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## Quick Start Guide

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For Gold and Silver Editions

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**IMPORTANT NOTE:** Before using this guide, please make sure you have already set up your settings in QCEvolution 2 Utilities. The Utilities' defaults are very important to the entering of clients and policies. Please visit our website for training Webinars or view QCEvolution 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
<b>Operating System</b>	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.
<b>Computer</b>	Windows-based desktop or notebook computer with at least a Pentium class processor.
<b>Memory</b>	2 GB RAM or higher.
<b>Hard Disk</b>	2 GB or more of free disk space.
<b>Internet Access</b>	Broadband
<b>Scanner</b>	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**

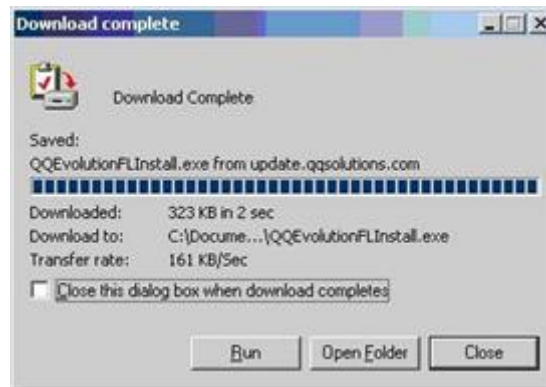
1. Open your internet browser and enter <http://www.qgsolutions.com/> into the address bar.
2. Once at the Web site, click on Downloads, then locate the “QQSolutions Updates & Installations” and click on the link.
3. On the next screen, you will be required to enter your account login information. The 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.

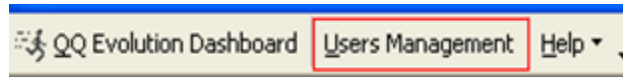
12. Once you complete the installation on your computer, you will see a new QQEvolution 2 icon appear on your desktop.



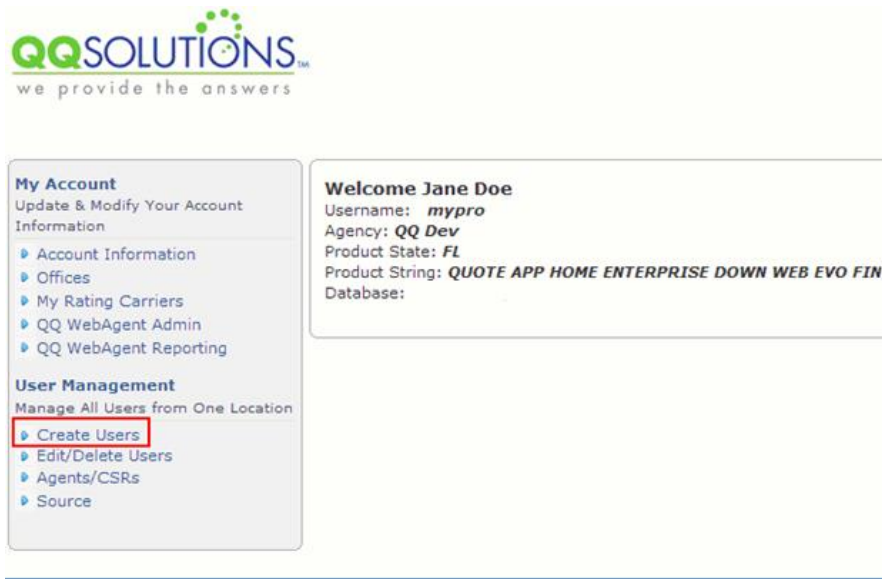
13. Login into QQEvolution 2 with the User ID and Password provided in the previous email you received. Enter the Utilities and complete the setup of all your users, agents, companies, commissions and defaults.

## 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.

**Step 1: User Details**  
\* -: Denotes a required field | -o -: Denotes an error in the field

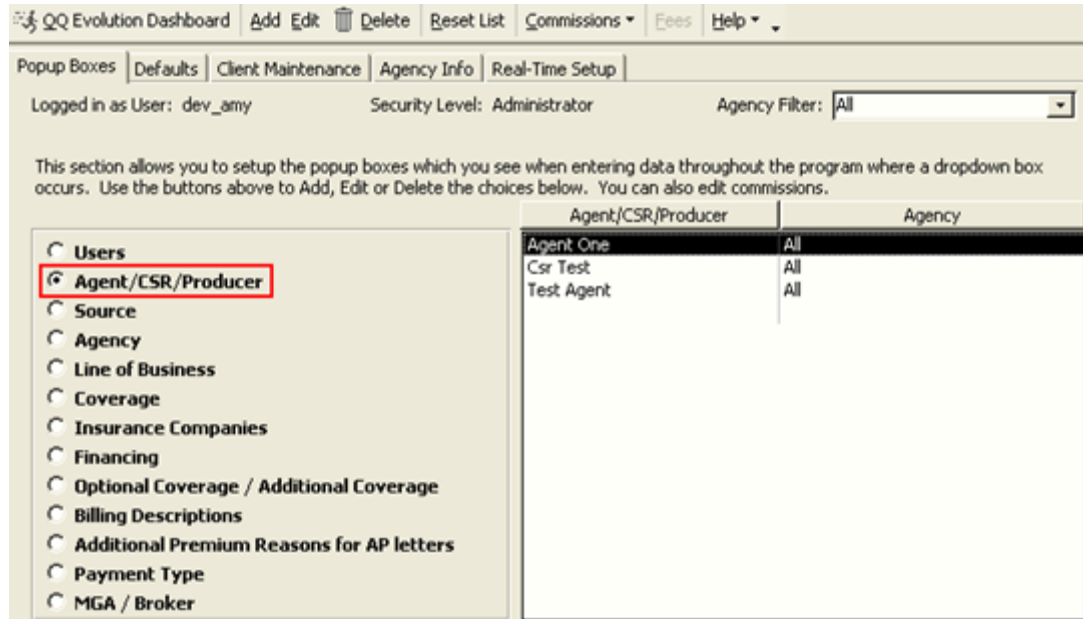
*First Name:	<input type="text" value="Producer"/>	
Middle Name:	<input type="text" value="K"/>	
*Last Name:	<input type="text" value="Test"/>	
*E-Mail Address:	<input type="text" value="producer@qqonline.com"/>	
*Username:	<input type="text" value="producer-test"/>	<a href="#">(Check Availability)</a>
*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"/>	

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**.



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

- 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

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.



Type Entry to Add: Janet Teller

Add To List | Done Adding | Agency: All

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.

