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About this Manual

The QQ WebRater User and Installation Manual contain valuable information and instructions as to the operation of your new software package. This Manual can be accessed on our website or directly within the program.

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Chapter 1 – Welcome to QQ Solutions™

About QQ Solutions™

Welcome to QQ Solutions! You have just received the most complete Quoting, Printing and Agency Management system available today. As the Leader in Insurance Software, QQ WebRater™, QuickQuote™, QQ Evolution™, and QuickFile™ are truly the next generation of insurance software. Our suite of software products are designed to be a complete package of tools that will fulfill all of your rating, filing, and printing needs.

QQ WebRater™ - Web Based Comparative Auto Rater

- NO software to install.
- Quote up to 6 cars and 6 drivers
- Pull financial responsibility reports (credit)
- Upload applications directly to Insurance Companies
- Verify Motor Vehicle Records (MVR)
- Transfer quote information to QQ Evolution, QuickFile Enterprise, or QuickFile Desktop
- Transfer quote information from QQ Evolution, QuickFile Enterprise, or QuickFile Desktop back to QQ WebRater

QuickQuote™ - Comparative Auto Insurance Rater

- Quote 4 cars and 4 drivers
- Verify Motor Vehicle Records (MVR)
- Pull financial responsibility reports (credit)
- Upload applications directly to Insurance Companies
- Bridge to company rating software
- Transfer quote information to QuickFile and QQ Evolution

QQ Evolution™ - Complete Agency Management



- All the same features as QuickFile plus much more!
- Dashboard
- QQ Evolution Assistant – Calendar, To Do List, and Messaging
- Advanced Agency Commission Structures
- Enhanced Producer Commission Structures
- Stand Alone Search Feature directly on Dashboard
- Claims Section with storing of images and/or documents... and so much more!

QuickFile™ - Agency Management System

- Store and track Active, Expired and Cancelled clients/policies
- Print plain paper applications, ACORD forms and generic forms
- Print finance agreements with coupons
- Store documents and images
- Customizable agency production reports
- QuickWord Word Processor

Service Requirements

You do not need to install software to use QQ WebRater! In fact, nothing at all is installed on your computer. All you need is your computer and an internet connection. Our program will work with both PC and Mac. We recommend you to use high-speed internet such as DSL or cable. We do not recommend the use of Dial-Up internet. Below is a chart of the web browsers QQ WebRater currently can be used with.

Browser	Minimum Version	PC	Mac
Internet Explorer	8		NA
Firefox	3.5		
Safari	Coming Soon	--	--
Opera	Coming Soon	--	--

NOTE:

Mac users can download the Firefox browser at <http://www.mozilla.com/en-US/firefox/ie.html>

Accessing QQ WebRater

The following are the steps to access QQ WebRater.

1. Open your browser and go to <https://qqwebmater.com/home/>
2. Towards the upper right of the screen enter your QQ User ID (associated to your agency), User ID and password and click Login.



3. If you have multiple offices you will select the office you would like to log into and then click "Continue." To access an office you must have been given the proper permission by your account administrator. If you feel you should be able to access an office and you cannot, please contact your administrator.



Select Working Office

*QQ Dev FL EV03 - Deerfield Beach,33441

*Test - Deerfield Beach,33441

Indy Bay - Deerfield Bch,33441

QQ Bret FL - Deerfield Beach,33441-

QQ Dev FL QFE - Deerfield Bch,33441

QQ Dev TX EVO - Dallas,75234

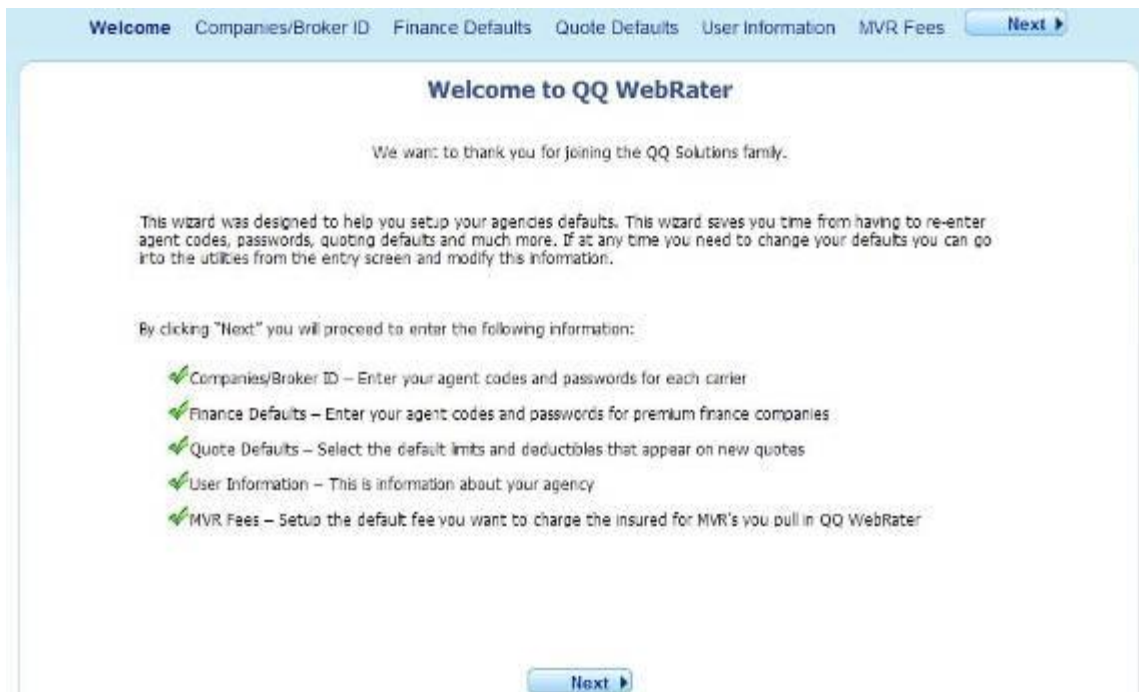
QQ Sales FL QF - Fort Lauderdale,33309-

QuickQuote, Inc - Deerfield Beach,33441

* - Denotes your default agency

Continue

4. When you log into QQ WebRater for the first time you will be presented with a Setup Wizard to walk you through setting up your Utilities section. The next time you access the rater the wizard will not appear. The Utilities can be setup or edited at any time but make sure to have it completed before you start quoting.



NOTE: The setup of the Utilities section is explained in Chapter 2 of this manual.

Chapter 2 – QQ WebRater Utilities Set Up

The QQ WebRater Utilities section is used to enter system settings and common default values that will effectively speed up the quoting process.

Tip: Enter your quoting defaults before quoting for the first time.

The screenshot shows the top navigation bar of the QQ WebRater interface. The 'Utilities' tab is selected and highlighted with a red box. Below the navigation bar, there are several input fields for user information: First Name (with a dropdown for 'M'), Last Name, Suffix, Phone (with area code '(954)' and a dropdown for '-'), Email, Drivers (1), Cars (1), Street (with placeholder 'Enter Garage Street'), Mailing Address, Prior Cov (No Prior), Prior Co, Eff Date (05/02/2011), City (with placeholder 'Enter Garage City'), ST (FL), Zip Code (33319-), Months, Expire (05/02/2011), Notes, and Source.

Companies/Broker ID

Here is where you will see your selected insurance companies for rating as well as enter your agent code for the insurance company. The different company's information such as address and phone number are listed here as well.

The screenshot shows the 'Utilities' window with the 'Companies/Broker ID' tab selected. The window is divided into two main sections: 'Company Name' and 'Company Information'. The 'Company Name' section lists 15 insurance companies with checkboxes and agent code input fields. The 'Company Information' section displays details for the selected company, 21st Century Insurance, including address, phones, and general information.

Company Name	Agent Code
<input checked="" type="checkbox"/> 21st Century Insurance	<input type="text"/>
<input checked="" type="checkbox"/> Access Insurance Company	<input type="text"/>
<input checked="" type="checkbox"/> Affirmative PIP/PD	<input type="text"/>
<input checked="" type="checkbox"/> Affirmative Standard	<input type="text"/>
<input checked="" type="checkbox"/> Agency Insurance Company	<input type="text"/>
<input checked="" type="checkbox"/> American Southwest	<input type="text"/>
<input checked="" type="checkbox"/> American Vehicle	<input type="text"/>
<input checked="" type="checkbox"/> AssuranceAmerica	<input type="text"/>
<input checked="" type="checkbox"/> Bristol West/Foremost	<input type="text"/>
<input checked="" type="checkbox"/> Cornerstone	<input type="text"/>
<input checked="" type="checkbox"/> DairylandAuto	<input type="text"/>
<input checked="" type="checkbox"/> EGI Auto	<input type="text"/>
<input checked="" type="checkbox"/> Equity Insurance Company	<input type="text"/>
<input checked="" type="checkbox"/> Explorer Preferred	<input type="text"/>

Company Information

Address

Company: 21st Century Insurance
MGA: The New Hampshire
Street: P.O. Box 1802
City/State/Zip: Alpharetta GA 30023-0302

Phones

Toll Free: (877) 244-4288
Local: (800) 334-9641
Fax: (800) 815-7803
Binding:
Claims: (888) 244-6163

General

Abbreviation: AIN Best Rating: A++
Admitted: Yes
NAIC: 23833
Appointments: Selective Agents

*Changes made in this section will apply to all users from this agency.

In order to rate with a company, enter your agent code for that specific company. In some cases you are allowed to enter the QuickBind password or the User ID/Password for the company's website. In order to enter these codes click the icon of the gold lock displayed next to the company agent code.

Note: Changes made on the Company/Broker ID tab will apply to all users in the agency.

Finance Defaults

You will enter your agent code with the finance company. Information pertaining to each company such as phone number and address are also provided.

Utilities

Companies/Broker ID | **Finance Defaults** | Quote Defaults | User Information | Lienholder | MVR Fees | Save & Close

Finance Company Name | Agent Code

<input checked="" type="checkbox"/> Appco Finance Corp.	<input type="text"/>
<input checked="" type="checkbox"/> Del Rio Discount Corp.	<input type="text"/>
<input checked="" type="checkbox"/> Elite Premium Finance	<input type="text"/>
<input checked="" type="checkbox"/> ETI Financial Corp.	<input type="text"/>
<input checked="" type="checkbox"/> Finco Financial Corporation	<input type="text"/>
<input type="checkbox"/> M.C.L. Inc.	<input type="text"/>
<input checked="" type="checkbox"/> MAG Premium Finance Company	<input type="text"/>
<input checked="" type="checkbox"/> Old Colony Finance Corp.	<input type="text"/>
<input checked="" type="checkbox"/> Pro Premium Finance Co., Inc.	<input type="text"/>
<input type="checkbox"/> Security Premium Finance	<input type="text"/>

Financial Company Information

Address

Company: Appco Finance Corp.
Street: 3155 NW 77th Avenue
City/State/Zip: Miami FL 33122

Phone

Toll Free:
Local: (305) 716-6000
Fax: (305) 716-6406

General

Binding: No Draft: No

Financing Options

Annual % Down Semi Annual % Down Payment Options
Number Annual Paymts Number Semi Paymts
Default Company

*Changes made in this section will apply to all users from this agency.

Financing Options

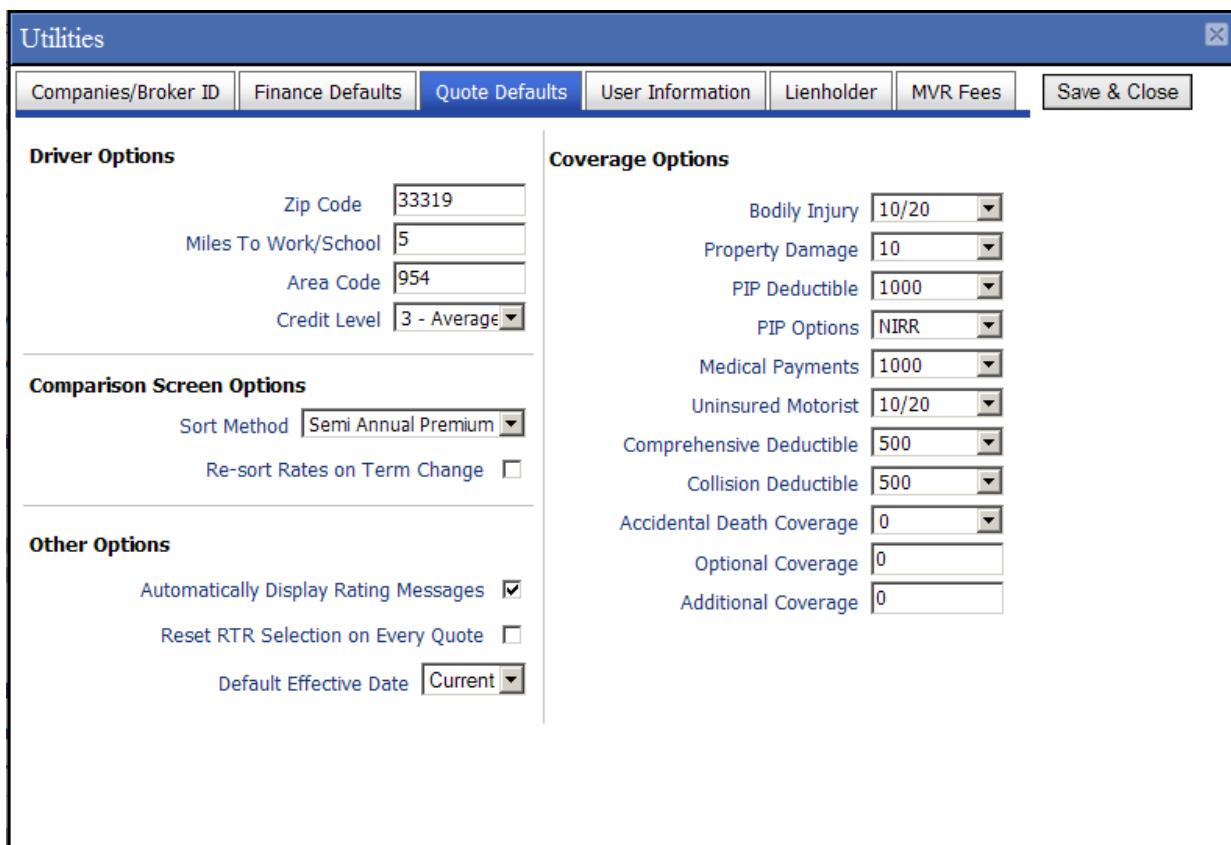
Select the finance options you most commonly use when a policy is financed.

Default Company: Select from the drop down menu the finance company most used by your agency.

Note: If you have multiple agencies, the changes will apply to all agencies.

Quote Defaults

The default Quote options you select here will appear when quoting an auto policy. Even though you may set a specific Zip Code, for example, you can always change it when actually quoting. Select your most commonly used quoting options.



