



# Vertafore/CatalystQQ Training Guide

January 2018\_V1

## Step 1

Log in to DYL

DYL Login:

Enter your email address and password to login to your DYL account.

Email Address:

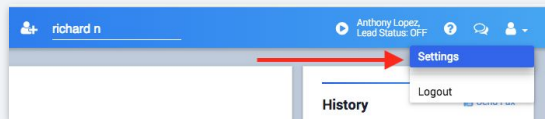
Password:

[Login](#)

[Forgot your password? Reset Password](#)

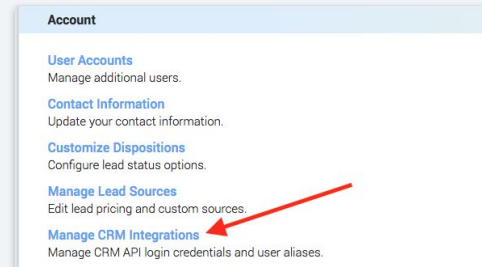
## Step 2

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



## Step 3

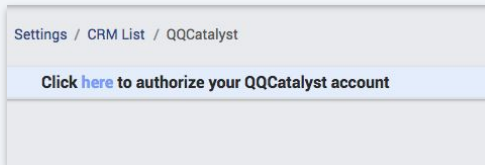
Click "Manage CRM Integrations"



## Step 4

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

Active CRM Integrations	
CRM	Verified
• QQCatalyst	✓
• Vertafore	✗



## Step 5

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

Log in

Email Address:

Password:

Remember my email address | [Forgot password?](#)

[LOG IN](#)

## 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.

QQCATALYST®

**Authorize**

**Warning:** Never give your login credentials to another web site or application.

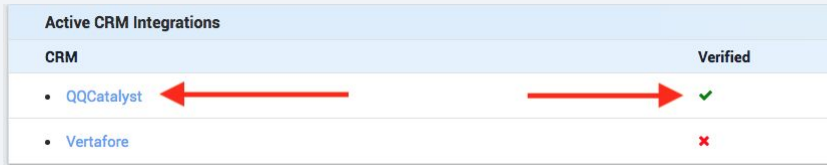
API Partner - DYL Dev application is requesting to access the private data in your account here. Is that alright with you?

If you grant access now, you can revoke it at any time by returning to your users preferences page.

Yes  No

## Step 7

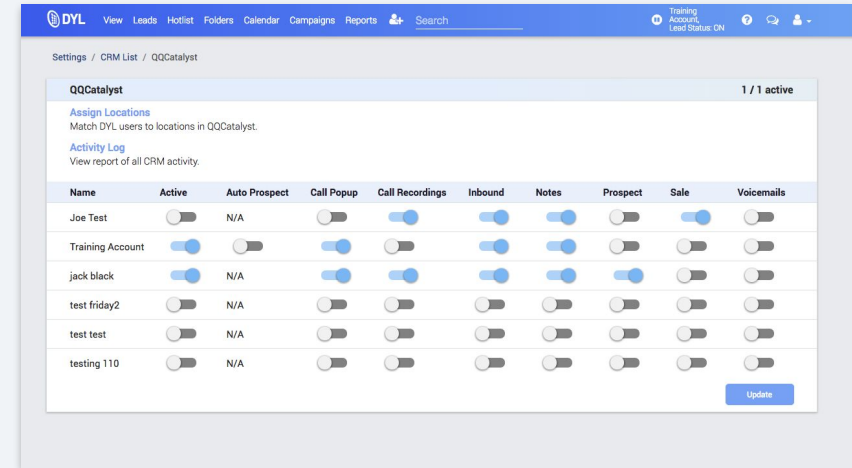
Once you've authorized DYL, you'll notice a green checkmark next to QQ Catalyst back on the Manage CRM Integrations screen of DYL. This confirms the login credentials are correct, and that you are ready to set up integration features for users within DYL.



