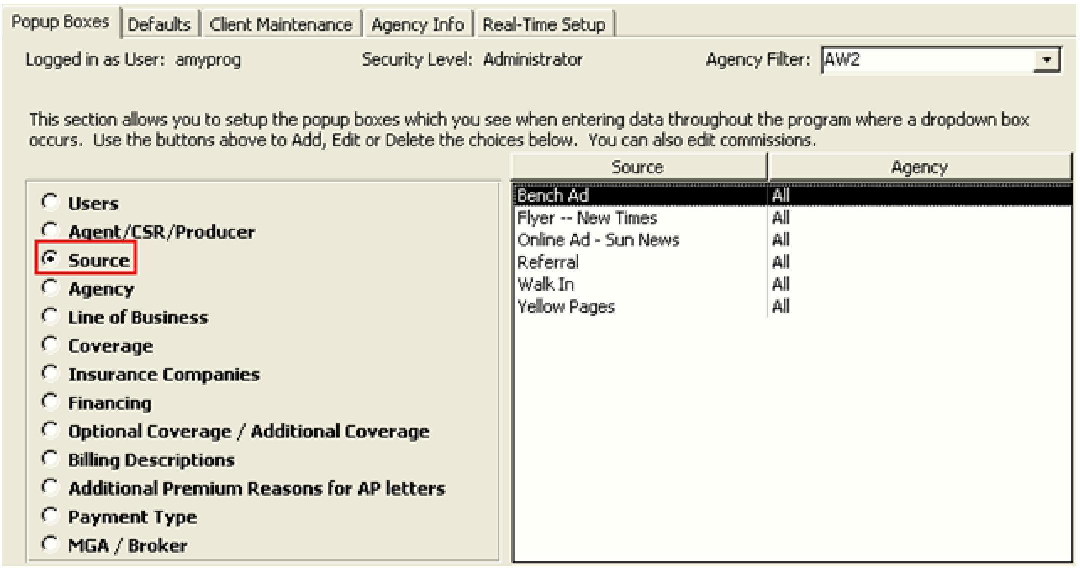
Now having walked you through how to set up the commission structures we will give you an example of how this is done:

> 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.



Create Sources

1. In the Utilities, select Source.

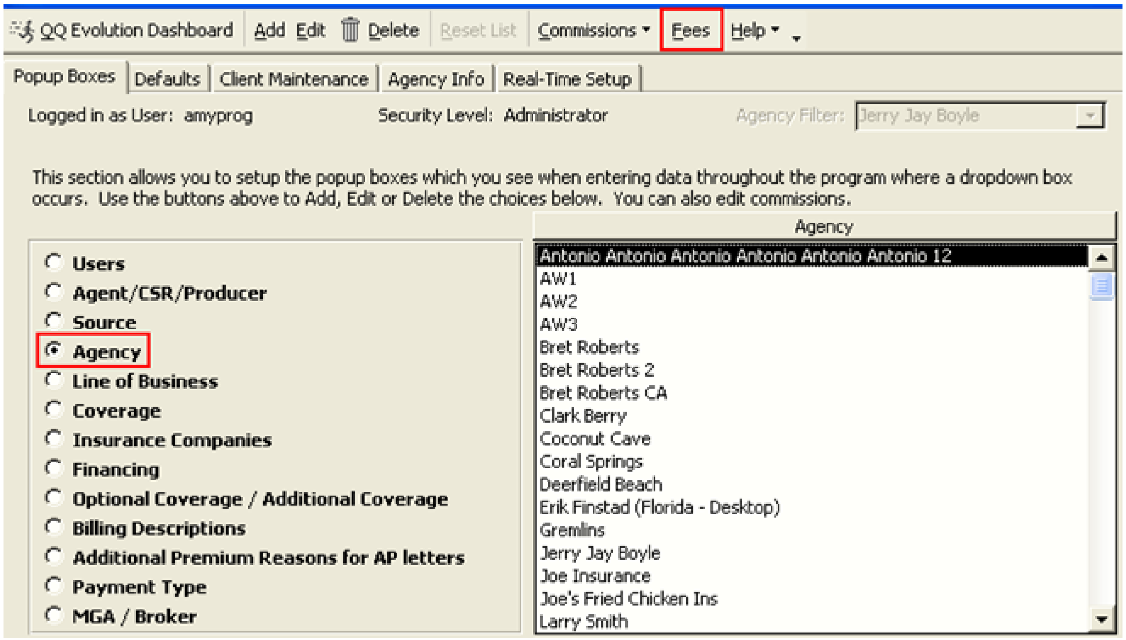


2. Enter potential sources of your business by clicking the **Add** button on the top Ribbon. Enter the source and when you are finished click **Done Adding**. When entering client data in QQEvolution 2, you may select the source of that business. A newspaper advertisement, radio commercial, a yellow page advertisement or even a walk-in are all examples of sources. This will help you determine where your business is coming from and what agency marketing is working for you

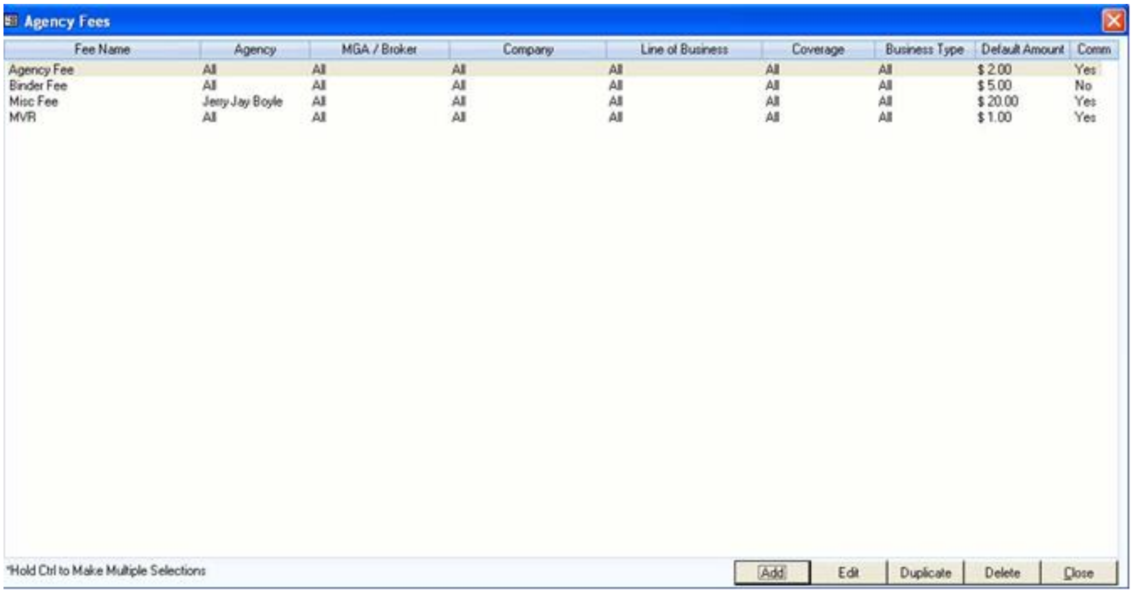
Setup Agency Fees

1. Open Utilities

2. Select Agency and click Fees on the top Ribbon



3. Click on Add



4. Enter the Fee Name and select what it applies to, when done click "OK."

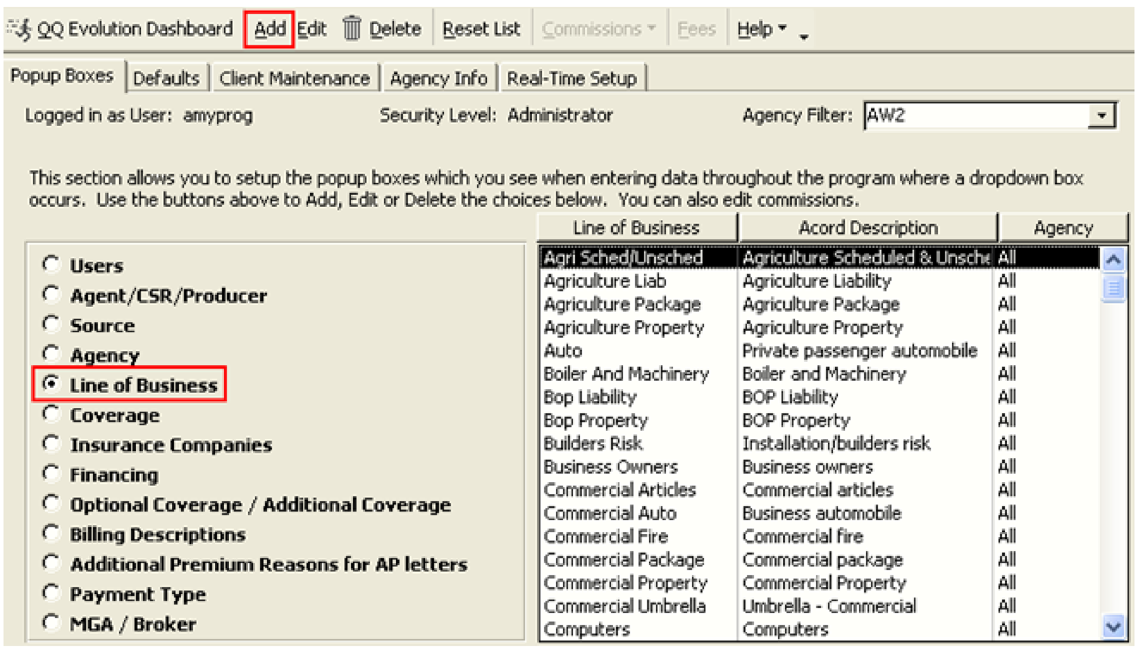
Setup Line of Business

You will enter the Lines of Business that you offer. An example of a Line of Business might be Homeowners, Auto, Life, Commercial General Liability, etc. By Default, we have most of the Lines of Business in the software but if you would like to add your own, you can.

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.

1. Open Utilities

2. Select Line of Business and click "Add" on the top Ribbon

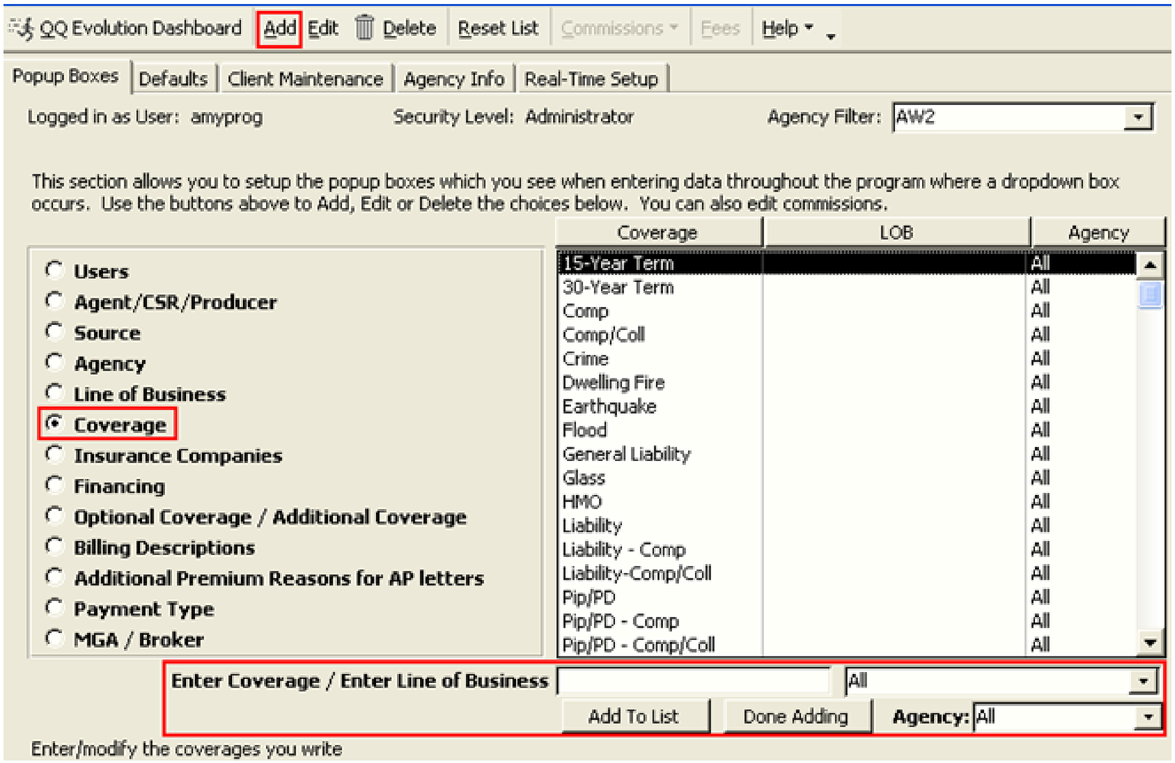


3. A box will appear allowing you to enter the line of business.

Setup Coverages

You are provided a default list of coverages but you will need to add the ones you write that are not listed.