Utilities						
Companies/Broker ID	Finance Defaults	Quote Defaults	User Information	Lienholder	MVR Fees	Save & Close
Driver Options						
Zip Code	33319					
Miles To Work/School	5					
Area Code	954					
Credit Level	3 - Average					
Comparison Screen Options						
Sort Method	Semi Annual Premium					
Re-sort Rates on Term Change	<input type="checkbox"/>					
Other Options						
Automatically Display Rating Messages	<input checked="" type="checkbox"/>					
Reset RTR Selection on Every Quote	<input type="checkbox"/>					
Default Effective Date	Current					
Coverage Options						
Bodily Injury	10/20					
Property Damage	10					
PIP Deductible	1000					
PIP Options	NIRR					
Medical Payments	1000					
Uninsured Motorist	10/20					
Comprehensive Deductible	500					
Collision Deductible	500					
Accidental Death Coverage	0					
Optional Coverage	0					
Additional Coverage	0					

Driver Options

Zip Code: Enter your most commonly used zip code. This will most likely be the zip code in which your agency is located.

Miles to Work/School: Enter the number of miles the insured drives to work one way.

Area Code: Enter your most commonly used area code. This will most likely be the area code in which your agency is located.

Credit Level: Set a default average credit rating for the insured.

Comparison Screen Options

Sort Method: Select the default Sort method. You can also manually change the sort method on the Comparison screen by clicking on the appropriate column heading.

- **Alphabetical:** Sort companies alphabetically by name.
- **Down Payment:** Sort companies by lowest down payment.
- **Annual Premium:** Sort companies by lowest annual premium.
- **Semi Annual Premium:** Sort companies by lowest semi-annual premium.

Other Options

Automatically Display Rating Messages: Selecting this will automatically display any underwriting message after selecting the company from the Comparison screen.

Reset RTR Selection on Every Quote: Once the RTR selections have been made during quoting they will stay marked. By selecting this option it will reset the RTR selections to “all” after every quote being done. Meaning you will have to reselect your RTR companies every time you quote.

Default Effective Date: Allows the user to set the effective date on the entry screen to the current date, a future date, or blank by default. If “Future” is selected another field will appear that asks how many days in the future from today’s date should the effective date be set

of Days in Future (1-30)

Coverage Options

Select the most commonly requested policy coverage. You can always change coverage while quoting.

User Information

The User information section displays your registration information. This information was provided to us when you subscribed to QQ WebRater. You can modify this information by clicking **My QQ Solutions Account** on the upper right of the screen. This is QQ Solutions' Online Account Management system.

The screenshot shows a web application window titled "Utilities" with a close button in the top right corner. Below the title bar is a navigation menu with the following tabs: "Companies/Broker ID", "Finance Defaults", "Quote Defaults", "User Information" (which is currently selected), "Lienholder", "MVR Fees", and a "Save & Close" button. The main content area is divided into three sections: "Agency Information", "Agent Information", and "System".

Agency Information

Name of Agency: _____
Address: _____
City/State/Zip Code: _____
Agency Phone Number: _____
Agency Fax Number: _____
Agency E-mail Address: _____
Agency Product String: _____
QQ WebRater.com Package: _____

Agent Information

Agent Name: _____ [Edit](#)
State License Number:
Agent E-mail Address:

System

Command Line:

Note: In order to access QQ Solutions Account Management you must have the proper user permission. If you do not, please address this with your office administrator.

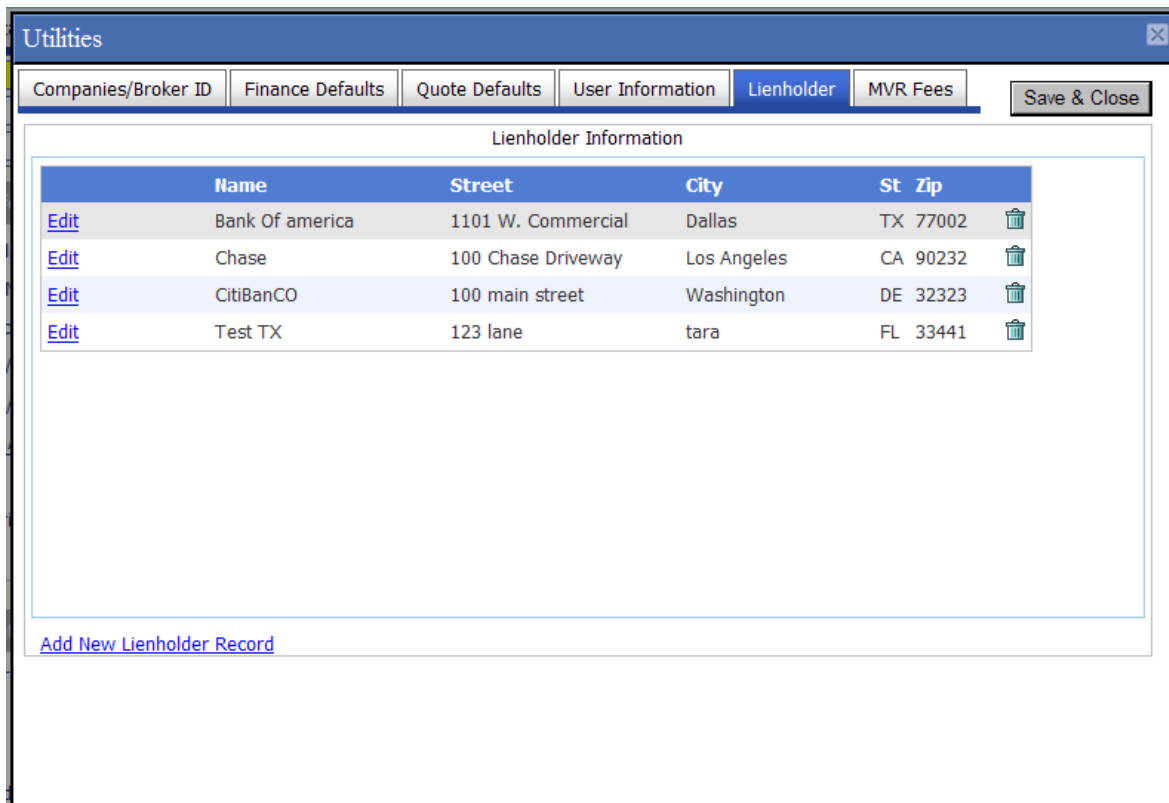
State License Number: You can enter your state license number here.





Agent E-Mail Address: Enter your e-mail address.

Command Line: This is used by QQ Solutions' product support team.

Lienholder

Here is where you will enter your most commonly used Lien holders. This will allow you to auto fill the lienholder information on the application. You can also manually enter the information as well.



	Name	Street	City	St	Zip	
Edit	Bank Of america	1101 W. Commercial	Dallas	TX	77002	
Edit	Chase	100 Chase Driveway	Los Angeles	CA	90232	
Edit	CitiBanCO	100 main street	Washington	DE	32323	
Edit	Test TX	123 lane	tara	FL	33441	

[Add New Lienholder Record](#)

Add New Lienholder Record: Enter the lienholder name and address, when done adding click “Save.”

Edit: This will allow you to edit an existing lien holder’s information.



: Clicking this trash can icon will delete the lienholder.

MVR Fees

If you are pulling an MVR for a client and you wish to charge the client a fee for doing so, enter the fee in the “Standard Agency Fee” field. An MVR fee can always also be entered manually when keying in the quoting data. You must have set up an MVR account in order to see the MVR Fees tab. This can be done through the Online Account Management system at the following address: <https://qqolam.qgsolutions.com>

Note: MVR fees CANNOT be included in the financed amount and will be added directly to the down payment.

Utilities

Companies/Broker ID

Finance Defaults

Quote Defaults

User Information

Lienholder

MVR Fees

Save & Close

Enter the fees agency charges per MVR

State	Standard QQ Fee	Standard Agency Fee	7 Year QQ Fee	7 Year Agency Fee
FL	\$9.30	\$ 11.30	\$11.30	\$ 15.00
GA	\$7.00	\$ 7.50	\$9.00	\$ 10.30
NJ	\$13.00	\$ 12.00	N/A	N/A
NY	\$8.00	\$ 3.50	N/A	N/A
TX	\$7.00	\$ Not Set	N/A	N/A

*Standard MVR in FL, GA, NY and TX: 3 year

*Standard MVR in NJ: 5 year

MVR Payment Plan

☒ Enable MVR payment process method

☒ Enable credit card processing

*Changes made in this section will apply to all users from this agency.

IMPORTANT NOTE: When done entering information into the Utilities section click the “Save & Close” button on the upper right side to save the information.

Utilities

Companies/Broker ID

Finance Defaults

Quote Defaults

User Information

Lienholder

MVR Fees

Save & Close

Enter the fees agency charges per MVR

State	Standard QQ Fee	Standard Agency Fee	7 Year QQ Fee	7 Year Agency Fee
FL	\$9.30	\$ 11.30	\$11.30	\$ 15.00
GA	\$7.00	\$ 7.50	\$9.00	\$ 10.30
NJ	\$13.00	\$ 12.00	N/A	N/A
NY	\$8.00	\$ 3.50	N/A	N/A
TX	\$7.00	\$ Not Set	N/A	N/A

*Standard MVR in FL, GA, NY and TX: 3 year

*Standard MVR in NJ: 5 year

MVR Payment Plan

☒ Enable MVR payment process method

☒ Enable credit card processing

*Changes made in this section will apply to all users from this agency.

Chapter 3 - Performing an Auto Quote

Basic Entry Screen Information

After logging into QQ WebRater you will be on the Entry screen. This is where you enter all of your information pertaining to the quote.

[What's New!](#) | [Sample Agent](#) | [My QQ Solutions Account](#) | [Help](#) | [Log Out](#)

Agency QQ Dev's FL EVO-3 in Deerfield Beach, 33441 has done 34 quote(s) for the month.

Quote ▼		RTR Selection	MVR	Reports	Marketing	Pro Rata	Utilities
First <input type="text"/> M <input type="text"/>	Last <input type="text"/> Suffix <input type="text"/>	Phone (954) - <input type="text"/>	Email <input type="text"/>	Drivers <input type="text"/> Cars <input type="text"/>			
Street <input type="text"/>	Mailing Address <input type="text"/>	Prior Cov <input type="text"/>	Prior Co <input type="text"/>	Eff Date <input type="text"/>			
City <input type="text"/>	ST <input type="text"/> Zip Code <input type="text"/>	Months <input type="text"/>	Expire <input type="text"/>	Notes <input type="text"/>			

Driver Information

Driver # 1

First Name / Middle

Last Name / Suffix

Social Security Number

DOB / Sex / Relationship SM NI

Cust / Miles / Use / Credit N 5 P 3

Lic. FL / USA / MVR / ST 19 19 19 FL

Driver's Info

Driver's License

Violations

At the top of the Entry Screen you will notice a Tool Bar with different buttons.

Quote ▼	RTR Selection	MVR	Reports	Marketing	Pro Rata	Utilities
----------------	---------------	-----	---------	-----------	----------	-----------

Quote: Selecting this button will rate your risk. Hovering your mouse over the ▼ next to the Quote button will expose the following options:

- **Quote:** Selecting this button will rate your risk
- **New Quote:** This will clear the current quote information displaying on the screen.
- **Retrieve Quotes:** Clicking this button will open the quote saver to access previously saved quotes.
- **Save Quote:** Allows you to save your quote prior to rating
- **Unsaved Quotes:** *Available to Gold and Platinum subscribers only* Lists the last 5 quotes you were working on that have not yet been saved. This list will be populated when you click the Quote button or if QQ WebRater times out. You can login to QQ WebRater and your last quote be will at the top of the list

RTR Selection: Here you can select which Real Time Rating companies you wish to rate with.

MVR: If you wish to pull an MVR for the driver(s), it will be done from here.

Reports: Various reports can be run from here. Reports can be generated in either .PDF or Excel.

Marketing: *Available to Platinum subscribers only* will display the QQ Marketing Dashboard where you can view your incoming leads and import that information into QQ WebRater.

Pro Rata: The Pro-Rata Wheel will help you to calculate returned commissions, additional commissions, and Endorsement Premium.

Utilities: This is where you will set up various defaults for the rating process.

Note: The available buttons will change depending on which portion of the program you are currently using.

At the upper right hand of the screen there are additional functions

[What's New!](#) | [Sample Agent](#) | [My QQ Solutions Account](#) | [Help](#) | [Log Out](#)

What's New!: This lists any new features/updates that have been added to QQ WebRater.

My QQ Solutions Account: This is used by Administrators only, to access the Online Account Management System

Help: You can access Help documents for various features of QQ WebRater.

Log Out: Allows you to log out of QQ WebRater

Quote Counter: This displays the number of quotes your agency has done during the month. It is displayed on the upper right of the screen. Reports can be run based on the Quote Counter in the Reports section.

Agency in Deerfield Beach, 33441- has done 56 quote(s) for the month.

When a quote is saved, it is considered a new quote for a 3 day period. If the saved quote is edited and resaved within the 3 days, it is still considered the same quote. However, if the quote is re-quoted after 3 days, it is considered a new quote and will be added to the total in the Quote Counter.

In addition, if you have a quote that you are currently working on and it has not been saved, the quote will be recorded once in the quote counter within the first quoting session hour. After one hour, a re-quote for this same quote, will be considered within a new quoting session, and this re-quote will be added to the Quote Counter total.

Begin the quote by entering the Client's Name, Address, and Zip Code where appropriate. Next, enter the phone number, prior coverage information, and e-mail address. The last box in this section, select the number of Drivers and Cars to be included in the quote. The entry screen will self-adjust to accommodate the number of drivers and vehicles you plan to include in your quote. You have the ability to quote up to *six* drivers and *six* cars. The Effective date and Source are also entered here. The Source is how the client found you such as Walk In, Yellow Pages, or Referral.

First	Sample	M	A	Last	Driver	Suffix		Phone	(954)555-5555	Email		Drivers	1	Cars	1
Street	123 Sample Rd			Mailing Address				Prior Cov	No Prior	Prior Co		Eff Date	03/24/2011		
City	Deerfield Beach			ST	FL	Zip Code	33441	Months		Expire	03/24/2011	Notes			
												Source			

The following icons also appear in this section.



: Clicking this icon will verify the address.



: You can enter a mailing address if it differs from the garaging address. Once a mailing address has been entered a red check will also appear on the icon.



: This will access a calendar from which you can select the expiration date of the prior coverage.



Notes

: Any notes or comments pertaining to the insured or policy can be entered here. Once a note has been entered on a client a red check will appear on the icon.



Notes

Note: The area in which you are entering the information will be highlighted in yellow. This is so you can easily track where you are during the quoting process.

Driver Information

In this section enter the information of the driver. An information area will display for each driver you are quoting.

The image shows a software interface for entering driver information. On the left is a vertical list of field labels: First Name / Middle, Last Name / Suffix, Social Security Number, DOB / Sex / Relationship, Cust / Miles / Use / Credit, Lic. FL / USA / MVR / ST, Driver's Info, Driver's License, and Violations. On the right is a window titled 'Driver # 1' containing a form with the following data: First Name 'Sample', Middle 'A', Last Name 'Driver', Social Security Number (empty), DOB '03/24/1976', Sex 'SM', Relationship 'NI', Custody 'N', Miles '5', Use 'P', Credit '3', License FL '19', USA '19', MVR '19', and ST 'FL'. There are also empty fields for Driver's Info, Driver's License, and Violations.

First Name: Enter the client's first name.

Middle: The middle name or initial can be entered.

Last Name: The client's last name will be entered here.

Suffix: If their name contains a suffix such as Jr. or II, it can also be entered.

Social Security Number: Enter the driver's social security number.

DOB: The date of birth is keyed in here.

Sex: Whether the driver is a single female, single male, married female or married male is selected here.