Active CRM Integrations	
CRM	Verified
• <a href="#">QQCatalyst</a>	✓
• <a href="#">Vertafore</a>	✗

## 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!



Settings / CRM List / QQCatalyst

**QQCatalyst** 1 / 1 active

[Assign Locations](#)  
Match DYL users to locations in QQCatalyst.

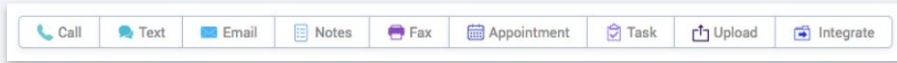
[Activity Log](#)  
View report of all CRM activity.

Name	Active	Auto Prospect	Call PopUp	Call Recordings	Inbound	Notes	Prospect	Sale	Voicemails
Joe Test	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Training Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
jack black	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
test friday2	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
test test	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
testing 110	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Update](#)

## Step 9

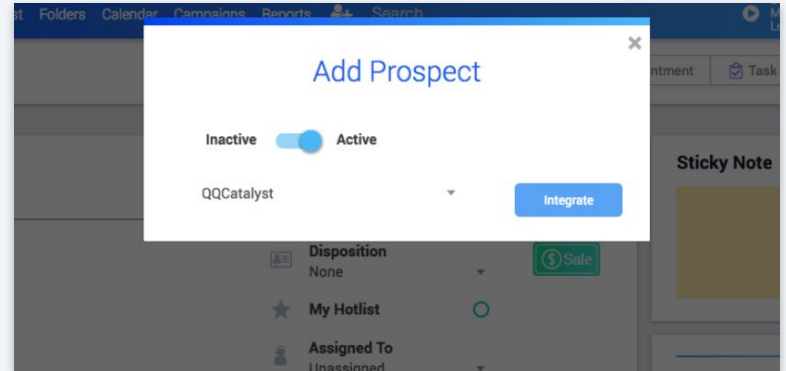
Once you've enabled the integration features for your DYL Users, they will notice an "Integrate" button on Leads they are actively working. They will simply click this whenever they want to send a new Lead over to QQ.



## 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

The screenshot shows the 'ACTIVE CUSTOMER OVERVIEW' for John Smith. The interface includes a top navigation bar with 'CONTACTS', 'AI', 'SALESROOM', 'REPORTS', 'MAILROOM', and 'MORE'. Below this is a toolbar with icons for 'DELETE CONTACT', 'COPY CONTACT', 'MERGE CONTACT TO', 'CHANGE STATUS', 'BILL / PAY', 'PRINT / EMAIL', 'ADD ACCORD FORM', 'ADD TASK', 'ADD NOTE', 'POLICY SUMMARY', 'POLICY PROPOSAL', and 'NEW POLICY'. The main content area is divided into sections: 'CONTACT PREFERENCE' (Phone), 'FULL NAME / NICKNAME' (John Smith), 'PRIMARY ADDRESS' (Main), and 'CONTACT INFO' ((555) 555-5555, dyl@dyl.com). Below this are 'EMERGENCY CONTACT' and 'CUSTOMER SINCE' (09/12/2017). A 'TASKS' section shows 'No tasks found.' and a 'NOTES' section shows 'No notes found.' A 'NAVIGATION' sidebar on the right lists 'Tasks' and 'Notes'. At the bottom, there is a search bar and buttons for '+ NEW CONTACT', '+ NEW TASK', and '+ NEW EMAIL'.

