

Welcome to TurboRater!

We'll guide you, the Agency Admin, through preparing your new TurboRater account for quoting and bridging.

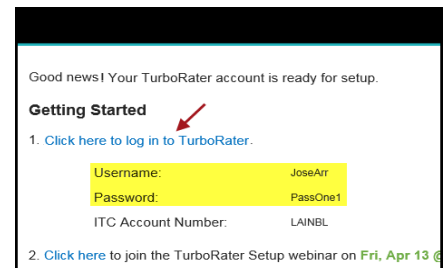
## Quick Start Links

- A. [Log In & Change Password](#)
- B. [Set Up Carriers for Quoting & Bridging in Company Group\(s\)](#)
- C. [Set Up Bridging to Certain Companies](#)
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### A. Log In & Change Password



1. Go to [www.turborater.com/login](http://www.turborater.com/login).
2. Save page to favorites.
3. Log in with the username and password in your welcome email.
4. Go to *Administration > Edit Current User Info*.
5. At *Password* and *Verify Password*, enter a new password.
6. Click *Submit*.

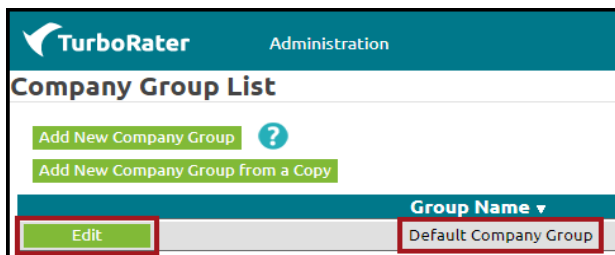


### B. Set Up Carriers for Quoting & Bridging in Company Group(s)

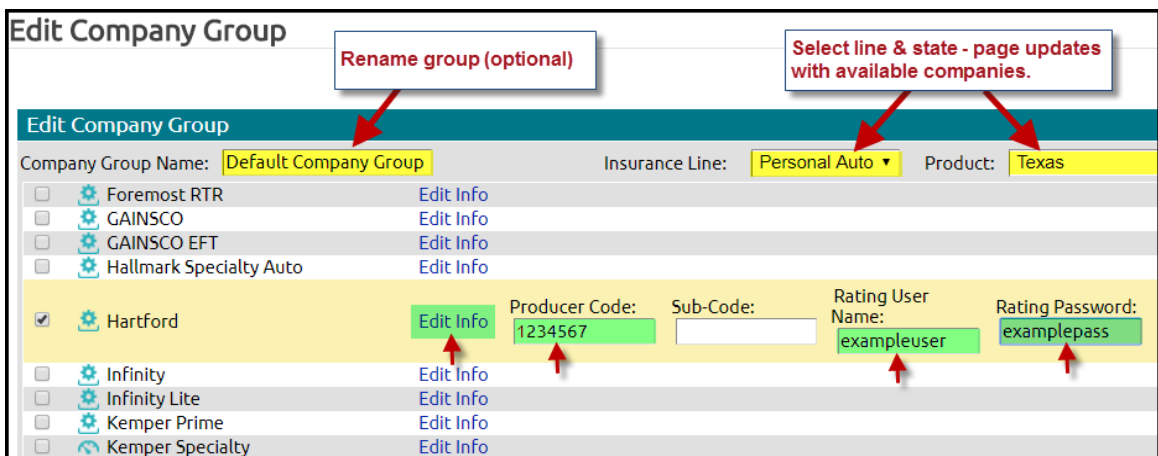


To begin TurboRating, your appointed **carriers must be added in a Company Group with producer codes and company website logins**. A different company group is required for every agent or location that has at least one different producer code. Otherwise, all users and locations can share one company group.