Relationship: If there is more than one driver, their relationship to the named insured will be entered.

Cust: Select "Yes" or "No" for custody of a minor child.

Miles: The miles to work driven one way is entered here.

Use: Select the insured's vehicle usage: Principal, Business, Occasional, Artisan, and Excluded.

Credit: Credit level: 1 Best; 2 Good; 3 Average; 4 Fair; 5 Poor.

Lic. FL: Enter the number of years the insured has been licensed in Florida. You may enter "N" if the insured has No license and "L" if the insured has been licensed for Less than 1 year.

USA: Enter the number of years the insured has been licensed in the United States. If the insured does not have a USA license, you may enter "I" for an International license.

MVR: Enter the number of years the insured has had a verifiable MVR. You may enter "N" if the insured has No license and "L" if the insured has been licensed for Less than 1 year.

ST: Select the state in which the driver is licensed in.

Driver's Info: Select all options that apply to the driver, then click the Close button or press the Esc key. You may select more than one option. Here you will select such items as SR-22 and if they are a homeowner.

Driver #1 Info

☒

SR-22 (SR2)

☐

SR-22s (SRS)

☐

FR-44 (FR4)☐☐☐☐☐☐☐☐☐☐

Close

Driver's License: You can enter a driver's license number in this field.

Violations/Claims: Here select any violations the driver might have. Click on the violation and click “Add Vio”. The violation will appear on the right; you can change the date of the violation by entering the date manually or using the calendar function. When you are finished, click on Save & Close. When a MVR is pulled it will override any violations entered manually.

NOTE: If you click the X to close the window your choices will not save.

Driver #1 Violations/Claims

Violation/Claim Description		Vio Code	Claim Amount Per Coverage								
			Vio	Vio Date	MVR	BI	PD	UM	MED	COLL	OTC
Accident - At Fault	ACC	ACC	03/24/2011	No	0	0	0	0	0	N/A	
Accident - Not At Fault	ACN	CPL	03/24/2011	No	N/A	N/A	N/A	N/A	N/A	N/A	
Accident W/ Dui/Dwi	ACD	434	03/24/2011	No	N/A	N/A	N/A	N/A	N/A	N/A	
Accident W/ Reckless Driving	ACR										
Administrative Per Se For .08 Bac (A08)	829										
All Other Non Traffic/Criminal	383										
All Other Non Traffic/Non-Criminal	380										
Allowing Unlicensed Operator To Drive	AWD										
Atv Operated On Public Road (M80)	458										
Bicycle Regulations	382										
Car Pool Lane Violation	CPL										
Careless/Improper Driving	CAR										
Child Restraint Violation	CRV										
Coasting Or Oper W/Gears Disengaged	434										


Add Vio
Delete Vio
Save & Close

Driver's License Generator (Florida driver's licenses only)

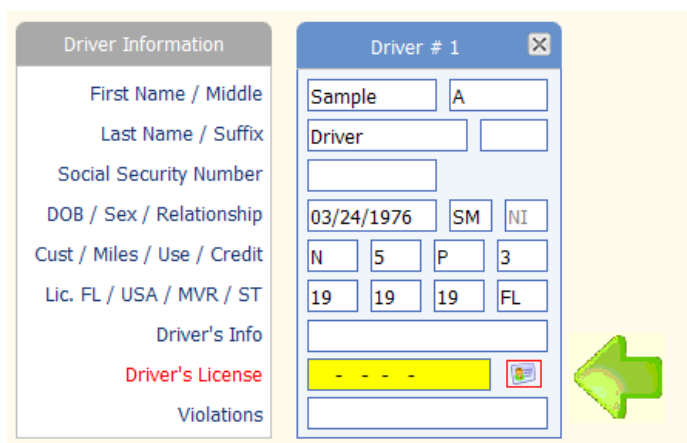
About the License Generator

If you need to verify a Florida driver's license number for use in your quote or for use in QuickMVR, use the Florida License Generator.

How to use the License Generator

Enter the driver's first name, middle initial (if available), last name, gender and date of birth into QQ WebRater. Click the icon  located to the right of the Driver's License field, this will automatically generate the Florida driver's license number for this person. This will only work if the "ST" field is "FL", and can be done for each driver on the policy with a FL license.

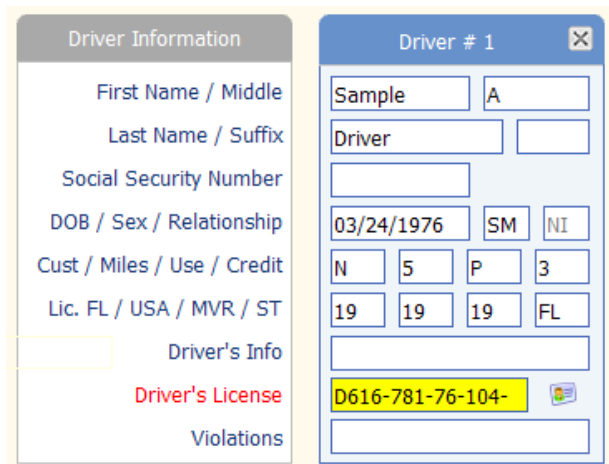
Before clicking on the icon:



Driver Information	
First Name / Middle	
Last Name / Suffix	
Social Security Number	
DOB / Sex / Relationship	
Cust / Miles / Use / Credit	
Lic. FL / USA / MVR / ST	
Driver's Info	
Driver's License	
Violations	

Driver # 1	
Sample	A
Driver	
03/24/1976	SM NI
N	5 P 3
19	19 19 FL

After:



Driver Information	
First Name / Middle	
Last Name / Suffix	
Social Security Number	
DOB / Sex / Relationship	
Cust / Miles / Use / Credit	
Lic. FL / USA / MVR / ST	
Driver's Info	
Driver's License	
Violations	

Driver # 1	
Sample	A
Driver	
03/24/1976	SM NI
N	5 P 3
19	19 19 FL

Note: The State of Florida added a 13th digit to the Florida Driver License. This is normally '0'. However, should this be a duplicate license or a duplicate name or date of birth, this last digit may vary. Please check with the insured to add the last digit to the driver's license number.

Vehicle Information

Once you have filled out the driver(s) information, enter the vehicle details.

The image shows a software interface for entering vehicle information. On the left is a menu titled 'Vehicle Information' with options: VIN, Year / Make, Model / Symbol, Vehicle Features, and Actual Cash Value / MSRP. On the right is a form titled 'Vehicle # 1' with a close button. The form contains the following fields: a VIN field with '19UUA662' entered; a Year field with '2005' and a Make field with 'ACURA'; a Model field with '3.2TL' and a Symbol field with '17'; a Vehicle Features field with 'PAT;6CL;ABD;ABP;ABS;'; and two empty fields for Actual Cash Value and MSRP.

VIN: Enter the full VIN of the vehicle. If you do not have the full VIN but still wish to do a quote, select the Year, Make, and Model and a list of VIN numbers will display. You will then select the VIN which matches your vehicle. It will provide the first eight digits of the VIN. When you are doing a QuickBind policy the full VIN is required.

Year/ Make: Once you reach this field, a drop down list of years and vehicle makes will appear. Select the vehicle's Year and Make from the drop down list.

Model/ Symbol: Select the vehicle model from the drop down list. Once you have selected a vehicle model, a list will appear detailing the model's VIN Number, Style, Engine and Symbol. Match the vehicle details in the list to that of the insured's vehicle. Some models will have multiple listings here so make sure you are selecting the correct vehicle/symbol.

Note: If you enter the full VIN number; the Year, Make, Model, and Symbol will automatically populate.

Vehicle Features: Many vehicles have features that will affect the rate such as airbags, anti-lock brakes, alarms, etc. Select all that apply and then click Close or press the Esc key. The program will select many of the Vehicle Features automatically for you.

Actual Cash Value/ MSRP: Enter the vehicles Actual Cash Value and Manufacturer's Suggested Retail Price (MSRP). While not necessary for some quotes, some companies take these figures into consideration when rating.

Coverage Information

Once you have filled out the vehicle information, enter the desired coverage and limits.

Coverages	Coverages		
BI / PD	10/20	10	
PIP / Option	1000	NIRR	
UM / Med	10/20	1000	
Comp / Coll	500	500	
Cust Equip / Tow / Rental	0	NONE	NONE
Accidental Death	0		
OPT / ADD / MVR	0	0	0

Tip: You can set defaults for the most commonly selected coverage in the Utilities section.

BI / PD: Select the desired Bodily Injury and Property Damage coverage.

PIP / Option: Select the desired Personal Injury Protection deductible and who it will apply to: Named Insured and Resident Relatives or Named Insured Only (NIRR or NIO.)

UM / MED: Select the desired Uninsured Motorist and Medical coverage. If no coverage is requested for MED, set to NONE.

Comp / Coll: Select the desired Comprehensive and Collision deductibles. If no coverage is requested, set these to NONE.

Cust Equip/ Towing / Rental: Enter the total value of all custom equipment for the vehicle. Also select the desired Towing and Rental coverage. If no coverage is requested, set these to NONE.

Accidental Death: Select the Accidental Death and Dismemberment limit.

OPT: Enter any Optional fees that you wish to charge this client. Fees entered in this box will be EXCLUDED from the financed amount and added to the down payment.

ADD: Enter any fees/charges that you wish to INCLUDE in financing. For example, if you added Access Legal Prepaid Services to the quote, the dollar amount will be entered here.

MVR: Enter the dollar amount for the Motor Vehicle Record fee.

QuickMVR

After completing the quoting information, an MVR can now be pulled. Click the MVR button on the top toolbar.



The following screen will display allowing you to pull an MVR.

The screenshot shows the 'QuickMVR' window. At the top, a blue header bar contains the text 'QuickMVR'. Below this is a yellow background area. A white box at the top contains a warning: 'Please verify that the Driver License Number(s) below are accurate prior to submitting your request. Note: Incorrect entries will still incur a non-refundable fee. Submitting this request will accumulate \$19.98 in MVR fees for your client.' Below the warning, there is a green text prompt: 'Enter the number of MVR's you would like to pull:' followed by a dropdown menu showing the number '2'. The main area contains two sets of input fields for driver information. The first set is for 'Driver's License 1' and the second for 'Driver's License 2'. Each set includes a 'State' dropdown (both set to 'TX'), a 'DOB' field (the first is filled with '03/03/1975'), and 'First Name' and 'Last Name' fields. To the right of these fields are three buttons: 'Retrieve MVR', 'Print MVR', and 'Close'. At the bottom of the form, a small note reads: 'To adjust the MVR fee, use the MVR tab in Utilities section.'

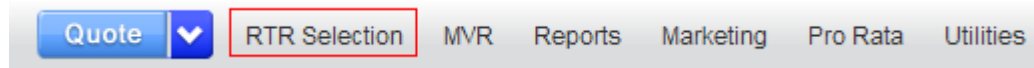
If the driver license(s) was keyed in on the Entry screen it will automatically be filled for you. This also applies to the driver's date of birth, first name, and last name. If you did not do this you will enter the missing information on the QuickMVR screen. Once all fields have been completed you will click the **Retrieve MVR** button. The program will connect with the state and pull the MVR. After it is pulled you will click **Print MVR** to print it out. When you are finished click "Close" to exit the MVR screen, you will be taken back to the Entry screen. When pulling an MVR, you are required to pull for all drivers listed on the policy.

There is a neat trick to the MVR area. The MVR box will only display areas for driver licenses for the number of drivers listed on the quote. Now, as an example say you have one driver listed but when you open the MVR box you would like to add a second driver. Where it states "Enter the number of MVR's you would like to pull" click the drop down and select the number two. Another Driver License area will appear. After you pull the two MVRs you will notice on the Entry screen the second driver has been automatically entered for you.

IMPORTANT NOTE: The MVR(s) pulled on a quote will be saved for 30 days as long as you SAVE the quote after completing it. After 30 days the MVR(s) will need to be pulled again. Also once an MVR is pulled the violations cannot be deleted on the client.

RTR Company Selection

At this point before proceeding with your quote, you will need to select which Real Time Rating companies you wish to receive rates from. You will need to click the RTR Selection button on the top toolbar.



A box will appear listing all of the RTR companies. Put a check next to the companies you wish to receive rates from. After selecting your companies click on “Close.” You must first select your companies in the Utilities under Company/Broker ID in order for it to appear in the RTR selection.

Once you have selected your RTR companies, they will always remain checked for every quote. You can change them at any time. In the Utilities you can set the RTR selections to reset after every quote if you wish.

Additional Client Information

After selecting the RTR companies, you will click the **Quote** button on the top toolbar to proceed with quoting. If you are missing any required information on the Entry screen, a message will display stating what is missing.

NOTE: If you are rating with any RTR company which requires the Social Security Number to pull a credit score, it must be entered on the Entry screen before a quote can be retrieved.

The next screen that appears is the “Additional Client Information” screen. Here you will find specific questions related to the companies that you have selected in the directory. Review these items carefully as the answers will be used when rating and will influence the quote.

Education Level	Bachelors Degree
Industry	Business/Sales/Office
Occupation / Years	Consultant 15
Driver Training / Date	No
Active / Retired Military	No
Reason for No Prior Insurance	Has been driving a compar
Paperless Discount	
Months at Current Address	50
Companion Policy	NONE
Companion Policy Number	
Hartford Policy	
Hartford Tier	Sentinel
Direct Repair Discount	No
Substitute Vehicle Coverage	No
Prior PIP Claims	0
Live less than 10 months in FL	No
Recommended Repair Shops	No
Waiver Mandatory Arbitration	No
Limited Comprehensive	No
Additional Vehicle Information	
Vehicle Owned / Financed	Malibu Classic LS Financed
Proceed Cancel	

Once the additional information has been entered select the **Proceed** button to continue on with the quote. You will have to click the “I Agree” button on the toolbar of the next screen which is the “Client Credit Request” if your client agrees to have the credit score pulled. A “Communicating with Company for Rates” screen will briefly appear displaying the rating process.

Comparison Screen with Verified Rates

Once all of the companies have been rated, you will be presented with the Comparison Screen showing each company's rates, based on the information you entered.

Florida Comparison Screen

[Print](#) | [Email](#) | [Edit Quote](#) | [Help](#)

Policy Term: ☒ 6 Months ☐ 12 Months
☐ Re-sort Rates on Term Change

- Click Edit Quote to go back to the Entry screen. You will have to rate again if you go back.
- Select a rated company below to see breakdown rates.

Verified	Company	Liability	Physical	Total ▲	EFT	PIF	Down	Details
✓	Equity Insurance	1051.00	688.00	1761.48		1751.48	347.16	See Messages
✓	Windhaven	1373.00	936.00	2338.89		2328.89	451.47	See Messages
✓	Kingsway Amigo	1755.00	725.00	2512.24		2242.78	499.14	See Messages
✓	Gainsco Auto Insurance	2502.00	600.00	3141.87		3131.87	636.37	See Messages
	GMAC Choice	1647.00	681.00	2358.26	2237.72	2121.22	559.43	See Messages
	Assurance America	0.00	0.00	0.00			0.00	Missing Info. See Messages
	Bristol West/Foremost	0.00	0.00	0.00			0.00	Missing Info. See Messages
	Infinity	0.00	0.00	0.00			0.00	Missing Info. See Messages
	Infinity Low Cost	0.00	0.00	0.00			0.00	See Messages
	Mercury Insurance Company	0.00	0.00	0.00			0.00	See Messages
	Peachtree Casualty	0.00	0.00	0.00			0.00	See Messages

This green checkmark represents credit successfully pulled or credit not required.

