

Getting Started-Onboarding Checklist (downloadable)

Onboarding Check List

These are the things you will want to work on in preparation for using Nowcerts. Please review instructions and videos related to these items and reach out if you encounter any difficulty.

1. Agency Configuration –

- Upload agency logo- this is accessed in the agency profile by clicking configuration. You will see that the logo can be uploaded right under the license number. You will also want to check the box show logo in the menu.

<https://youtu.be/pHpiue5gMK4>

- Email Template/Send Emails from/Fax through email – In your agency configuration, you will want to enter in an email signature in your email template to ensure that your branding shows up on correspondence sent from the system. You will also want to enter in an email in the “send emails from” section and further down for sending certificates of insurance, as well as inputting your efax info so that anything faxed shows that it came from your fax instead of ours. The goal of this to get the responses that may come from these communications to come back to your office instead of ours

<https://youtu.be/rUkQMBgucBE>

- Notification Settings- This is where you can set up automatic notifications to your insureds and/or your agency. This is also where you will select how far in advance certain items will start showing up on your dashboard as well as what automated notifications you would like to go out and to whom.

<https://youtu.be/kxMX2MKWcV0>

Carrier Downloads- If you will be using Ivans for your carrier downloads you will want to enter in your Ivans Credentials in to Nowcerts and then email support@nowcerts.com to let us know that you have so we can make sure the connect is complete. The section for entering these credentials is located in your agency configuration. Prior to do this you will want to update your management system with Ivans and all the carriers that download through. Let them know that Nowcerts is your agency management system. Some carriers will ask for a version number. You can have them select ALL or 1.0. Lastly if they say they do not currently work with Nowcerts, more than likely the do they just do not have a specific format for Nowcerts. You can tell them to use the QQ Catalyst format. It is the same as ours and will work just fine.

Contacts	
Phone	888-586-4792 Ext. _____
Cell Phone	801-940-9997
Fax	801-503-9529
E-Mail Address	agency@nowcerts.com

IVANS	
info IVANS Account	Test
info IVANS User Id	Test
info IVANS Password	123

- Additional choices to make in agency configuration- As you go through you will see there are additional items that need to be entered. Things like list settings, dashboard permissions, E-sign features, etc. Please see video link below for a brief overview;

<https://youtu.be/n3hucceGY-Y>

2) Additional Set up Items – support articles linked below

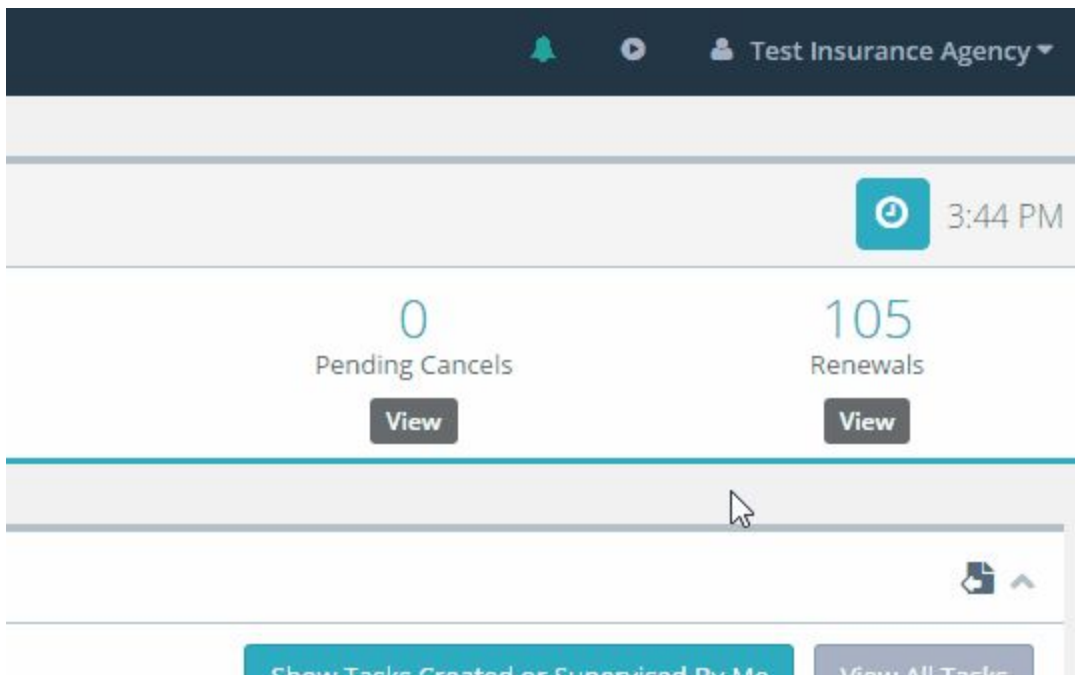
- Set up Business Locations

<https://nowcerts.freshdesk.com/solution/articles/48000132037-step-2-setup-business-locations>

-Add Agents

<https://nowcerts.freshdesk.com/support/solutions/articles/48000132038-step-3-add-agents>

1. Go to Agency Menu and click on "Agents"



2. Click on "Add New" next to Active Agents

Name	Phone	Cell Phone
Test Insurance Agency	888-111-2222	802-111-2222

Info	Locations	Agents 25
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Search 🖱️

<p>First Name</p> <input type="text" value="First Name"/>	<p>Last Name</p> <input type="text" value="Last Name"/>
------------------------------------------------------------------	----------------------------------------------------------------

Active Agents Add new

First Name	Last Name	E-Mail
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3. Fill the "Details" section with pertinent information.