**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.
  - **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.

**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

## Create Sources

1. In the Utilities, select Source.

The screenshot shows the 'Real-Time Setup' tab in the QQEvolution 2 software. The 'Agency Filter' is set to 'AW2'. On the left, a list of categories is shown with radio buttons. The 'Source' category is selected and highlighted with a red box. On the right, a table displays the current sources and their associated agencies.

Source	Agency
Bench Ad	All
Flyer -- New Times	All
Online Ad - Sun News	All
Referral	All
Walk In	All
Yellow Pages	All

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

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: Jerry Jay Boyle

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.

**Agency**

- ☐ 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 List:

- Antonio Antonio Antonio Antonio Antonio Antonio 12
- AW1
- AW2
- AW3
- Bret Roberts
- Bret Roberts 2
- Bret Roberts CA
- Clark Berry
- Coconut Cave
- Coral Springs
- Deerfield Beach
- Erik Finstad (Florida - Desktop)
- Gremilns
- Jerry Jay Boyle
- Joe Insurance
- Joe's Fried Chicken Ins
- Larry Smith

3. Click on Add

Agency Fees

Fee Name	Agency	MGA / Broker	Company	Line of Business	Coverage	Business Type	Default Amount	Comm
Agency Fee	All	All	All	All	All	All	\$ 2.00	Yes
Binder Fee	All	All	All	All	All	All	\$ 5.00	No
Misc Fee	Jerry Jay Boyle	All	All	All	All	All	\$ 20.00	Yes
MVR	All	All	All	All	All	All	\$ 1.00	Yes

\*Hold Ctrl to Make Multiple Selections

[Add] [Edit] [Duplicate] [Delete] [Close]

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

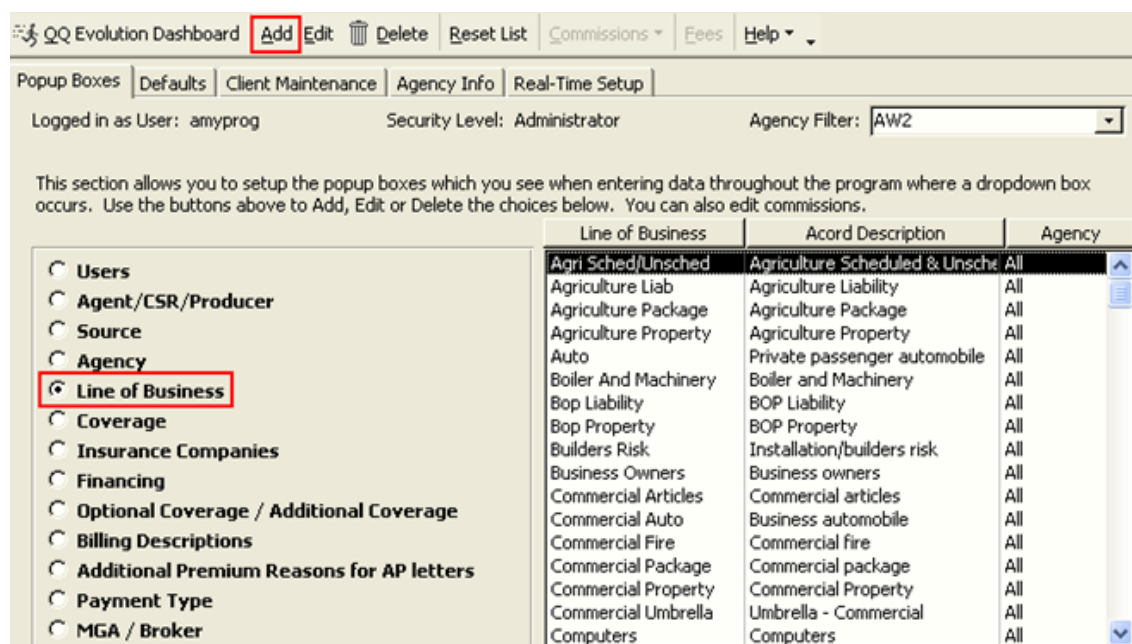


## Setup Line of Business

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



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

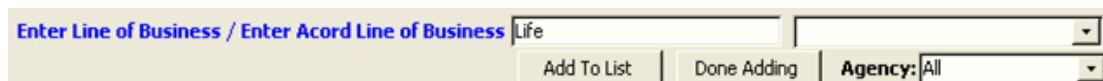
Popup Boxes Defaults Client Maintenance Agency Info Real-Time Setup

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.

	Line of Business	Acord Description	Agency
<input type="radio"/> Users	Agri Sched/Unsched	Agriculture Scheduled & Unsche	All
<input type="radio"/> Agent/CSR/Producer	Agriculture Liab	Agriculture Liability	All
<input type="radio"/> Source	Agriculture Package	Agriculture Package	All
<input type="radio"/> Agency	Agriculture Property	Agriculture Property	All
<input checked="" type="radio"/> Line of Business	Auto	Private passenger automobile	All
<input type="radio"/> Coverage	Boiler And Machinery	Boiler and Machinery	All
<input type="radio"/> Insurance Companies	Bop Liability	BOP Liability	All
<input type="radio"/> Financing	Bop Property	BOP Property	All
<input type="radio"/> Optional Coverage / Additional Coverage	Builders Risk	Installation/builders risk	All
<input type="radio"/> Billing Descriptions	Business Owners	Business owners	All
<input type="radio"/> Additional Premium Reasons for AP letters	Commercial Articles	Commercial articles	All
<input type="radio"/> Payment Type	Commercial Auto	Business automobile	All
<input type="radio"/> MGA / Broker	Commercial Fire	Commercial fire	All
	Commercial Package	Commercial package	All
	Commercial Property	Commercial Property	All
	Commercial Umbrella	Umbrella - Commercial	All
	Computers	Computers	All

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



Enter Line of Business / Enter Acord Line of Business Life

Add To List Done Adding Agency: All

## 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.

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.

	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

Enter Coverage / Enter Line of Business

Add To List Done Adding Agency: All

Enter/modify the coverages you write

## Setup Insurance Companies

1. Open Utilities
2. Select Insurance Companies and click “Add”

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.

Company	Code	Agency
ACA INS CO		All
Access General Agency	AGN	All
Access Insurance Company	LIN	All
Acuity		All
adi	ADI	All
Adrian Insurance1 CO	QQQ	All
Adrian Insurance2 CO	RRR	All
Adrian Insurance3 CO	WWW	All
Affirmative Partner 6M	AFP	All
Aggressive Select	ARS	All
Aig Natl Ins Co Inc		All
AllAmerica Fncl Alliance Ins Co	AFA	All
Allmerica Financial Benefit	AFB	AW2
Amco ins co		All
American Access	AMC	All
American Century Cas Co	ACO	All
American Family Home ins co		All

**Insurance Companies**

Type Entry to Add: Insurance Co Code: NAIC Code: Agency: All

Add To List Done Adding Select From List...

