

Congratulations on choosing Personal Lines Rating! This document will show step-by-step how to install and setup PL Rating™ on your workstation.

**The following must be completed on each workstation:**

- Workstation Setup
- Manage Real-Time Passwords (Required to Activate Real-Time Rating)

**The following must be completed by the Agency Administrator:**

- PL Rating User Setup
- Carrier Setup

## System Requirements

- Desktop Operating System – Windows Vista, Windows 7, 8 & 8.1 (32 and 64 bit).
- Internet Explorer Version IE 8, 9, 10 & 11 (32-bit only).
- Internet Connection (ISDN or higher preferred)
- Adobe® Acrobat Reader® version 8.0 or higher.  
FREE Download available at <http://www.adobe.com/products/acrobat/readmain.html>
- PL Rating Users must be Administrators of their own workstations in order to launch the setup programs necessary to use the following PL Rating features:

Real-time Rating  
Integration

- If you are a Citrix or Terminal Server user, please see your Network Administrator for assistance.

## Workstation Setup

**1. Log into PL Rating using the login information provided in the “Welcome to Personal Lines Rating” e-mail.**

- The “PL Rating Workstation Setup” window will display.
- This installation will apply the following changes/settings to the workstation. Choose “more...” to get a detailed explanation of each change.
  - Add PL Rating as a Trusted Site
  - Alter the Trusted Site settings, if needed
  - Alter Internet Explorer settings, if needed

PL Rating™

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**PL Rating Workstation Setup**

Your workstation must be updated with PL Rating components.

**If you are a Citrix or Terminal Server user please see your Network Administrator for assistance.**  
**If you are NOT an Administrator of this computer please see your Network Administrator for assistance.**

If you require assistance from PL Rating Support, contact (800) 444-4813.

1. Click the **Install** button to accept the changes and update your workstation .
2. A file download window will display, prompting you to **Run** or **Save** the file. Click the **Run** button.
3. Once the workstation component is installed, an Internet Explorer window will display prompting you to **Run** or **Don't Run** the file. Click the **Run** button.
4. The applicable workstation setup window will display. When the setup is complete, click the **Finish** button, if prompted.

The following changes will be made with the install.

Add **PL Rating** as a **Trusted Site**. more...

Alter the **Trusted Site** settings, if needed. more...

Alter **Internet Explorer** settings, if needed. more...

Install Exit

Friday, October 15, 2010

- All Internet browser windows will close. **Be sure to save your work before running the installation.**
- Select **Install**
- You will be given a message that **“PL Rating will close and re-launch once the setup is complete” > OK.**
- When the **“File Download”** window appears, click **Run**.
- When the **“Internet Explorer”** window for **“Do you want to run this software”** appears, click **Run**.
- After the installation is complete, all Internet Explorer windows will be closed automatically. PL Rating will re-launch after a moment and take you into the program.

## 2. Add PL Rating to Favorites, rating.vertafore.com

- On the PL Rating login screen, select **Add to Favorites**

PL Rating™ Login

Enter your Account ID, User ID, and Password.

Account ID:

User ID:

Password:

Remember me

[Send Me My Login Information](#)

[Add to Favorites](#)

Register now for NEW PL Rating access.

If you're having trouble or need assistance, please phone Customer Service at (800) 444-4813.

Individual and group training sessions are available. Please contact our Training Team to schedule a convenient session for your office at (800) 444-4813.

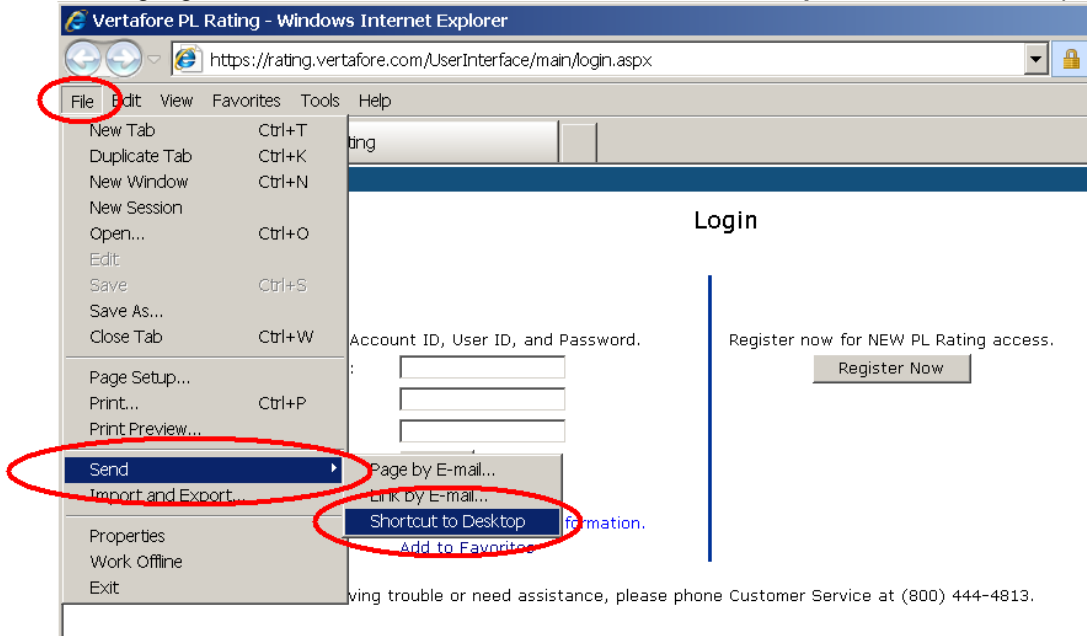
Single Sign-On is coming soon! [Learn more](#)  
If you are in the Single Sign-On early adapter program, [click here to login](#).