4. Account and Permissions:

User vs Agent: You can have as many "Agents" in NowCerts without extra cost. This would help you keep track of production and commissions. However, an Agent, without "User" access, cannot log into the system and cannot make changes. To give Agent access, click on the "User" checkbox. Upon choosing User many extra options appear:

- Time Zone: Choose the time zone of your user
- Click on Advanced Settings to set the hours during which you allow access to NowCerts. You can also specify IP Address (for e.g. the IP Address for the office to limit access to data from the agency computers)

Day	From Time	To Time	IP Address
Monday	<input type="text"/> ⌵	<input type="text"/> ⌵	<input type="text"/> +
Tuesday	<input type="text"/> ⌵	<input type="text"/> ⌵	
Wednesday	<input type="text"/> ⌵	<input type="text"/> ⌵	
Thursday	<input type="text"/> ⌵	<input type="text"/> ⌵	
Friday	<input type="text"/> ⌵	<input type="text"/> ⌵	
Saturday	<input type="text"/> ⌵	<input type="text"/> ⌵	

- Choose the appropriate permissions you allow a user to have. For example, it is not recommended to give any users "Delete" permissions for any features unless they are administrators. To do that, uncheck the box below "Delete"

5. Click on the appropriate down arrow and add individual raters credentials, if applicable.

6. Add the Agent Carrier Code. This would allow NowCerts to automatically parse information for carrier downloads and commissions by the agent. Fill Code and Carrier and then click the green "+" button for each Carrier.

Note: You might want to skip this step and add Carrier codes in the next step when you add carriers. If you are adding an agent after you have been using this system for a while, you can add now since all carriers have been already added.

7. Click "Save changes"

-Add Agency Commission rules ****you should not add agency commission rules for any carriers whose policies come in via Carrier download**

<https://nowcerts.freshdesk.com/support/solutions/articles/48000132125-step-6-setup-agency-commission-rules>

-Add Agent commission rules- set these up for all Agents/CSRs that are paid commissions

<https://nowcerts.freshdesk.com/support/solutions/articles/48000132140-step-7-setup-agent-commission-rules>

-Add Signatures

<https://nowcerts.freshdesk.com/support/solutions/articles/48000132169-step-8-add-signatures>

-Sync your email

<https://nowcerts.freshdesk.com/support/solutions/articles/48000132176-step-9-sync-your-email>

1. **Agency customization –**

- Data Import- We can assist you with importing your current insureds, policies, MGAs/Carriers and more from your existing management system. There is a small charge if we are to do this for you. First, you would need to get a back up from the AMS you are working with. Remember that once you have your back up, you will need to enter in anything new you have after that date. To request this please complete the form in this link; <http://bit.ly/NCDataConversion2>. You can also choose to import data on your own. It can be imported via excel spreadsheet saved in .csv format. Here is a helpful article on how to do exactly that.

<https://nowcerts.freshdesk.com/solution/articles/48000146756-data-import-tool-importing-data-from-excel-csv-files>

- Contacts – Carriers, MGAs, Finance Companies – If you are having us import this data for you, there will not be much to do here. However, once the data comes in you will want to check for duplicates and also make sure your carriers come in as carriers and your MGAs come in as MGAs. Depending on the way your back up was prepared by your previous AMS you may find that some of your carriers come in as MGAs or vice versa.

Adding carriers/MGAs Contacts;

<https://youtu.be/NJiOmPR1AT4>

NAIC Website;

https://naic.org/index_consumer.htm

Merging carriers/MGAs;

<https://youtu.be/2yRXGetFKGI>

- PDF Forms- This can be found in both the agency profile and under MICSELLANEOUS>Agency Customization. This function allows you to upload fillable PDF forms so they are accessible to complete within Nowcerts. The system allows you to “map” the fields of the form so that insured details will automatically populate when you go to edit the form for an insured.

<https://youtu.be/ifQ-h1pqdGM>

- Description Templates- This can be found in both the agency profile and under MICSELLANEOUS>Agency Customization. Certificate, email and texting templates can be created. There is the ability to add “placeholders” that will populate details for insureds and their policies into the template.

<https://youtu.be/P50-Yfn0qJ8>

- Tasks-Categories and Stages- Creating customized tasks allows you to create a standardized workflow with instructions for each step. This ensures that the tasks are completed correctly and can help prevent

<https://youtu.be/loUwdmBB7jE>

items from slipping through the cracks. I suggest creating these categories and stages for any task that is completed routinely that has several steps that need to be done and may be completed over the course of several days or even weeks.


- Tags- In Nowcerts you can create tags that can be applied to insureds to provide valuable info that could be used to categorize a group of insureds. These tags are searchable and also visible from the insured's details page.

<https://youtu.be/EPINOsXoiUw>

- Insured/Policy default folder structure- You can create a folder structure for the storing of documents that can be applied to each insured/policy once it is entered. This is handled in the agency details.

<https://youtu.be/lyrXkbGwXEU>

- Additional options for agency customization- There are additional options that can be customized. They are all found under miscellaneous in the left side menu. They allow you to additional Lines of Business, additional stages for Quotes and Opportunities, Prospect categories, custom fields and more. Just click on the customization you would like to add and then add new.

 MISCELLANEOUS ▼

Agency Customization ▼

Files

Description Templates

Signatures

PDF Forms

Lines of Business

Opportunity Stages

Quote Stages

Prospect Statuses

States

Calendar Categories

Referral Source Categories

Tasks - Categories and Stages

Tags

Custom Fields

Important Date Templates

E-M

Fa

Se

No

Da

Da

Gk

Ra

Do