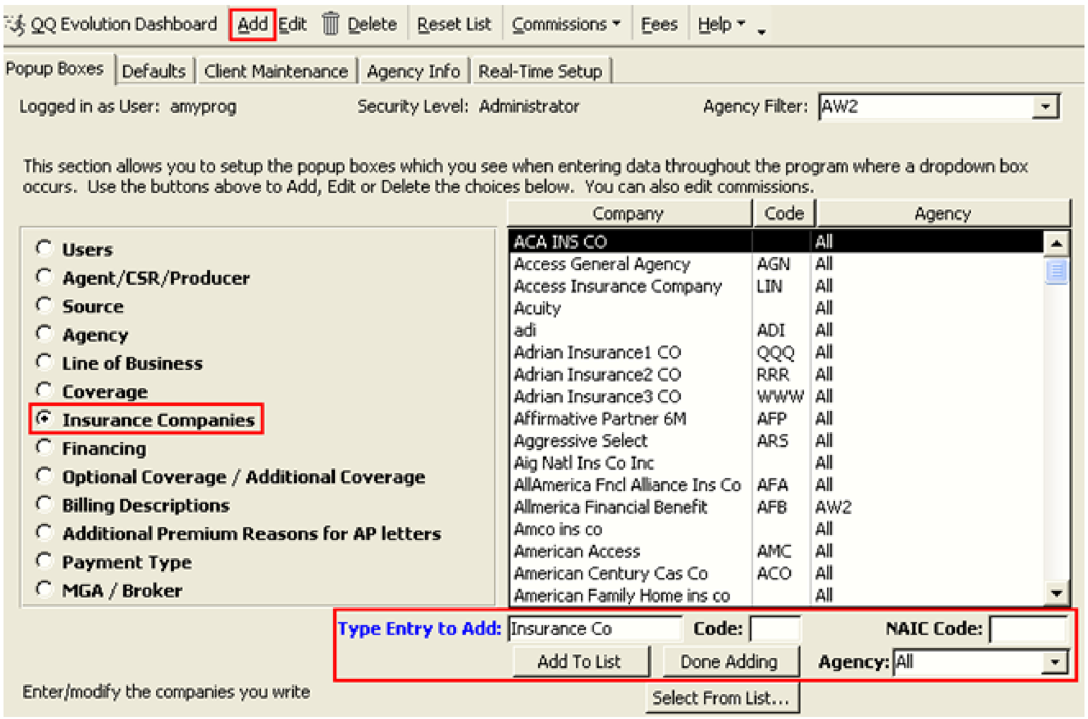
1. Open Utilities
2. Select Coverages and click “Add”
3. A box will open so you can enter your coverage.



Setup Insurance Companies

1. Open Utilities

2. Select Insurance Companies and click “Add”

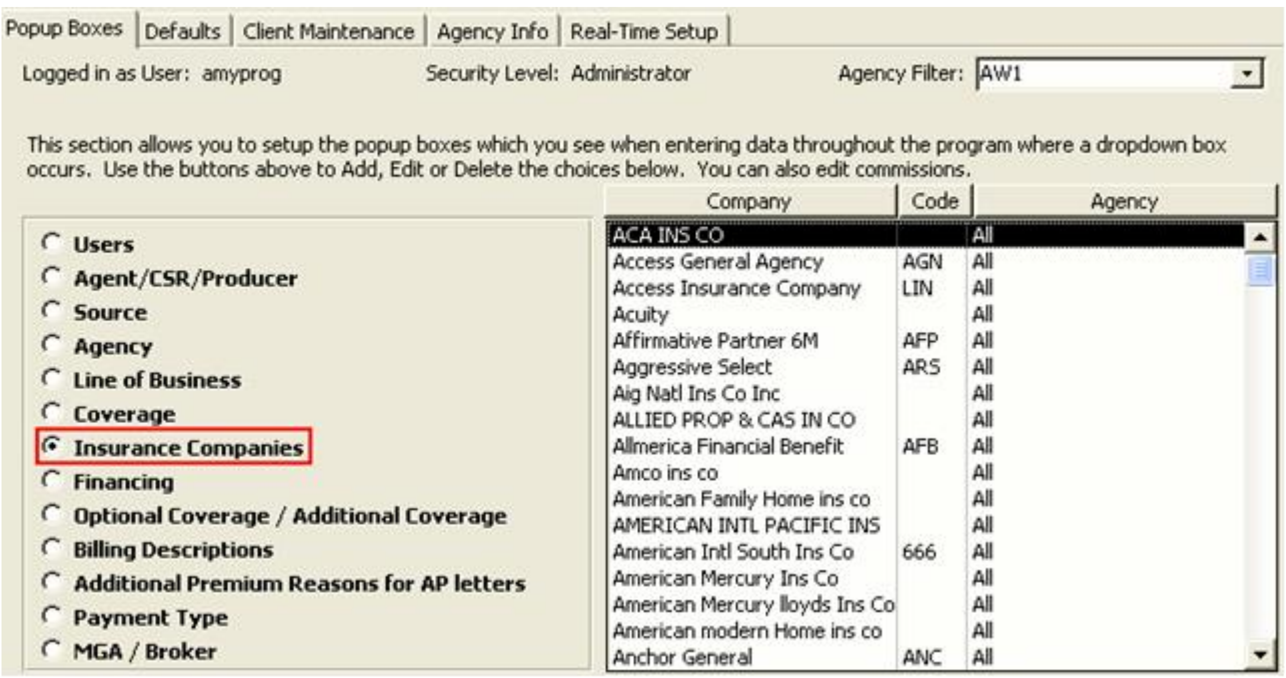


3. Type in the name of the company you would like to add. The “Code” is not required unless you use the raters QQWebRater or FSC. The rater will populate the code for you if you use one of those just previously mentioned. You can put in your own code there if you would like. If you are a QQDownload subscriber and you intend to process downloads with the carrier you are entering you will enter the NAIC code for the carrier. If you do not know the NAIC code, please contact the carrier for this information.
    a. The insurance companies may have more than one company name and NAIC code. You will have to add a new company for each one you write with.

Setup Agency Commissions

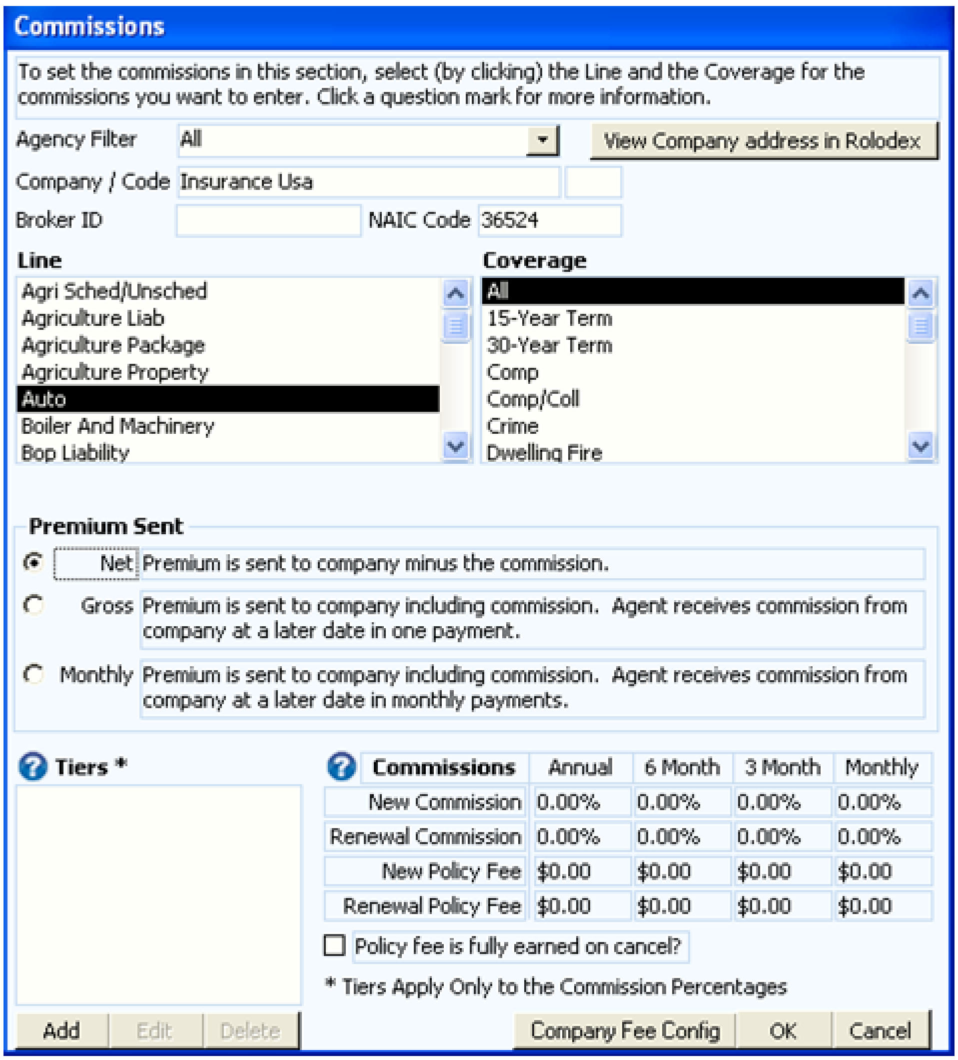
Setup Agency Commissions by LOB and Coverage with a Percentage

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



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.

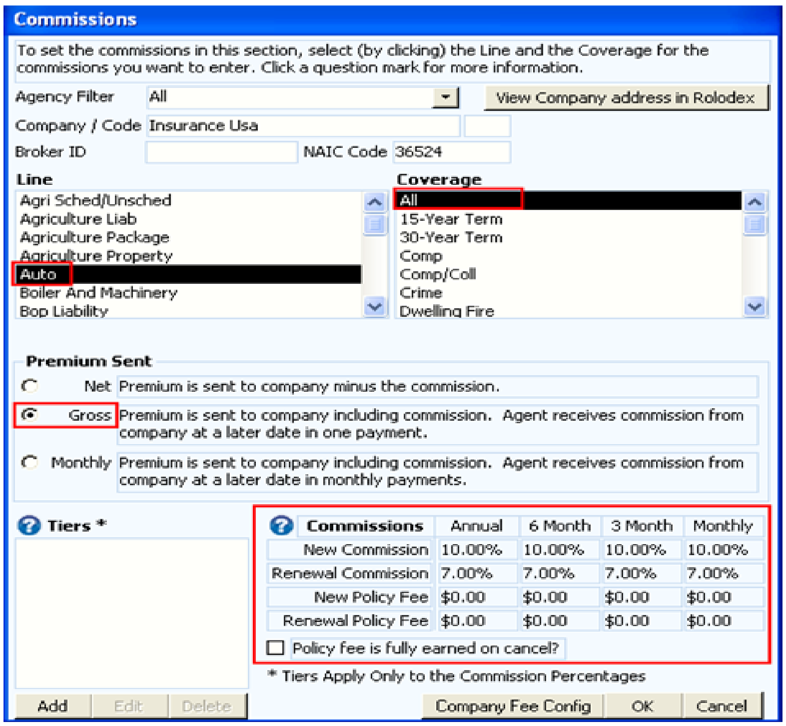


You will see your company name at the top of the window. You will notice when the box opens it defaults to the line of Auto and the coverage of All, this is simply a default, change it as needed to set up the commission structures. Enter in your Broker ID and NAIC Code for those of you who are doing 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.