Enter/modify the companies you write

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.

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

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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 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	Coverage
Agri Sched/Unsched	All
Agriculture Liab	15-Year Term
Agriculture Package	30-Year Term
Agriculture Property	Comp
Auto	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	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 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.

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 \***

	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.

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.

The screenshot displays the QQ Evolution Dashboard interface. At the top, there is a navigation bar with buttons: "Add", "Edit", "Delete", "Reset List", "Commissions" (highlighted with a red box), "Fees", and "Help". Below this is a sub-navigation bar with tabs: "Popup Boxes", "Defaults", "Client Maintenance", "Agency Info", and "Real-Time Setup". The main content area shows the "Agency" section selected in the left-hand menu, which is also highlighted with a red box. The right-hand pane displays a list of agencies: "AW1", "AW2" (highlighted), and "AW3". Above the list, there is a text field labeled "Agency Filter" with "AW2" entered. The top of the main content area includes status information: "Logged in as User: amyprog", "Security Level: Administrator", and "Agency Filter: AW2". A descriptive text block states: "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."

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.

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

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.

The screenshot shows the QQ Evolution Dashboard with the 'Fees' tab selected. The 'Insurance Companies' section is highlighted in the left sidebar. The main area displays a table of insurance companies with their codes and agency assignments.

Company	Code	Agency
ACA INS CO		All
Access General Agency	AGN	All
Access Insurance Company	LIN	All
Acuity		All
adi	ADI	All
Adrian Insurance1 CO	QQQ	All
Adrian Insurance2 CO	RRR	All
Adrian Insurance3 CO	WWW	All
Affirmative Partner 6M	AFP	All
Aggressive Select	ARS	All
Aig Natl Ins Co Inc		All
AllAmerica Fncl Alliance Ins Co	AFA	All
Allmerica Financial Benefit	AFB	AW2
Amco ins co		All
American Access	AMC	All
American Century Cas Co	ACO	All
American Family Home ins co		All

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.

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 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.”

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

Popup Boxes Defaults Client Maintenance Agency Info Real-Time Setup

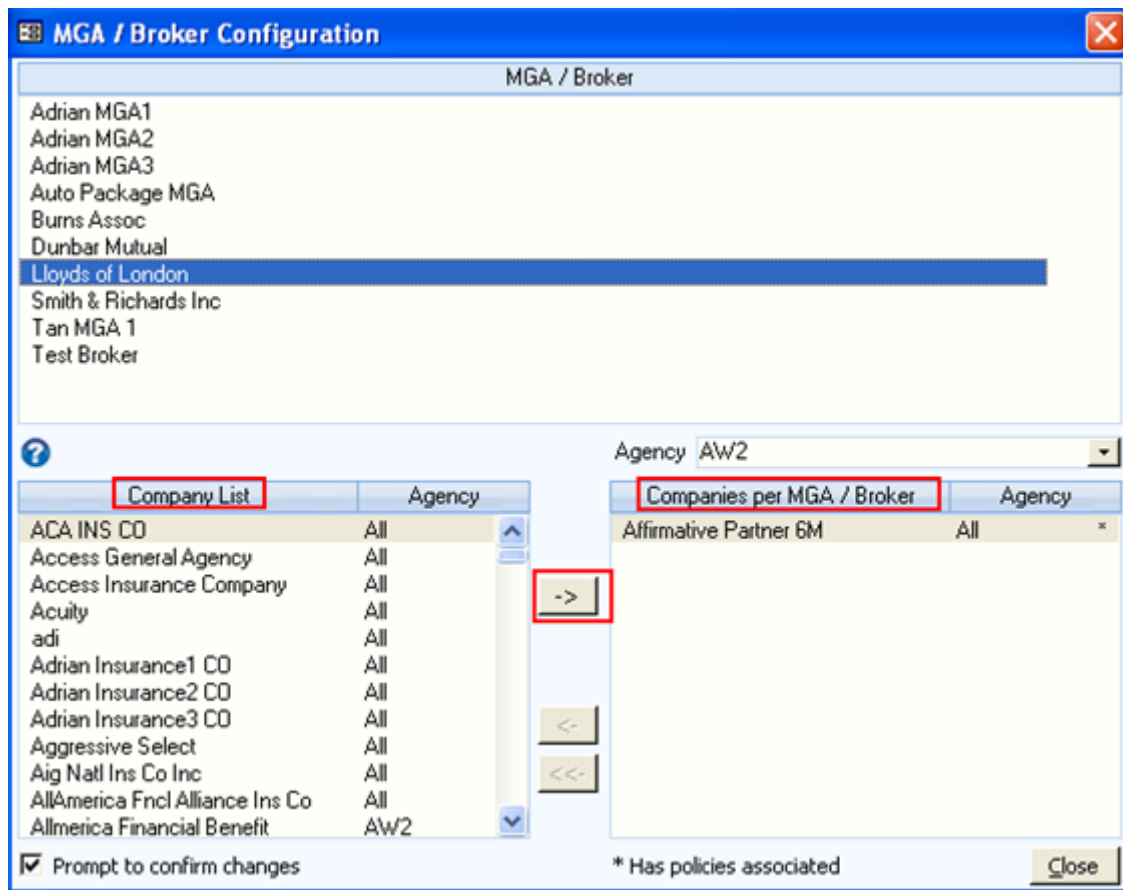
Logged in as User: amyprog Security Level: Administrator Agency Filter: AW2

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.

	MGA / Broker	Companies	Agency
<input checked="" type="radio"/> <b>MGA / Broker</b>	Adrian MGA1 Adrian MGA2 Adrian MGA3 Auto Package MGA Burns Assoc Dunbar Mutual <b>Lloyds of London</b> Smith & Richards Inc Tan MGA 1 Test Broker	Affirmative Partner 6M	All *

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.

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   Age

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.

