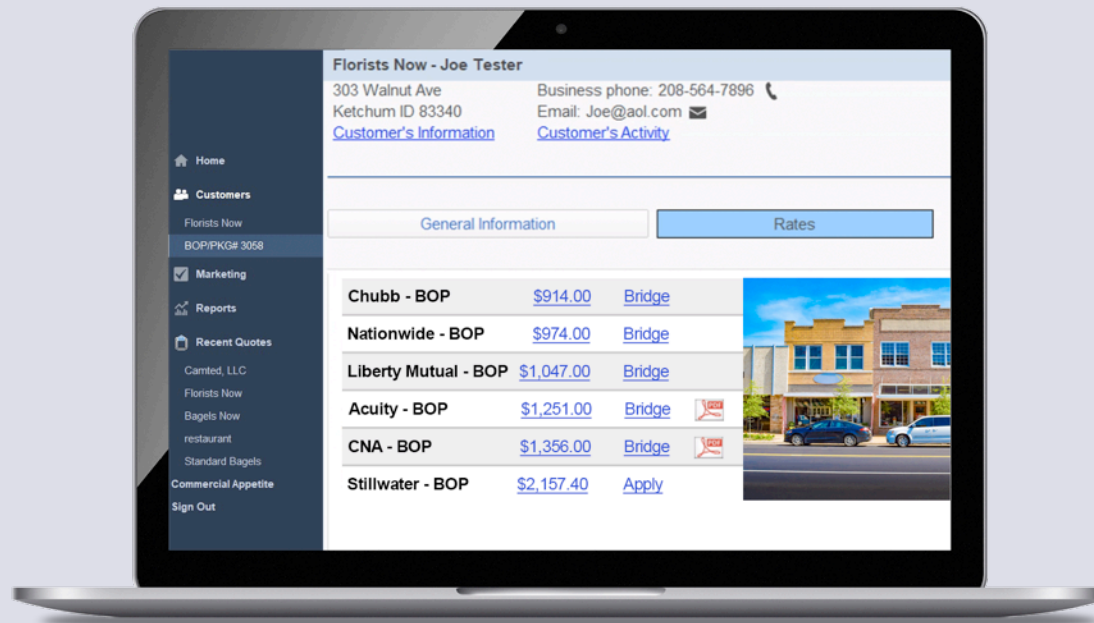


Getting Started Guide



Home Page

Thanks for choosing IBQ's Comparative Rater. Take a few moments to get familiar with the basics. After you log in, you'll land on your agency's home page.

The screenshot shows the 'Acme Insurance Agency - Test Area' home page. The sidebar on the left contains the following navigation items: Home, Customers, Marketing, Reports, Recent Quotes, Lumpia Factory, Hepworth, Reed Hopkins, Reed Hopkins, Painters Plus, Commercial Appetite, and Sign Out. The main content area is titled 'Home' and includes a form to 'Enter Customer Information' with fields for 'Last Name/Business Name' and 'Zip', and buttons for 'Add New' and 'Advanced Search'. Below the form is a 'Recent Customers' table with columns for Applicant Name, Phone, City, State, Zip, and Type. The right-hand panel features a calendar for July 2020 and an 'Activity for Today 7/10/2020' section with an 'Add Activity' button. The activity log lists several items with dates and descriptions.

Applicant Name	Phone	City	State	Zip	Type
Lumpia Factory	360-692-0153	SILVERDALE	WA	98383-9453	Commercial
Hepworth	208-343-7511	BOISE	ID	83702-5758	Commercial
Hopkins, Reed	509-720-6633	SPOKANE	WA	99203-1912	Personal
Hopkins, Reed	509-720-6633	SPOKANE	WA	99203-1912	Personal
Painters Plus	208-378-6541	BOISE	ID	83704-5902	Commercial
Bakers Dozen	253-752-5071	RUSTON	WA	98407-3212	Commercial
ABC business	999-999-9999	NEW YORK	NY	10018-6255	Commercial
Brandos	570-420-7745	DARLINGTON	PA	16115-2813	Commercial
Sewll Electrical	530-386-6677	SAN RAFAEL	CA	94903-1148	Commercial
Style Cut	360-692-9001	SILVERDALE	WA	98383-9130	Commercial