AD&D coverage premium is not included in the premiums above. Any premium for AD&D will be displayed and added into the total when you select the company.

Policy Term: Select which policy term you would like rates for, 6 Months or 12 Months.

Verified: The green check in this column indicates the credit has been verified or the company did not require credit to be pulled.

Company: The name of the insurance company.

Liability: This displays the liability rate. The companies can be sorted by this rate by simply clicking the column Liability title.

Physical: The Physical Damage rates are shown. The companies can be sorted by this rate by clicking the column Physical title.

Total: Displays the total premium amount. The companies can be sorted by this rate by clicking the column Total title.

EFT: This shows the total premium if EFT (Electronic Funds Transfer) is going to be chosen for the payment type. It will appear blank if the amount is the same as the total premium. The companies can be sorted by this rate by simply clicking the column EFT title.

PIF: Displayed in this column is the “Paid in Full” amount. The companies can be sorted by this rate by simply clicking the column PIF title. This will appear blank if the amount is the same as the total premium.

Down: This is the basic down payment. The companies can be sorted by this amount by simply clicking the column DOWN title.

Note: By placing your mouse pointer over an underlined down payment, you will see all the payment options associated with that quote.

Details: Rating messages are displayed here. The messages are such things as “Inspect Vehicle, take photos” or “Agent Code Required.”

On the upper right of the Comparison screen you will see the following three options:

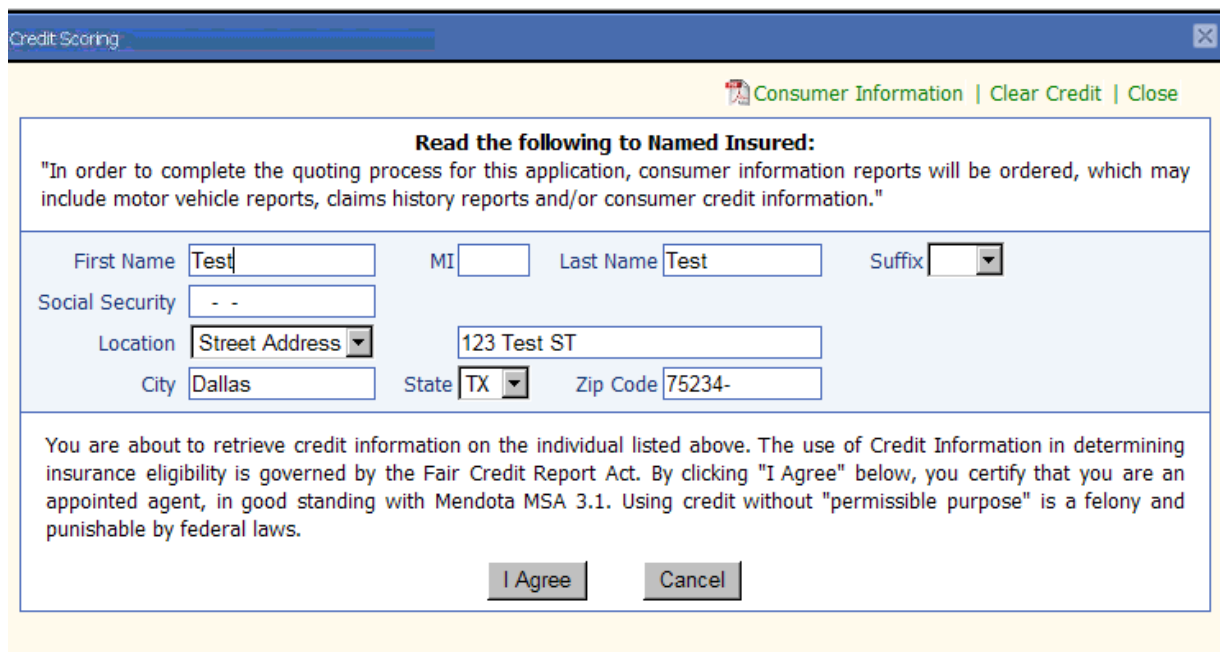
Print | Email | Edit Quote

Print: This allows you to print out the list of companies with their rates from the Comparison screen.

Email: You are able to e-mail a copy of the rates from the Comparison screen. The “To” address is pulled from the e-mail address listed on the Entry screen for the client. The “From” address is the e-mail address listed on your account. Both of the address can be changed.

Edit Quote: This will take you back to the Entry screen where you can then edit the quote.

NOTE: Not all companies pull credit on the “first pass.” Some of them require their credit to be pulled individually when you choose them to rate the risk. To do this you will select that company and a Credit Scoring box will open. Fill out any missing information. Then click “I Agree” for the credit to be pulled.



Credit Scoring

[Consumer Information](#) | [Clear Credit](#) | [Close](#)

Read the following to Named Insured:

"In order to complete the quoting process for this application, consumer information reports will be ordered, which may include motor vehicle reports, claims history reports and/or consumer credit information."

First Name MI Last Name Suffix

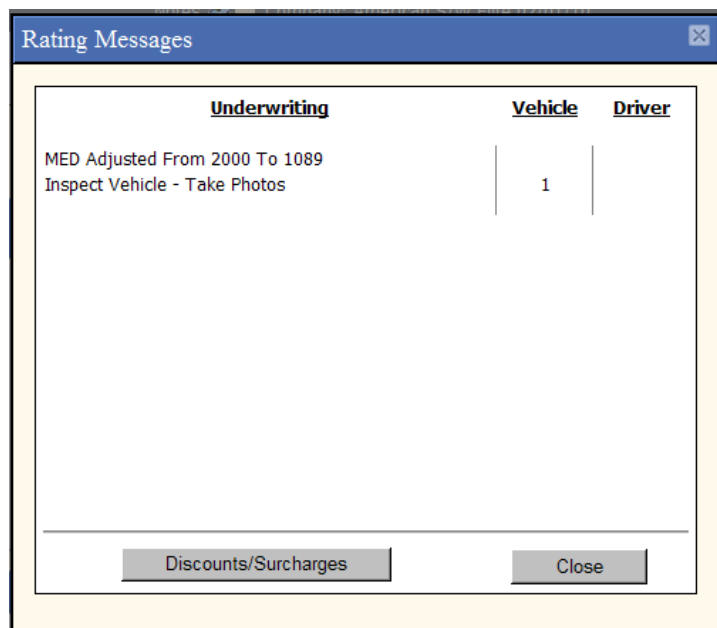
Social Security

Location

City State Zip Code

You are about to retrieve credit information on the individual listed above. The use of Credit Information in determining insurance eligibility is governed by the Fair Credit Report Act. By clicking "I Agree" below, you certify that you are an appointed agent, in good standing with Mendota MSA 3.1. Using credit without "permissible purpose" is a felony and punishable by federal laws.

You will now select the insurance company you wish to rate the risk with. The Rating Messages box will then appear. This is the underwriting for the policy. In the Utilities you can select to have this box appear automatically after choosing the insurance company on the Comparison screen. If you do not wish to have the Rating Messages display at this time you would unselect this option in the Utilities. After viewing the messages click on “Close.” You will now be presented with the Breakdown screen.



Rating Messages

<u>Underwriting</u>	<u>Vehicle</u>	<u>Driver</u>
MED Adjusted From 2000 To 1089 Inspect Vehicle - Take Photos	1	

Breakdown Screen

The Breakdown Screen will now appear. The Breakdown Screen gives you a second chance to look over the quote with the breakdown of the cost of the coverage with the selected insurance company. You can also edit the quote, view underwriting, save the quote, print, go back to the Comparison screen, or exit.

You will notice on the Breakdown screen the Driver information is not displayed. If you wish to view it, click on the **Show Driver Information** button.

Application/Bind/Bridge Comparison Edit Quote Retrieve Quotes Messages Save Quote Print			
Name Insured: Sample A Driver		Notes	
Phone: (954)555-5555		Zip Code: 33441	
Email:		Company: GMAC Choice 03/17/11	
		Policy Period: 03/24/2011 to 09/24/2011	
		Term: <input type="text" value="SEMI"/> Company Tier: B,NS	
			Total Policy Premium
			\$3,172.72
Show driver information			
Vehicle Coverages		2005 ACURA 3.2TL	
BI/PD	10/20/10	\$530.00 / \$249.00	
PIP	1000 NIRR	\$1,041.00	
UM	10/20	\$301.00	
Med	1000	\$141.00	
Comprehensive		500 Ded	\$258.00
Collision		500 Ded	\$612.00
Custom Equipment		N/A	\$0.00
Towing		N/A	\$0.00
Rental		N/A	\$0.00
Subtotal		\$3,132.00	
Other Cov / Fees		Total Fees: \$40.72	
Accidental Death		N/A	\$0.00
ADD / OPT		\$0.00	\$0.00
MVR / SR-22		\$0.00	\$0.00
Policy Fee / FHCF		\$0.00	\$40.72

Notice that the Toolbar at the top has now changed and has different buttons.

Application/Bind/Bridge Comparison Edit Quote Retrieve Quotes Messages Save Quote Print

Comparison: Clicking this button will take you back to the Comparison screen.

Edit Quote: This will allow you to edit your current quote. You will have to re-rate after changing any information.

Retrieve Quotes: Clicking this button will open the quote saver. You can then access any quotes previously saved.

Messages: This will open the Rating Messages display. This displays any underwriting messages such as "Inspection required" and also the discounts / surcharges that apply to the policy.

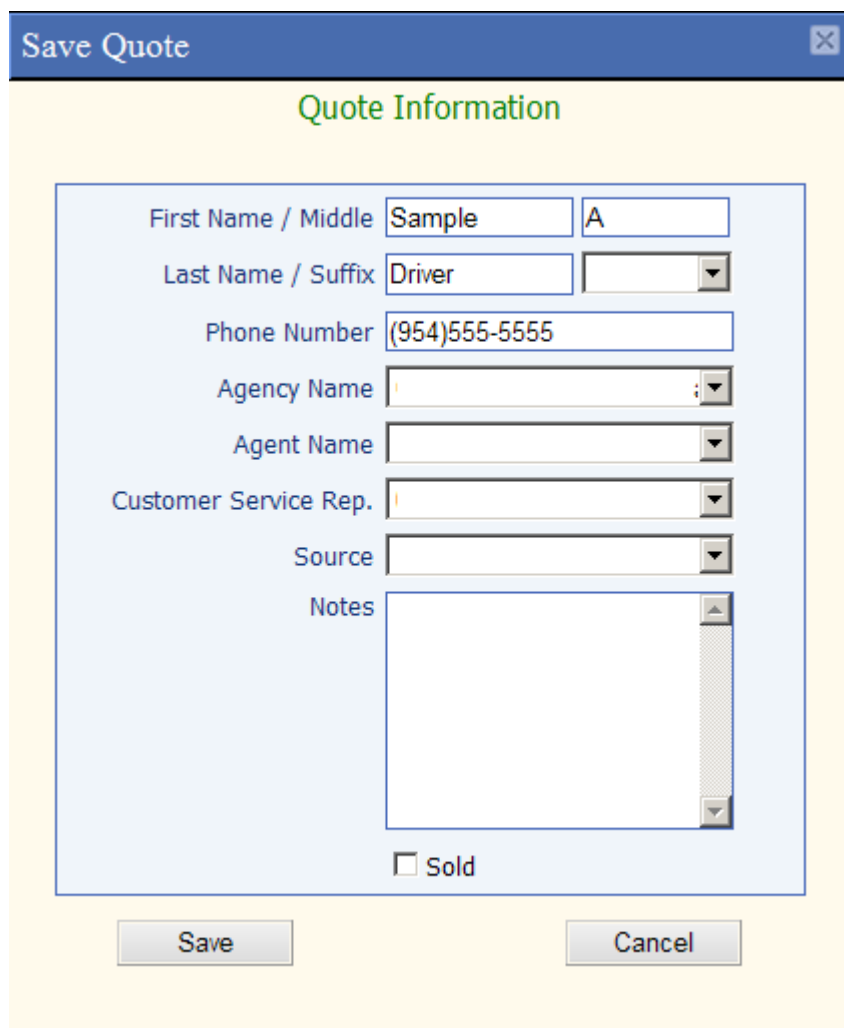
Print: This allows you to print out various letters and inspection forms. They are all in .PDF format. They are listed below.

- **Quote Printout:** Prints everything you see on the quoted screen including information on the client, agent, insurance company, driver(s), vehicle(s), underwriting, coverage, and billing.
- **Customer Letter:** This will print a letter listing the drivers, vehicles, and coverage of the policy. Each limit is listed individually.
- **Customer Letter Detailed:** A letter with more detail than the Custom letter listed above. It includes things such as Limits and Premium of the coverages.
- **Pre-Insurance Inspection:** This form is used when the insurance company requires it for individuals being insured for comprehensive and/or collision coverage.
- **Vehicle Inspection:** This is the Department of Insurance's inspection form. This will be used when an insurance company requires an inspection to be completed.
- **ID card:** Form allowing agents to create an ID card for the insured.

Quote Saver

The QQ WebRater Saved Quotes section is used to store and retrieve all of your saved quotes. You can save the quote by clicking on the Save Quote button located in the top toolbar.

Save Quote: This will open the “Save Quote” box. Most of the information will be pre-filled. You can fill in any missing information such as Source. You are also able to check **Sold** if the policy was written. If you are doing a re-quote the buttons on the Save screen will change. You will have the choice between **Save as New**; this will allow you to save this quote as new. Doing this will create a second quote for your applicant. The second button will say **Re-Save**, doing this will save the current quote therefore replacing the original quote.