**For This Company**

	MGA / Broker	Companies	Agency
<input type="radio"/> Users	Adrian MGA1	Affirmative Partner 6M	All *
<input type="radio"/> Agent/CSR/Producer	Adrian MGA2		
<input type="radio"/> Source	Adrian MGA3		
<input type="radio"/> Agency	Auto Package MGA		
<input type="radio"/> Line of Business	Burns Assoc		
<input type="radio"/> Coverage	Dunbar Mutual		
<input type="radio"/> Insurance Companies	<b>Lloyds of London</b>		
<input type="radio"/> Financing	Smith & Richards Inc		
<input type="radio"/> Optional Coverage / Additional Coverage	Tan MGA 1		
<input type="radio"/> Billing Descriptions	Test Broker		
<input type="radio"/> Additional Premium Reasons for AP letters			
<input type="radio"/> Payment Type			
<input checked="" type="radio"/> <b>MGA / Broker</b>			

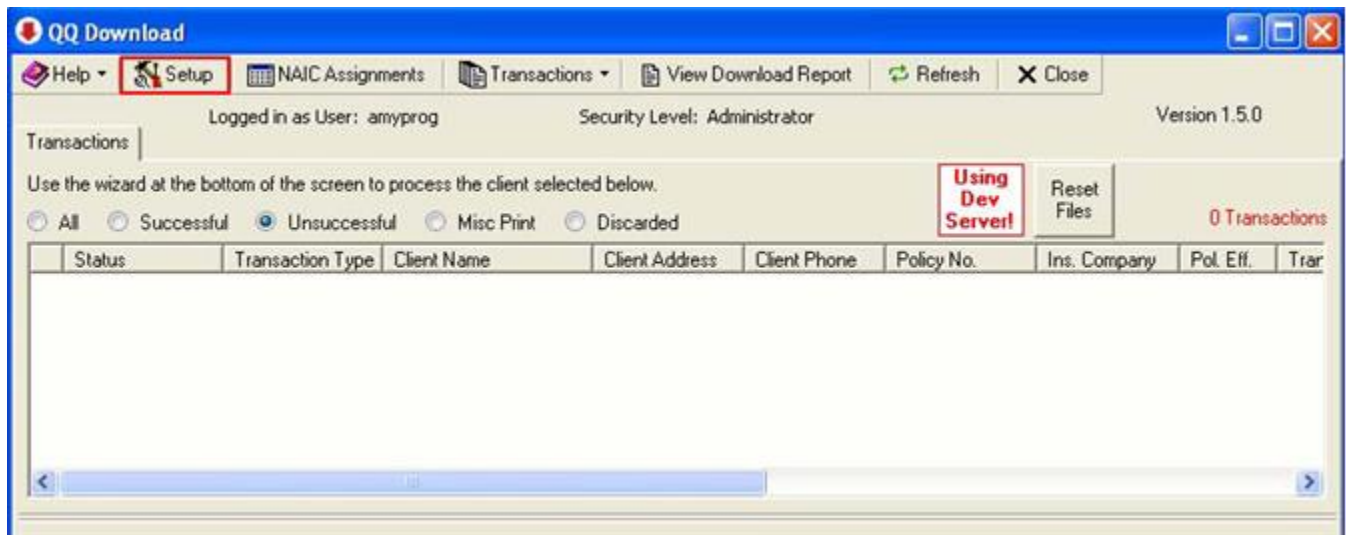
## QQDownload

### Installing TM.net for QQDownload

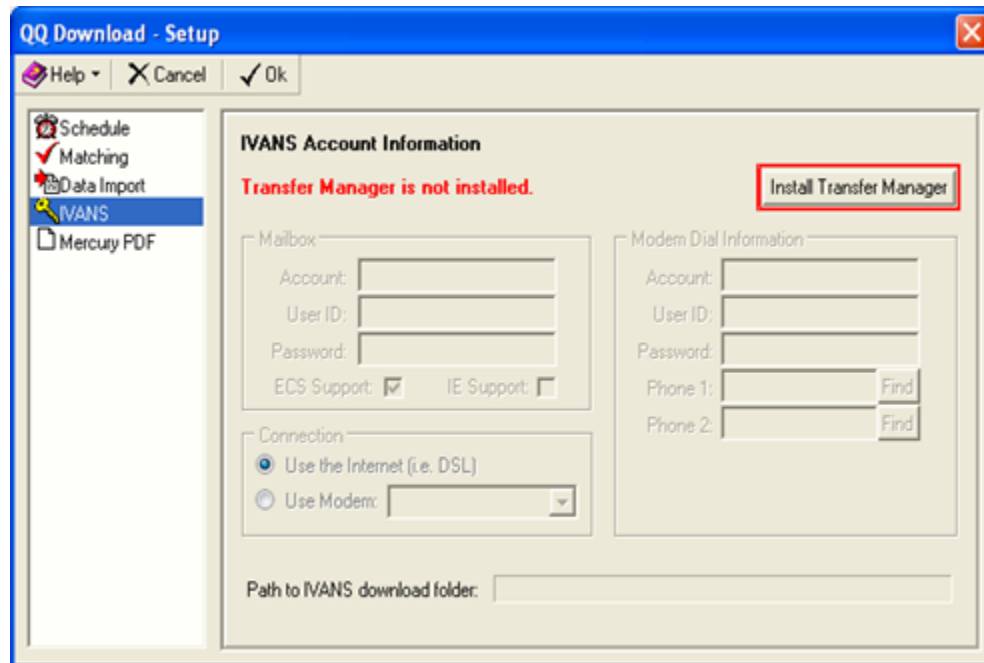
From the Dashboard of QQEvolution 2 select Carrier Download



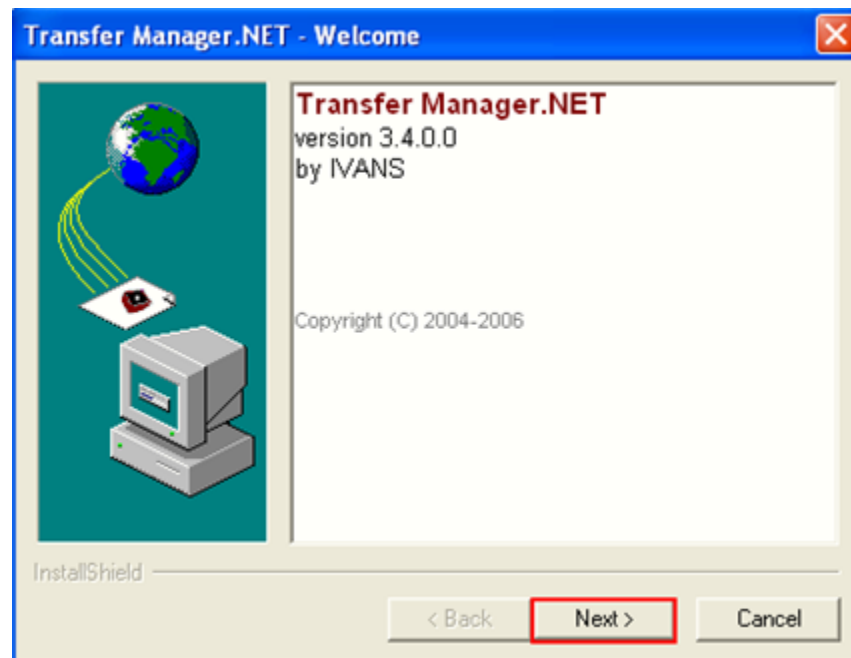
QQDownload will appear in a separate window that you can run in addition to QQEvolution 2. On the toolbar at the top of the QQDownload program, select "Setup".