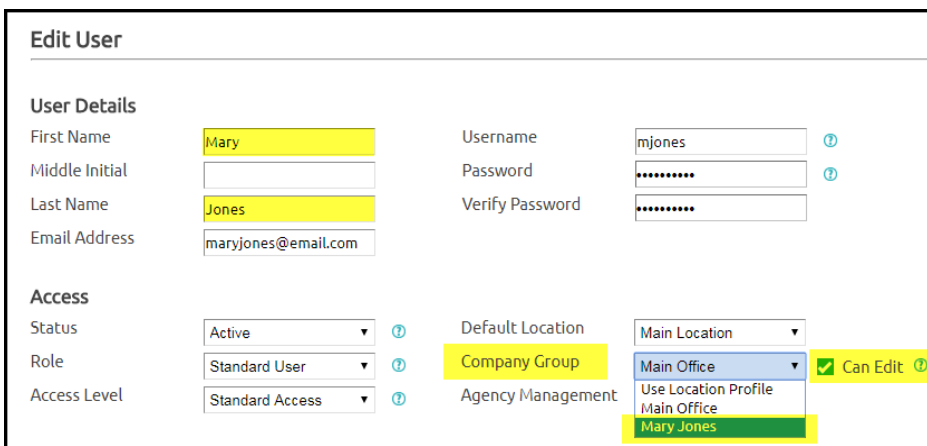
1. Go to *Administration > List Company Groups*.
2. At *Default Company Group*, click *Edit*.



3. Rename the *Company Group Name*, if you'd like.
4. Select a *Product* state and *Insurance Line* – the available companies update each time these are changed. NOTE: If a company isn't available, we may add the company in the future.
5. At the *Active* column, check the boxes for your agency's appointed companies.
6. At each selected company, click *Edit Info*, and **enter a producer code, plus the username and password used to login to the carrier site.**
7. Check the icons on the left of your carriers' names – if any are missing the gear icon or have a different icon, you must [click here to install the ITC bridging tool](#). **This tool is required on every computer to bridge from TurboRater to the carriers that don't have the gear icon.**
8. Repeat steps 4 - 6 for every *Product* state and *Insurance Line* your agency writes.
9. *Save Changes*.



10. Create a separate company group for every location or user that has at least one different producer code. TIP: It's often faster to make a copy of an existing group, then edit the copy.
11. Go to *Administration > List Locations* or *List Users > Edit* and set the appropriate company group.



### C. Set Up Bridging to Certain Companies

Do you write Auto with any company listed below? If not, skip this step. If so, click their blue link and follow instructions. Any bridging software must be installed once on every computer.

- |   |  |
|---|--|
| 1. <a href="#">American Freedom</a>                     | 8. <a href="#">Legacy - all products</a>   |
| 2. <a href="#">Arizona Auto</a> (aka Legacy)            | 9. <a href="#">MILE Auto Insurance</a>     |
| 3. <a href="#">Arrowhead – Michigan only</a>            | 10. <a href="#">Pronto</a>                 |
| 4. <a href="#">Connect MGA</a>                          | 11. <a href="#">Select</a>                 |
| 5. <a href="#">Encompass</a>                            | 12. <a href="#">Trexis - all products</a>  |
| 6. <a href="#">Federated National</a>                   | 13. <a href="#">Traders - all products</a> |
| 7. <a href="#">First Chicago – only</a> “FIRST” product |  |

### D. Manage Locations



We add the main location in every new TurboRater account. The admin should review the information for accuracy and add other locations, if applicable.

#### Review the main location:

1. Go to *Administration > List Locations > Edit*.
2. Review for accuracy, including *Company Group & Agency Management System*.
3. Update if necessary and *Submit*.

#### Create a new location:

1. Go to *Administration > Add New Location*.
2. At *Description*, enter the location’s city or street.
3. At *Agency Name for Location*, enter the agency name, then all other required information.
4. Set the Company Group as applicable ([more info](#)).
5. Set an Agency Management System, if applicable.
6. Click *Submit*.