At this point, we are setting up the commission structure based on percentage; you will not use the Tiers feature at this time. It will be covered later.

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 QQEvolution 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.

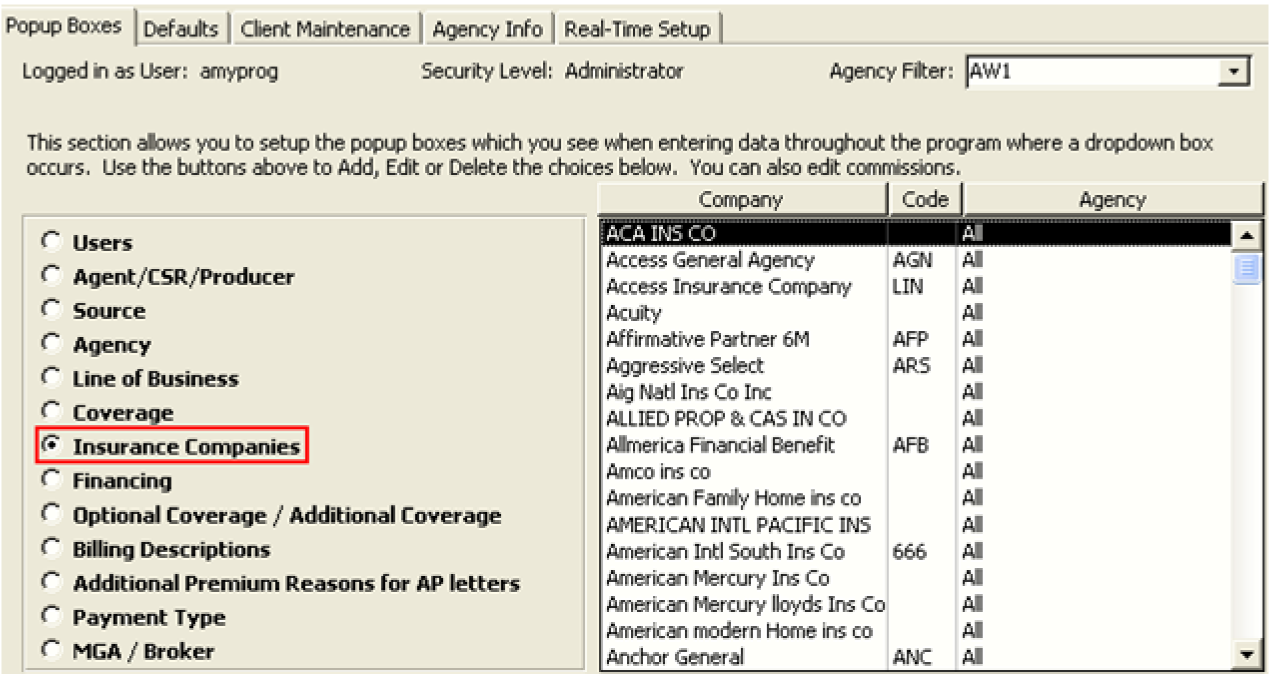


If the company charges other standard fees and taxes for this line of business, use the “Company Fee Config” button provided. In order to first set up the company fees you will do this directly on the Popup Boxes after you select Insurance Companies. A button on the top Ribbon will appear labeled Fees.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

Setup Agency Commissions by Tiers

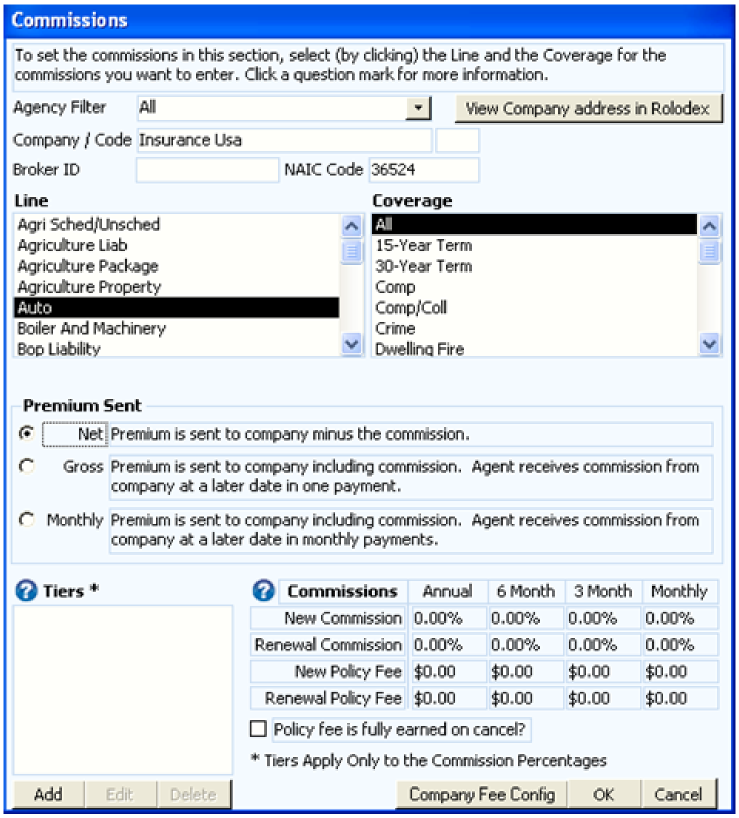
Agency commissions can be set up by Tiers in QQEvolution 2. This meaning if a company does their commissions by set dollar amount of the premium you can base your commission structure on this. To set up the default commission structure by Tiers open Utilities from the Dashboard. After opening Utilities,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

Tiers can also be set up for the MGA/Broker commission structure if needed.



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.



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.

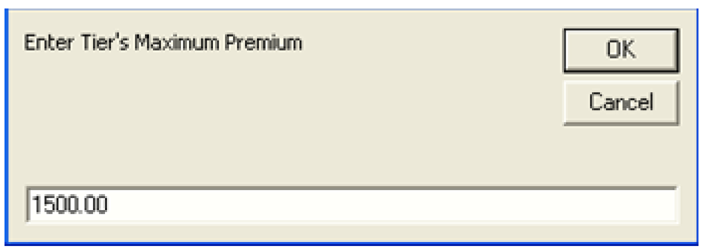
1. Select the Line of Business

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 and $1500.00, click the “Add” button again and enter $1500.00 in the “Add New Tier” box.



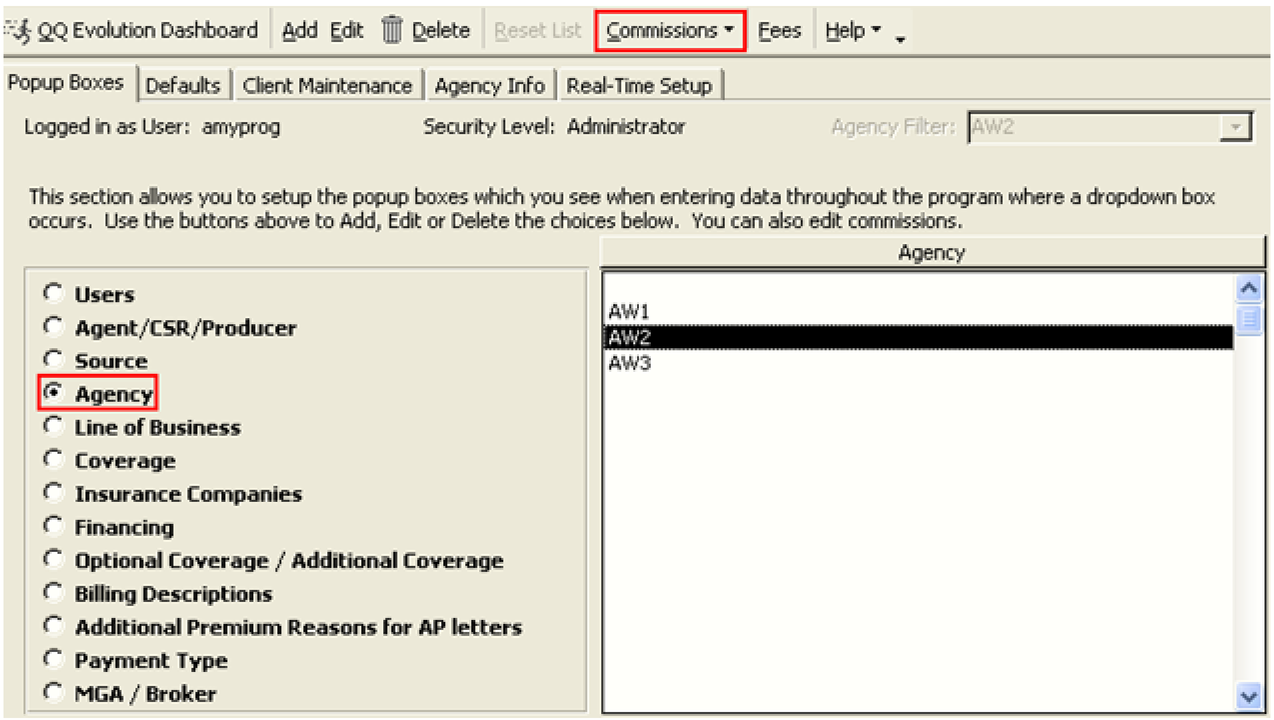
The Tiers will be listed as shown below. You will notice Tier 1 is the $0.00 to $500.00 amount so the commission percentage shows as 10%. It will change to 12% if we select the Tier for the $500.00 to $1500.00 amount. Each Tier can have its own commission percentage. Remember, the Tiers are set up by 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 QQEvolution 2 to subtract the fee from the premium before it calculates the commission due to your Agency.

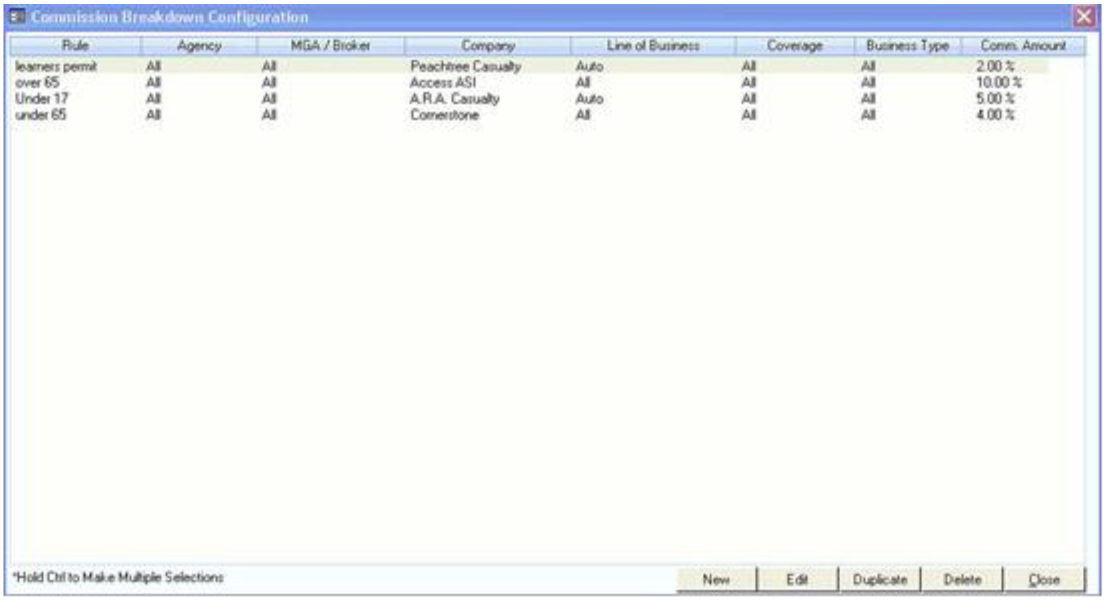
If the company charges other standard fees and taxes for this line of business, use the "Company Fee Config" button provided. In order to first set up the company fees you will do this directly on the Popup Boxes after you select Insurance Companies. A button on the top Ribbon will appear labeled Fees.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