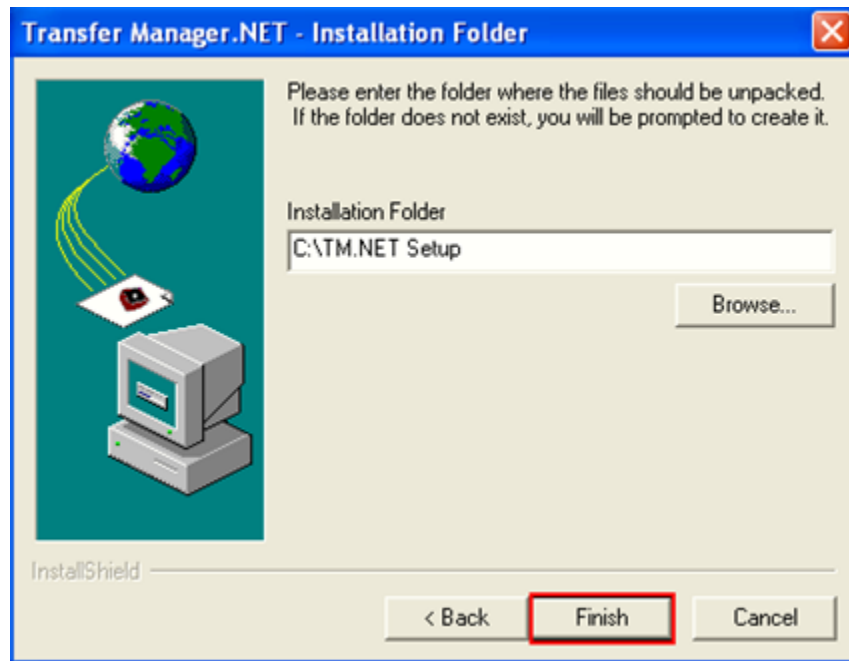
Click on IVANS box on the left then locate and select the button **"Install Transfer Manager."** A window will come up asking you if you would like to install Ivan's Transfer manager, click on "YES."



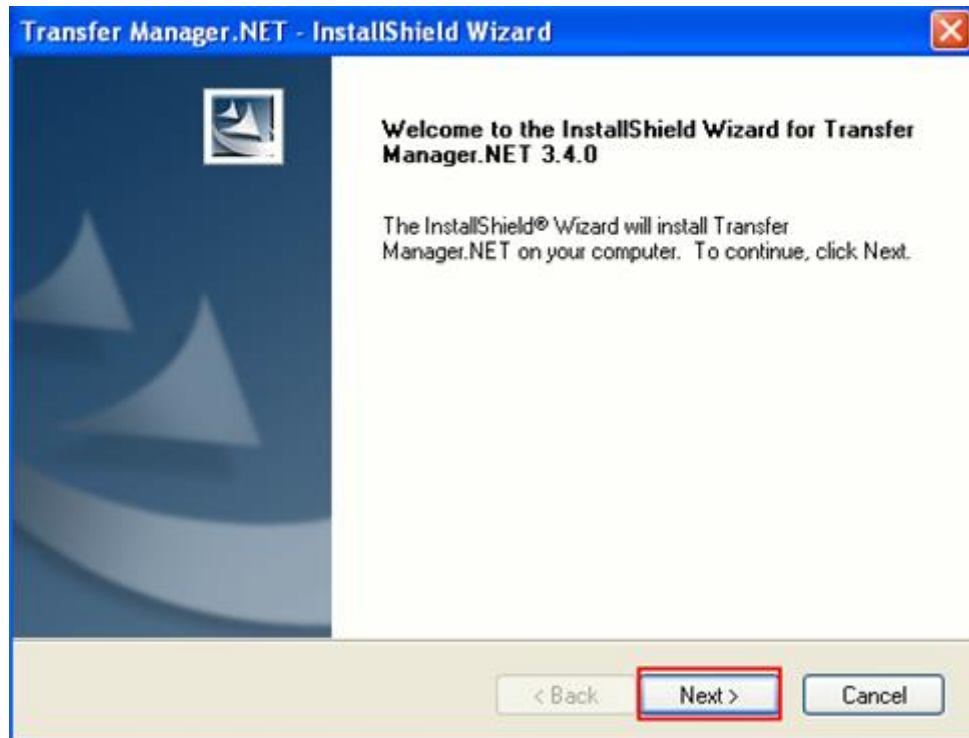
Click 'Next' on the "Transfer Manager.Net" screen



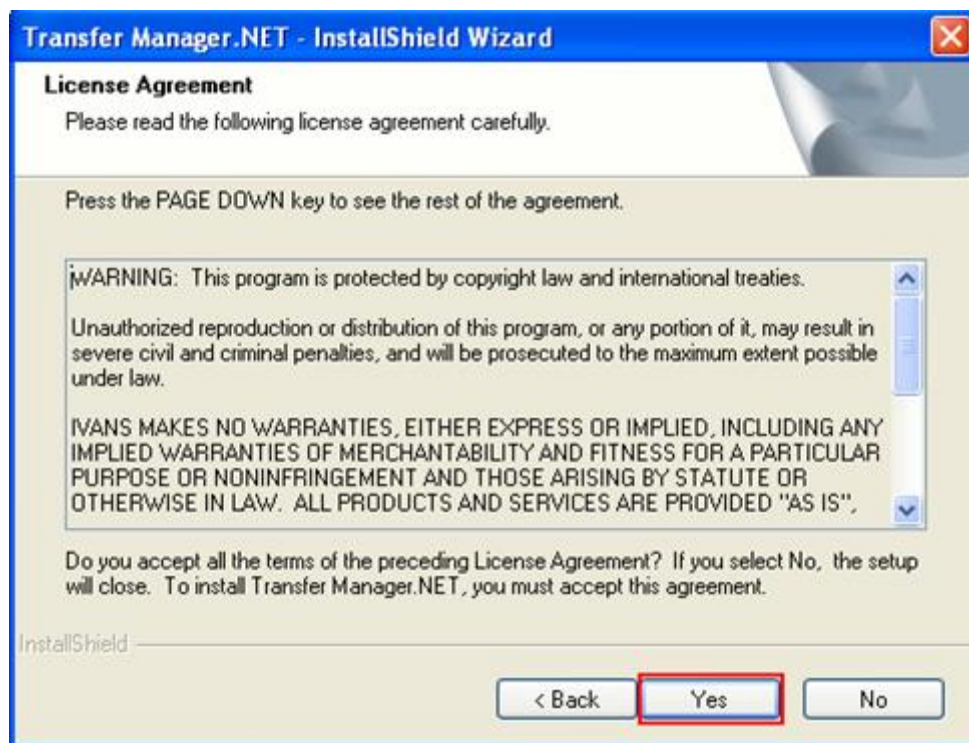
On the next screen, click “Finish.” Please do not change the path for the destination of the folder where Transfer Manager.NET will be installed. The files will then unpack themselves.



