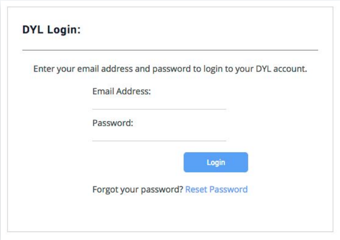
DYL

Vertafore/CatalystQQ
Training Guide

January 2018_V1

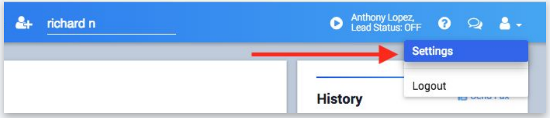
Step 1

Log in to DYL



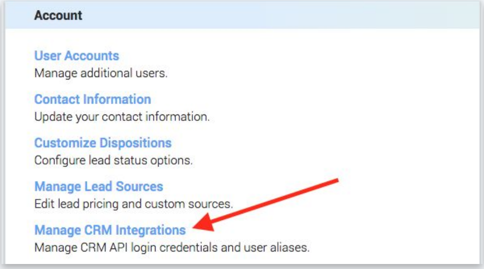
Step 2

Once you are logged in to DYL, go to Settings.



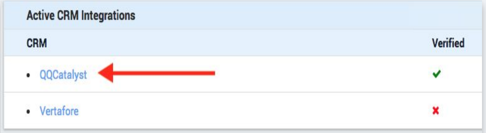
Step 3

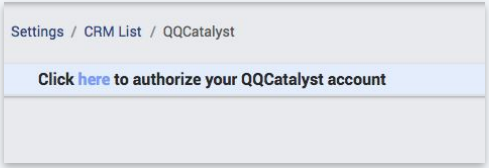
Click "Manage CRM Integrations"



Step 4

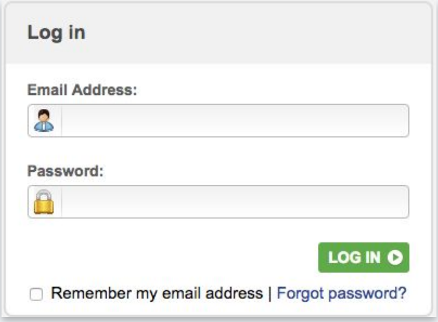
Click "QQ Catalyst. "You will be brought to a page that says “Click here to authorize.”





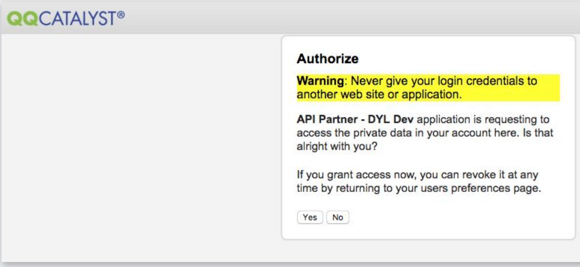
Step 5

You will then be routed to a QQ login screen that looks like this:



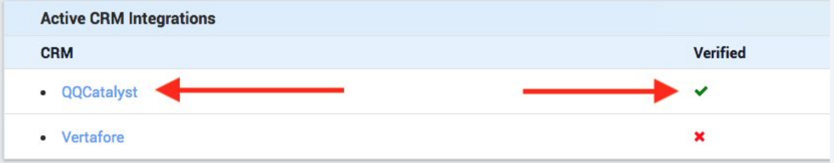
Step 6

After logging in, you will be brought to a screen that is asking you to allow DYL access to your QQ account. Go ahead and authorize this.



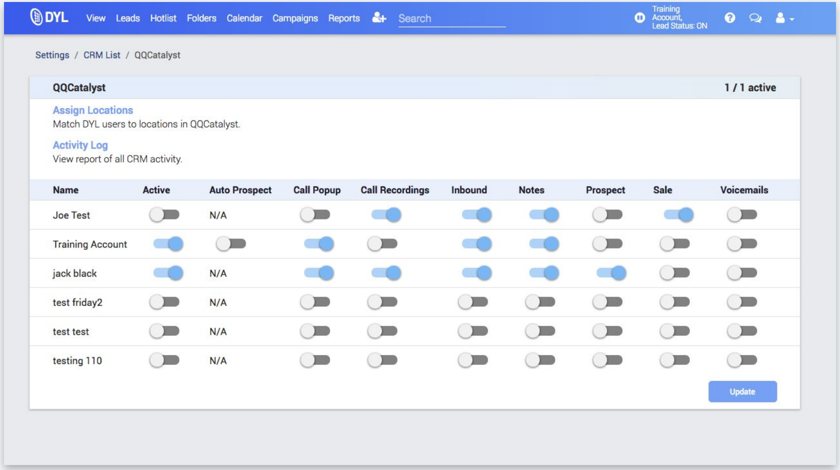
Step 7

Once you've authorized DYL, you'll notice a green checkmark next to QQ Catalyst back on the Manage CRM Integrations screen of DYL. This confirms the login credentials are correct, and that you are ready to set up integration features for users within DYL.