#### Create New Location

New Location Information

Description:*	<input type="text" value="Lewisville Location"/>
Agency Name for this location:	<input type="text" value="Carter Insurance"/>
Address1:*	<input type="text" value="449 Arrow Street"/>
Address2:	<input type="text"/>
City:*	<input type="text" value="Lewisville"/>
State:*	<input type="text" value="TX"/>
ZIP Code:*	<input type="text" value="76063"/>
Phone:*	<input type="text" value="800-234-2345"/>
Alternate Phone:	<input type="text"/>
Fax Number:	<input type="text"/>
Company Groups:*	<input type="text" value="Default Company Group"/>
Agency Management Options:	<input type="text" value="InsurancePro Remote"/>
Active?	<input checked="" type="checkbox"/>
* Required Fields	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

### E. Manage Users

We add a first Agency Admin user account in every new TurboRater account. The admin should review the information for accuracy and add other users, if applicable.

As the admin, you’ll manage existing accounts over time; like email address or phone # updates and disabling users who should no longer have TurboRater access.

#### Review your admin user account:



1. Go to *Administration > List Users > Edit*.
2. Review information and update if necessary.
3. Update the password, if you’d like, then *Submit*.

## Add a new user:



1. Go to *Administration > List Users > Add New User*.
2. Create the user's *Username & Password* – and provide them to the user.
3. At *Role & Access Level* – allow or restrict the user's abilities in TurboRater. Click question mark icons for help.
4. At *Default Location*, set the user's office.
5. Set the *Company Group* as applicable ([more info](#)) and check *Can Edit* if you want to allow the user to edit their own companies, producer codes and logins.
6. Set *Permissions*.
  - The *Weekly Agency Report Card* is a quote summary of the prior week – it is emailed every Monday morning.
7. Click *Submit*.

## F. Customize the Rating Applications with Quote Templates

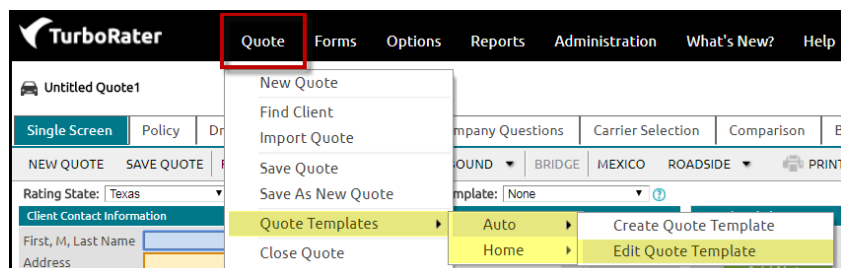


Quote Templates save time and allow you to highly customize the Auto and Home quote applications. We recommend starting every new quote with a template. An agency should create several different templates for their agency's most common quoting scenarios.

### Review & edit pre-loaded templates:

Every new TurboRater account has five pre-loaded templates: auto state minimums, auto100/300/100 standard coverages, homeowners HO3, renters HO4 and condo HO6. Review and edit the existing templates to suit your agency's specific needs.

1. Go to *Quote > Quote Template > Auto or Home > Edit Quote Template* (at this point, there is also an option to start a new template).



2. Select a state.
3. Click *Edit* to review/edit the template.

State: Texas			
Template Name			
TX Homeowner - HO3	Edit	Copy	Delete
TX Condo - HO6	Edit	Copy	Delete
TX Renter - HO4	Edit	Copy	Delete

The Quote Template page lists the fields that correspond to rating application fields. Review the current settings and change any to suit your agency's needs.

4. At each field, select an option from the dropdown, and set a default answer as applicable.

**Show** = field will be visible in the rating application.

**Show as Blank & Required** = field will be visible in the rating application AND the user MUST select an answer. No default can be set.

**Hide** = field will not be visible on the rating application. A default answer can be set.

**Default column** = you can set an answer in field on the right. Answer will prefill new applications and can be changed during quoting.