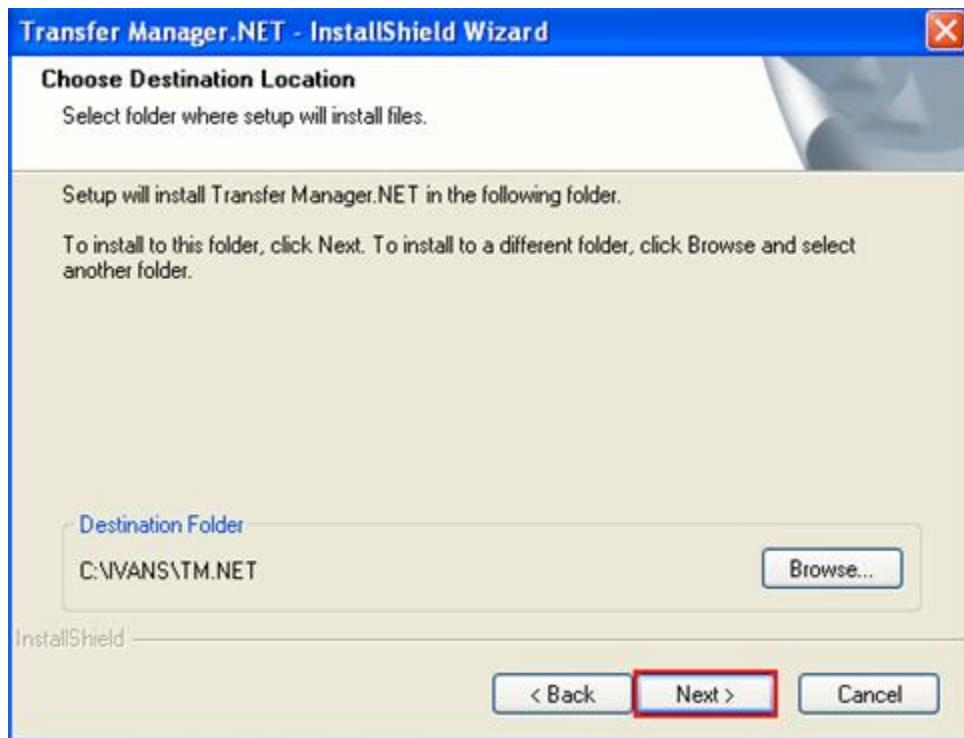
After the files have been unpacked the install for Transfer Manager.NET will appear, click on “Next.”



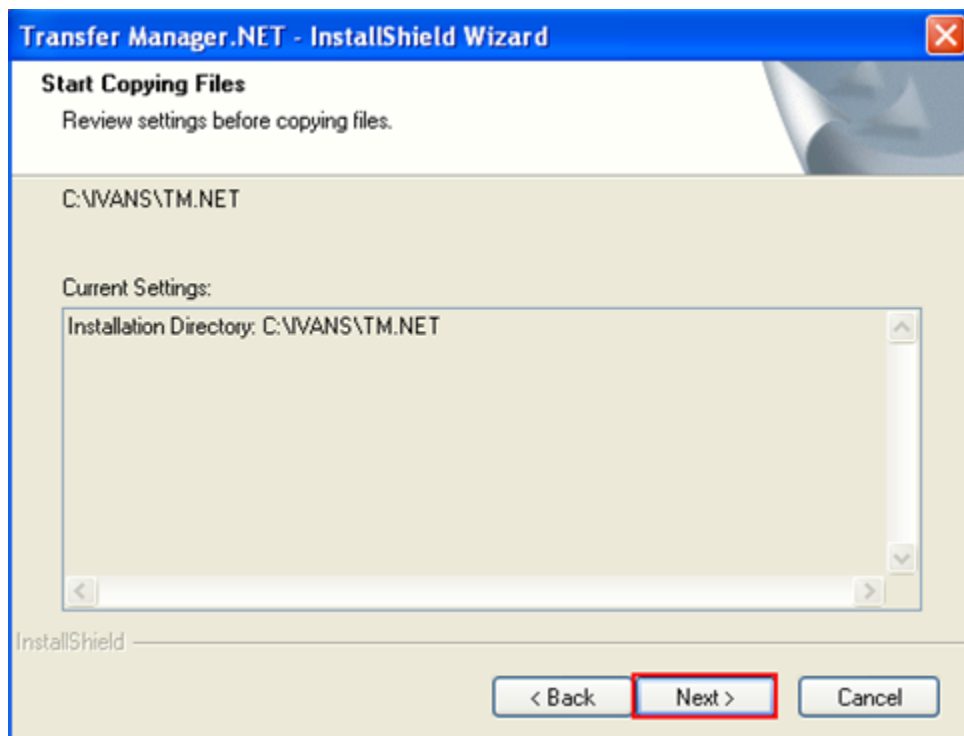
The license agreement will now appear, click on “Yes.”



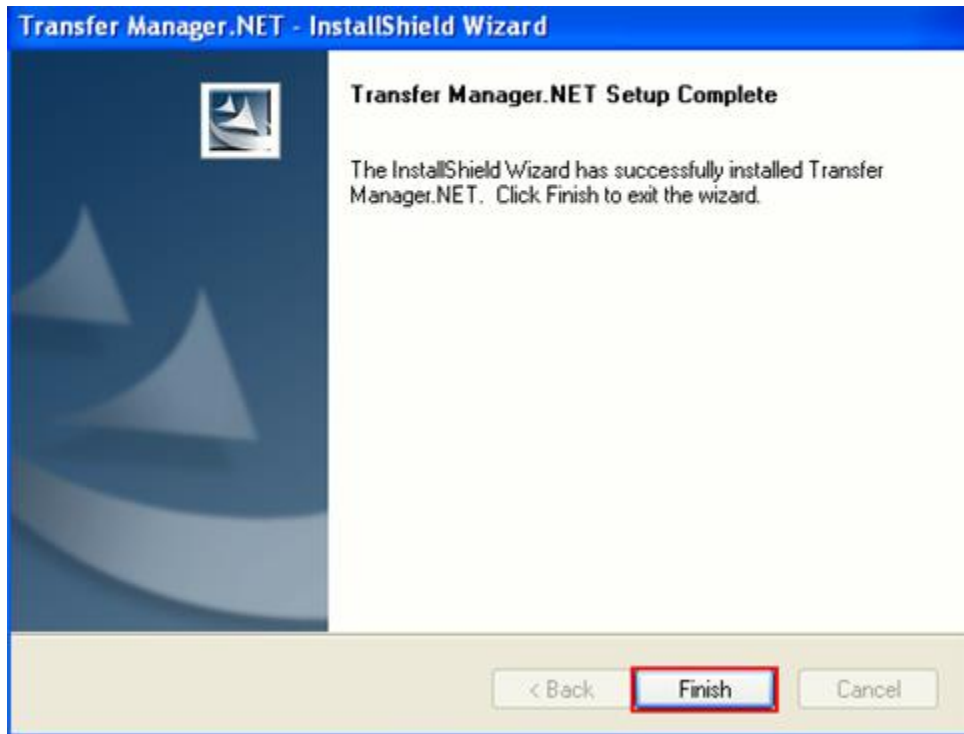
The box asking for the install destination will now open; do not change the path that is already listed. You will click on “Next.”