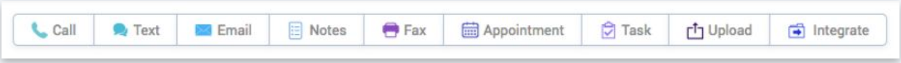
Step 8

Click in to QQ Catalyst.This is what the next step of the process looks like. You will choose which users you want as "Active," as this will enable them to send information from leads in DYL to customer profiles in QQ!



Step 9

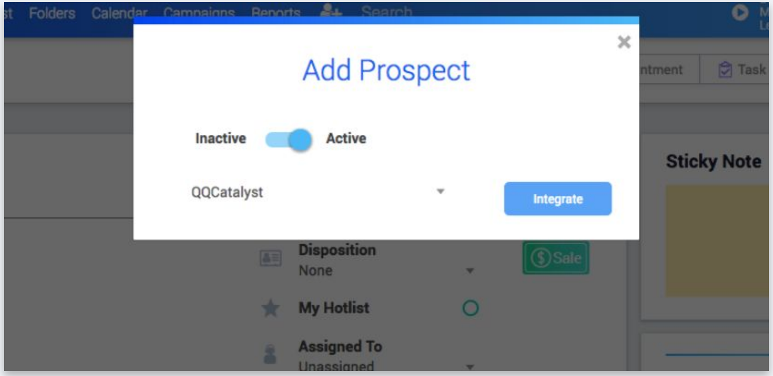
Once you've enabled the integration features for your DYL Users, they will notice an "Integrate" button on Leads they are actively working. They will simply click this whenever they want to send a new Lead over to QQ.



Step 10

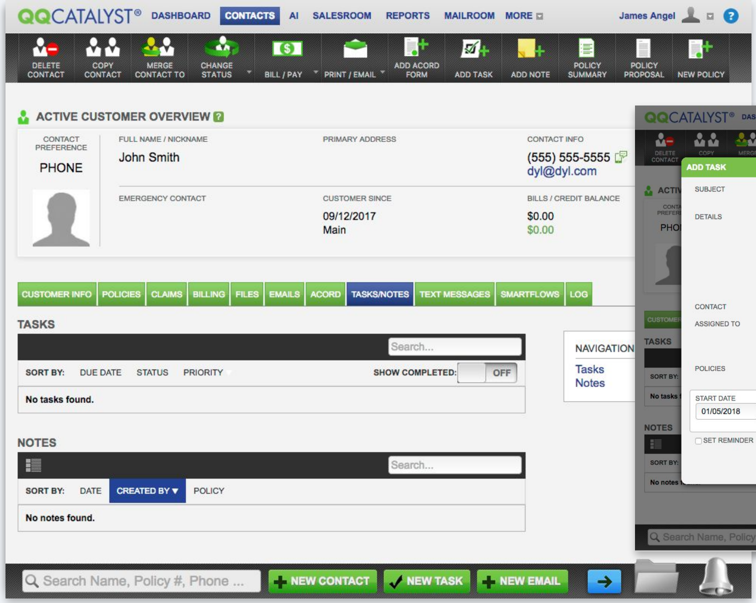
When the modal appears, switch the lever to "Inactive" or "active." Then, choose QQCatalyst in the drop down and click the "Integrate" button.

For users who have both QQCatalyst and AMS-360, select either from the dropdown.