Time	Details
12/19/2018	Coffee Chip BOP quote with forms 125, 126, 140 emailed to
12/26/2018	Carpenter Services Quote emailed to customer
02/20/2019	Craig's Coffee House BOP quote with forms 125, 126, 140 emailed to
08/20/2019	Reed Test Bruce Hopkins
03/13/2020	Hairs for you WebRate quote created - follow-up required
03/19/2020	Books R U WebRate quote created - follow-up required

Main navigation bar -

You'll find the high level functions in this sidebar

Start a quote -

Start quotes, look up customers and more in this panel

Plan your day -

See your activities and reminders in this section

Starting a quote

Enter a name -

Add a customer name for a new quote or pull up an existing record by typing in a name. Then click "Add New" or "Advanced Search".

Applicant Name	Phone	City	State	Zip	Type
Lumpia Factory	360-692-0153	SILVERDALE	WA	98383-9453	Commercial
Hepworth	208-343-7511	BOISE	ID	83702-5758	Commercial
Hopkins, Reed	509-720-6633	SPOKANE	WA	99203-1912	Personal
Hopkins, Reed	509-720-6633	SPOKANE	WA	99203-1912	Personal
Painters Plus	208-378-6541	BOISE	ID	83704-5902	Commercial

Recent customers-

After you've quoted customers, they'll show up here. To pull up the quote, simply double click on the name.

Choose customer type -

Select the type of customer: personal or commercial.

Phone	City	State	Zip	Type
208-343-7511	BOISE	ID	83702-5758	Commercial
509-720-6633	SPOKANE	WA	99203-1912	Personal
360-692-9001	SILVERDALE	WA	98383-9130	Commercial

Advanced search -

Easily filter records to find quotes from a specific date range, line of business, policy type. Or pull up info based on policy number.

Enter Customer Information

Name/Business Name: Zip:

Advanced Quote Search

Quotes done:

Date range: -

Line of business:

City:

Quote number:

Policy type:

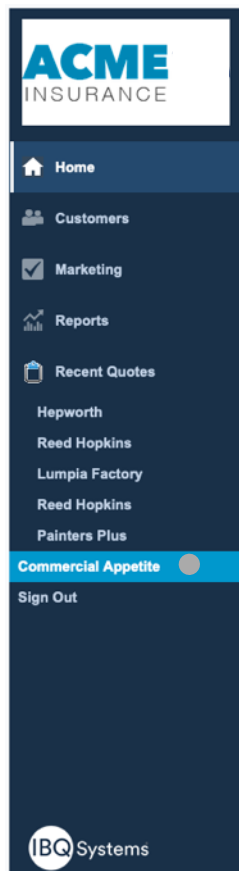
Policy Search

Policy number:

Commercial appetite

Find a carrier for your risk -

Select Carrier Appetite to see which of your carriers write the type of business you're quoting.



Enter a business description or SIC code -

Try to be as broad as possible. Typing "Bake" will display bakeries, bake shops, etc.

The screenshot shows the 'Commercial Appetite Guide' search interface. It has a title bar and a subtitle: 'Search by description or classcode to find what carriers have an appetite for a certain risk'. Below this, there is a dropdown menu for 'Line of Business' set to 'BOP/PKG'. A search box is labeled 'Search By Description or Code' with a 'Description:' label. A blue 'Search' button is to the right of the search box. Below the search box are four checkboxes: 'Company search', 'Disable linking', 'Match all words', and 'Link All' (checked). 'Search All' is also checked.

Know your options -

You'll see carriers accepting that type of risk. If your search turns up blank, you can always submit an Accord form to the carrier. IBQ can fill in the form for you.

The screenshot shows the 'Commercial Classification Finder' interface. It has a title bar and a subtitle: 'Commercial Appetite Guide'. Below this, there is a dropdown menu for 'Line of Business' set to 'BOP/PKG'. A search box is labeled 'Search By Description or Code' with a 'Description:' label and the text 'bakery' entered. A blue 'Search' button is to the right of the search box. Below the search box are four checkboxes: 'Company search', 'Disable linking', 'Match all words', and 'Link All' (checked). 'Search All' is also checked.

