



Vertafore

FSC Rater Upgrade overview

December 9th, 2021

Agenda

- Objectives for today
- FSC Rater History
- Upgrade Overview
- Feature and Carrier Comparison
- Demonstration
- Next Steps on Getting Started

Objectives for today

- Provide additional details on Upgrade email
- Answer any questions regarding the current status of FSC Rater
- Provide an overview of the upgrade solution available for all current FSC Rater clients
- Review the process and what you need to do to get set up

FSC Rater History

- California's leading rating system for almost 30 years
 - Over 3,000 agencies and several hundred carriers
- Reliable, accurate and easy to use
 - A trustworthy brand
 - Helping agencies grow and prosper
- A legacy Windows desktop solution
- What's next?



FSC Rater Upgrade

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Significantly **easier-to-use, web-based interface** and additional features to drive growth and productivity for your agency

Largest set of manufactured and real-time California, auto homeowner, dwelling fire and motorcycle carriers with enhanced accuracy and content availability

Maintain your current pricing and licensing

A single carrier credential store for TNOW users

Quotes, users and carrier credentials imported into PLR

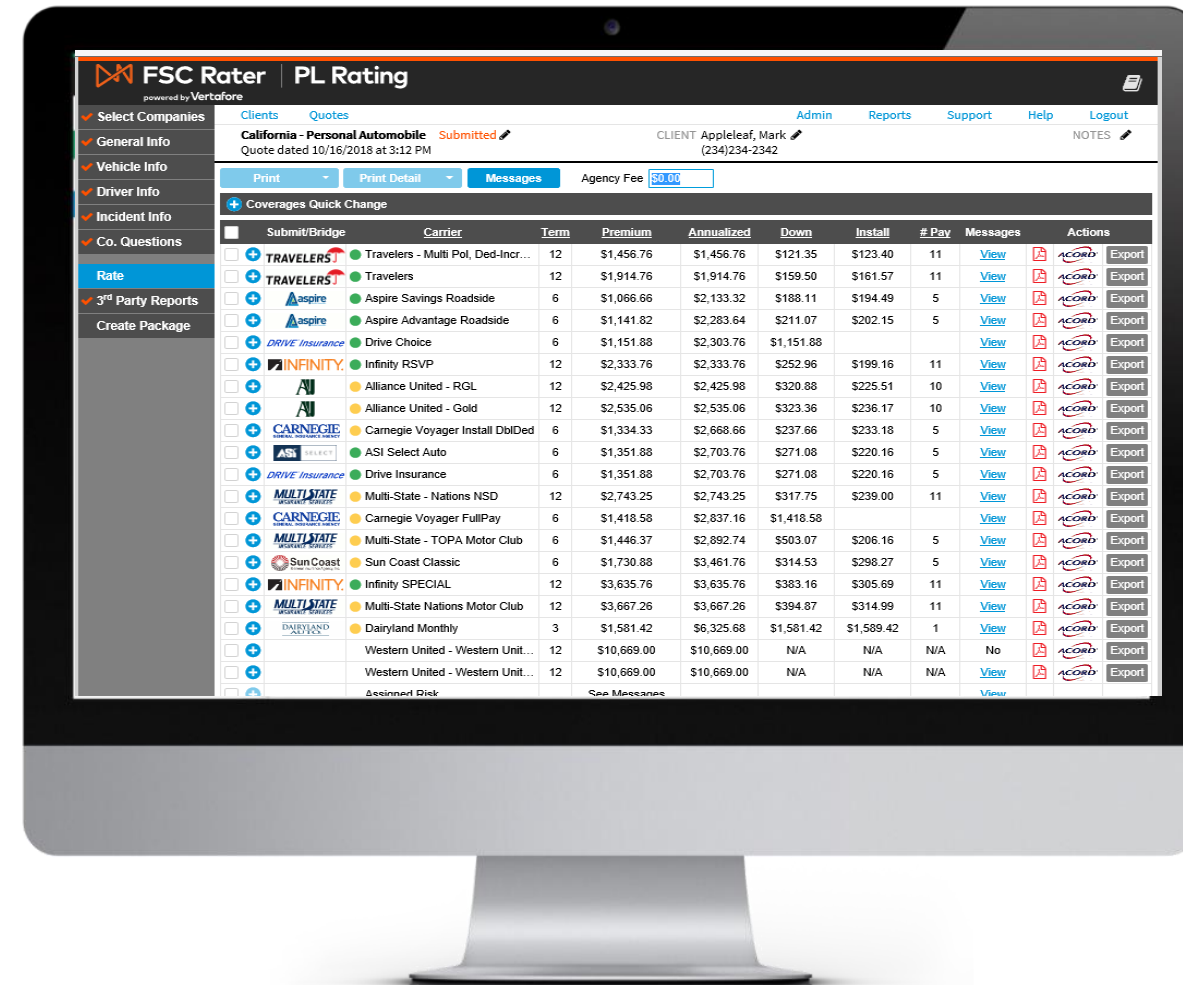
Eliminate all the unnecessary desktop maintenance and rate updating that your staff or IT department must do to keep up the current FSC Rater