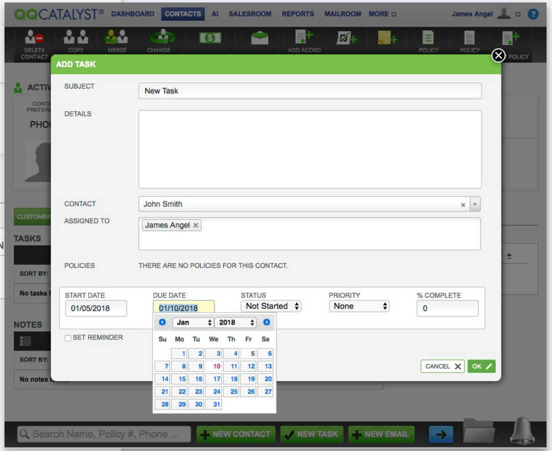


QQ Catalyst Screens

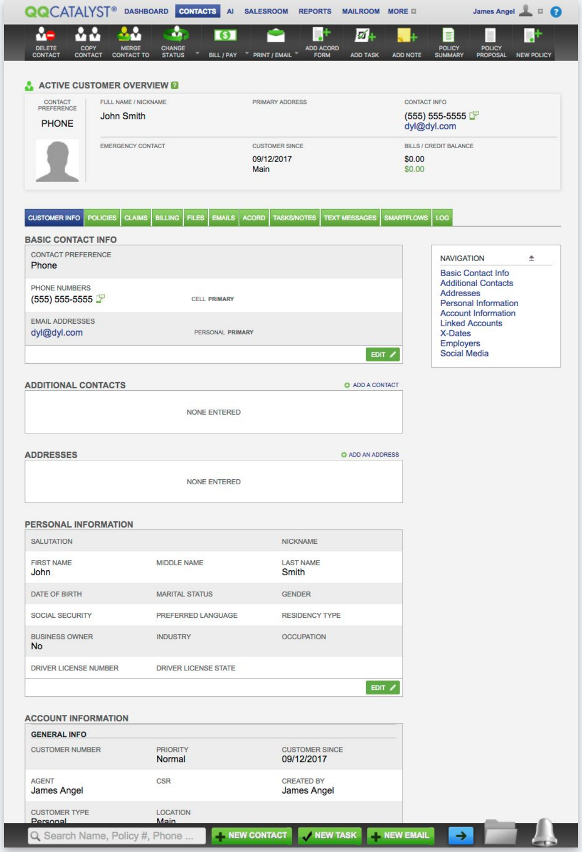
Contacts > Active Customer Overview



Add New Task

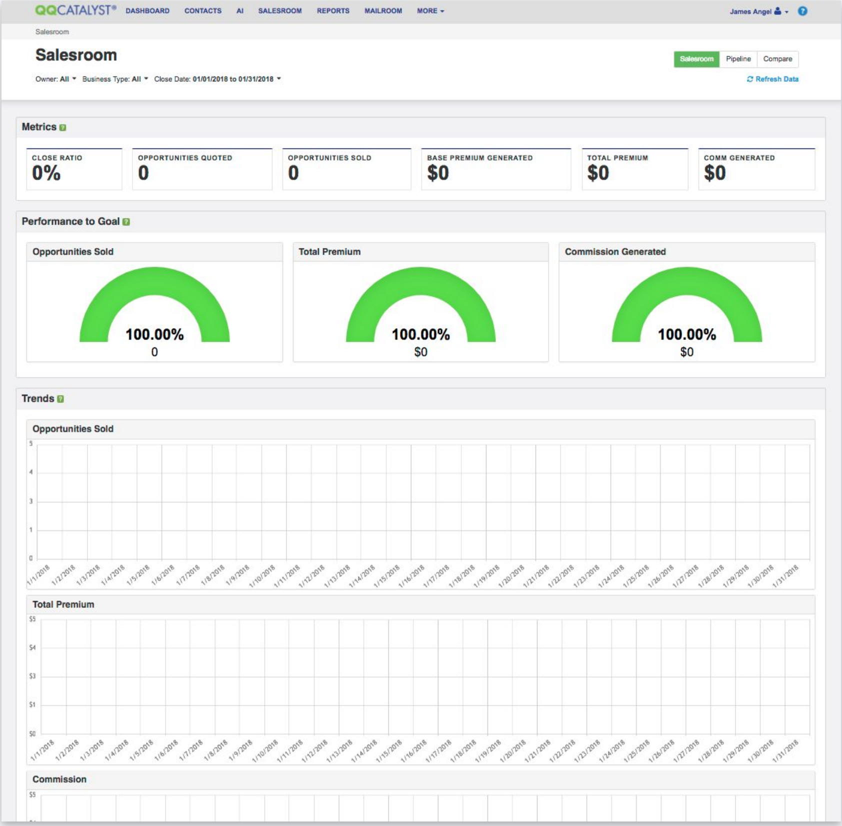


Individual Active Overview