5. At the lower right, are two options:  
**Set as Agency Default** = will default for everyone in the agency who hasn't set their own template default in

*User Preferences.*

**Apply to All Users** = sets as default for everyone in the agency, overrides any templates set in *User Preferences.*

6. Click *Save & Exit.*

### Quote Template

Save Template As: TX Auto - State Minimum

Rating State: Texas

**Policy Defaults**

Zip	Show	-
County	Show	
City	Show	
Region	Show	
Cell Phone	Show	( ) -
Home Phone	Show	( ) -
Work Phone	Show	( ) -
Email	Show	
Policy Term	Show	Semi-Annual
Payment Option	Show	Installments
Insurance Score	Show	Average
Non-owner:	Show	No
Broadform:	Show	No
Liability:	Show	Please Select / 25
PIP:	Show	No Coverage
Medical Payments:	Show	No Coverage
Uninsured BI:	Show	No Coverage
Uninsured PD:	Show	No Coverage
Accidental Death:	Show	No Coverage
Contact Method	Show	None
Lead Source	Show	Internet
Quote Description	Show	New Business
Native Language	Show as Blank and Required	English
Paperless Discount	Hide in Additional Attributes	Yes

**Driver Defaults**

First Name	Show	
Last Name	Show	
Date of Birth	Show as Blank and Required	

Set as agency default

Apply to all users

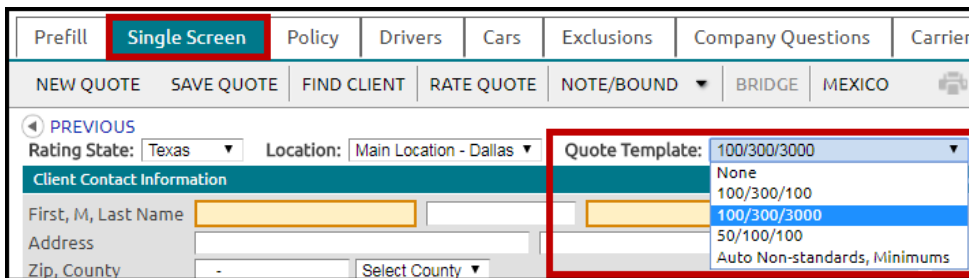
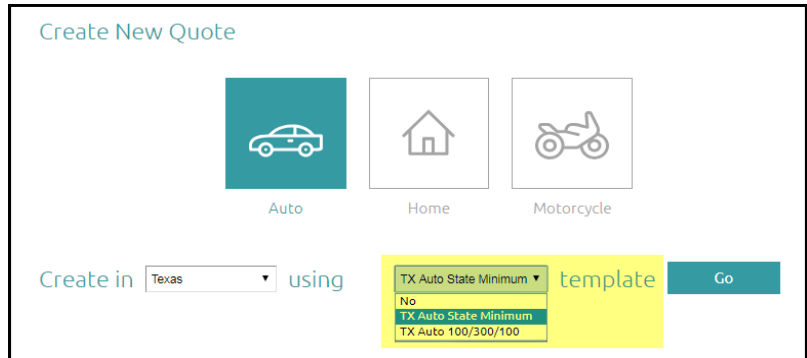
Save Save & Exit

### Start a new template:

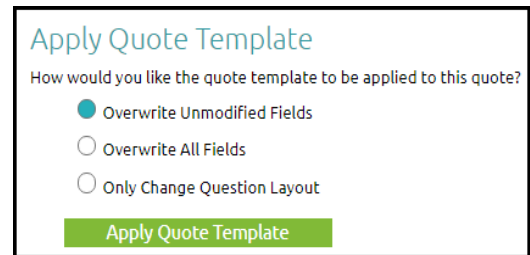
1. Go to *Quote > Quote Templates > Auto or Home > Create Quote Template.*
2. Name the template and set fields as described in the steps above.
3. Click *Save & Exit.*

## Start a quote from a template:

1. Go to *New Quote* (upper left).
2. Select a state, and a template from dropdowns, then *Go*.
3. The quote application opens with fields and answers as designated in the template.
4. At the *Single Screen*, there is also an option to switch to another template by using the dropdown menu.



5. Select how to apply template:
  - **Overwrite Unmodified Fields** (most common) – only changes fields that haven't modified to the new quote template defaults.
  - **Overwrite All Fields** – applies changes to all fields even ones that have been modified for the quote. Don't use this if you already entered name, address, etc. - it will be overwritten.