Setup Agency Commissions by Rules

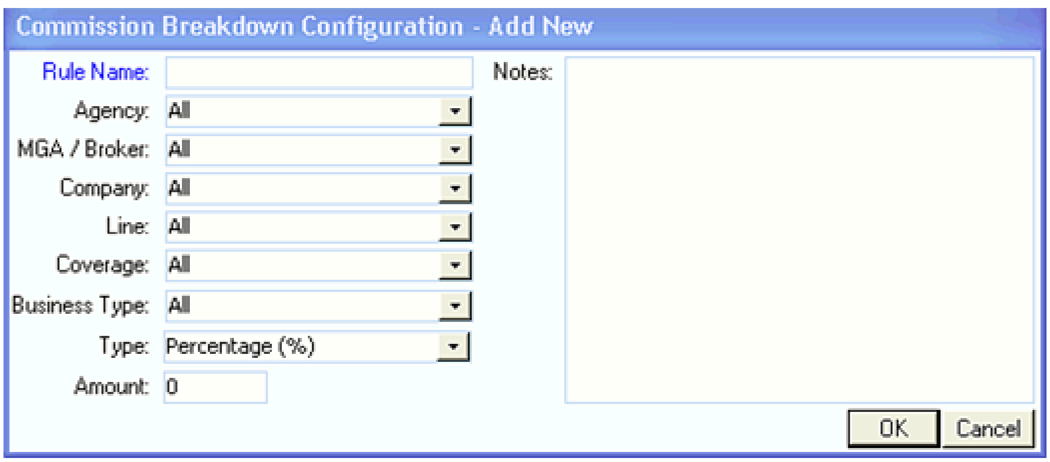
You can set up commission structures by Rules. This means you can set structures based on things such as age, to access this feature open the Utilities from the Dashboard and select Agency.



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.



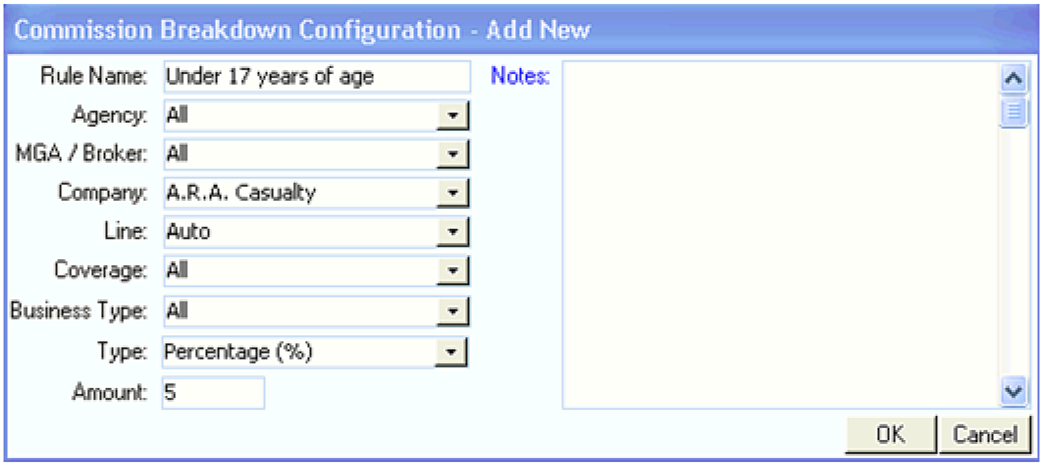
To create a new Rule, click the New button on the bottom right of the box. Another box will open where you can set up the individual Rule.



Rules can be broken down as specific as you need them to be. You can set a Rule to apply to all items or to just one if you would like. When you are setting the Rule, click the drop downs next to each item and it will display the defaults you have currently set for that item.

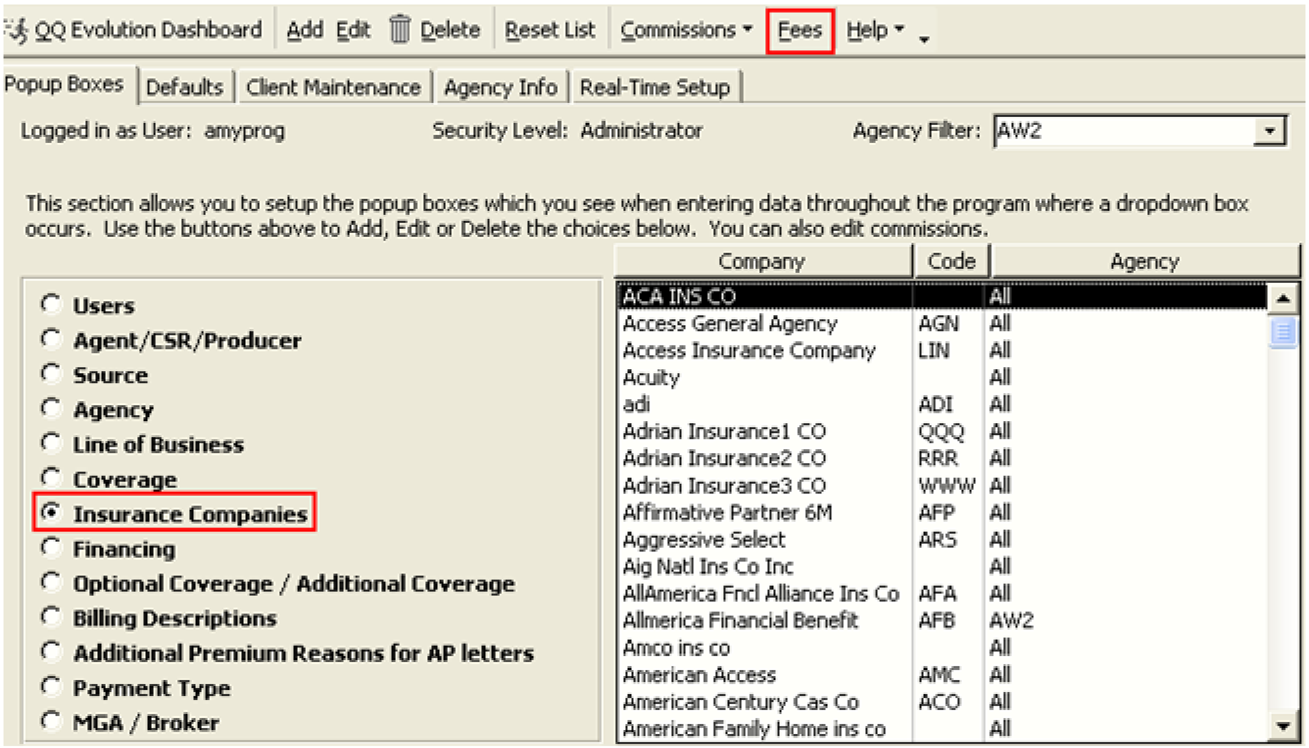
We will now give an example of how to set the commission structure up by Rules.

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.

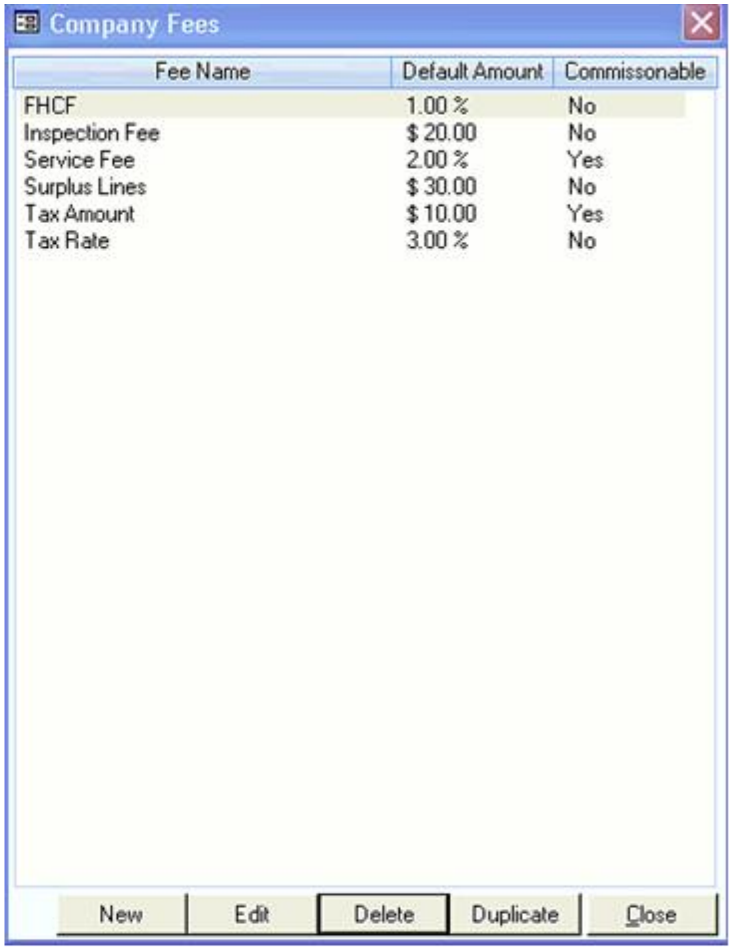

Commission Breakdown Configuration - Add New
Rule Name:
Under 17 years of age
Notes:
Agency:
All
MGA / Broker:
All
Company:
A.R.A. Casualty
Line:
Auto
Coverage:
All
Business Type:
All
Type:
Percentage (%)
Amount:
5
OK
Cancel

Setup Company Fees

Some insurance companies charge fees such as a surplus lines fee. You have the ability to set a default list of these fees that can be applied to the companies as you are setting up the agency commission or at any point they can be entered. You will also have the ability to select a company fee when you are entering the policy itself.



You will click on Insurance Companies and then Fees on the top Ribbon. After selecting “Fees”, a Company Fees box will open. Here you will enter any company fees and you can edit or delete existing fees.