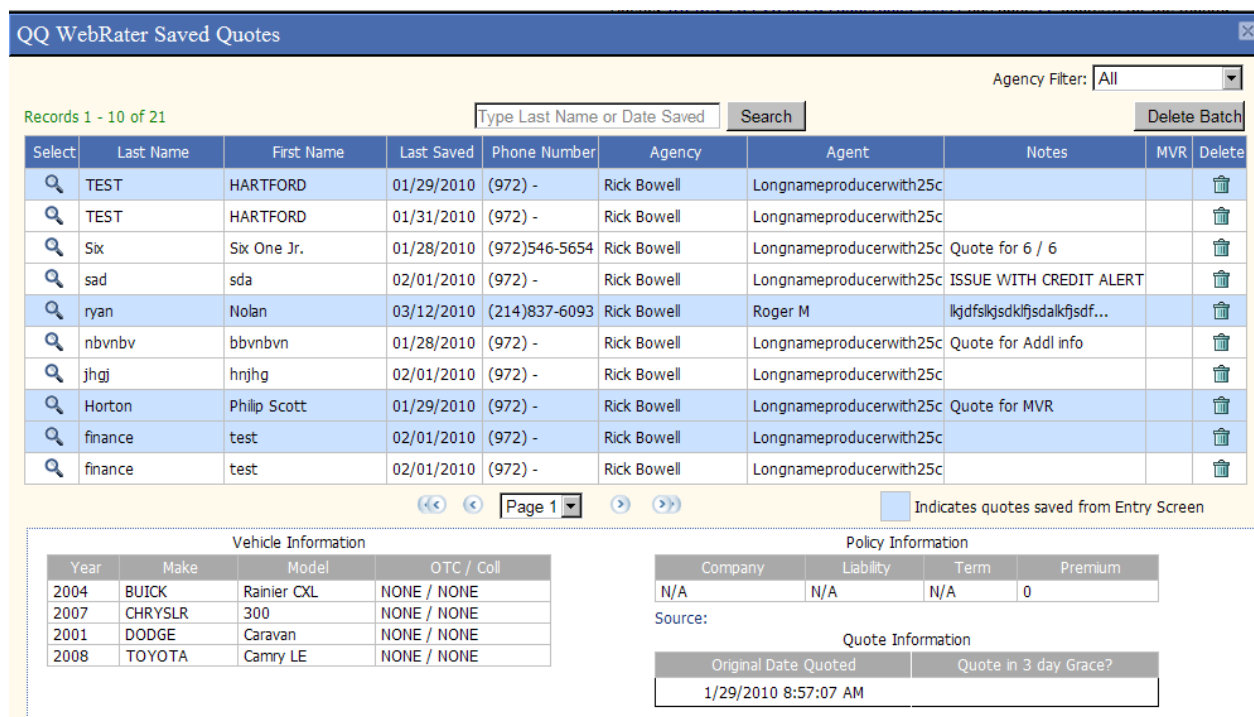
The image shows a "Save Quote" dialog box with a blue title bar and a close button. The main area has a yellow background and is titled "Quote Information" in green. It contains a light blue rectangular form with the following fields:

- First Name / Middle: Text input with "Sample" and a dropdown with "A".
- Last Name / Suffix: Text input with "Driver" and a dropdown menu.
- Phone Number: Text input with "(954)555-5555".
- Agency Name: Text input with a dropdown menu.
- Agent Name: Text input with a dropdown menu.
- Customer Service Rep.: Text input with a dropdown menu.
- Source: Text input with a dropdown menu.
- Notes: A large text area with a scrollbar.
- ☐ Sold: A checkbox at the bottom of the form.

At the bottom of the dialog box are two buttons: "Save" and "Cancel".

Retrieving a Saved Quote:

To retrieve a saved quote, hover your mouse over the arrow  next to the “Quote” button, click on “Retrieve Quotes”. Doing so will open the QQ WebRater Saved Quotes form.



Select	Last Name	First Name	Last Saved	Phone Number	Agency	Agent	Notes	MVR	Delete
	TEST	HARTFORD	01/29/2010	(972) -	Rick Bowell	Longnameproducerwith25c			
	TEST	HARTFORD	01/31/2010	(972) -	Rick Bowell	Longnameproducerwith25c			
	Six	Six One Jr.	01/28/2010	(972)546-5654	Rick Bowell	Longnameproducerwith25c	Quote for 6 / 6		
	sad	sda	02/01/2010	(972) -	Rick Bowell	Longnameproducerwith25c	ISSUE WITH CREDIT ALERT		
	ryan	Nolan	03/12/2010	(214)837-6093	Rick Bowell	Roger M	lkjdfslkjsdklfjsdalkfjsdf...		
	nbnbnv	bbvnbnv	01/28/2010	(972) -	Rick Bowell	Longnameproducerwith25c	Quote for Addl info		
	jhgj	hnjhjg	02/01/2010	(972) -	Rick Bowell	Longnameproducerwith25c			
	Horton	Philip Scott	01/29/2010	(972) -	Rick Bowell	Longnameproducerwith25c	Quote for MVR		
	finance	test	02/01/2010	(972) -	Rick Bowell	Longnameproducerwith25c			
	finance	test	02/01/2010	(972) -	Rick Bowell	Longnameproducerwith25c			

Vehicle Information			
Year	Make	Model	OTC / Coll
2004	BUICK	Rainier CXL	NONE / NONE
2007	CHRYSLR	300	NONE / NONE
2001	DODGE	Caravan	NONE / NONE
2008	TOYOTA	Camry LE	NONE / NONE

Policy Information			
Company	Liability	Term	Premium
N/A	N/A	N/A	0

Source:

Quote Information	
Original Date Quoted	Quote in 3 day Grace?
1/29/2010 8:57:07 AM	

This area displays all pertinent information, at a glance, for all the saved quotes in your agencies database. You can view quotes per agency, or all agencies, by using the “Agency Filter” located at the top right hand of this form.

Entries highlighted in light blue indicate the quote was saved from the entry screen. Typically, there will be no quote information associated with this saved entry.

Search: Allows you to search for a quote by Last Name or Date Saved. Note: If you use the Search feature, you can return to the full saved quotes list by clicking on the browse button.

Delete / Delete Batch: By clicking on the trashcan icon you can delete an individual saved quote. To delete several quotes at a time, click on the Delete Batch button and enter the start and end dates and click the Delete button.

Select: To select a quote from the quote saver you need to click on the magnifying glass icon in this column. Be advised that double clicking on the quote entry will not open the quote. Only clicking on the magnifying glass will open the quote.

NOTE: A single quote on the saved quote entry will update the vehicle, policy and quote information listed at the bottom of the quote saver form. This allows you to review information prior to opening the quote.

The following columns can all be used to sort entries in the Quote Saver:

Last Name: Insured's last name

First Name: Insured's first name

Last Saved: Date that the quote was last saved

Phone Number: Insured's phone number

Agency: Indicates name of agency that saved the quote

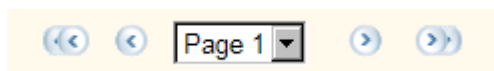
Agent: Name of agent assigned to the quote

Notes: Any notes associated with the quote

MVR: If an MVR was pulled for this quote and saved, an asterisk will appear in this column. The MVR(s) pulled on a quote will be saved for 30 days as long as you SAVE the quote after completing it. After 30 days the MVR(s) will need to be pulled again. Also once an MVR is pulled the violations cannot be deleted on the client.

Browsing Saved Quotes

You can browse through saved quotes easily by using the page (forward/back) arrows located just below the entry list. Also, you can go directly to a page number using the drop down list.



Beginning of list



End of List



Next page (Down)



Next page (Up)

Application/Bind/Bridge

If your quote is correct you are now ready to move forward, click on the Application/Bind/Bridge button on the left in the top tool bar. The following screen will appear. If you are using premium financing or the plain paper application the tabs on Application/Bind/Bridge may change. Examples of the tabs that may change will follow.

Quote for Test Test

Company: Premium Company Policy Term: Semi-annual Total Policy Premium: \$1365.50

Save & Close

Pay Plan Driver Vehicle Finance Policy Print Application Transfer to QQ Evolution Help

Next

Paid In Full

Total Payment

Other Information

☐ \$1365.50

Direct Bill

Down Payment

EFT

Installments

☐ \$224.90 ☒

5 Payments - First \$226.62

☐ \$330.50 ☒

5 Payments - First \$205.50

☐ \$232.55

5 Payments - First \$234.09

☐ \$341.75

5 Payments - First \$212.25

EFT payment plan will reduce the premium by \$45.00.

Outside Financing

☐ Finance Company

Hallmark Finance Corp.

Amount Financed: \$913.00

Down Payment \$ 452.50

Finance Charges: \$54.76

Percentage Down 30.0

Total Payments: \$967.76

Number of Payments 4

APR: 28.46%

Monthly Payments \$241.94

Pay Plan: This is the first section displayed. Select the pay plan the customer wishes to have. The green check mark indicates EFT as the payment type may be applied. Also at the bottom of the screen it lists the amount of the discount when EFT is applied.

Once the pay plan is selected the total premium may change, depending on discounts the company may offer based on Paid in Full or EFT. Once the pay plan is chosen, any discounts such as Paid in Full are applied and the total premium reflects this.

After completing the Pay Plan section, click on the “Next” button to the upper right or simply click “Driver.”

Driver: The next section that needs to be completed is Driver.

The screenshot shows a web application interface for entering driver information. At the top, there is a navigation bar with links: Pay Plan, **Driver**, Vehicle, Finance, Policy, Print Application, Transfer to QQ Evolution, and Help. On the right side of the navigation bar are buttons for 'Previous' and 'Next'. The main content area is titled 'Driver 1' and contains several sections of input fields:

- Driver 1:** Fields for First (Test), M, Last (Test), Suff (dropdown), Home Phone ((972)651-0651), Work Phone (() -), Ext. (), Cell Phone (() -), Email (), License (), and SS# (- -).
- Vehicle Percent Use:** A checkbox field.
- Co-Applicant:** A checkbox field.
- Garaging Address:** Fields for Street (123 Test St), City (Farmers Branch), County (Dallas), ST (TX), and Zip (75234-). A 'Verify Address' link with a globe icon is next to the Zip field.
- Mailing Address:** Fields for Street, City, County, ST (dropdown), and Zip (-). A 'Verify Address' link with a globe icon is next to the Zip field.
- Employer Information:** Fields for Name, Street, City, ST (dropdown), Zip, Occupation, and Years Employed (checkbox).

As you see in the above example, any information already entered on the Entry screen is pre-filled here for you. You will fill in any missing information such as the employer and then proceed to the next screen by clicking the “Next” button. You will also note there is a **Verify Address** next to each possible address entry. You are able to check and see if the address the client provided you is valid.

Vehicle: Any information entered on the Entry screen is pre-filled for you.

The screenshot shows a web application interface for vehicle entry. At the top, there is a navigation bar with links: Pay Plan, Driver, **Vehicle**, Finance, Policy, Print Application, Transfer to QQ Evolution, and Help. On the right side of the navigation bar are two buttons: "Previous" and "Next". Below the navigation bar, the main content area is titled "2004 ACURA 3.2TL". Under this title, there are two input fields: "VIN" with the value "19UUA656" and "Annual Mileage" with the value "5000". Below these fields is a section titled "Lienholder/ Additional Interest" with a link "View All". Under this section, there are several input fields: "Name", "Street", "City", "ST" (a dropdown menu), "Zip", and "AI". To the right of the "AI" field is a checkbox labeled "Save as New".

- **VIN:** The VIN number should be entered here.
- **Annual Mileage:** Enter the annual mileage of the vehicle.
- **Lienholder/ Additional Interest:** If the vehicle has any lien holders they will be entered here. If you click "View All," it will display any lien holders you have previously saved. You can select one and its information will be automatically filled in for you. Lien holders can be entered in the Utilities section for future use on any application. To the far right is "Save as new," this will save the lienholder into the Utilities for later use.

Finance

Some of the insurance companies accept outside financing. On these companies an additional option will display under “Pay Plan.” After completing the Finance area you will proceed with your quote as explained above.

Outside Financing ☐ Finance Company

Hallmark Finance Corp.

Down Payment \$

452.50

Percentage Down

30.0

Number of Payments

4

Monthly Payments \$241.94

Amount Financed: \$913.00

Finance Charges: \$54.76

Total Payments: \$967.76

APR: 28.46%

Once Outside Financing is selected another tab will appear next to Pay Plan called “**Finance.**”

The tabs available on the Finance screen will depend on which finance company you have selected.

Finance Policy Details

Contract Number	Policy Effective	Policy Expires	Insurance Company	Type of Coverage	Premium
	03/31/2010	09/30/2010	Gainsco 6M Choice	AUTO	\$1,159.50

Hallmark Finance Corp.

Agent #

First Payment Due

04/30/2010

Payment Details

Down Payment: \$394.50

Percentage Down: 30.0%

Number of Payments: 4

Monthly Payments: \$202.72

Amount Financed: \$765.00

Finance Charge: \$45.88

Total Payments: \$810.88

APR: 28.45%

Create Finance Forms

Finance Policy Details: Here, enter the details pertaining to the financing of the policy.

Binder Number: Enter the binder number for the finance company manually. If a Brokering Agent's Register Number is entered on the Policy screen, it will auto fill that number into the Binder number area and vice versa.

Policy Effective/Expires: This is the effective and expiration date of the policy.

Insurance Company: This is the insurance company the policy is being written with.

Type of Coverage: The coverage which was selected on the Entry screen is listed here.

Premium: The total premium of the policy is shown here.

Financial Corp: The finance company you have chosen will be displayed. Under Financial Corp are the following.

- **Agent #:** This is your agent code with the finance company. It will be pre-filled for you once you have entered the code in the Utilities section.
- **First Payment Due:** This is the date the first payment for the policy is due. It will be pre-filled based on the effective date but it can be changed if needed.

Payment Details: This shows the details for the payment such as down payment, APR, and number of payments.

Once all finance information has been entered, please review to confirm everything is correct. When you are satisfied you can then click on the **“Create Finance Forms”** button. This will then print the Finance Agreement as well as the Finance Coupons. These can be printed out or save electronically as a PDF file

Finance Agreement Finance Coupons Adobe Help

1 / 2 85.5% Find

PREMIUM FINANCE AGREEMENT - Truth-in-Lending Disclosure Page 1 of 2

NAME OF INSURED Test Test		NAME OF AGENT/BROKER QQ Dev TX EVO	
ADDRESS 201 Street	TEL # (972)546-4654	ADDRESS 5211 NE 15th Avenue	TEL # (713) 398-5389
CITY / STATE / ZIP CODE Houston, TX 55785-6757		CITY STATE ZIP Ft. Lauderdale, TX 33334	
		Agent #	Contract #: 123456

SCHEDULE OF POLICIES

POLICY NO.	DATE OF POLICY (OR OF APPLICATION)	POLICY TERM	INSURANCE COMPANY	TYPE OF COVERAGE	PREMIUM
	03/31/2010	SEMI-ANNUAL	Gainsco 6M Choice	AUTO	\$1,159.50

Name of LENDER

TRUTH-IN-LENDING DISCLOSURES

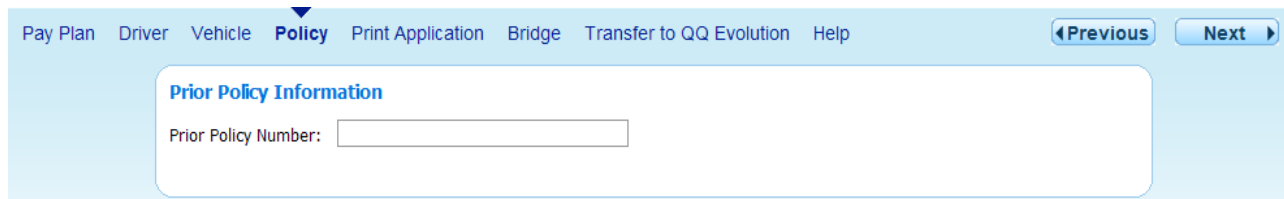
NOTE: If you do not print the finance agreement and coupons at the time the quote is done, you will have to requote the policy in order to print these documents. When you pull this quote from the saver, you must requote the saved quote first in order to make any changes. This includes reprinting the finance documents.

Policy

Additional policy information can be entered.

