

Re-Quote Module

For

ROBO-agent

(Allstate version)

Product Overview

RoboAgent Re-Quotes module is a **Stand Alone** “true” Re-Quoting system. Re-Quotes gathers information used in previous quotes that are stored in the Agents Alliance database. Re-Quotes uses the data stored in Alliance to ReQuote that prospect at the current rates/premium costs. This approach is key in establishing or continuing a “contact relationship” with your prospective clients. **Re-Quotes is NOT a rerun of previous leads files.** Re-Quotes is an add-on module to RoboAgent.

Functions performed by Re-Quotes

You specify Xdate and type of quote (i.e. Auto/Homeowners/Condo/Renters). Re-Quotes

- Performs quotation housekeeping:
 - Deletes duplicate quotations
 - Deletes old quotations
 - Most current quotations are preserved
 - Outputs exception list of quotes not fully completed
- Updates follow-up dates in Alliance
- Displays:
 - Number of quotes that month
 - Duplicates
- Creates “csv” file for the XDate specified used for submission to Alliance for scrubbing then saved in your “My Documents” directory.

Product Steps

1. User specifies type of quote (Auto/Homeowner/Condo/Renter) and XDate (expiration date).
2. Re-Quote builds a “csv” (comma separated value) file that meets those criteria. Quotes

with incomplete data for quoting are saved in an exception file.

3. That file is submitted to Alliance for scrubbing; noting “Current Customer” etc. (RoboAgent does not print a piece when it sees “Current Customer”).
4. “Scrubbed” csv file is input for RoboAgent who generates new quotes to be printed and/or e-mailed via Re-Quotes.

Columns Needed

1. Name
2. Product Type
3. Policy Number/Control Number
4. Transaction Status
5. Last Saved Date
6. Follow-Up Date
7. Source
8. Address

What is your time worth?

This allows “you to work-the-work” not let “the work-work-you”. The introductory price of \$ 70.00/quarter includes:

- The Re-Quote license
- Technical Support and
- Updates

Relative to manual processes in place, a Re-Quote license is very economical to the labor costs of existing processes

Requirements

- ⊕ Re-Quote subscription
- ⊕ Allstate owned PC or Agency Choice Technology PC with access to Alliance

ROBO-agent
Automation of prospecting
for New Business



<http://www.roboagent.net>
sales@roboagent.net

Telephone (708)671-0100 Extension #104

Re-Quote Column Selection

RoboAgent and Requotes ☆

Available Columns (Select for multiple selections)

- Expiration Date
- Company
- ID
- Agent ID
- Policy Number
- Policy
- Agent

Selected Columns (Ctrl + Select for multiple selections)

- Name
- Address
- Product Type
- Notes
- Policy Number/Control Number
- Last Saved Date
- Source
- Follow-Up Date
- Transaction Status

Buttons: Add >>, << Remove, Reorder: ↑ ↓, Save, Restore Default, Cancel

XDate Existing Quotes Summary

YR.	Mo...	Quotes (X100)	Duplicate Quotes(X100)
2008	JAN	18 >	1 >
2008	FEB	0 >	0 >
2008	MAR	0 >	0 >
2008	APR	0 >	0 >
2008	MAY	0 >	0 >
2008	JUN	0 >	0 >
2008	JUL	0 >	0 >
2008	AUG	0 >	0 >
2008	SEP	0 >	0 >
2008	OCT	0 >	0 >
2008	NOV	0 >	0 >
2008	DEC	0 >	0 >

ROBO-agent
Automation of prospecting
for New Business



<http://www.roboagent.net>
sales@roboagent.net

Telephone (708)671-0100 Extension #104