QQCatalyst®

powered by Vertafore

Onboarding Guide

Here's a step-by-step guide on how Vertafore will onboard your agency and get you operational and trained within **one week**.

Step 1 – Sign Up for QQCatalyst (24 hours)

After purchase, you will receive an email message with the following:

- Your login information
- Quick-start video
- Information you will need for your setup call (scheduled by your sales rep)

Step 2 – Setup Call (48 hours)

After signing up, you will be called by one of our seasoned support professionals to assist you with your initial setup of QQCatalyst. This call will cover:

- System navigation
- System administration
- How to set up users
- How to add policies and customer contacts
- How to set up carrier downloads (if applicable)
- How to set up bridge with your comparative rater (if applicable)

Step 3 – Product Training (1 week)

We have designed a streamlined training program, which will get both you and your agents trained and productive on QQCatalyst. Our **FREE** interactive training classes cover the **essential** system workflows and are delivered virtually throughout the week.

Attend live interactive classes or watch recorded classes at your convenience. *Each class is only 20 minutes in length to get you up and running in no time!* *See page 2 for a list of classes.*

Topic (All classes are 20 minutes in length)	Owner Administrator	CSR Producer
Downloads - Ivans Account Setup	✓	
Introduction to Billing Setup	✓	
Commission Central Overview	✓	
Simple Commission Setup	✓	
Contacts (Advanced)	✓	
Advanced Commission Setup	✓	
Billing Modules and Posting a Payment	✓	✓
Customer and Policy Creation and Overview	✓	✓
Processing Downloads	✓	✓
ACORD Forms, Tasks/Notes, Email		✓
How to Enter a Policy		✓
Total Training Time	**180 minutes**	**100 minutes**

Step 4 – Follow-up

During your first few weeks of using QQCatalyst, the Senior Support and Services Team will contact you to check on your progress.

Step 5 – Additional Resources

We offer a wide range of **FREE** resources to help you and your agents get trained on QQCatalyst:

Help Center: help.qqcatalyst.com

Training Portal: training.qqcatalyst.com

If you have product support questions, please contact us at:

Phone: 1.800.444.4813