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### 3. Create a Desktop Shortcut

- From the PL Rating login screen, select **File – Send – Shortcut to Desktop** from the Internet Explorer toolbar.



- This is the shortcut created.



## PL Rating User Setup

- The Agency Administrator has the ability to setup users within PL Rating.
  - Once logged into PL Rating, select **Admin** on the header bar and select **Manage Users**.
  - Select the **New** button.
  - Select the **Create** button.
  - Complete the **required fields** (in yellow) > **OK**
    - **First Name and Last Name**
    - **User Location** – Licensed Branch locations will display in drop-down list
    - **User Type**

**Agency Administrator** – This user type can only be setup by another Agency Administrator or PL Rating Personnel and is able to manage the following areas within PL Rating:

1. Create Agency Administrators, Agency Users, Location Administrators and Location Users in all locations, as well as manage their personal User Information
2. Update all Clients for the agencies in all locations
3. Set Defaults for all users, as well as update those setup by others in all locations
4. Set Company Groups for all users, as well as update those setup by others in all locations
5. Setup their individual Real-Time Rating Passwords

**Agency User** – This user type can only be setup by the Agency Administrator or PL Rating and is able to manage the following areas within PL Rating:

1. Manage their personal User Information
2. View and Update all Clients for the agency
3. Set their own personal Defaults, as well as select Defaults setup by other users
4. Set their own Company Groups, as well as select Company Groups setup by other users
5. Setup their individual Real-Time Rating Passwords

**Location Administrator** – This user type can only be setup by an Agency Administrator, another Location Administrator or PL Rating Personnel and is able to manage the following areas within PL Rating:

1. Create Location Users, as well as manage their personal User Information
2. View and Update all Clients for their Location
3. Set Defaults for all users within their location, as well as update those setup by others in their location
4. Set Company Groups for all users within their location, as well as update those setup by others in their location
5. Setup their individual Real-Time Rating Passwords

**Location User** – This user type can only be setup by an Agency Administrator, a Location Administrator, or PL Rating Personnel, and is able to manage the following areas within PL Rating:

1. Manage their personal User Information
2. View and Update all Clients for their location
3. Set their own personal Defaults, as well as select Defaults setup by other users in their location
4. Set their own Company Groups, as well as select Company Groups setup by other users in their location
5. Setup their individual Real-Time Rating Passwords

- **Note: “Location Administrator” and “Location User” should only be used if the agency has branch locations. The “Location” options allow these users to see only details for that Location; no other branch or main office details are viewable.**

**Restricted User** – This user type can only be setup by an Agency Administrator, a Location Administrator, or PL Rating Personnel, and is able to manage the following areas within PL Rating:

1. Manage their personal User Information
  2. View and Update only their Clients
  3. Set and Access only their Defaults
  4. Set and Access only their Company Groups
  5. Setup their individual Real-Time Rating Passwords
- **Email Address** – User’s work email address
  - **User Name** – The name the user will use to login to PL Rating. This must be a minimum of 5 characters, in any combination of alpha or numeric characters
  - **Password** – The password the user will use to login to PL Rating. This must be a minimum of 6 characters. At least one character must be numeric.
- **OK**

## **Carrier Setup**

- Your PL Rating subscription includes access to all carriers within your state(s). Follow the below instructions to edit the carrier inventory for your account.
  - Select **Admin > Manage Agency Information**
  - Select **Next** on the **Agency Information** tab
  - On the **States** tab, select any state(s) you wish to include by checking the box for that state > **Next**
  - On the **Carriers** tab, select the **state, line of business**, and the **carriers** you would like to appear in PL Rating > **Finish**

## Manage Real-Time Passwords (Required to Activate Real-Time Rating)

- To activate Real-Time Rating functionality for participating carriers (those with a green dot), **each user must enter their unique carrier site login credentials.**
  - Select **Admin**
  - Select **Manage Real-Time Passwords**
  - Select each carrier from the drop-down menu and enter required login information
  - Select **Save**

**NOTE: If you are using TransactNOW to store your credentials, PL Rating will pull your carrier credentials from TransactNOW.**

- **\*Network Version: Enter your TransactNOW user name and password and select the verify button. You will receive a login successful message.**
- **\*Standard Version: Enter your TransactNOW user name and password and select the verify button. You will receive a login successful message. Select OK to update and/or enter additional carrier logins.**
- **\*360-TransactNOW users must store credentials within PL Rating. Credentials are not shared within this workflow.**

## Forgot Login Information

Login details can be obtained at any time by choosing the “Send Me My login Information?” link on the PL Rating login screen.

PL Rating™

### Login

Enter your Account ID, User ID, and Password.

Account ID:

User ID:

Password:

Remember me

Log In

[Send Me My Login Information](#)

[Add to Favorites](#)

Register now for NEW PL Rating access.

Register Now

If you're having trouble or need assistance, please phone Customer Service at (800) 444-4813.

Individual and group training sessions are available. Please contact our Training Team to schedule a convenient session for your office at (800) 444-4813.



Single Sign-On is coming soon! [Learn more](#)

If you are in the Single Sign-On early adopter program, [click here to login](#).

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Enter the email address used when your account was created and follow the onscreen instructions. All login information will be emailed to you.

PL Rating™

### Request Login Information

Enter your Email address, so that we can email your login information.

Email Address:

Send me my login information

If you're having trouble or need assistance, please phone Customer Service at (800) 444-4813.

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## Where to Go for Help with Your PL Rating Program

We strive to provide you with superior Customer Service each time you contact us. If you have questions regarding PL Rating, please contact us via telephone – 800.444.4813, on-line chat or you may search My Vertafore at <https://support.vertafore.com> for solutions or create a case.