## Add New Task

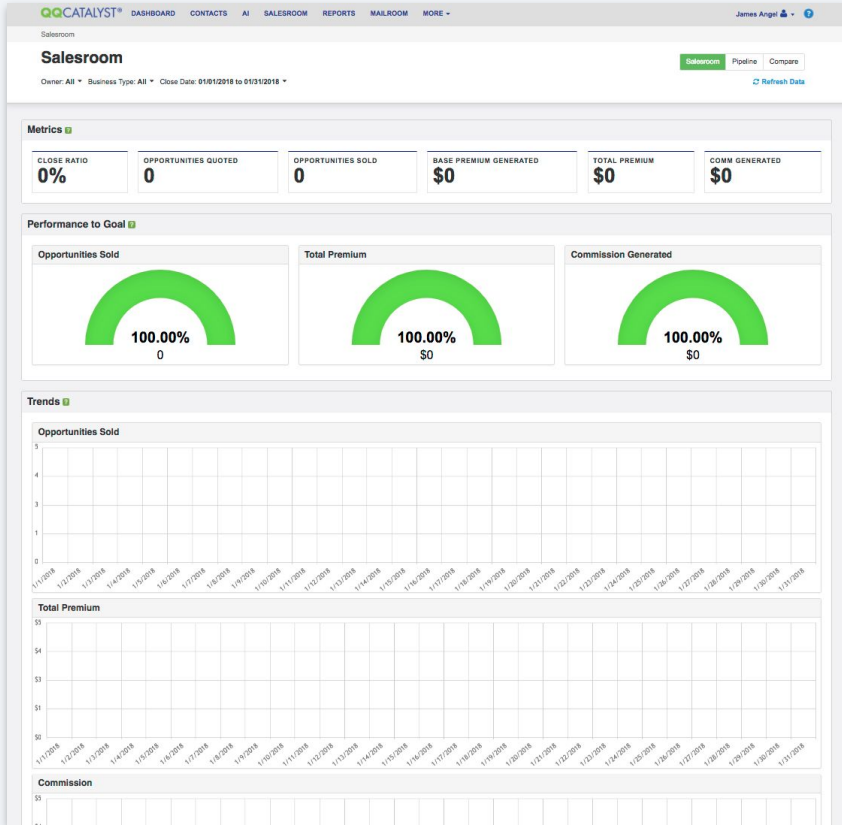
The 'ADD TASK' modal window is open, showing a form to create a new task. The 'SUBJECT' field is labeled 'New Task'. The 'CONTACT' dropdown is set to 'John Smith'. The 'ASSIGNED TO' dropdown is set to 'James Angel'. Below the form, there is a 'POLICIES' section with the message 'THERE ARE NO POLICIES FOR THIS CONTACT.' At the bottom, there is a calendar for January 2018, with the date 01/19/2018 selected. The 'START DATE' is 01/19/2018, 'DUE DATE' is 01/19/2018, 'STATUS' is 'Not Started', and 'PRIORITY' is 'None'. There are 'CANCEL' and 'OK' buttons at the bottom right of the modal.

