

## ConsumerRateQuotes Setup Instructions

To enable Consumer Rating on your Agents website please follow the simple three screen instructions outlined below.

1. Agency Setup
2. Real – Time Passwords
3. Coverage Defaults

It is important to note you must select “**update**” in order for the changes to take place. Once setup is complete you can select “Return to PL Rating” & continue with your agent workflow within PL Rating.

### Agent Setup

CLICK HERE FOR LIVE HELP

Powered by WebEx

Consumer Rate Quotes Setup

Agency: [34302] PL Rating Agency - Pulaski, TN

[Setup Instructions](#)
[Contact Us](#)
[Return to PL Rating](#)

[Agency Setup](#)
[Real-Time Passwords](#)
[Coverage Defaults](#)

Agency Information

Agency Name:

Street Address:

City / State / Zip Code:

Phone Number:

Producer:

PL Rating Agency

100 disk drive PO Box 547

Pulaski, TN 38478

866-425-2255

Dunnivant, Jeri

Quote Notification Information

Email Address:

sschmidt@vertafore.com;WHaney@vertafore.com;amoos@vertafore.com;

scott.wilson@vertafore.com; dgrajeda@vertafore.com

Consumer URL

Sub Domain:

URL:

plrating

http://plrating.PUL-CONSUMER/consumer/default.aspx

Agency URL

Return to URL:

TEST CONSUMER SITE

http://www.vertafore.com

Agency Logo

Logo Position:

Display Logo on Left

Messages

Intro Screen Message

Quote Result Screen Message

Email Message

Need Insurance Rates today! Start here to get fast and easy comparative rates.

Thank you for your interest, we will be contacting you soon.

Thank you for your interest, we will be contacting you by email soon.

	State Minimum	Basic	Standard	Preferred
Enable Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Plan Name	Standard	Bronze	Preferred	Gold

1. Agency Information – This includes Information about your agency that integrates from your PL Rating account. The information can be changed within ConsumerRateQuotes setup, but these changes apply to ConsumerRateQuotes only and will not be adjusted in your PL Rating account.
2. Quote Notification Information – Enter the email address(es) you want to be notified when a lead is generated by a consumer. If you are entering more than one email address, you will need to separate the addresses by a semicolon. The first email address will display as the from email.
3. Consumer URL – Agents URL where ConsumerRateQuotes will reside.
4. Agency URL – Agents URL where a consumer can return once lead is generated.

**Note: It is recommended that the “Test Consumer Site” and “Test Return URL” options be utilized to confirm the settings are working properly.**

5. Agent Logo – There are three options available for displaying the ConsumerRateQuotes on a website.
  - a. The logo to display on the left of the webpage.
  - b. The logo to display at the top of the webpage.
  - c. ConsumerRateQuote to display in an IFrame. *See IFRAME instructions below for details.*

**Notes: (1)The logo must be in .jpg format. (2)The logo will be used in the email notification to the consumer.**

6. Messages – There are three options for displaying messages.
  - a. Intro Screen – The agent can customize an intro message to the Consumer. This message will display on the first screen of ConsumerRateQuotes.
  - b. Quote Result Screen – The agent can customize a message that will display on the comparison screen of the ConsumerRateQuotes. This message will also display in the email to the Consumer.
  - c. Email Message – The agent can customize the message displayed in the email to the consumer.
7. Plans – There are four possible plans to display to the Consumer. The agent has the ability to offer up to four plans to the consumer by checking the “Enable Plan” option. The “plan name”, which is visible to the consumer, can be customized by the agent.

## Real-Time Passwords

**PL Rating**  
ConsumerRateQuotes Setup  
Agency: (11111)PL Rating Agency - Pulaski, TN

Agency Setup | **Real-Time Passwords** | Coverage Defaults

Filter: State [ All States ] Carrier [ All Carriers ]

	State	Lob	Company Name	User Name	Password	Agency Code
<a href="#">Edit</a>	AL	PA	ABC Company	test	*****	02

1. The agent will need to enter the real time passwords for each state and carrier. If you do not want to offer a particular state and/or carrier on the consumer website simply do not enter the credentials. At which time you do want to offer the carrier on the consumer website you previously removed, you will need to reenter the credentials. If a carrier updates their credentials, you will need to update the consumer credentials.

## Coverage Defaults

**PL Rating**  
ConsumerRateQuotes Setup  
Agency: (11111)PL Rating Agency - Pulaski, TN

Agency Setup | **Real-Time Passwords** | **Coverage Defaults**

Filter: State [ New York ] [Update](#)

Policy Coverages	Standard	Preferred	Premium	Gold
Liability CSL/BI Limit	25,000/50,000	50,000/100,000	100,000/300,000	250,000/500,000
Liability PD Limit	25,000	50,000	50,000	100,000
Medical Payments	1,000	1,000	10,000	10,000
PIP	50,000	60,000	75,000	100,000
PIP Ded	200	100	100	Full
Out of State PIP	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SUM Single/BI Limit	25,000/50,000	50,000/100,000	100,000/300,000	250,000/500,000
Statutory UM Limit	25,000/50,000	25,000/50,000	25,000/50,000	25,000/50,000
Obel	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accidental Death	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work Loss	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Med Exp. Elimination	None	Named Insured Only	Named Insured Only	Named Insured and Relatives
Spousal Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

  

Vehicle Coverages	Standard	Preferred	Premium	Gold
Full Glass	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Loan Lease	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Towing & Labor	25	50	75	100
Transportation Expense	No Cov	15	30	50
Electronic Equipment	0	0	1000	5000
Media Coverage	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Repair/Replacement Cost Cov.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Update](#)

[Return to PL Rating](#)

1. As the Agent, you have the ability to set the defaults you want to present to the consumer in each of the four plans. In order to change any of the defaults simply select the drop down arrow to change. You must select “update” to save changes.

## **Instructions for adding ConsumerRateQuotes as an IFRAME**

### ***iFrame Example***

Add the following iframe to your HTML code.

```
<iframe id="TheFrame" name="TheFrame" frameborder="1" height="600px" width="1000px" src="http://test.ConsumerRateQuotes.com/Consumer/default.aspx"></iframe>
```

1. Replace “test” in the example iFrame (above) with the sub domain name which you chose in ConsumerRateQuotes Setup.
2. You should set “Logo Position” to “Display in iFrame (No Logo)” in ConsumerRateQuotes Setup.
3. The “Agency URL” setting that you enter in ConsumerRateQuotes Setup will determine where ConsumerRateQuotes returns to after the consumers get a rate.

**NOTE: The frameborder is optional. If you do not wish to have a frame change the setting to 0 (ie: zero).**

**NOTE: Set the height & width to what is most applicable to work best for the agency site.**

### ***Hyperlink Example***

Add the following hyperlink to your HTML code.

```
<a id="TheLink" href="http://test.ConsumerRateQuotes.com/Consumer/default.aspx">Click Here to get an Auto quote!</a>
```

1. Replace “test” in the example hyperlink (above) with the sub domain name which you chose in ConsumerRateQuotes Setup.
2. You should set “Logo Position” to “Display Logo at Top” or “Display Logo on Left” in ConsumerRateQuotes Setup.
3. You need to upload a logo that works with your site.