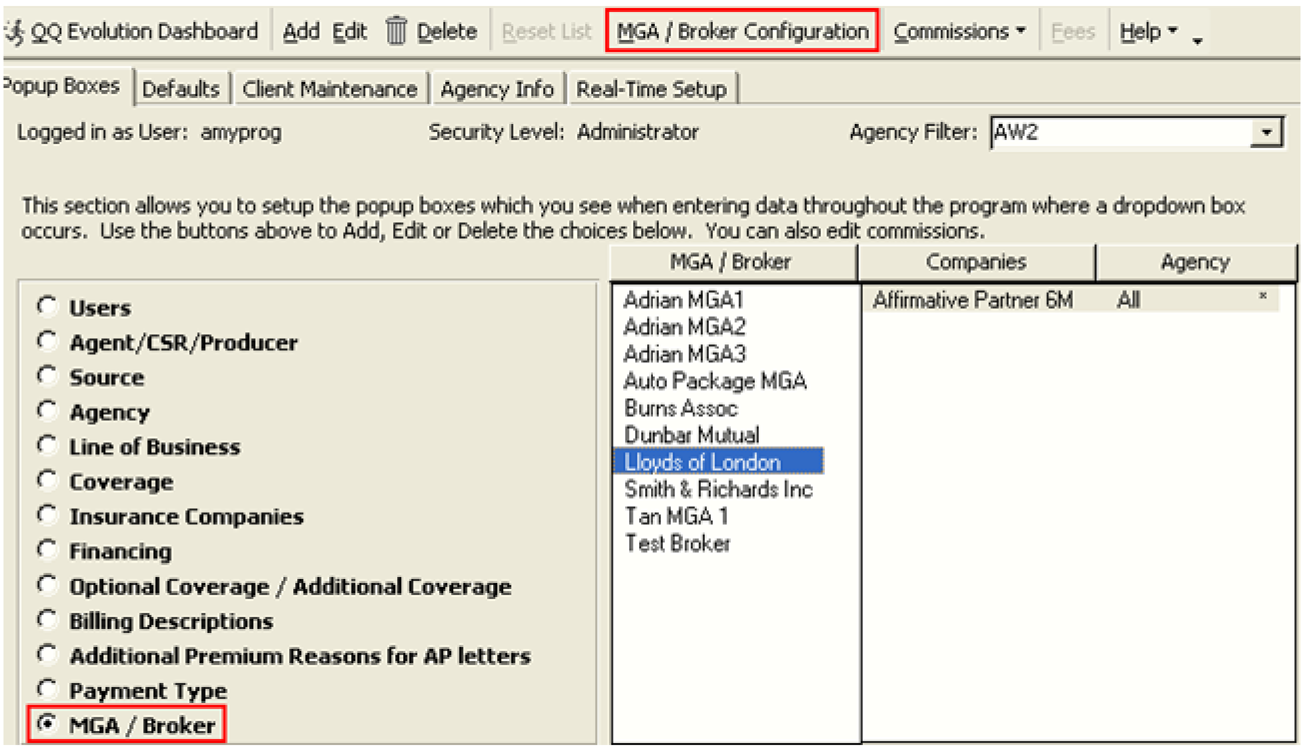


When you select the New button to add a fee another box will open. Here you will type in the name of the fee, choose if it is by percentage or flat amount, and put the percentage or dollar amount in. If the fee you have entered is “commissionable”, put a check next to it. If you are using QQWebRater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

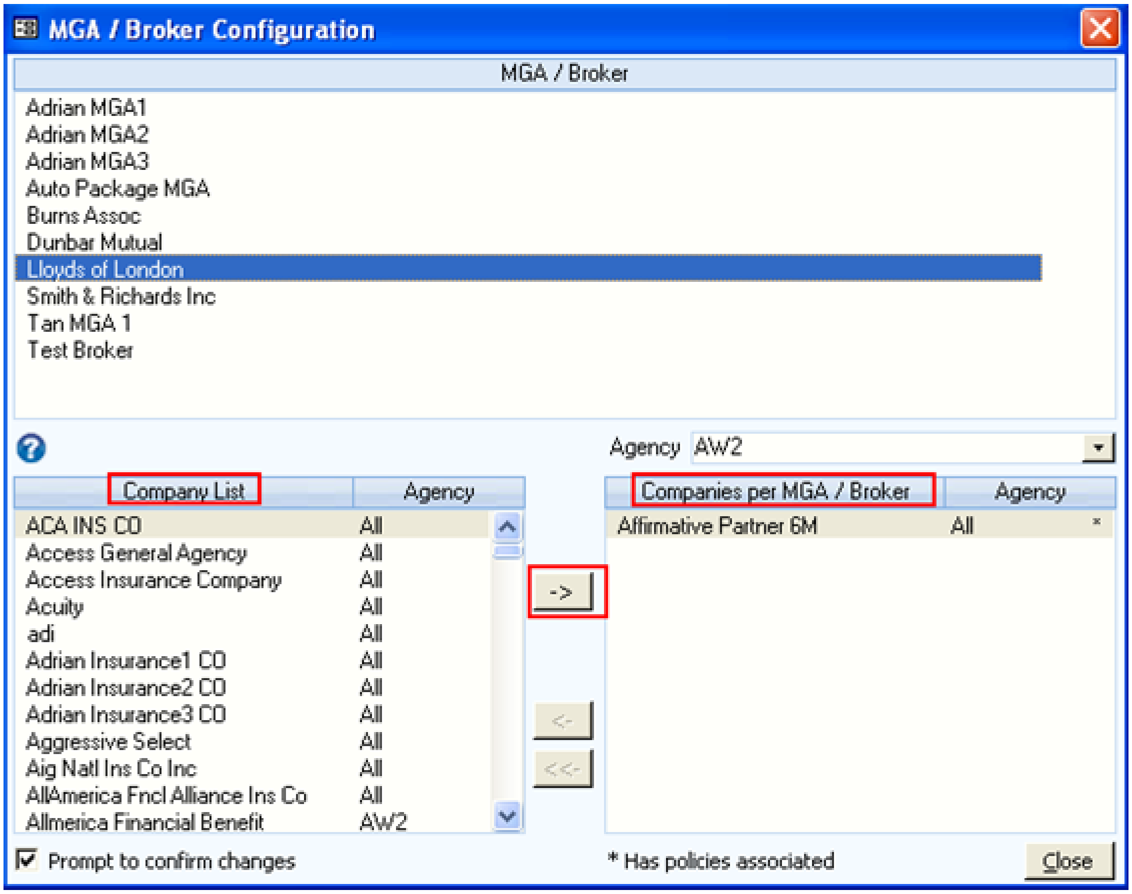
Now when you set up the commission structures as previously shown and you need to add a company fee to the structure you will click on the “Company Fee Config” button and select the fees.

Setup MGA/Brokers

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



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, and then 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.



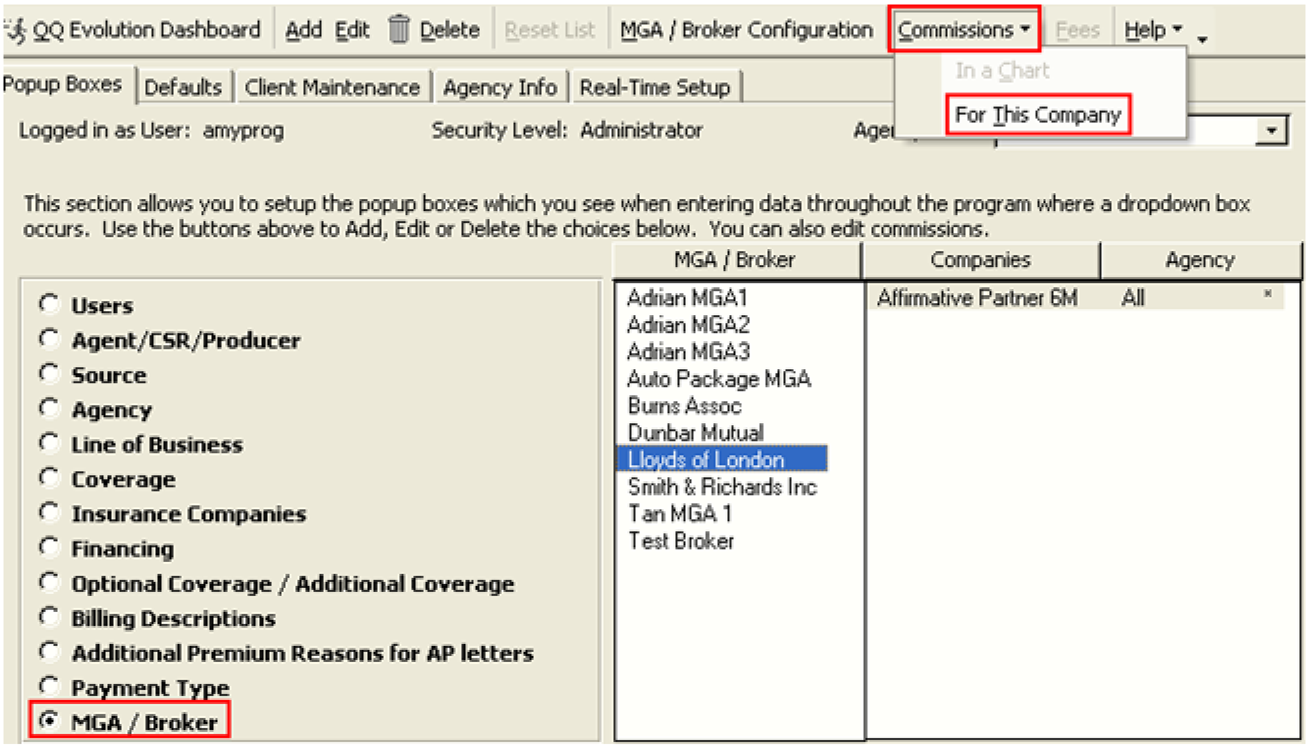
If you need to edit the MGA/Broker linked list, you can remove a company by selecting the company name and clicking the left arrow. When you are done adding or removing companies repeat the process as needed for the other MGA/Brokers listed and then click “Close.”

Each insurance company 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 and then click on 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.

You will see your M GA/Broker in the upper right of the box. The insurance company you are setting the structure for is listed on the upper left. You have the ability to set separate commission structures for each insurance company associated to the MGA/Broker.

The MGA/Broker commission structure is setup in the same manner as the insurance company. Please refer to the earlier parts of this document on how to set up agency commission and follow those instructions.

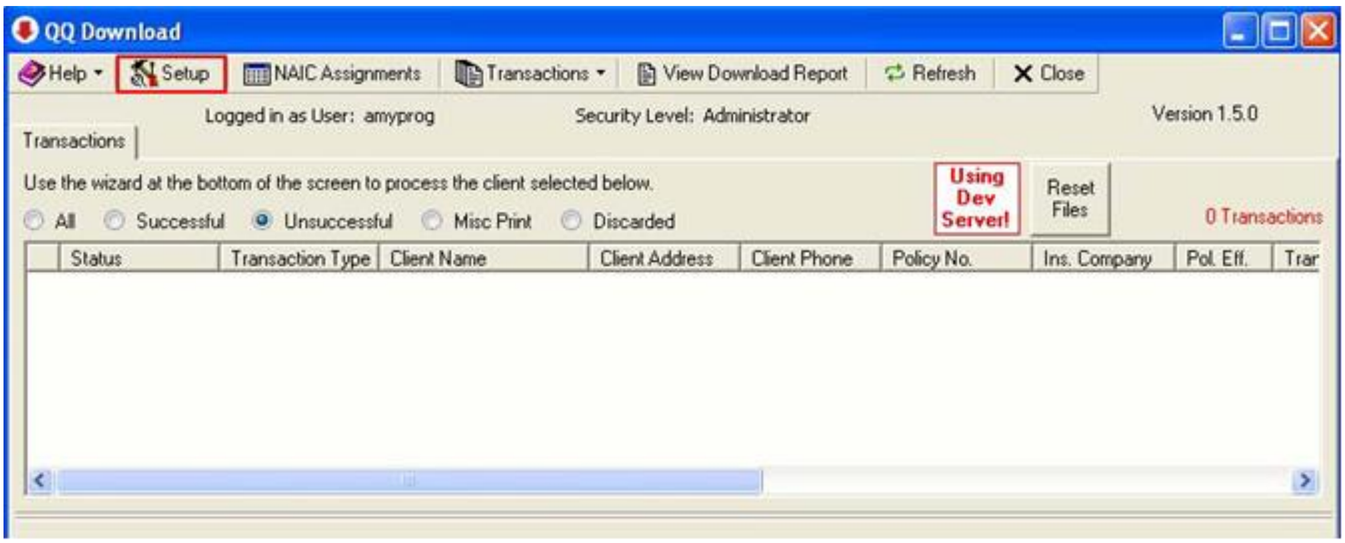


QQDownload

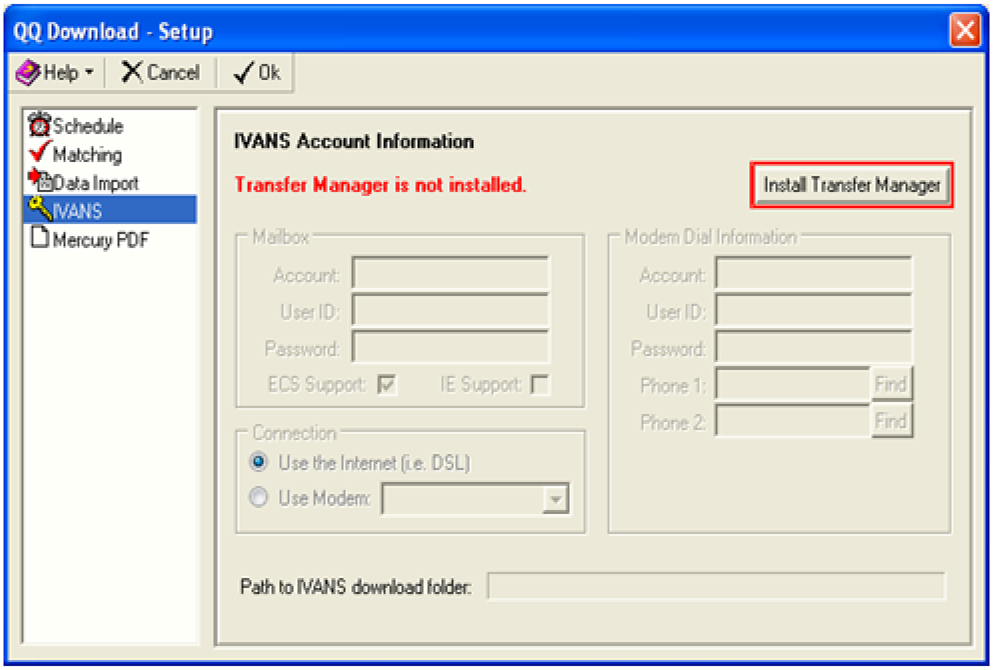
Installing TM.net for QQDownload

From the Dashboard of QQEvolution 2 select Carrier Download

QQDownload will appear in a separate window that you can run in addition to QQEvolution 2. On the toolbar at the top of the QQDownload program, select “Setup”.