## Individual Active Overview

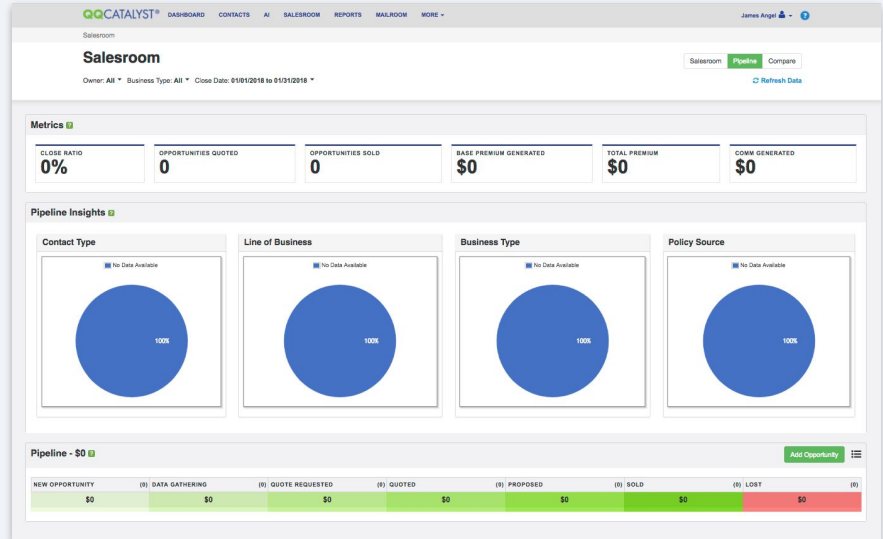
The 'ACTIVE CUSTOMER OVERVIEW' screen for John Smith provides a detailed view of the customer's information. It includes a 'PHONE' section with a profile picture and contact details. The 'CUSTOMER SINCE' is 09/12/2017, and the 'BILLS / CREDIT BALANCE' is \$0.00. The screen is divided into several sections: 'CUSTOMER INFO' (Policies, Claims, Billing, Files, Emails, Accord, Tasks/Notes, Text Messages, SmartFlows, Log), 'BASIC CONTACT INFO' (Phone, Phone Numbers, Cell Primary, Email Addresses, Personal Primary), 'ADDITIONAL CONTACTS' (None Entered), 'ADDRESSES' (None Entered), 'PERSONAL INFORMATION' (Salutation, First Name, Middle Name, Last Name, Date of Birth, Marital Status, Gender, Social Security, Preferred Language, Residency Type, Business Owner, Industry, Occupation, Driver License Number, Driver License State), and 'ACCOUNT INFORMATION' (General Info, Customer Number, Priority, Customer Since, Agent, Created By, Customer Type, Location). A 'NAVIGATION' sidebar on the right lists 'Basic Contact Info', 'Additional Contacts', 'Addresses', 'Personal Information', 'Account Information', 'Linked Accounts', 'X-Dates', 'Employers', and 'Social Media'. At the bottom, there is a search bar and buttons for '+ NEW CONTACT', '+ NEW TASK', and '+ NEW EMAIL'.

# QQ Catalyst Screens

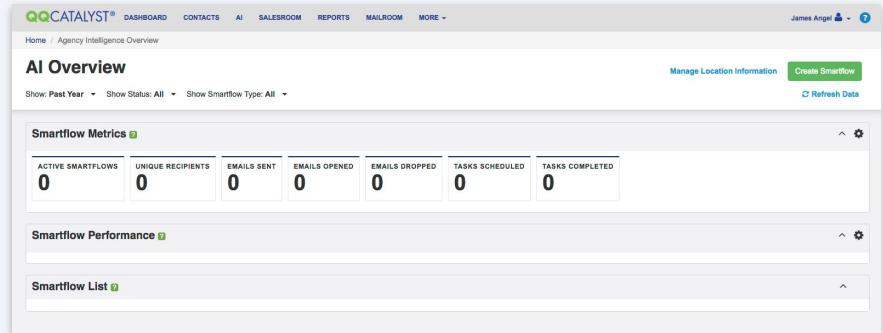
## Salesroom



## Pipeline



## AI Overview



# QQ Catalyst Screens

## Reports

REPORTS

RUN A REPORT OR CREATE YOUR OWN. THE REPORTING TOOL BELOW ALLOWS YOU TO BROWSE THROUGH THE DIFFERENT REPORT LIBRARIES AVAILABLE OR SEARCH FOR A SPECIFIC REPORT. TO RUN A REPORT, SELECT THE REPORT AND CLICK 'RUN' IN THE DROP-DOWN MENU THAT APPEARS. IF YOU NEED TO CREATE YOUR OWN CUSTOM REPORT, SELECT 'ADD NEW REPORT' IN THE TOOLBAR AND A WORKFLOW WILL WALK YOU THROUGH THE PROCESS OF CREATING A CUSTOM REPORT.

Main Search...