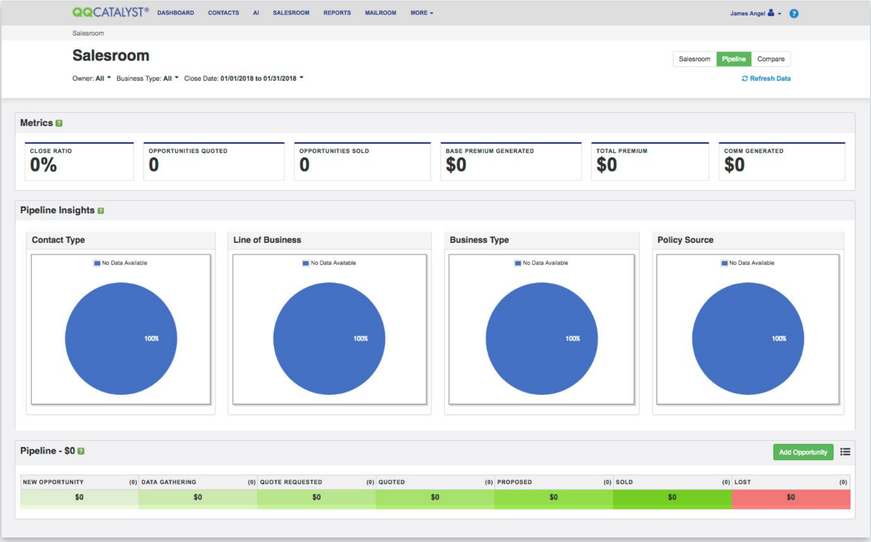


QQ Catalyst Screens

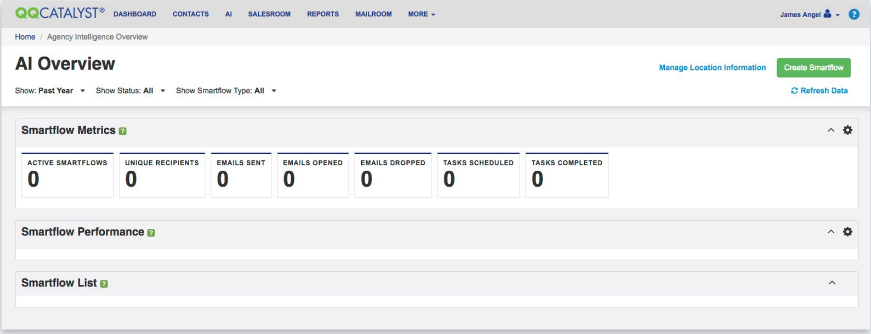
Salesroom



Pipeline

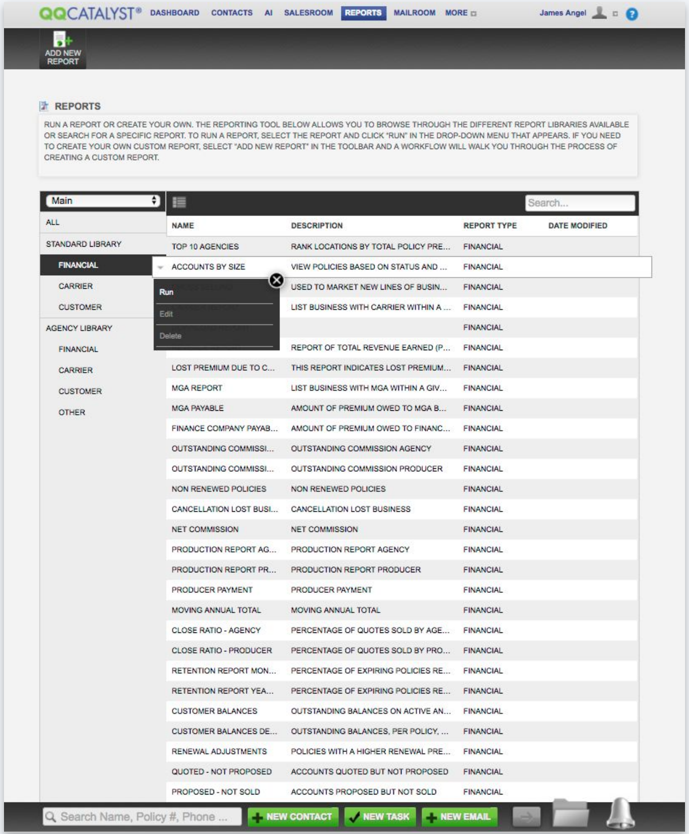


AI Overview



QQ Catalyst Screens

Reports



More > Import Contacts