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



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





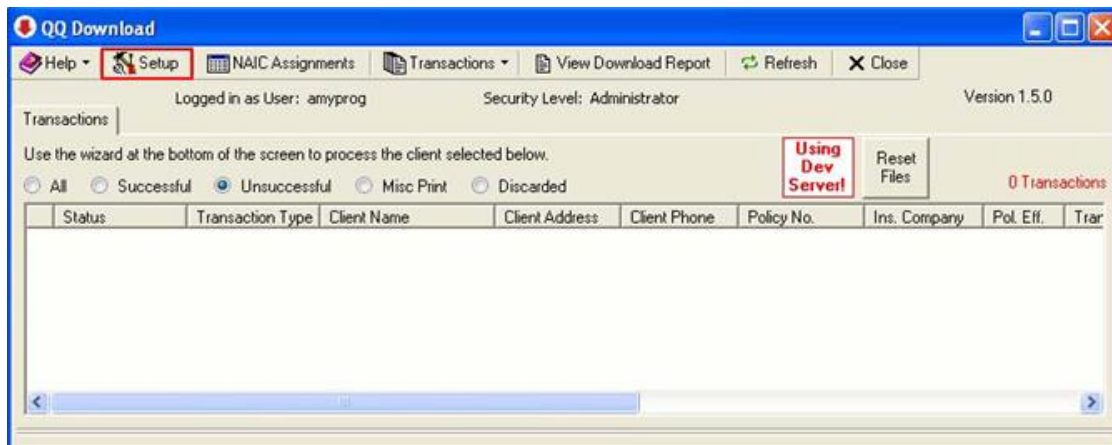
## Configure QQDownload to Process Transactions from IVANS

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.

**QQ Download - Setup**

Help | Cancel | Ok

Schedule  
Matching  
Data Import  
**IVANS**  
Mercury PDF

**IVANS Account Information**

This information should be provided to you by one of your participating insurance carriers.

**Mailbox**

Account:   
 User ID:   
 Password:   
 ECS Support: ☒ IE Support: ☐

**Modern Dial Information**

Account:   
 User ID:   
 Password:   
 Phone 1:  Find  
 Phone 2:  Find

**Connection**

☒ Use the Internet (i.e. DSL)  
☐ Use Modem:

Path to IVANS download folder:

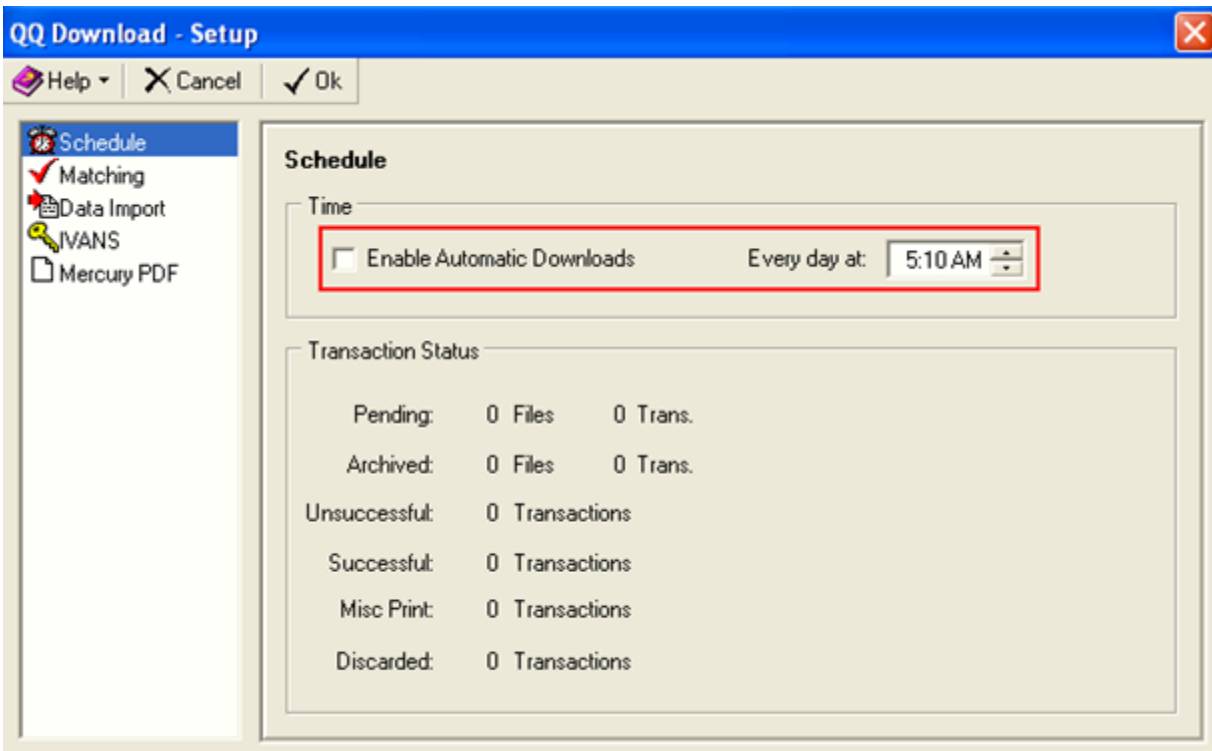
- Once you have successfully setup the IVANS account information in QQDownload, contact your insurance carrier and notify them that you are ready to begin receiving downloads. Depending on the participating insurance carrier, you may request an initial download from that carrier.

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.