ALL	NAME	DESCRIPTION	REPORT TYPE	DATE MODIFIED
STANDARD LIBRARY	TOP 10 AGENCIES	RANK LOCATIONS BY TOTAL POLICY PRE...	FINANCIAL	
FINANCIAL	ACCOUNTS BY SIZE	VIEW POLICIES BASED ON STATUS AND ...	FINANCIAL	
CARRIER		USED TO MARKET NEW LINES OF BUSIN...	FINANCIAL	
CUSTOMER		LIST BUSINESS WITH CARRIER WITHIN A ...	FINANCIAL	
AGENCY LIBRARY			FINANCIAL	
FINANCIAL		REPORT OF TOTAL REVENUE EARNED (P...	FINANCIAL	
CARRIER	LOST PREMIUM DUE TO C...	THIS REPORT INDICATES LOST PREMIUM...	FINANCIAL	
CUSTOMER	MGA REPORT	LIST BUSINESS WITH MGA WITHIN A GIV...	FINANCIAL	
OTHER	MGA PAYABLE	AMOUNT OF PREMIUM OWED TO MGA B...	FINANCIAL	
	FINANCE COMPANY PAYAB...	AMOUNT OF PREMIUM OWED TO FINANC...	FINANCIAL	
	OUTSTANDING COMMISSI...	OUTSTANDING COMMISSION AGENCY	FINANCIAL	
	OUTSTANDING COMMISSI...	OUTSTANDING COMMISSION PRODUCER	FINANCIAL	
	NON RENEWED POLICIES	NON RENEWED POLICIES	FINANCIAL	
	CANCELLATION LOST BUSI...	CANCELLATION LOST BUSINESS	FINANCIAL	
	NET COMMISSION	NET COMMISSION	FINANCIAL	
	PRODUCTION REPORT AG...	PRODUCTION REPORT AGENCY	FINANCIAL	
	PRODUCTION REPORT PR...	PRODUCTION REPORT PRODUCER	FINANCIAL	
	PRODUCER PAYMENT	PRODUCER PAYMENT	FINANCIAL	
	MOVING ANNUAL TOTAL	MOVING ANNUAL TOTAL	FINANCIAL	
	CLOSE RATIO - AGENCY	PERCENTAGE OF QUOTES SOLD BY AGE...	FINANCIAL	
	CLOSE RATIO - PRODUCER	PERCENTAGE OF QUOTES SOLD BY PRO...	FINANCIAL	
	RETENTION REPORT MON...	PERCENTAGE OF EXPIRING POLICIES RE...	FINANCIAL	
	RETENTION REPORT YEA...	PERCENTAGE OF EXPIRING POLICIES RE...	FINANCIAL	
	CUSTOMER BALANCES	OUTSTANDING BALANCES ON ACTIVE AN...	FINANCIAL	
	CUSTOMER BALANCES DE...	OUTSTANDING BALANCES, PER POLICY, ...	FINANCIAL	
	RENEWAL ADJUSTMENTS	POLICIES WITH A HIGHER RENEWAL PRE...	FINANCIAL	
	QUOTED - NOT PROPOSED	ACCOUNTS QUOTED BUT NOT PROPOSED	FINANCIAL	
	PROPOSED - NOT SOLD	ACCOUNTS PROPOSED BUT NOT SOLD	FINANCIAL	

Run

## More > Import Contacts

IMPORT CONTACTS - UPLOAD YOUR FILE YOUR CURRENT PLAN ALLOWS Y

YOU CAN IMPORT A LIST OF CONTACTS INTO QQCATALYST®. AN IMPORT FILE CAN BE ANY DATA FILE THAT EXCEL (.XLS OR .XLSX), COMMA-SEPARATED VALUES (.CSV), OR TEXT FILE (.TXT) FORMAT. CLICK ON 'SELECT UPLOAD' OR SIMPLY DRAG & DROP YOUR FILE ON THE PAGE BELOW. YOU MUST INDICATE THE LOCATION Y TO AS WELL AS THE TYPE OF CONTACT (CUSTOMER OR PROSPECT) YOU ARE IMPORTING. WHEN YOU ARE

SELECT FILE TO UPLOAD ?

SELECT OR DRAG AND DROP YOUR FILE

SELECT FILE +

CANCEL X

NEXT →

DOWNLOADS

EXPORT TO QUICKBOOKS

IMPORT CONTACTS

COMMISSION CENTRAL

TIME CLOCK

EMPLOYEE PRODUCTIVITY

MARKETING