FSC Rater Upgrade

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- Offer to upgrade to all FSC Rater customers “powered by Vertafore PL Rating”
- Currently in use by over 11,000 agencies
- Customers receive access to all available carriers on FSC and more real-time functionality
- Zero migration required by customers to convert data
 - Move all users
 - three-year quote history
 - Real time carrier credentials
- No change to current pricing or licensing
- We’re continuing to support both products



FSC Rater Upgrade

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Current Features:	Features included in Upgrade:
California Quoting - Auto, Homeowners, Dwelling & Fire and Motorcycle	California Quoting - Auto, Homeowners, Rental & Condo (HO 3, 4 & 6) Dwelling Fire (DP1 & DP3), Motorcycle
CA carrier inventory	All active FSC carrier inventory available in PL Rating PLUS new Real Time carriers
Agency Management System Integration	AMS 360, QQ Catalyst & Evolution, Sagitta Other AMS systems e.g., Applied TAM & EPIC, Nexsure, Hawksoft and others
No Flood Availability	NFS, AON EZ Flood, Selective Flood quoting included in Homeowners
Quote based vs. Client Based	Auto and Home Package Quoting, 1 client w/ multiple quotes
Web FSC – Online Consumer Quoting (manufactured carriers only)	Consumer Rate Quotes w/ real time & manufactured carriers including new Mobile Responsive update
	<p>Included in Upgrade:</p> <ul style="list-style-type: none"> - Single credential store for TNOW / Vertafore AMS360 and Sagitta clients - Reporting on Quote, Transaction and audit history - Templates to default most values to make quoting faster - Enhanced User Permissions - Automatic Life Insurance quoting via BackNine Life
Additional Features Available	
No pre-fill capabilities	48 states and 300+ carriers rating capability
	Solutions at Quote (Lexis/Nexis) – Driver and Vehicle pre-fill
	Corelogic (MSB) property prefill and ITV



Demo

FSC Rater | PL Rating
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California - Personal Automobile Submitted
Quote dated 10/16/2018 at 3:12 PM

CLIENT Appleleaf, Mark
(234)234-2342

Print Print Detail Messages Agency Fee \$0.00

Coverages Quick Change

Submit/Bridge	Carrier	Term	Premium	Annualized	Down	Install	# Pay	Messages	Actions
<input type="checkbox"/>	TRAVELERS	Travelers - Multi Pol, Ded-Incr...	12	\$1,456.76	\$1,456.76	\$121.35	\$123.40	11	View ACORD Export
<input type="checkbox"/>	TRAVELERS	Travelers	12	\$1,914.76	\$1,914.76	\$159.50	\$161.57	11	View ACORD Export
<input type="checkbox"/>	Aspire	Aspire Savings Roadside	6	\$1,066.66	\$2,133.32	\$188.11	\$194.49	5	View ACORD Export
<input type="checkbox"/>	Aspire	Aspire Advantage Roadside	6	\$1,141.82	\$2,283.64	\$211.07	\$202.15	5	View ACORD Export
<input type="checkbox"/>	DRIVE Insurance	Drive Choice	6	\$1,151.88	\$2,303.76	\$1,151.88			View ACORD Export
<input type="checkbox"/>	INFINITY	Infinity RSVP	12	\$2,333.76	\$2,333.76	\$252.96	\$199.16	11	View ACORD Export
<input type="checkbox"/>	AI	Alliance United - RGL	12	\$2,425.98	\$2,425.98	\$320.88	\$225.51	10	View ACORD Export
<input type="checkbox"/>	AI	Alliance United - Gold	12	\$2,535.06	\$2,535.06	\$323.36	\$236.17	10	View ACORD Export
<input type="checkbox"/>	CARNEGIE	Carnegie Voyager Install DblDed	6	\$1,334.33	\$2,668.66	\$237.66	\$233.18	5	View ACORD Export
<input type="checkbox"/>	ASI	ASI Select Auto	6	\$1,351.88	\$2,703.76	\$271.08	\$220.16	5	View ACORD Export
<input type="checkbox"/>	DRIVE Insurance	Drive Insurance	6	\$1,351.88	\$2,703.76	\$271.08	\$220.16	5	View ACORD Export
<input type="checkbox"/>	MULTI-STATE	Multi-State - Nations NSD	12	\$2,743.25	\$2,743.25	\$317.75	\$239.00	11	View ACORD Export
<input type="checkbox"/>	CARNEGIE	Carnegie Voyager FullPay	6	\$1,418.58	\$2,837.16	\$1,418.58			View ACORD Export
<input type="checkbox"/>	MULTI-STATE	Multi-State - TOPA Motor Club	6	\$1,446.37	\$2,892.74	\$503.07	\$206.16	5	View ACORD Export
<input type="checkbox"/>	Sun Coast	Sun Coast Classic	6	\$1,730.88	\$3,461.76	\$314.53	\$298.27	5	View ACORD Export
<input type="checkbox"/>	INFINITY	Infinity SPECIAL	12	\$3,635.76	\$3,635.76	\$383.16	\$305.69	11	View ACORD Export
<input type="checkbox"/>	MULTI-STATE	Multi-State Nations Motor Club	12	\$3,667.26	\$3,667.26	\$394.87	\$314.99	11	View ACORD Export
<input type="checkbox"/>	DAIRYLAND	Dairyland Monthly	3	\$1,581.42	\$6,325.68	\$1,581.42	\$1,589.42	1	View ACORD Export
<input type="checkbox"/>		Western United - Western Unit...	12	\$10,669.00	\$10,669.00	N/A	N/A	N/A	No ACORD Export
<input type="checkbox"/>		Western United - Western Unit...	12	\$10,669.00	\$10,669.00	N/A	N/A	N/A	View ACORD Export