Your Carrier's

Company	LOB	Status	Code	Class Description	SIC	NAICS
Acuity	BOP	R/T	12361	Bakery Distributors (No Baking)	5149	424490
Acuity	BOP	R/T	51315	Bakery Plants	2051	311812
Acuity V2 - Testing only	BOP	R/T	10100	Bakery cafes, on premise baking and selling for immediate consumption		722515-002
Acuity V2 - Testing only	BOP	R/T	51315	Bakery products, fresh (i.e., bread, cakes, doughnuts, pastries), made in commercial bakeries		311812-002
Acuity V2 - Testing only	BOP	R/T	51315	Soft pretzels made in a commercial bakery		311812-019
Chubb Insurance	BOP	R/T	46	Bakery Store- No baking on premises		
CNA	BOP	R/T	20520AA	BAKERY PLANTS	2052	311812
Hartford	BOP	R/T	51931	Bakery Distributor with Cooking	5149	
Hartford	BOP	R/T	51921	Bakery Distributor without Cooking	5149	

Marketing

Reach out to prospects -

Easily pull lists of prospects who didn't buy a policy initially.

Find quotes based on date range or line of business -

Every quote you run in IBQ is stored. Create marketing email or direct mail lists to contact prospective or existing customers who meet the criteria you choose. Filter your list by X-date, quote date, prior carrier, birth date and more.

The screenshot shows the IBQ Marketing Center interface. On the left is a dark blue sidebar with the ACME INSURANCE logo and navigation links: Home, Customers, Marketing (highlighted), Reports, Recent Quotes, Lumpia Factory, Hepworth, Reed Hopkins, Painters Plus, Commercial Appetite, and Sign Out. The main content area is titled "Acme Insurance Agency - Test Area" and "Marketing". It features a "Create a List" button and several filter sections: "Baseline Filters" (Quotes: All, Line of Business: All, Only show quotes with email addresses: No), "Use a Date Range" (Quote effective date search: Date range, From date: 04/10/2019, To date: 07/24/2020), "Address Filters" (State: All, City, Zip), and "Other Filters" (Producer: All, Prior carrier: All). A "More Filters" button is also present. Below the filters is the "IBQ's MARKETING CENTER" section, which includes instructions on how to use the search criteria and provides examples for searching by drivers age, incident/loss date, prior carrier, and creating a mailing list.

ACME INSURANCE

Home Customers Marketing Reports Recent Quotes Lumpia Factory Hepworth Reed Hopkins Painters Plus Commercial Appetite Sign Out

IBQ Systems

Acme Insurance Agency - Test Area

Marketing

Create a List

Baseline Filters
Quotes: All
Line of Business: All
Only show quotes with email addresses: No

Use a Date Range
Quote effective date search: Date range
From date: 04/10/2019
To date: 07/24/2020

Address Filters
State: All
City:
Zip:

Other Filters
Producer: All
Prior carrier: All
More Filters

IBQ's MARKETING CENTER

Enter any combination of search criteria to find customer quotes and then click the Search button. Here are just a few handy search ideas:

- * **Search by drivers age** - Select your previous auto quotes based on when a driver will be turning a specific age - like 21. Beat the existing carrier to the punch with a more competitive quote. [See how it's done.](#)
- * **Search by incident / loss date** - Select your previous auto or home quote based on when an incident or loss may be falling off (3 years, etc). Beat the existing carrier to the punch with a more competitive quote. [See how it's done.](#)
- * **Search by prior carrier** - If you know a carrier is taking a rate increase, you can search your existing quotes where that company was the prior carrier. Beat the existing carrier to the punch with a more competitive quote. [See how it's done.](#)
- * **Requote from the search results** - After the search results have been returned, click on the quote number and you are taken directly into the quote to begin remarketing the customer. [See how it's done.](#)
- * **Create a mailing list** - You can create a traditional mailing list or you can create an email list for targeted email blasts. [See how it's done.](#)

Calendar

All your activity at your fingertips-

The Calendar shows quotes you've done, emails and tasks you add.

