

You can find more help and frequently asked questions in our [TurboRater knowledgebase](#). We also have training videos for TurboRater on [www.GetITC.com/training/rating](http://www.GetITC.com/training/rating).

**How to create a quote:**

- Hover over *Quote* in the top menu, and select *New Quote*.
- Select the type of quote you wish to create.
  - o Or, if you are already in a quote, you can click the *New Quote* button from the top of that quote and select the type of quote you wish to create.
- Make sure you have the correct rating state and location selected at the top of the screen.
- Enter your client's information. Required fields are outlined in red and highlighted in yellow.
- Click *Rate Quote* or *Next*.
- Answer any company questions that may apply, and click *Next*.
- Confirm the client's information, and select the companies you wish to rate. Then, click *Rate Quote*.
- On the comparison page, you can take a closer look at specific companies by clicking *Select*, or you can bridge to a carrier's website. Click the plus sign on the left to see the available pay plans for that quote. If you want to change the coverage options, you can do that from the fast requote section at the top of the page.

**How to find an existing quote or client:**

- On the quote entry screen, click on *Find Client*. (Or hover over *Quote* in the top menu, and select *Find Client* from the menu that appears.)
- Select the state your client lives in, and enter other identifying information you have.
- Select your client's name from the list that appears.
- From there, you can start a new quote for that client or click *Open Quote* to look at an existing quote.

**How to go to a recent quote:**

- Hover over *Quote* on the top menu bar.
- The last item on the menu that appears should be *Quote History*. Hover over that, and a list of your 10 most recent quotes will appear. Click the one you need.

**How to enter an agency/broker/other fee:**

- On the quote entry screen, under the *Notes/Reminders* section is a *Miscellaneous Fees* section.
- If your agency administrator has set up standard fees for your agency, you can click *Select Fee from List*, and the fees available to you will appear there.
  - o Or, if your agency administrator has activated it, you can enter special fees by clicking *Add Fee* and entering the fee information directly.

**Quote templates allow you to set your default entries in advance. To create a quote template:**

- On the quote entry screen, go to *Quote > Quote Templates*, select your line of business, and then *Create Quote Template*. NOTE: If you have any open quotes, you will be asked to close them out.
- This will start the quote template mode. (This title will appear in red text in the top middle of the screen).
- Select your default entries in each field on each tab.
- Once you have each entry field set the way you want, click on *Save/Close Quote Template* at the top right of the screen.
- To save your settings, click *Yes* to the prompt “Would you like to save the changes to your quote template?”
- Enter a template description. The template description will be the name of the quote template.
- Then click *Save*.

**How to print an auto ID card:**

- From the quote breakdown screen in a specific quote, click on *Forms* in the top menu. Then, click either *ID Card* or *Binder*.
- For an ID card, select *Current Policy* so that the ID card will pre-fill with the client’s information.
- Then select *Print/Preview* in the top menu.
- The ID card or binder will appear in a PDF format.
- To close the form viewer, click on *X Exit ID Card* or *X Exit Binder*.

**How to find FAQs and training videos within TurboRater:**

- Hover over *Help* in the top menu.
- The top two options are *Frequently Asked Questions* and *Training Videos*.
- In the FAQ website, you can search or browse for any topics.

**How to change the location to which a quote is assigned:**

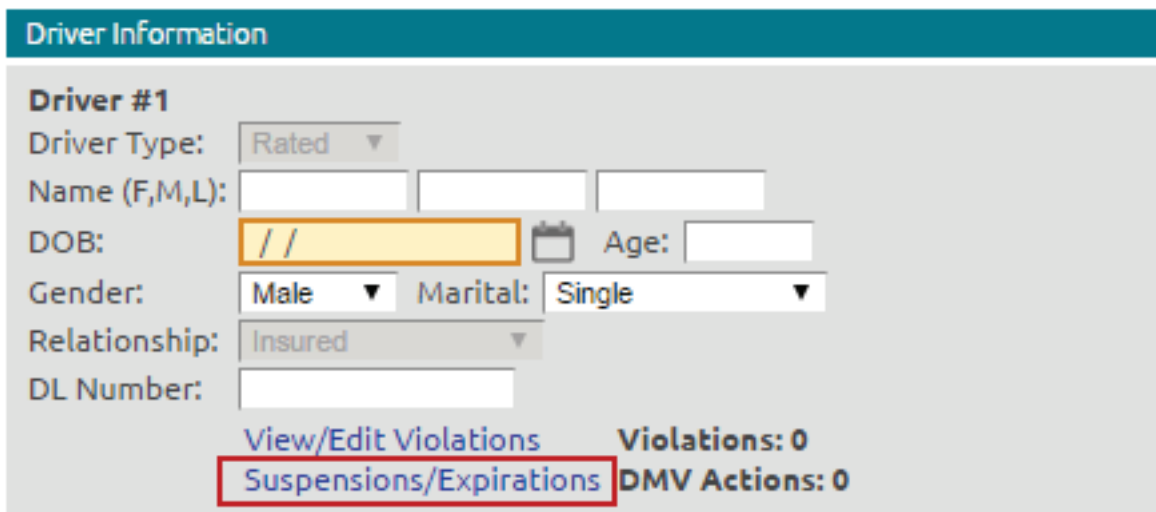
- At the top of that quote's quote entry page, just above where you enter the client's name, is a location drop-down menu.
- Select the desired location from that menu, and save the quote. The quote is now assigned to that location.

**Preferences**

- More options for customizing your TurboRater settings, including start-up options, quote entry options, and rating options, are available in the *Preferences* menu.
- Hover over the gear icon in the upper right corner of TurboRater, and select *Preferences* from the list.

**How to enter/edit a suspension or expiration in CA:**

- Go to the link *Suspensions/Expirations* located in the driver information below view/edit violations.
- A screen will appear, and you will have the option to *Click here to add new DMV action*.
- Choose what type of DMV action to enter: suspension or expiration.
- Enter months since or date of DMV action.
- Enter months since or date of reinstatement or renewal for DMV action.
- Once you have the entry fields set the way you want, click *OK*.



**Driver Information**

**Driver #1**

Driver Type:

Name (F,M,L):

DOB:   Age:

Gender:  Marital:

Relationship:

DL Number:

[View/Edit Violations](#) **Violations: 0**

[Suspensions/Expirations](#) **DMV Actions: 0**

**How to enter an international driver's license or matricula in California:**

- Make a selection from the foreign licensed field in the driver attributes section.

**Driver Attributes**

Reason For No Insurance:	Select One ▼
Yrs/Mths Licensed U.S.:	0 0
Licensed U.S.:	Yes ▼
Licensed in California:	No ▼
State Licensed:	None Selected ▼
Foreign Licensed:	None ▼
Yrs/Mths Foreign License:	None
FR Filing:	California ▼
FR Filing Reason:	▼
License Status:	International
Industry:	Business/Sales/Office ▼
Occupation:	Director/Administrator ▼
Residence Status:	Lease ▼
Yrs/Mths at Residence:	0 6