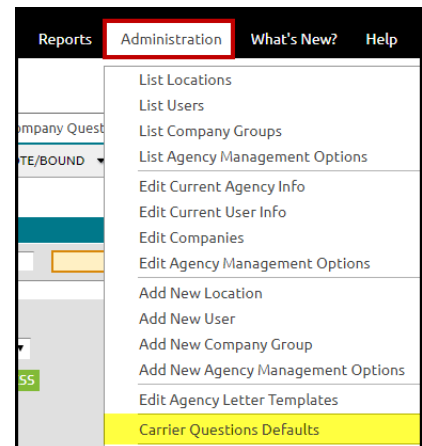


## G. Set Carrier Questions Defaults



For every quote, some companies may have their own underwriting questions that affect the premium. Save time by setting the common answers to pre-fill into new quote applications.

1. Go to *Administration > Carrier Questions Defaults*.
2. Select a state and line of business.
3. Set the most common answers to your companies' underwriting questions.
4. Repeat steps 2 & 3 for each line of business and state, as applicable.
5. *Save Changes*.



## H. Review Preferences Watch ▶

Preferences are used to customize TurboRater features at user, location and agency levels. Review our many Preferences and setup those important to your agency.

1. At the upper right, go to your name and select *Preferences*.
2. At the left, select *Agency, Location* or *User*.
3. One example of Preferences is Misc. Fees – add fees, then quickly apply a fee to new quotes.

### Auto Miscellaneous Fees

State: Texas

	Description	Amount Applied To
<a href="#">Edit</a>	Agency Fee	\$50.00 Down Payment - Policy
<a href="#">Edit</a>	MVR Fee	\$10.00 Down Payment - Driver

Click here to add a new miscellaneous premium.

Allow free entry of misc premium [?](#)

Save
Cancel

### Edit Miscellaneous Premium

Premium Amount:\*

Description:\*

Calculation Method: Apply to Down Payment ▼

Applies To:

Policy

Driver

Vehicle

% Based on

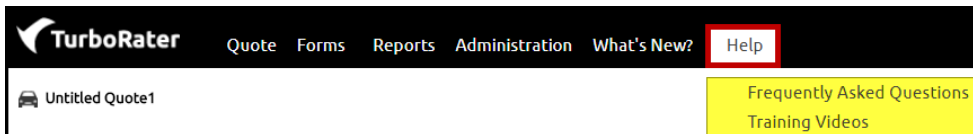
Total

\* indicates a required entry

Save
Cancel

## I. Training Resources

We offer [free daily webinars](#), a comprehensive [video library](#) and a FAQ knowledgebase.



### Register for Webinars

1. [Register for TurboRater Setup](#)
2. [Register for TurboRater Quoting & Bridging](#)

### More Training Videos

- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. <a href="#">TurboRater Setup Webinar</a></li> <li>2. <a href="#">PIA Affiliates, Carrier Setup &amp; Quote Binding</a></li> <li>3. <a href="#">Quoting an Auto Policy</a></li> <li>4. <a href="#">Quoting a Homeowners, Renters or Condo Policy</a></li> <li>5. <a href="#">Unlimited Free Prefill Lookups for TX Agents</a></li> <li>6. <a href="#">Finding a Client / Quote</a></li> <li>7. <a href="#">Carrier Bound Data &amp; Report Scheduling</a></li> </ol> | <ol style="list-style-type: none"> <li>8. <a href="#">Run Basic or Advanced Reports</a></li> <li>9. <a href="#">Generate Pre-filled ACORD Forms</a></li> <li>10. <a href="#">Quoting a Foreign License</a></li> <li>11. <a href="#">Record a Quote as a Bound Policy</a></li> <li>12. <a href="#">Set Company Ranking</a></li> <li>13. <a href="#">Quoting a Motorcycle Policy</a></li> <li>14. <a href="#">Delete a Quote</a></li> <li>15. <a href="#">Select Specific Carriers to Quote</a></li> <li>16. <a href="#">Order an MVR Report</a></li> <li>17. <a href="#">Restrict User Access</a></li> </ol> |
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Questions? Contact [training@getitc.com](mailto:training@getitc.com) or [support@getitc.com](mailto:support@getitc.com).