Policy Information	
Brokering Agent's Register Number: <input type="text"/>	
Notice to Applicant: Read this section carefully	
Does or has the applicant, any household member, or any regular driver (applies to questions 1 thru 5) (Explain all YES answers in Remarks)	Disclosure
1. Had auto insurance cancelled, been refused insurance or renewal, or received notice of such intent?	<input type="radio"/> Yes <input type="radio"/> No
2. Had license to drive or registration suspended, revoked or refused in the past 5 years?	<input type="radio"/> Yes <input type="radio"/> No
3. Had an accident or sustained a loss in the past 5 years?	<input type="radio"/> Yes <input type="radio"/> No
4. Been fined, convicted, arrested, or forfeited bail in the past 5 years?	<input type="radio"/> Yes <input type="radio"/> No
5. Have a handicap or physical disability that substantially impairs the applicant(s)/driver(s) driving ability, which is NOT corrected by mechanical assistance?	<input type="radio"/> Yes <input type="radio"/> No
6. Do any operators reside in Florida LESS than 10 months per year?	<input type="radio"/> Yes <input type="radio"/> No
7. Has a listed vehicle ever been salvaged?	<input type="radio"/> Yes <input type="radio"/> No
8. Any listed vehicle "Gray Market", (i.e. not manufactured for original sale in the U.S.)?	<input type="radio"/> Yes <input type="radio"/> No
9. Any vehicles listed on this application used for hire (taxi, limo, etc.), commercial or business purposes, delivery (pizza, newspaper, etc.), or used in the course or scope of your employment?	<input type="radio"/> Yes <input type="radio"/> No
10. Any residents of your household (licensed or not) that have NOT been disclosed on this application?	<input type="radio"/> Yes <input type="radio"/> No
11. Have you failed to list any drivers such as children away from home or in college, who may operate your vehicles on a REGULAR basis?	<input type="radio"/> Yes <input type="radio"/> No
12. Have you failed to list any other vehicles in the household?	<input type="radio"/> Yes <input type="radio"/> No
13. Do any of the vehicles on this application have any existing damage?	<input type="radio"/> Yes <input type="radio"/> No
14. Have you or any resident member of your household made a claim for payment of Personal Injury Protection benefits in the past 3 years?	<input type="radio"/> Yes <input type="radio"/> No
Remarks: <input type="text"/> <input type="text"/>	
Agent's Name: <input type="text"/>	
Agent's State License Number: <input type="text"/>	
PIP Dependents	
1	First: <input type="text"/> M: <input type="text"/> L: <input type="text"/> Suff: <input type="text"/> DOB: <input type="text"/> Relationship: <input type="text"/> Occupation: <input type="text"/>
2	First: <input type="text"/> M: <input type="text"/> L: <input type="text"/> Suff: <input type="text"/> DOB: <input type="text"/> Relationship: <input type="text"/> Occupation: <input type="text"/>

Prior Policy Number: If the policy is a transfer or renewal, enter the policy number for the prior policy.



Pay Plan Driver Vehicle **Policy** Print Application Bridge Transfer to QQ Evolution Help

◀ Previous Next ▶

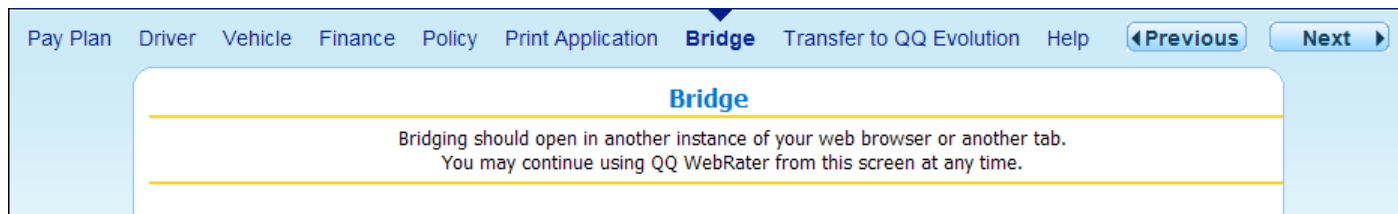
Prior Policy Information

Prior Policy Number:

Print Application

There are several companies which take our plain paper application. By clicking on **Print Application**, this opens the paper application which you can then print. All the information will have already been pre-filled for you based on what you selected on the previous tabs. You cannot type directly onto the application. If anything needs to be changed it must be done on the previous tab the information was originally entered on.

Bridge: When this is selected the connection process will begin with the insurance company you are writing with. The below message will display.



The screenshot shows a web application interface with a navigation bar at the top containing links: Pay Plan, Driver, Vehicle, Finance, Policy, Print Application, Bridge (highlighted), Transfer to QQ Evolution, and Help. On the right side of the navigation bar are buttons for 'Previous' and 'Next'. Below the navigation bar, the title 'Bridge' is centered. Underneath the title, a message states: 'Bridging should open in another instance of your web browser or another tab. You may continue using QQ WebRater from this screen at any time.'

A separate window will open displaying the insurance company name and stating that your quote is being loaded to their website.

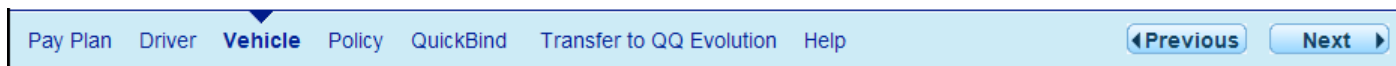


The screenshot displays the GAINSCOconnect.com Agent Portal. At the top, the text 'GAINSCOconnect.COM AGENT PORTAL' is followed by links for 'Home', 'Contact Us', and 'Login'. The main header features the GAINSCO Auto Insurance logo on the left and a background image of a red race car with the number 99 and GAINSCO Auto Insurance branding. Below the header, a navigation bar includes links for 'HOME', 'ABOUT US', 'NEW AGENTS', 'CONTACT US', and 'GAINSCO SITES'. The main content area on the left welcomes users to GAINSCOconnect.com, stating it is the online portal for partner agents and asking them to login. On the right, there is a login form with fields for 'Code', 'User ID', and 'Password', a 'Remember Me?' checkbox, a 'Log-In' button, and a link for 'Forgot your password?'. A link for 'About GAINSCO' is located at the bottom left of the main content area.

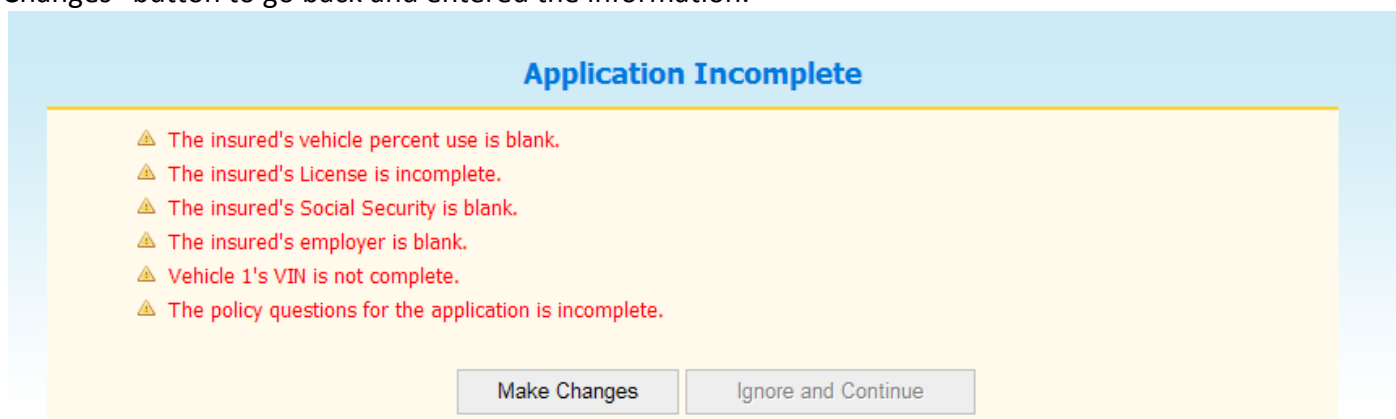
Once the quote is loaded you will be taken to the insurance company's website. The information previously entered into QQ WebRater will pass over to the company website. Once on the company website continue on with the writing process in the manner in which the company requires.

QuickBind

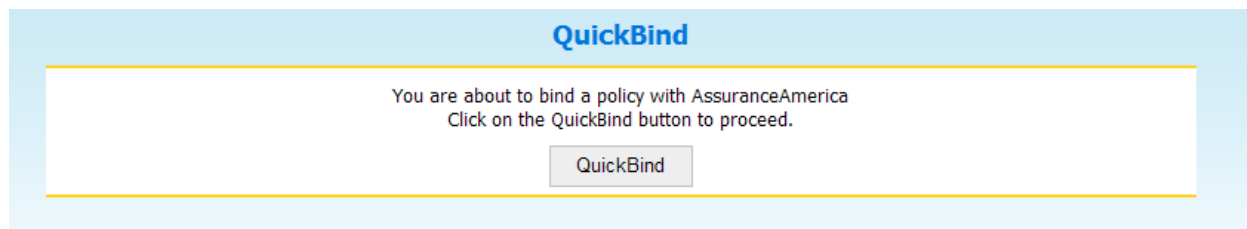
If you are writing with an insurance company and/or finance company that binds you will see a “QuickBind” tab. The QQ WebRater is a **“one click”** binding program. This meaning you can bind the insurance and finance company’s application at the same time. This is a great time saver.



Once you click this tab, if the information on the previous tabs has not been completed you will receive the below message. The missing information must be completed before binding. You will select the “Make Changes” button to go back and entered the information.



Once on the QuickBind screen the below message will appear. It will list the name(s) of the companies you are binding with. You will simply click the **QuickBind** to bind the policy.



After the binding is completed the following message will appear and your quote will have been automatically saved for you.

Binding Successful

Policy uploaded successfully.
Your quote was automatically saved.

Open Application PDF

Click on Open Application PDF, you have the ability to print this document if you wish. You can also save this document in PDF format.

Quote for Test Driver

Company: AssuranceAmerica **Policy Term:** Semi-annual **Total Policy Premium:** \$1,518.50
 This policy was bound with AssuranceAmerica on 04/06/2010 9:12:00 AM

Pay Plan Driver Vehicle Policy **Bound Docs** Transfer to QQ Evolution Help

[Adobe Help](#)

Bound App Document

AUTOMOBILE APPLICATION

AssuranceAmerica Insurance Co
P.O.B. 723128
Atlanta, GA 31139-0128
Phone (800) 450-7857 Fax (877) 952-0258

Application # TX7777-10-04-06-11UJ

Producer Name QQ Sales TX (Evo)
Address P.O. Box 702591
City, State, Zip Dallas, TX 75370-
Phone (214) 837-6093
Producer Code TX7777

POLICY INFORMATION

Effective Date 04/06/2010 Time 09:12 AM Pol. Term SEMI
Expiration Date 10/06/2010 Policy Number PTX001908

PRIOR INSURANCE INFORMATION

Company NO PRIOR
Expiration Date Policy Number

Coverage is Bound no earlier than 12:01am the date received by Company (premium or deposit must be enclosed) unless prior arrangements are made with Company.

APPLICANT INFORMATION

First/M/Last/S Test Driver
Address 123 Test St
City, Cnty, St, Zip San Antonio Bexar TX 78228
Phone (972)555-5555 Work Phone (555)555-5555

GARAGING INFORMATION

Garage Address 123 Test St
City, State, Zip San Antonio TX 78228
Garage County Bexar
Garage, Driveway, Carport

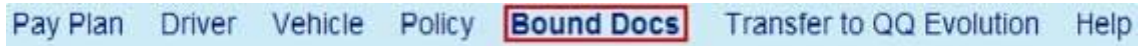
DRIVER(S)

Name	DOB	Sex	M/S	Rel	License	St	Social Security #	Pts	% USE	SR 22	Case #	Occurrence Date

Reprinting an application

There may be an occasion when you need to reprint the application. This can easily be done by following the below steps.

- 1 Open "Retrieve Quotes" and select your client.
- 2 Once on the Breakdown screen click Application/Bind/Bridge.
- 3 Now there will be a Bound Docs or Print Application tab which replaces the QuickBind tab. You can reprint the documents by selecting the printer icon.



Pay Plan Driver Vehicle Policy **Bound Docs** Transfer to QQ Evolution Help

Transfer to QQ Evolution

This allows you transfer all of the policy's information to the QQ Evolution Agent Management system. In an area that is blank, you can fill in the missing information. Not all of the information is required for the transfer to QQ Evolution.

[Pay Plan](#) [Driver](#) [Vehicle](#) [Policy](#) [Print Application](#) [Bridge](#) **Transfer to QQ Evolution** [Help](#) [Previous](#)

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

Binder Number	<input type="text" value="173"/>	Agency	<input type="text" value="QQ Sales TX (Evo)"/>
Client Number	<input type="text" value="XXX11135YYY"/>	Agent	<input type="text" value="0adi1"/>
Policy Number	<input type="text"/>	CSR	<input type="text" value="0adi1"/>
Contract Number	<input type="text"/>	Client Source	<input type="text" value="Bench Ad"/>
Additional Amount	<input type="text" value="0.00"/>	Source Detail	<input type="text"/>
Additional Company	<input type="text"/>	Policy Source	<input type="text" value="Bench Ad"/>
		Optional Company	<input type="text"/>

Memo

Memo Reminder Date

Coverage Description

Premium Quoted	<input type="text" value="429.00"/>
Base Premium	<input type="text" value="368.00"/>
Fees	<input type="text" value="61.00"/>
Premium Issued	<input type="text" value="429.00"/>
Policy Issued	<input type="checkbox"/>
Premium Down Payment	<input type="text" value="429.00"/>
Agency fee	<input type="text" value="0.00"/>
MVR fee	<input type="text" value="0.00"/>
Optional Amount	<input type="text" value="0.00"/>

Total Down Payment Due	<input type="text" value="429.00"/>
IOU Amount	<input type="text" value="0.00"/>
Down Payment Received	<input type="text" value="429.00"/>
Due Date	<input type="text" value="04/09/2010"/>
Number of Payments	<input type="text" value="0"/>
Monthly Payments	<input type="text" value="0.00"/>
First Due Date	<input type="text" value="/ /"/>

Payment Type

☐ Split Pay ☐ EFT To Company

Please note: This client will be transferred as a prospect until the policy has been bound or bridged. If bridging, remember to enter the Premium Issued Amount after the bridge.

Transfer to QQ Evolution (With Receipt)

Transfer to QQ Evolution (No Receipt)

Transfer to QuickFile Enterprise

This allows you transfer all of the policy's information to the QuickFile Enterprise Agent Management system. In an area that is blank, you can fill in the missing information. Not all of the information is required for the transfer to QQ Evolution.

[Pay Plan](#) [Driver](#) [Vehicle](#) [Policy](#) [Print Application](#) [Bridge](#) **Transfer to QuickFile** [Help](#) [Previous](#)

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

Binder Number	Love -298 - You	Agency	*QQ David V FL - I
Client Number	565	Agent	00001akutestagen
Policy Number		CSR	00001akutestagen
Contract Number		Client Source	Internet
Additional Amount	50.00	Optional Company	
Additional Company			
Memo	Client/Policy Added		
Memo Reminder Date			
Coverage Description	2005 AUDI A4 1.8T Avant Quattr		
Premium Quoted	1,405.67		
Premium Issued	1,405.67		
Premium Down Payment	1,405.67		
Agency fee	0.00		
MVR fee	0.00		
Optional Amount	25.00		
Total Down Payment Due	1,430.67		
IOU Amount	0.00		
Down Payment Received	1,430.67		
Due Date	06/04/2010		
Number of Payments	0		
Monthly Payments	0.00		
First Due Date			
Payment Type	Cash	<input type="checkbox"/> Split Pay	<input type="checkbox"/> EFT To Company

Please note: This client will be transferred as a prospect until the policy has been bound or bridged. If bridging, remember to enter the Premium Issued Amount after the bridge.