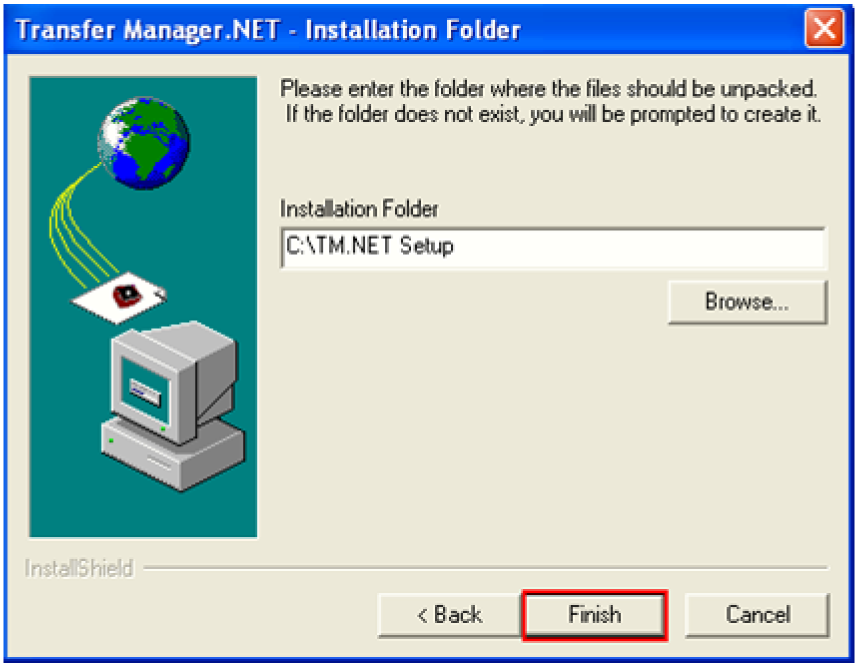


Click on IVANS box on the left then locate and select the button **"Install Transfer Manager."** A window will come up asking you if you would like to install Ivan's Transfer manager, click on "YES."

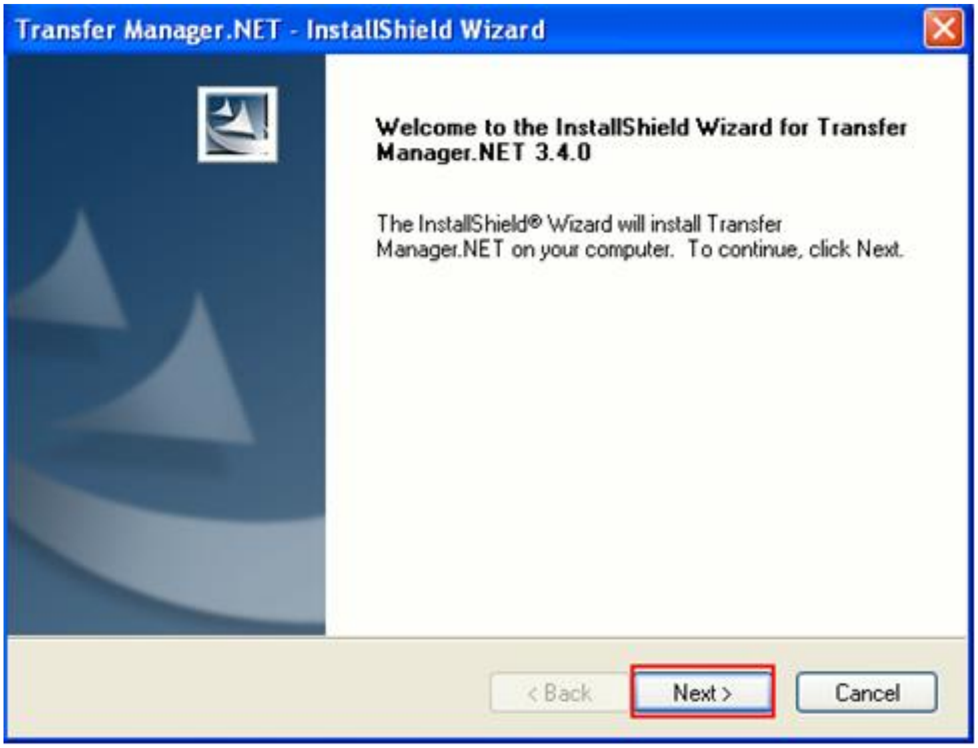


Click 'Next' on the "Transfer Manager.Net" screen

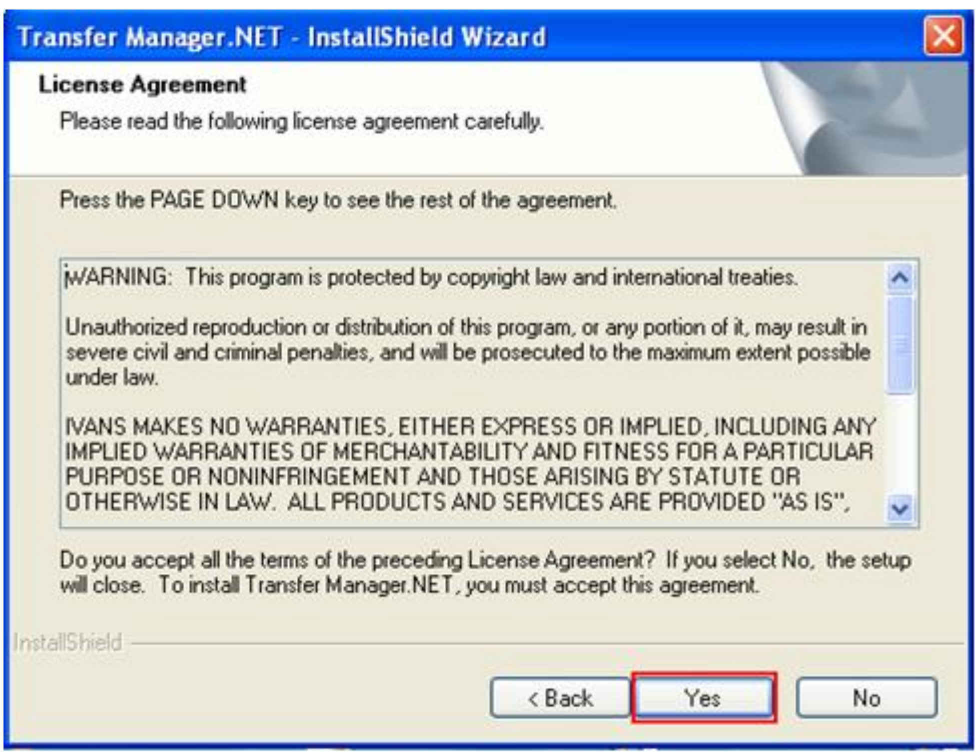
On the next screen, click “Finish.” Please do not change the path for the destination of the folder where Transfer Manager.NET will be installed. The files will then unpack themselves.



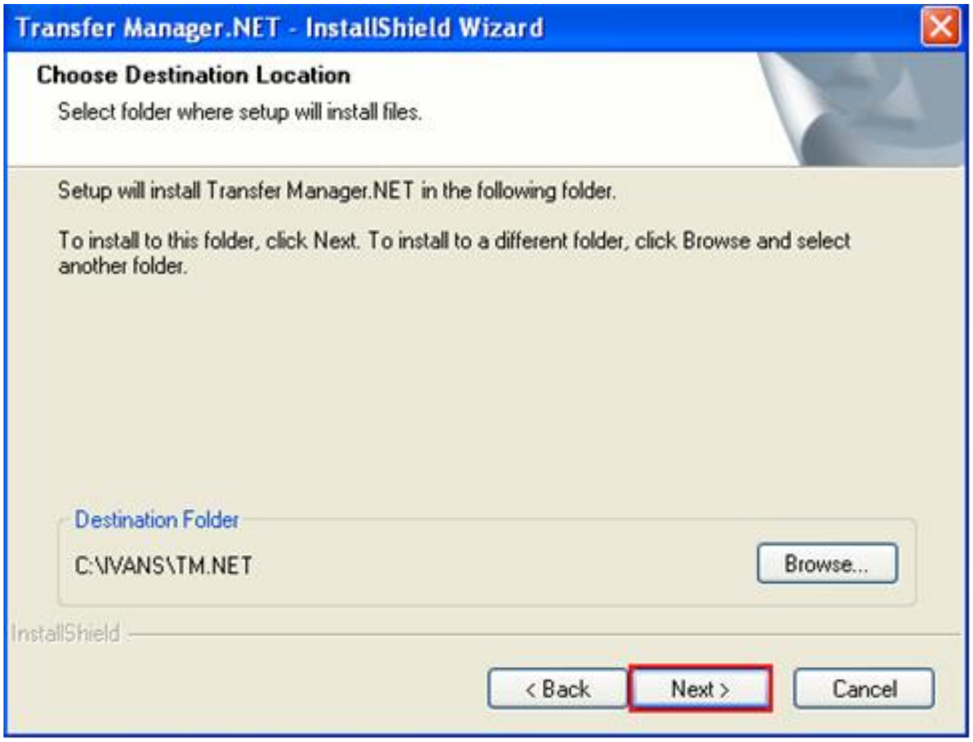
After the files have been unpacked the install for Transfer Manager.NET will appear, click on “Next.”