The screenshot shows a calendar interface. At the top, there are settings and user icons. Below that, a calendar for July 2020 is displayed, with the date 10th highlighted. A 'Hide Calendar' link is visible. Below the calendar, there is a section titled 'Activity for Today 7/10/2020' with an 'Add Activity' button. The activity list includes:

Time	Details
12/19/2018	Coffee Chip BOP quote with forms 125, 126, 140 emailed to
12/26/2018	Carpenter Services Quote emailed to customer
02/20/2019	Craig's Coffee House BOP quote with forms 125, 126, 140 emailed to
08/20/2019	Reed Test Bruce Hopkins
03/13/2020	Hairs for you WebRate quote created - follow-up required
03/19/2020	Books R U WebRate quote created - follow-up required

Add an activity, to-do, or reminder -

Easily add activities to your calendar. Set the date, time to follow up and assign the follow-up to anyone in your agency.

The screenshot shows the 'Add Activity' dialog box. It contains the following fields:

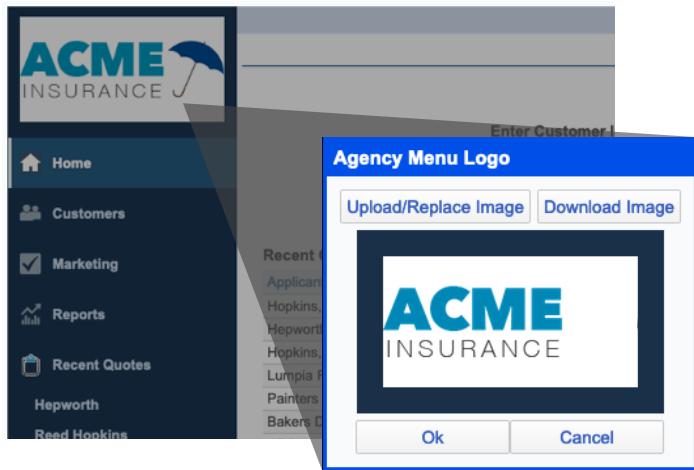
- Created by: Brian
- Date: 07/10/2020 3:36pm
- Follow-Up date: 07/10/2020
- Follow-Up time: 8:00am
- Follow-Up status: Open

There is a link 'Assign Follow-Up to' below the status field. The dialog also has a 'Subject' field (highlighted in cyan) and a 'Comments' field with the text 'Brian Hopkins'. In the background, a calendar for July 2020 is visible, with the date 10th highlighted.

Helpful tips

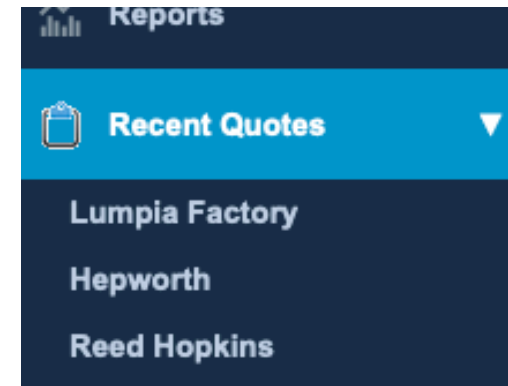
Add your logo -

Personalize your rater. Double click the logo in the top left to update your page.



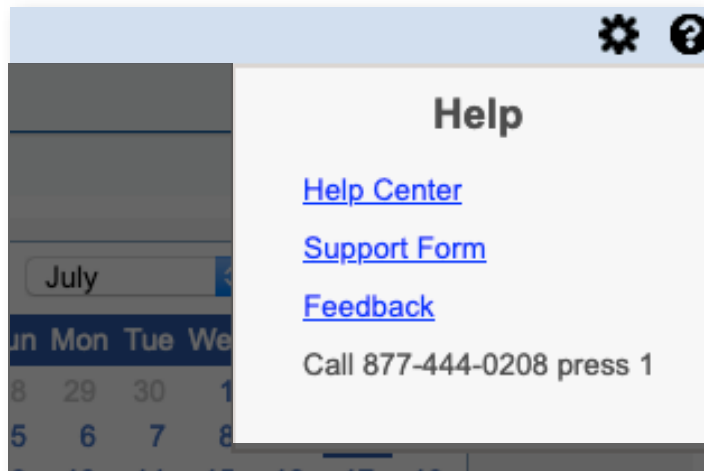
Pull up recent quote with a click -

Your recent quotes are at your fingertips - right in the main navigation.



Get support -

Click the ? icon to get help. Support is included at no extra charge.



See how you're doing with reports -

Get data on quote volume, who's writing business and more with built-in reports.