[Transfer to QuickFile \(With Receipt\)](#) [Transfer to QuickFile \(No Receipt\)](#)

Chapter 4 - Pro Rata Wheel

Introduction

The Pro-Rata Wheel will help you to calculate returned commissions, additional commissions, and Endorsement Premium. This chapter will help you understand exactly how the calculator works and what steps you must take to get the correct calculations.

The screenshot shows a software window titled "Pro-Rata Wheel". At the top, there is a "Client Name" field with a yellow placeholder. Below this is a large form area with two columns. The left column contains labels for various fields, and the right column contains the corresponding input fields or values. The fields are: "Cancel / Endorsement" (set to "Endorsement"), "Effective Date" (empty), "Endorsement Date" (set to "03/28/2011"), "Policy Term" (set to "Annual"), "Commission Rate (%)" (set to "15"), "Days Remaining" (set to "0"), "Annual Add Premium" (set to "\$"), "Unearned Factor" (set to "0.000"), "Pro Rata Premium" (set to "\$ 0"), "Commission" (set to "\$ 0.00"), "Due Company" (set to "\$ 0.00"), "Percent Down" (set to "35%"), "Amount Down" (set to "\$ 0"), "Financed Amount" (set to "\$ 0"), "# Payments Left" (empty), and "Added to Payment" (set to "\$ 0.00"). To the right of the form area, there are four buttons: "Print Wheel", "ACORD 35", "Clear", and "Close".

Field Label	Value
Cancel / Endorsement	Endorsement
Effective Date	
Endorsement Date	03/28/2011
Policy Term	Annual
Commission Rate (%)	15
Days Remaining	0
Annual Add Premium	\$
Unearned Factor	0.000
Pro Rata Premium	\$ 0
Commission	\$ 0.00
Due Company	\$ 0.00
Percent Down	35%
Amount Down	\$ 0
Financed Amount	\$ 0
# Payments Left	
Added to Payment	\$ 0.00

The Pro-Rata Wheel has been designed to calculate as you enter information, removing the need for a "Quote" button. Simply fill in all fields on the screen to complete your Endorsement, Cancel Short, or Cancel Pro Rate premiums.

On the right side of the screen you will see the following buttons:

- **Print Wheel** – Allows you to print the Pro-Rata screen. Form can be printed or saved as a PDF document
- **ACORD 35** – This will display the Cancellation Request / Policy Release form. Form can be printed or saved as a PDF document
- **Clear** – Clears the Pro-Rata Wheel
- **Close** – Closes the Pro-Rata Wheel

Endorsement Example

Begin by entering the Client's Name

Client Name

Policy Information

Once you have entered the client name, enter the Policy Information.

Cancel / Endorsement	Endorsement
Effective Date	<input type="text"/>
Endorsement Date	03/28/2011
Policy Term	Annual
Commission Rate (%)	15
Days Remaining	0

- **Cancel / Endorsement** – Select endorsement
- **Effective Date** – The effective date of the client's policy
- **Endorsement Date** – The date of the endorsement
- **Policy Term** – Annual or Semi-Annual
- **Commission Rate (%)** – The percentage of commission paid
- **Days Remaining** – Number of days left on the policy

Pro-Rata Information

Once you have filled out the Policy Information, enter the Pro-Rata Information.

Annual Add Premium	\$ <input type="text"/>
Unearned Factor	0.000
Pro Rata Premium	\$ 0
Commission	\$ 0.00
Due Company	\$ 0.00

- **Annual Additional Premium** – Amount of additional premium if any.
- **Unearned Factor** – A percentage of the unearned premium
- **Pro-Rata Premium** – The new premium based on the effective date in dollars
- **Commission** – Commission paid on the endorsement based upon the commission percentage rate
- **Due Company** – Dollar amount due the insurance company based on the endorsement amount

Finance Information

Once you have filled the Pro-Rata Information, complete the Finance Information

Percent Down	<input type="text" value="35%"/>
Amount Down	\$ 0
Financed Amount	\$ 0
# Payments Left	<input type="text"/>
Added to Payment	\$ 0.00

- **Percent** – The percentage that is required down
- **Amt Down** – The dollar amount required down
- **Financed Amount** – The amount to be financed
- **# Payments Left** – The number of payments left
- **Added to Payment** – The amount to be added to each of the remaining payments

After you have completed all of the necessary fields your calculation is complete. You can print the screen once you are done.



Cancel Short or Cancel Prorate Example

Begin by entering the Client's Name

Client Name

Policy Information

Once you have entered the client name, enter the Policy Information.

Cancel / Endorsement	<input type="text" value="Cancel Short"/>	
Effective Date	<input type="text"/>	
Cancellation Date	<input type="text" value="03/28/2011"/>	
Policy Term	<input type="text" value="Annual"/>	
Commission Rate (%)	<input type="text" value="15"/>	
Days Covered	<input type="text" value="0"/>	

- **Cancel / Endorsement** – Select Cancel Short or Cancel Prorate
- **Effective Date** – The effective date of the client's policy
- **Cancellation Date** – The date of the cancellation
- **Policy Term** – Annual or semi – annual
- **Commission Rate** – The percentage of commission paid
- **Days Covered** – Number of days of coverage

Pro-Rata Information

Once you have filled out the Policy Information, enter the Pro-Rata Information.

Annual Premium	\$ <input type="text"/>
Earned Factor	0.000
Earned Premium	\$ 0
Unearned Factor	0.000
Unearned Premium	\$ 0
Return Commission	\$ 0

- **Annual Premium** – Enter the amount of annual premium.
- **Earned Factor** – Displays the percentage of the earned premium.
- **Earned Premium** – Displays the premium earned based on the effective date in dollars.
- **Unearned Factor** – Displays the percentage of the unearned premium.
- **Unearned Premium** – Dollar amount not earned due to the Cancel Short or Cancel Prorate.
- **Return Commission** – Dollar amount due the insurance company based on the Cancel Short or Cancel Prorate.

After you have completed all of the necessary fields your calculation is complete. You can print the screen once you are done.

Chapter 5 - Online Account Management

The Online Account Management feature can be accessed via the internet or directly from QQ WebRater. To access it directly from the internet use the following web address: <https://qgolam.qqsolutions.com> .

Important Note: Only the account administrator(s) will have access to the Online Account Management system.

Accessing Online Account Management from QQ WebRater

In QQ WebRater you will click on the **My QQ Solutions Account** button on the upper right of the screen. The main menu will open. There will be no need to login when accessing QQ Solutions Account Management from within our programs. It will recognize the User ID and Password you used when logging into QQ Evolution and QQ WebRater.



Hello Ima Driver! | [My QQ Solutions Account](#) | [Help](#) | [Log Out](#)

Agency [in Deerfield Beach, 33441-](#) has done [56](#) quote(s) for the month.

Using Online Account Management

Once you have chosen to access QQ Solutions Account Management, the main menu will appear.

The screenshot shows the QQ Solutions Account Management interface. At the top left is the QQ SOLUTIONS logo with the tagline "we provide the answers". At the top right, it says "Hello dev_pm | Sign Out". Below this is a blue header bar. The main content area is divided into two columns. The left column contains a "My Account" section with links: Account Information, Offices, Invoices, My Rating Carriers, Carrier/Finance Codes, QQ WebAgent Admin, and QQ WebAgent Reporting. Below this is a "User Management" section with links: Agents/CSRs, Create Users, Edit/Delete Users, and Source. The right column displays "Welcome Sample Agent" followed by account details: Username: dev_pm, Agency: QQ Dev's FL EVO-3, Product State: FL, Product String: QUOTE APP HOME ENTERPRISE DOWN WEB EVO FIN, and Database: QFWinData_Prog. At the bottom, there is a dark blue footer bar containing copyright information, phone numbers (1.800.940.6600 and 1.954.640.0800), and links for Terms of Use, Privacy, and Contact.

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

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

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

The screenshot shows the "Account Information" form. It is divided into three sections: "Shipping Information", "Billing Information", and "Contact Information". Each section has several input fields, some marked with a red asterisk indicating they are required. The "Shipping Information" section includes fields for Agency Name, Address, City, State (a dropdown menu currently showing "Texas"), and Zip. The "Billing Information" section includes fields for Agency Name, Address, City, State (a dropdown menu currently showing "Texas"), and Zip. The "Contact Information" section includes fields for First Name, Last Name, E-Mail, Alt E-Mail, Phone (with a format guide () - -), Alt Phone (with a format guide () - -), and Fax (with a format guide () - -). An "Update" button is located at the bottom right of the form.

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

<u>Agency Name</u>	<u>Agency ID</u>	<u>Operating State</u>	<u>Status</u>	<u>Main Office</u>

C. **Invoices** – List of all invoice PDFs that QQ Solutions creates for an agency for subscription payments, MVR's, subscription adjustments. Etc....

D. **My Rating Carriers** – List of available FL rating carriers per agency. Here is where you can select carriers for rating.

E. **Carrier/Finance Codes** – Administrators can use this area to set the broker ID's, user names, passwords, etc... for the entire agency.

F. **QQ WebAgent Admin (*Platinum Subscribers Only*)** – QQ WebRater platinum users also have access to QQ WebAgent, a lead generation module for an agency's website. The setup and maintenance of that module can be controlled through the Online Account Management system.

G. **QQ WebAgent Reporting (*Platinum Subscribers Only*)** – QQ WebRater platinum users also have access to QQ WebAgent, a lead generation module for an agency's website. Reports on the lead generator can be run from the Online Account Management system.

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

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

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

Step 1: User Details

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

*First Name:	<input type="text" value="Amy"/>	
Middle Name:	<input type="text" value="K"/>	
*Last Name:	<input type="text" value="Brown"/>	
*E-Mail Address:	<input type="text" value="abrown@QQSolutions.com"/>	
*Username:	<input type="text" value="abrown"/>	(Check Availability)
*Password:	<input type="password" value="••••••"/>	
*Confirm Password:	<input type="password" value="••••••"/>	
User's Agent:	<input type="text" value="Tan"/>	
User's CSR:	<input type="text" value="Tan"/>	
	<input type="button" value="Next"/>	<input type="button" value="Cancel"/>

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

Step 2: User Permission

Permission Level

Application Access

Application ☒ QuickQuote
☐ QuickFile
☐ QuickHome
☒ Rolodex
☒ QQ WebRater
☐ QQ Evolution

Agency Access

Default Agency

Agencies Selected: 0

☐ Generic Insurance Agency

Select All Deselect All

Permissions				
Item	Modify	Add	Delete	View
Agent Popup Box - Agency Management	<input type="checkbox"/>			
Bills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Screen Agency Filter	<input type="checkbox"/>			
Clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CSR Popup Box - Agency Management	<input type="checkbox"/>			
DownPayments	<input type="checkbox"/>			
Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Images	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individual ACORD Forms	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Mailroom		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Memos	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy Commission and Fees	<input type="checkbox"/>			<input type="checkbox"/>
Producer Selection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QuickChecks	<input type="checkbox"/>			
QQ Download	<input type="checkbox"/>			
QuickQuote Quotes			<input type="checkbox"/>	
QuickWord	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quote Saving Agent/CSR	<input type="checkbox"/>			
Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rolodex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Number				<input type="checkbox"/>
Transfer From Rating System	<input type="checkbox"/>			
Transfer Screen Agent/CSR	<input type="checkbox"/>			
Transfer Screen MVR/OPT/ADD Fee	<input type="checkbox"/>			
Utilities - Agency Management	<input type="checkbox"/>			
Utilities - Comparative Rater	<input type="checkbox"/>			

Back Create User Cancel

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

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

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

Once you have finished setting the permissions you will click **Create User**. The new user has now been created and can start accessing the program(s). After you create the user you can send them a welcome letter directly to the email address you entered on their information. The letter will contain their User ID and Password.

Create User Succeeded

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

Send Welcome Email





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

Edit/Delete Users

Agency Filter:

Records 1 - 10 of 157

Search User Name:

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

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

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

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

Available Agents/CSRs
Please select an Agent/CSR to edit

Agency Filter:

Records 1 - 10 of 207

Search Agent:

Edit	Agent/CSR	Agency	Delete
	0adi	All	
	0adi1	All	
	0adi2	Jerry Jay Boyle	
	0adi7	All	
	0adi8	Tamarac	
	0adi9	Erik Finstad (Florida - Desktop)	
	0jim	All	
	10test3	All	
	11test	Gremlins	
	12test	Gremlins	

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

Type Entry to Add:

Agency:

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

Available Sources
Please select a Source to edit/delete

Agency Filter:

Records 41 - 45 of 45

Search Source:

Edit	Source	Agency	Delete
	Source for Bret Roberts	Bret Roberts	
	Source-aw1	AW1	
	SourceForJerry-Edit	Jerry Jay Boyle	
	Two	Jerry Jay Boyle	
	Yellow Pages	All	

Chapter 6 - Help Topics

The following are basic “Help” topics pertaining to various features in QQ WebRater. These topics can also be found within QQ WebRater itself, just click on the “Help” button located on the top tool bar.

General Help

1. I would like to request a feature be added to QQ WebRater, how do I do this?

Answer: At the bottom right of the screen click on “Report Bug/Feature Request.” You will be presented with a small form to fill out and then it can be submitted to QQ Solutions.

2. What web browsers can be used to view and operate qqWebRater.com?

Answer: Currently we support Mozilla Firefox 3.5 or higher and Internet Explorer 8.0 or higher. If you are using a Mac to run this program you will need to install the Mozilla Firefox browser. We will be introducing more browsers including Safari in upcoming editions.

3. If I’d like to know about the website requirements where can I find this?

Answer: At the bottom of the screen click on “Web Site Requirements.” This will display a list of all the current requirements for QQ WebRater.

4. How do I email documents that open as a PDF?

Answer: When a document such as a letter or an application opens as a PDF, on the upper right of that screen is Adobe Help. You will click on this and once open, choose “Email Document.” This will open a “Help” area with screen shots on how to enable the email function through Adobe. In order to email a PDF you will have to have an email client such as Microsoft Outlook installed and working on the computer you are trying to email from. The steps to setup the email feature are listed below without screen shots. Please refer to the Adobe Help for them.

- a. Right click on the Adobe Toolbar
- b. In the box that appears, select “More Tools”
- c. Under File Toolbar, put a check next to Email. The email icon will now appear in the Adobe toolbar
- d. When emailing, remember to select Send Copy, do not choose Send Link

5. Can I have QQ WebRater open in multiple browser windows/tabs?

Answer: Yes, please be advised that if you open a second browser window or tab and bypass logging in to QQ WebRater and there has been no activity within the last 60 minutes on the first window or tab, the session will time out. When this time out occurs, the second browser window or tabs will also time out causing a loss of data entered that was not saved. As a precaution, we recommend you always login to when opening a new instance of QQ WebRater.

Entry Screen Help

1. How many drivers and vehicles can be quoted at one time?

Answer: You can quote up to six drivers and six vehicles.

2. How do I open a previously saved quote?

Answer: On the Entry screen click “Retrieve Quotes” and the quote saver will open. Enter your search criteria and locate your client.

3. What is the “Source?”

Answer: This is how your client found you. Whether it be they just happen to see your office and “walked in” or a friend “referred” them to your agency. The Source defaults can be entered in the Online Account Management system.