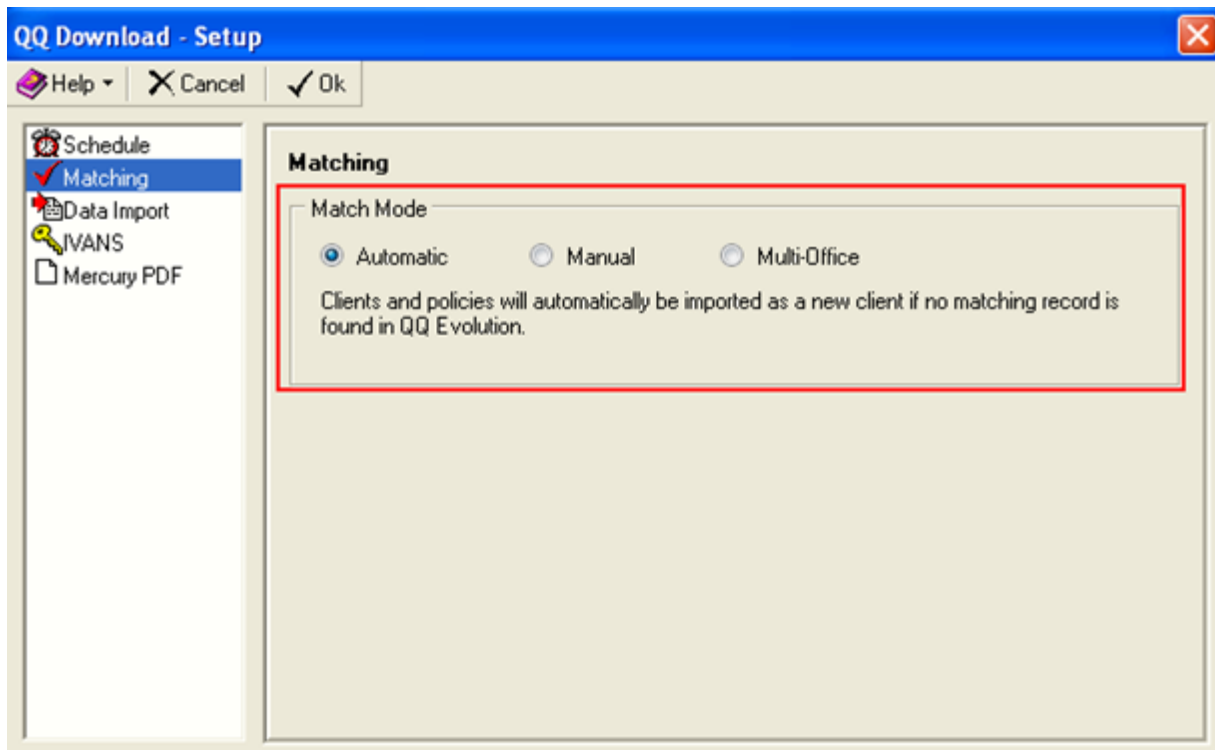


Now we would choose which Match Mode to use when importing the clients into QCEvolution 2.

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.

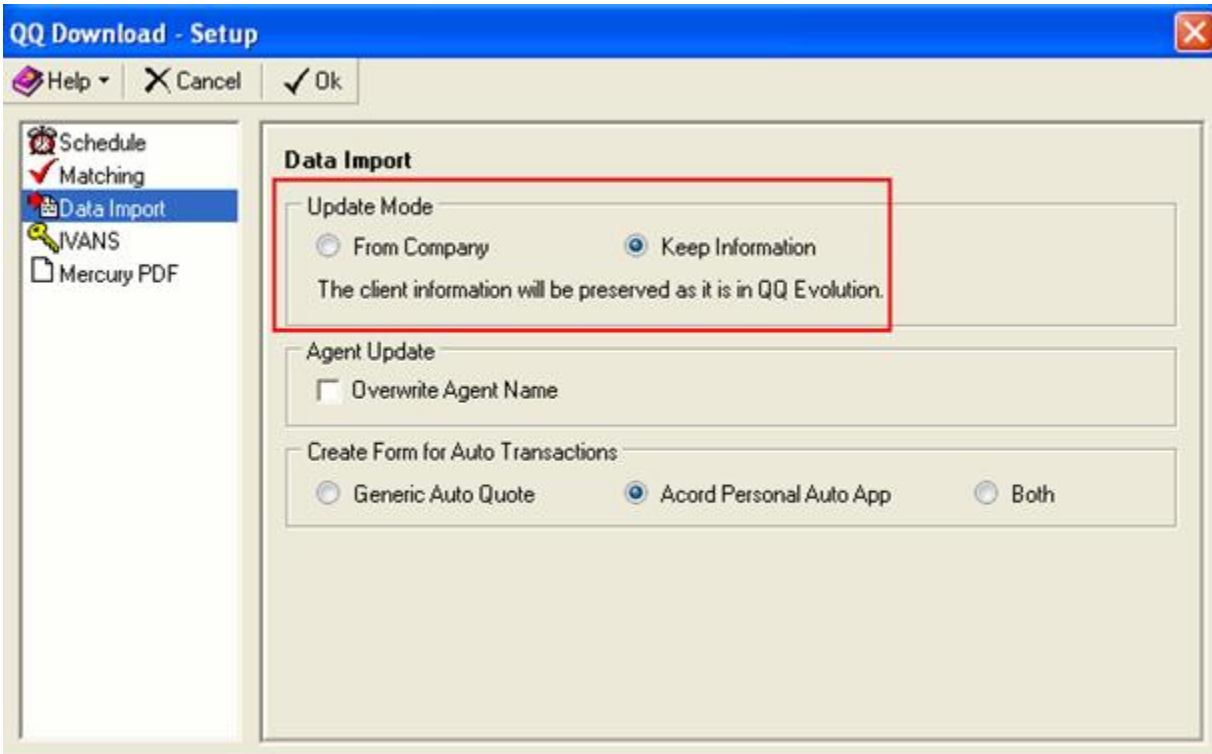
A third mode is available, **Multi-Office**. This feature can be used by agencies with multiple offices which process downloads from carriers with ONE agent code for all offices. You will be able to download the transactions for all offices to one location. Transactions with a match found within QCEvolution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



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.

The screenshot shows the 'QQ Download - Setup' window. On the left is a sidebar with icons and labels: 'Schedule', 'Matching' (checked), 'Data Import' (highlighted), 'IVANS', and 'Mercury PDF'. The main area is titled 'Data Import' and contains three sections: 'Update Mode' with radio buttons for 'From Company' and 'Keep Information' (selected), with a note 'The client information will be preserved as it is in QQ Evolution.'; 'Agent Update' with a checkbox for 'Overwrite Agent Name'; and 'Create Form for Auto Transactions' with radio buttons for 'Generic Auto Quote', 'Acord Personal Auto App' (selected), and 'Both'. A red rectangle highlights the 'Create Form for Auto Transactions' section.

## 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.