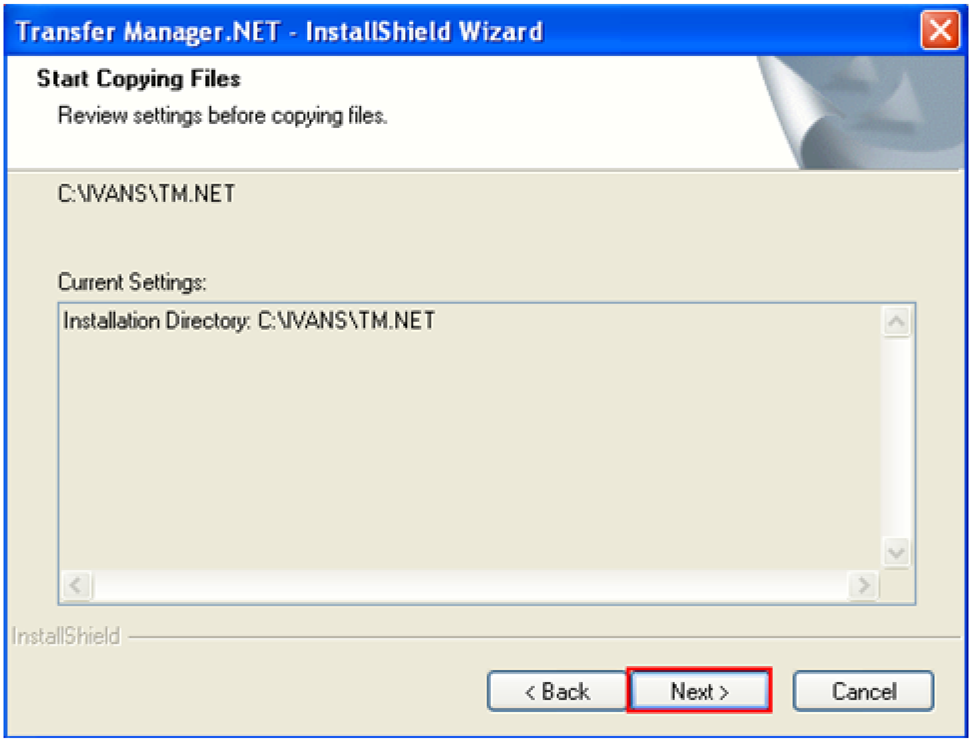
The license agreement will now appear, click on “Yes.”



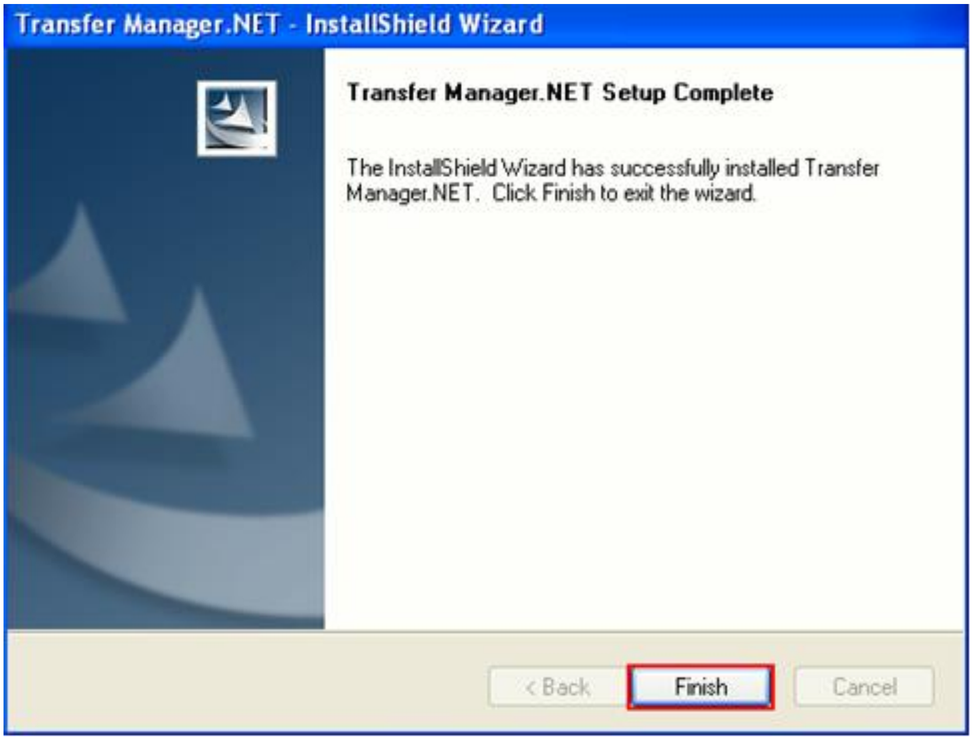
The box asking for the install destination will now open; do not change the path that is already listed. You will click on “Next.”



The install will now continue and start copying the necessary files, click on “Next.”



When the installation and setup is complete, click on “Finish.”

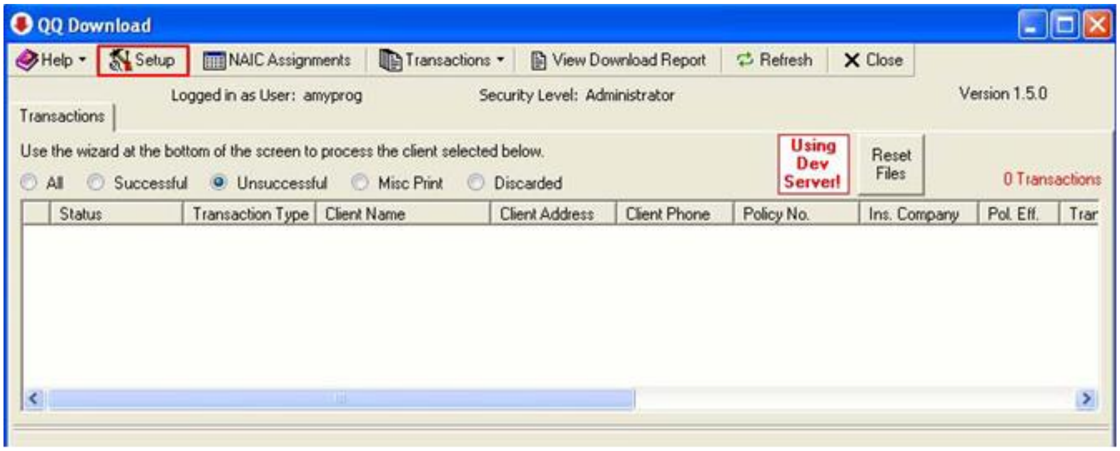

Transfer Manager.NET - InstallShield Wizard
Transfer Manager.NET Setup Complete
The InstallShield Wizard has successfully installed Transfer Manager.NET. Click Finish to exit the wizard.
< Back
Finish
Cancel

Configure QQDownload to Process Transactions from IVANS

You now will need to configure your IVANS Account information in the QQDownload program. This mailbox is where most of the participating carriers will download the transactions that will process in QQDownload. Follow these instructions to setup the IVANS account.

1. From the dashboard of QQEvolution 2, select Carrier Download.

2. QQDownload will appear in a separate window that you can run in addition to QQEvolution 2. You will select "Setup" on the top Ribbon.

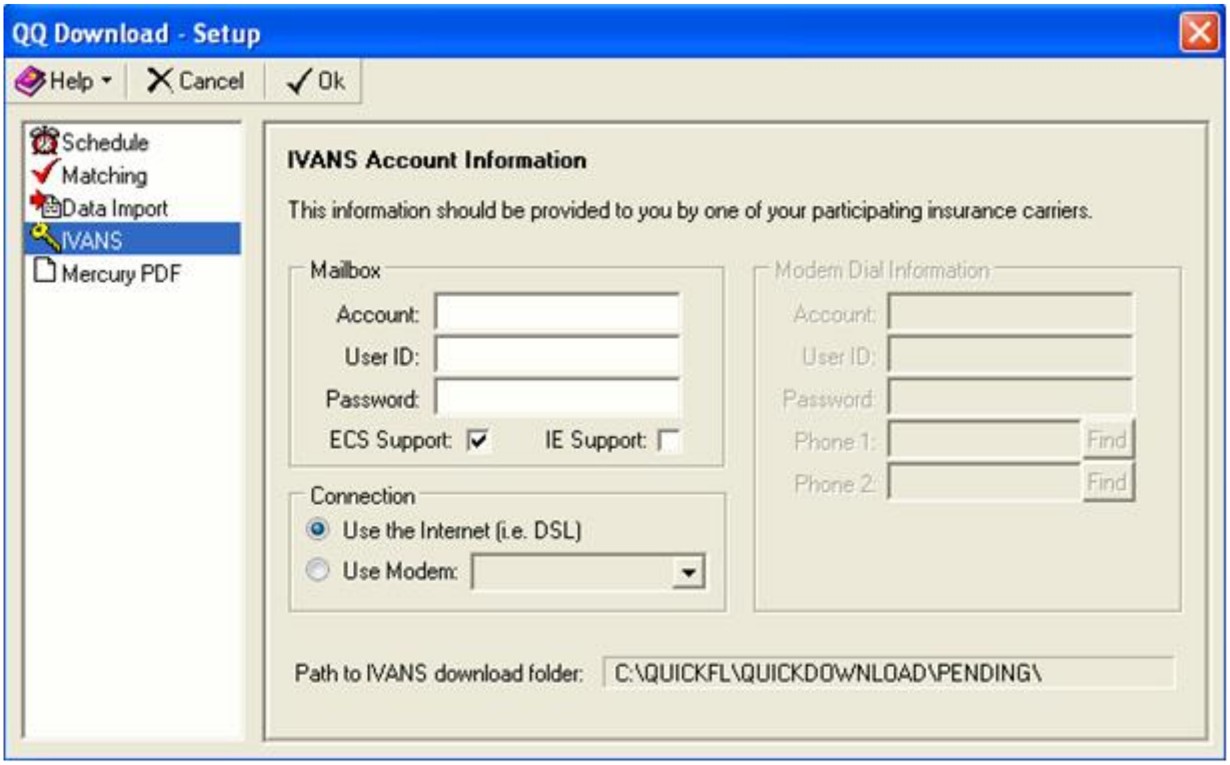


3. You will see the QQDownload Setup screen; locate the IVANS Account information section.
4. Enter your IVANS mailbox number that your insurance carrier has provided you. The IVANS mailbox number is usually in a specific format like the following:

   Example:

   Account: yd555x
   User ID: yx59x
   Password: yx59x

   The above example is not an actual IVANS' mailbox. You must also make sure to enter the IVANS mailbox in lower case letters. If you enter the mailbox information in upper case, QQDownload will tell you that the mailbox is invalid.



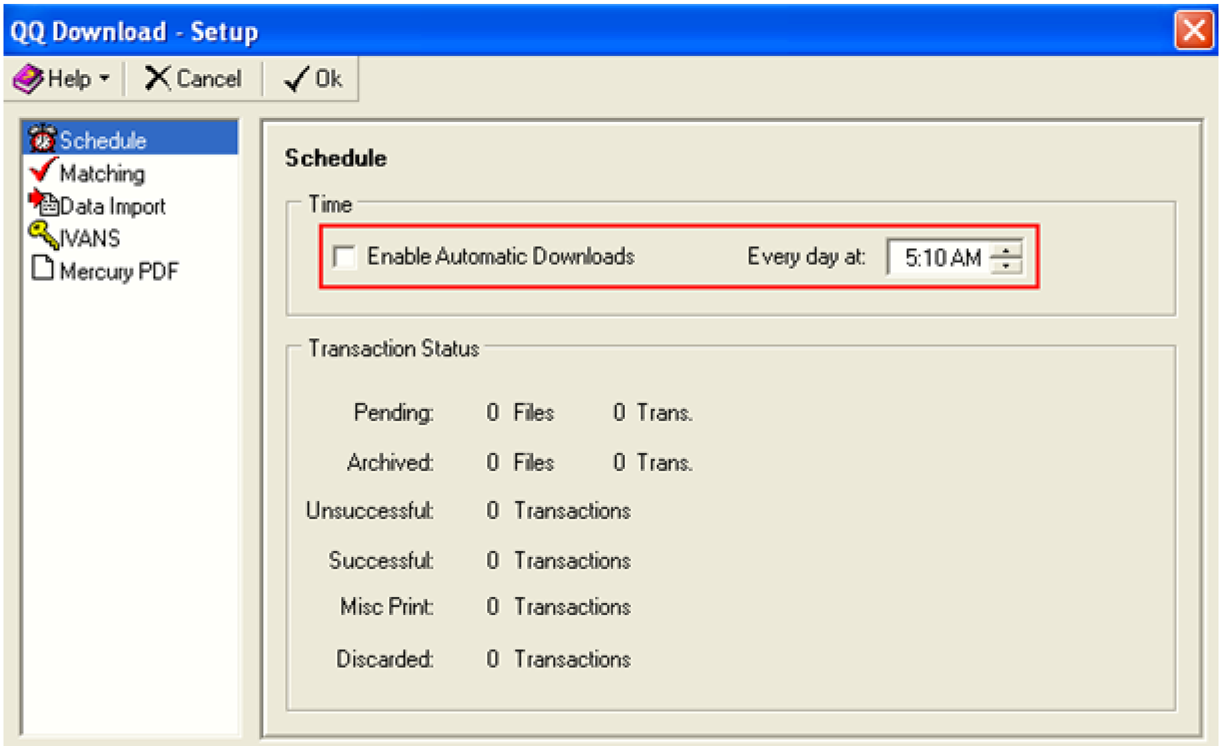
5. Once you have successfully setup the IVANS account information in QQDownload, contact your insurance carrier and notify them that you are ready to begin receiving downloads. Depending on the participating insurance carrier, you may request an initial download from that carrier.