What they're saying

"We have been users of FSC for over 20 years. We just moved over to PL Rating and are excited. PL Rater is quick, and we love the exporting that is much easier and faster. We have six (6) users who knew FSC inside out and were very reluctant to move over to PL Rating however it was a smooth transition, and everyone is up and running!!! Thank you to the PL Rating Team for helping us do this in one day!!!

**Wanda Robles @ Shaw, Moses, Mendenhall & Associates
Pasadena, CA**

The system is so easy to use. The new features that the rating system has really does save the agency time. One does not have to go into a separate cost estimator when quoting homes. It is right there for you. Another benefit, is being able to run SAQ. It saves us time by not having to correct the quote later and knowing which company to place the business with. It is truly a blessing for our office."

Tamara Shaver @ Shaver Insurance; Fontana, CA



FSC Rater Upgrade

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- In order to get your data moved, you need to initiate the “Quotes in the Cloud Feature” in FSC Admin
- It is a simple process that should not take more than 15 minutes
- If you have a network setup of stored quotes, only once
- If you have individual desktops, you’ll need to do each one

FSC Rater Upgrade

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Step 1 – activate the account under FSC Rater Admin:

Cloud Storage

Your Cloud Storage account is now available. Click the button below to activate it. Once active, locally stored quotes will need to be uploaded to your Cloud Storage account before they can be accessed in FSC Rater.

Please Note: Once you have elected to activate Cloud Storage, this action cannot be undone.

To find out more, click [here](#).

By activating Cloud Storage you are agreeing on behalf of your organization to the terms and conditions set forth [here](#), incorporated herein by reference.

[Activate Cloud Storage](#) [Not at this time](#)

A message will appear that displays Activated.

Cloud Storage

Cloud Storage **ACTIVATED**

To find out more, click [here](#).

Step 2 - Upload quotes to the cloud.

The screenshot shows the FSC Rater Admin interface. The main navigation menu includes 'Automobile', 'Homeowner', 'Motorcycle', and 'Condominium'. A 'Click Here' button is present with the text 'To find out more about your FSC Rater Upgrade.' Below this is a 'Download Updates' button. The 'Quote Management' menu is open, showing options under 'File Maintenance' (Delete, Upload Quotes to the Cloud), 'Reports / Graphs' (Funnel Analysis, Quote Reports), 'Policy Update' (Client / Policy Info, Applicant Status), and 'Letters / Mailers' (Labels, Envelopes, Marketing Letters). The 'Tools' section includes 'Export' and 'MarketLink'. A 'Close' button is at the bottom right of the menu.

FSC Rater Upgrade

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- Webinar this week to get more agencies preview and overview
- Over 1,200 FSC clients delivered access
- Migration information delivered after moving data to QIC
 - URL and login information
- Ongoing training sessions and follow up will be included in info
- If you're interested in getting access now, please send an email to: fscraterupgrade@vertafore.com
- Or you can visit our web site at:
- <https://www.vertafore.com/products/fsc-rater>

Questions?

Please use the Q&A section to submit questions

Send an email to: fscraterupgrade@Vertafore.com

Or visit our web site at:

<https://www.vertafore.com/products/fsc-rater>