4. The prior insurance company of my client is not listed, what should be selected?

Answer: In the list of insurance companies you would either select “Not in List – Standard” or “Not in List – Non Standard.”

5. Is it important to have the correct effective date listed when rating?

Answer: Yes it is. Some carrier rates may change based on this date. For accurate rates always enter the proper effective date.

6. How can I verify the garaging address?

Answer: Next to where you enter the garaging address is a small world icon. Clicking this will verify the address.

7. What if the mailing address is different from the garaging address?

Answer: Next to the garaging address, "Mailing Address" is listed with an icon of a house. Click this icon to enter a separate mailing address.

8. Is there an easy way to remove the previous quote information in order to start a new quote?

Answer: Yes, on the top toolbar select "Start New Quote." A warning will be displayed asking if you're sure you would like to clear the quote, if you select "Yes" the information will be removed.

9. How do I indicate on the quote that my client has an international driver's license?

Answer: In the area marked Lic. FL enter the letter "N" for none, in the USA area enter "I" for international, and for MVR enter the letter "N" for none.

10. How do I enter that my client has an SR-22?

Answer: You will click in the area marked "Driver Info" and a box will open allowing for additional information. Put a check mark next to SR-22 or SR-22s.

11. Under the Vehicle Features I see some items are already checked off such as Anti-Lock Brakes. My client states their vehicle also has a passive restraint which is not checked, what do I do?

Answer: You can manually check or uncheck any of the vehicle features as needed.

12. What is MSRP?

Answer: This stands for the Manufacturers Suggested Retail Price, which is generally the retail list price of a new vehicle.

13. When I first start a quote I notice there are limits already listed on the coverages, can this be changed?

Answer: Yes, what is listed is the default from the Utilities section. Click in the coverage area you wish to change and a list of available limits will appear; select the one you wish to use.

14. Where do I select the Real Time Rating companies I wish to get rates from?

Answer: On the top toolbar click RTR Selection and mark the companies you would like to rate. They must first have been selected in the Utilities section.

15. How do I sign up for a QuickMVR account?

Answer: To enroll in the QuickMVR program, we require that your agency enroll in our QuickPay Plan. Please login to <http://www.qqsolutions.com> with the main QQ UserID and Password provided at initial signup. After logging in click on "Solutions" at the top of the page, scroll down and click on "Comparative Rating Systems". Finally, scroll down to "QuickMVR" and click on "Sign Up Now". Once you are on the "QuickMVR Account Signup" form, follow the instructions to complete the form and fax your signed agreement form to QQ Solutions at 954-640-0553.

16. How do I pull an MVR?

Answer: On the top toolbar click MVR. The MVR box will open; an area for each driver's license will be listed. If you filled the license number out under the driver info then here in the MVR box it will be pre-filled for you, if you did not you will have to enter the full license number. After the full and correct license numbers have been entered click the "Retrieve MVR" button. Your MVR(s) information will be sent back from the state and you can print a copy of the MVR report.

17. How can I see a report of all my sold policies for a certain time frame?

Answer: On the top toolbar click on Reports. Here you will select the Report Type of "Date," the Status of "Sold," and then enter your Time Period. Then you will generate the report as either a PDF or into Excel. It is your choice.

18. How do I correctly exit the program?

Answer: On the upper right of the screen click on Log Out.

19. What is the “Notes” area for?

Answer: You can enter any notes or comments pertaining to your client and/or the policy and it will be stored on the client.

20. I have entered all the information required on the Entry screen, now what do I do?

Answer: To obtain rates you will click the Quote button on the top toolbar and proceed from there.

21. Can I save my quote from the Entry screen?

Answer: Yes, you can save from the Entry screen by clicking the Save Quote button.

Setting up Utilities

1. Where do I enter my agent code for the insurance company?

Answer: In Utilities, under Company/Broker ID. Select the company and enter the code. If you rate without entering your agent code, you will be prompted when you click on “Application/Bind/Bridge” to update your agent code.

2. Is there any where I can find the address for an insurance company?

Answer: In Utilities, under Company/Broker ID. Select the insurance company and any information we have pertaining to the company will appear to the right.

3. Where do I enter my agent code for the finance company?

Answer: In the Utilities section, select Finance Defaults. Then choose the finance company and enter the code.

4. How do I set quoting defaults for items such as the zip code or coverage limits?

Answer: In the Utilities section click Quote Defaults. Whatever default you set here will appear on the Entry screen when keying in a quote, but you can change it at the time of quoting if needed.

5. Can I store Lienholder information to use later when quoting?

Answer: Yes, in the Utilities section click on “Lienholder.” Here you can enter all of your lien holders and then when quoting you can simply select the correct lienholder. Their information will automatically appear for you.

6. Can I set a default for how I would like my rates to appear on the Comparison screen?

Answer: Yes, in Utilities select Quote Defaults. Under Comparison Screen Options choose your sort method.

7. Is my QuickBind password required to be stored in QQ WebRater?

Answer: Yes. In the Utilities section under Company/Broker ID and Finance Defaults the companies who require the QuickBind password here will have an icon of a gold lock next to them. Click on the lock to enter the password, it can also be edited if needed.

8. I am trying to edit the default amount of my MVR fee in the Utilities and it is not letting me.

Answer: In order to be able to edit the MVR fees you must have administrator privileges.

Additional Client Info Screen Help

1. Why do I have to fill out any of the additional information?

Answer: Some insurance companies require more information to provide an accurate rate.

2. What is the Paperless Discount?

Answer: Some insurance companies will provide a discount if the insured is willing to receive all their documents via e-mail.

3. What if the insured's Industry is not in the list?

Answer: You will select "Other" from the bottom of the list.

Comparison Screen Help

1. How do I select a rate on the Comparison Screen?

Answer: Hover you mouse pointer over the desired rate and click once.

2. Can I change how my insurance companies are sorted directly on the Comparison screen?

Answer: Yes, click the name at the top of the column to have it re-sorted. The only three columns that cannot be selected are Verified and Details.

3. What does the green check mark in the “Verified” column mean?

Answer: This green checkmark represents credit successfully pulled or credit not required.

4. Why does it say “See Messages” under the Details column?

Answer: There is some type of underwriting message. If you hover your mouse pointer over See Messages, the actual message will be displayed.

5. Can the rates from the Comparison screen be e-mailed?

Answer: Yes, on the upper right click on Email. A box will open, the To address will be pre-filled with the e-mail address already entered on the Entry screen. It can be changed if needed. If you wish, you can type in a message and then click Send. An e-mail with all the insurance companies and their rates will be sent to the recipient.

6. What if I decide to change something such as a coverage limit on the quote, how can I go back and do this?

Answer: On the upper right of the Comparison screen click on “Edit Quote.” This will take you back to the Entry screen where you can change the quote.

7. Is there any way to give my client a printout of the rates from the Comparison screen?

Answer: Yes, on the upper right of the Comparison screen select "Print." It will print a copy of the insurance companies along with their rates.

8. What if I quoted for a semi annual term but I'd like to see annual rates as well.

Answer: On the upper left of the Comparison screen select "12 Months" and the rates will change for an annual term policy.

9. Do all Real Time Rating companies pull credit on the first pass?

Answer: No, some do not. The companies who do not pull credit after entering the Additional Client Info will require you to pull the credit after you select them on the Comparison screen.

10. How can I see all of the down payment options available for a quote?

Answer: When your requested quotes are displayed on the comparison screen, each down payment will be underlined. By placing your mouse pointer over an underlined down payment, you will see all the payment options associated with that quote.

Breakdown Screen

1. How do I view my underwriting messages again?

Answer: Once on the Breakdown screen, on the top toolbar click on “Messages.” This will display any underwriting messages or discounts.

2. I chose to quote with one insurance company but I’d like to go back and select a different one.

Answer: Once on the Breakdown screen, on the top toolbar select “Comparison.” This will take you back to the Comparison screen where you can select a different company.

3. I have entered all the quote information and selected the company I wish to write with from the Comparison screen, now what do I do?

Answer: To proceed with writing the policy, on the top toolbar select Application/Bind/Bridge. This will allow you to continue the writing process.

4. I need to complete a vehicle inspection. Do you have a form for this?

Answer: Yes, on the top toolbar select “Print” and in the list click Vehicle Inspection. You will be able to fill in the inspection information and create the document.

5. Can I e-mail the quote to the client?

Answer: Yes, on the top toolbar select “Print.” In the list click on Quote Printout it will open in a PDF format. You can select the save icon and save the document to your computer. You can then attach the document to an e-mail and send it to the customer. This can be done with all the letters listed under “Print.”

6. Can I save my quote without proceeding through the Application/Bind/Bridge section?

Answer: Yes you can. There will be numerous occasions when you are simply obtaining a quote for a client and would like to save the quote information in case you write the business. From the Breakdown or Entry screen, click on “Save Quote.” Select “Save as New” to save a new quote. If this is a re-quote of an existing saved client and you do not want to create another new quote, select “Re-Save” which will update the original quote.

7. When I pull an MVR is it saved?

Answer: If you pull an MVR and save the quote, the MVR will be saved for 30 days. However, you must save the quote before exiting the client if you want to save the pulled MVR. If you exit without saving, the MVR will be lost and it will need to be pulled again.

8. I am receiving the message my agent code is invalid or missing, how do I find out the correct code?

Answer: You will need to contact the insurance company to obtain the correct agent code. We do not have access to this information here at QuickQuote. If the code happens to just be missing and you know what it is, open the Utilities section and on Company/Broker ID select the company and enter the code.

9. I'm on the breakdown screen, how can I see the available payment options for this quote?

Answer: To see the available payment options for your quote, click on the Application/Bind/Bridge button. This will take you to our application wizard and will display the Paid in Full, Direct Bill, and if applicable, Financing options that are available for your quote.

Application/Bind/Bridge Help

1. Why is there no financing option listed in the pay plans?

Answer: If a financing option is not showing it means the insurance company does not accept financing.

2. How do I select my Direct Bill pay plan?

Answer: After clicking on Application/Bind/Bridge a box will open and the first tab you will be on is the Pay Plan. If Direct Bill is an accepted method for the insurance company you have selected an option for it will be displayed. Check the pay plan you wish to use.

3. Where do I enter the named insured's employer information?

Answer: Once in Application/Bind/Bridge, click the tab marked "Driver." At the bottom of this screen there is a place to enter the employer information.

4. I forgot to verify the insured's address on the Entry screen can I still do it without having to go all the way back.

Answer: Yes, once on Application/Bind/Bridge, you can select the "Driver" tab. The garaging and mailing address will be pre-filled for you from what you entered on the Entry screen. Beside the address you can click the world icon next to "Verify Address."

5. Where can I enter the vehicle's annual miles?

Answer: Once in Application/Bind/Bridge select the "Vehicle" tab. Here you can enter the annual miles.

6. How do I select a lienholder to go on my client from the list I entered in the Utilities?

Answer: Once in Application/Bind/Bridge, click on the "Vehicle" tab. In the box is an area marked Lienholder/Additional Interest, click on "View All." The list of lien holders from the Utilities will be displayed and you can choose the one you would like.

7. Where can I find the applicant questions?

Answer: Once on the Application/Bind/Bridge tab select the "Policy" tab.

8. Can I transfer the policy I entered into QQ WebRater to my QQ Evolution or QuickFile Enterprise program?

Answer: Yes you can. After the quote is complete and you have filled out all necessary information listed in the "Application/Bind/Bridge" section you can click on the Transfer to QQ Evolution (or Transfer to QuickFile) button to transfer the quote directly into QQ Evolution (or QuickFile Enterprise). This process will create a new client and policy file in your agency management system. For more information, search our knowledge base for "Transfer Quotes between QQ WebRater and QuickFile Enterprise"

9. When I click on the tab QuickBind I get a message saying "Application Incomplete," what does this mean?

Answer: On that screen there will be messages displayed in red explaining what is incomplete. You will need to go back and enter or correct this information in order to bind the policy.

10. Why do I have a "Bridge" tab in Application/Bind/Bridge instead of the "QuickBind" tab?

Answer: The insurance company you have selected has you bridge all the information you have entered over into the website to finish the application instead of binding it directly in QQ WebRater.

11. When I select Print Application and the plain paper application opens, I cannot edit it. How can I change something on the application?

Answer: The information is pre-filled on the paper application based on what you entered on the previous tabs such as Drivers and Vehicles. If you need to change an entry please go back to that tab and edit it there. It will then change automatically on the application.

12. How do I close out of the Application/Bind/Bridge section?

Answer: On the upper right of this box click on "Save & Close."

13. Is my policy automatically saved for me when I finish it?

Answer: No, only after you bind a policy is it automatically saved. When bridging or using the plain paper application you must click on Save & Close and then back on the Breakdown screen select "Save Quote" to save the information.

14. After I finished the policy and I am back on the Breakdown screen, I don't see my driver listed.

Answer: To display the driver info you will click the button "Show driver information."

15. I am receiving the message my agent code is invalid, how do I find out the correct code?

Answer: You will need to contact the insurance or finance company to obtain the correct agent code. We do not have access to this information here at QQ Solutions. If the code happens to just be missing and you know what it is, open the Utilities section and on Company/Broker ID select the company and enter the code.

16. What is a bridge?

Answer: The bridge allows you to transfer quote and application information directly from QQ WebRater into the company's own rating software. QQ WebRater is already enabled for bridging.

18. How do I bridge a quote?

Answer: On the Application/Bind/Bridge screen, click on Bridge.

Quote Counter Help

1. What is the Quote Counter?

Answer: The Quote Counter keeps track of how many quotes your agency has done for the current month. This total is displayed towards the upper right of the entry screen. The quote counter increases by 1 each time you click on quote and receive rates on the comparison screen. A "Re-quote" will not increase your quote count. To see Quote totals from previous months you will need to run a Quote Counter report in the "Reports" section.

2. Can I view the quoting totals for dates other than the month we are in?

Answer: Yes, you can if you have permission to use the Reports section. Once in Reports, select the Report Type of "Quote Counter" and then select your date range. You can select Month-to-Date, Year-to-Date, or Specific Dates. When choosing Specific Dates you can select your own date range. Click on "Generate Report in PDF" or "Generate Report in Excel" to run the report. Your report will appear in a new window.

3. I have multiple offices, can I see the quote totals for them as well?

Answer: If you are an administrator for the account or have access to the Reports section, you will be able to view the quote totals for your other offices. In order to do these, in the Reports section select the office you wish to view by using the Agency Filter and then run the report.

4. What will appear on the report for the Quote Counter?

Answer: It will display the client / prospect's name, the name of the agent / CSR who created the quote, the date and time the quote was run, and the name of the agency where the quote was done. The total number of quotes run in the date range you specified will be shown at the end of the report.

5. If a quote is created and saved, how long will it be stored?

Answer: Any quote that is created and saved by an Agent / CSR will remain in our database until you choose to delete it.

6. How long before a re-quote of the same client's original quote will be counted again in the Quote Counter?

Answer: When a quote is saved, it is considered a new quote for a 3 day period. If the saved quote is edited and resaved within the 3 days, it is still considered the same quote. However, if the quote is re-quoted after 3 days, it is considered a new quote and will be added to the total in the Quote Counter.

In addition, if you have a quote that you are currently working on and it has not been saved, the quote will be recorded once in the quote counter within the first quoting session hour. After one hour, a re-quote for this same quote, will be considered within a new quoting session, and this re-quote will be added to the Quote Counter total.