It is recommended that you receive your download from the first carrier only for the first several days after setting up QQDownload. This will allow you to become accustomed to the feature and how to use it. Once you are ready contact your other carriers to start doing downloads with them. You will be providing them the same mailbox information as you entered when setting the IVANS mailbox up.

When requesting your initial “Book of Business” be sure to ask the carrier what they will be sending. There are several different ways carriers send this information. Some carriers will send the full book which includes all the business you have written with them. Other carriers will send a snap shot of the policy as it stands at the point in time the download was requested. This means if the last action taken on a policy was an endorsement, the full policy information will not be sent, only the endorsement. When this occurs a user will then need to manually enter the policy and then process the endorsement. For the carriers that send the snap shots ask them if it is possible to get your full book, some may have this ability

Configure remainder of QQDownload

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.

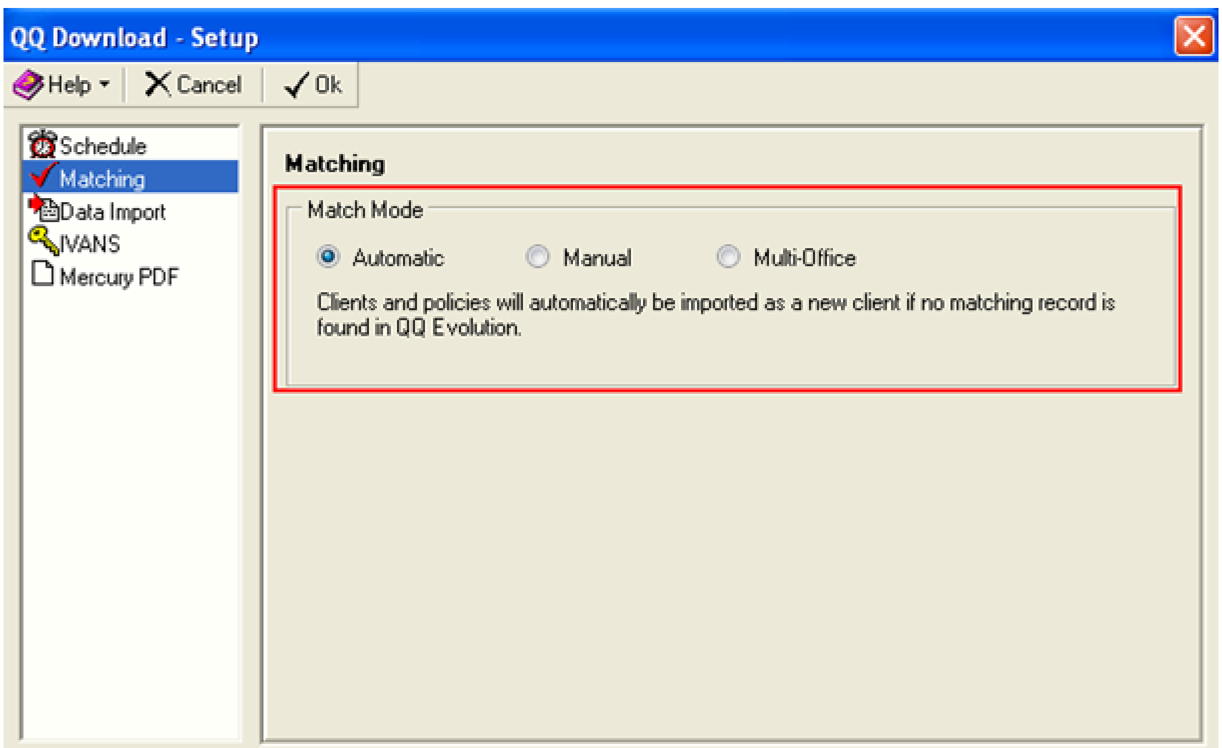


Now we would choose which Match Mode to use when importing the clients into QQEvolution 2.

In **Automatic mode**, if there is no match found (e.g., name, policy number, address, etc.) in your existing clients and/or policies, QQEvolution 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.

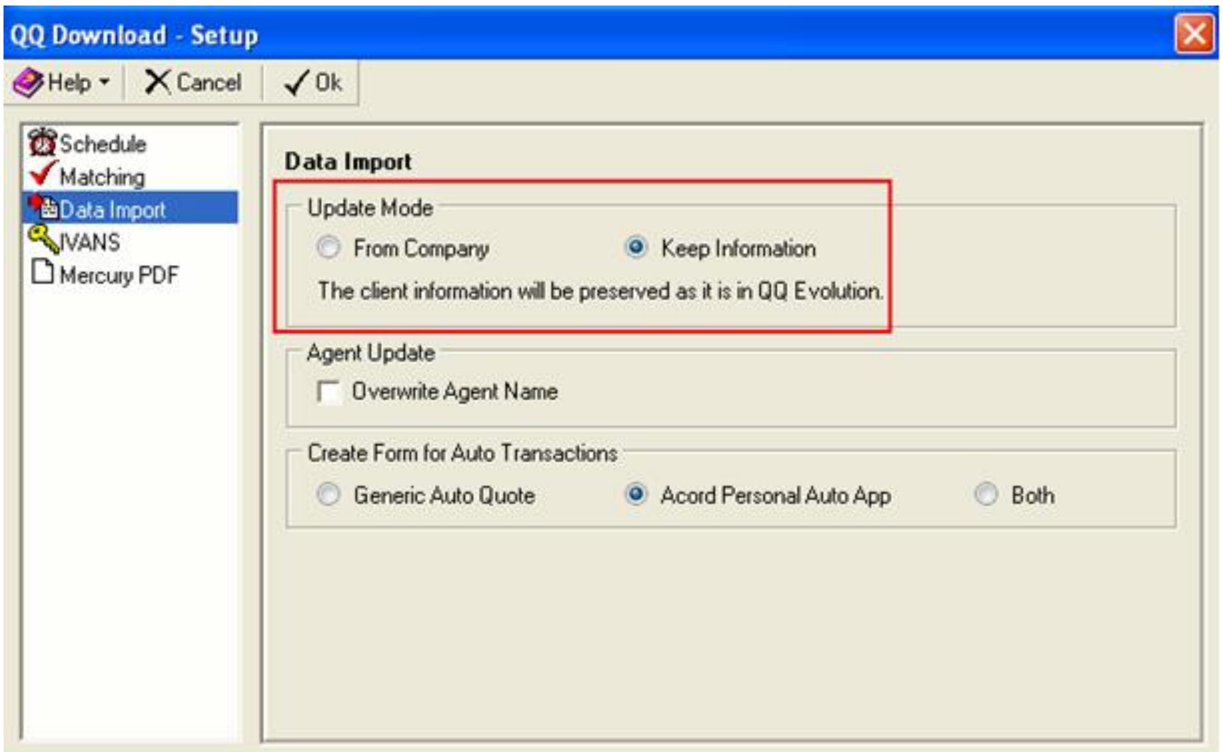
A third mode is available, **Multi-Office**. This feature can be used by agencies with multiple offices which process downloads from carriers with ONE agent code for all offices. You will be able to download the transactions for all offices to one location. Transactions with a match found within QQEvolution 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.



The Data Import section contains three different options. The first is "Update Mode."

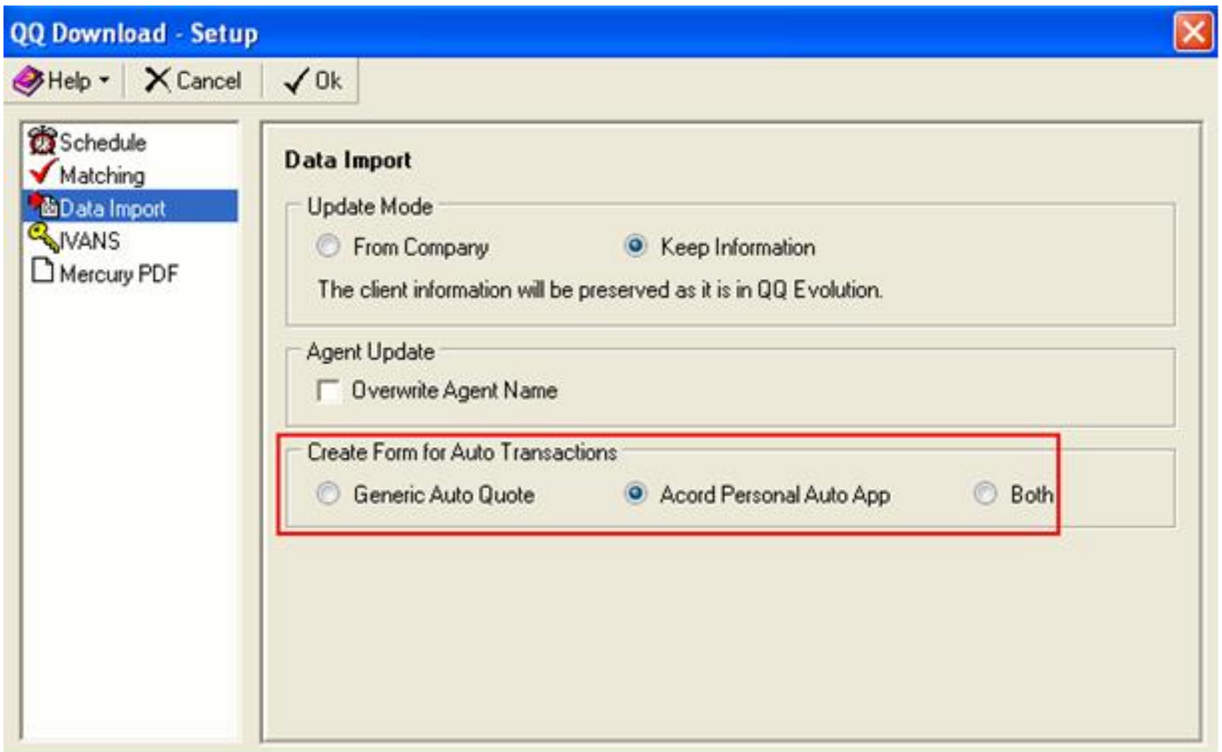
From Company -- This will overwrite certain client and policy information on the client's record with the information sent by the carrier.

Keep Information -- With this selected no information on the client or policy will be overwritten.



The second option available in Data Import is **Agent Update**. If you check mark this feature the agents 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.

The last 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.



Mercury Downloads

Mercury Insurance Companies do not use IVANS.

QQEvolution 2 does process Mercury downloads but in a different way than when they are sent from IVANS.

There is a separate document that explains how to set up and process Mercury downloads, please refer to it for setting up Mercury downloads. This document can be found in the Product Support Self Service Portal in the Knowledge Base.

The Self Service Portal can be accessed from our web site at http://www.qqsolutions.com/login.aspx?returnURL=ssportal

Progressive Downloads

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.

When the technician for Progressive asks for the Path to our QQDownload Program, please make sure that you give them the same path that you use for your IVANS Account, if you are on a network and QQDownload is configured to send the information to your Server or Main Computer please make sure to enter the correct path.

The common path for your local PC is C:\QuickFL\QuickDownload\Pending

C:\ is always your local hard drive. A network drive may be any other letter not currently used by the PC.

If you are unsure of your network configuration, please contact your Network Administrator for this information; QQSolutions Product Support Representatives are not responsible for your local network setup.