

# Getting Started With Robo4Life

## JOB AID

**Purpose:** This job aid will help agencies install and begin using Robo4Life Software.

**When:** Use this job aid when using Robo4Life for the first time.

**Materials** This job aid, Robo4Life software.

**Note:** This job aid starts with a “Quick Steps” section listing the steps required to complete the task(s). The remainder of the job aid provides detailed descriptions and graphics for each step.

### Quick Steps

1. Go to (<http://www2.pnci.com/allstatedownloads/index.html>) and download Robo4Life.
2. When prompted, click “Next”.
3. Accept the terms and conditions, and click “Next”.
4. Leave the download folder as default, and click “Next”.
5. Allow Robo4Life to finish downloading, and click “Close”.
6. Click on the new Robo4Life Icon on your desktop.
7. You will be prompted to enter in your agency information, fill out the form.
8. Enter in your Invoice Number and proper Invoice Date, then click “Activate”.
9. A new window will open within a few seconds, this is the main Robo4Life screen.
10. Click the “New Project” button located at the top left.
11. Select the leads file you wish to process, and click “Open”.
12. You will be taken to a new screen with pink and blue boxes. This is the column-alignment wizard. This step ensures Robo4Life properly labels the columns in your leads file. If there is a “Best Match” button, click that and ensure each box has the properly selected column. Otherwise, manually use the drop down arrows to match each box with the corresponding column title. Click “Next” when done.
13. A summary screen will be displayed with the amount of good records, and the number of records that had an error. A few errors is acceptable. Click “Continue to RoboAgent”.

## Getting Started with Robo4Life

---

14.	Robo4Life will now process the leads. Depending on the size of the leads file, this may take a few moments.
15.	The list will be displayed on the left, and a print preview will be displayed on the right.
16.	Names that are light blue are the ones that are selected to be printed. To print the entire list ensure they are all selected by hitting the "Select All" button, and then click "Print".

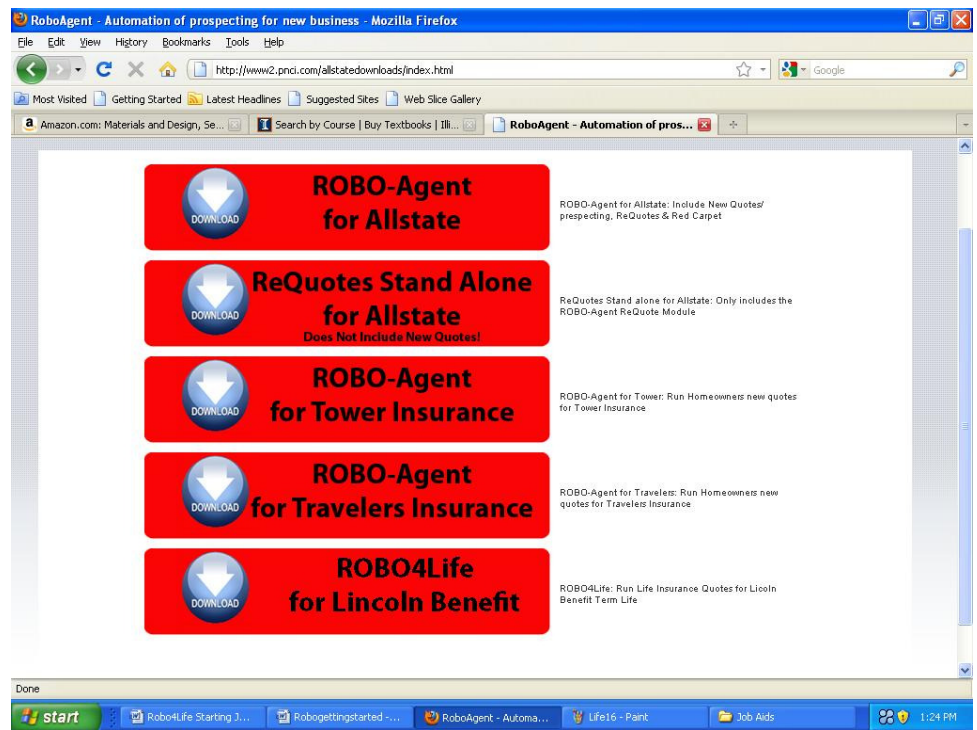
**Congratulations! You have completed your first quote using Robo4Life!  
We thank you for using our software. If you have any questions,  
comments, or problems, please call technical support at  
(708) 671-0100. Thank you!**

# Getting Started with Robo4Life

## Steps

1. Navigate to (<http://www2.pnci.com/allstatedownloads/index.html>) and download Robo4Life.

## Looks Like This

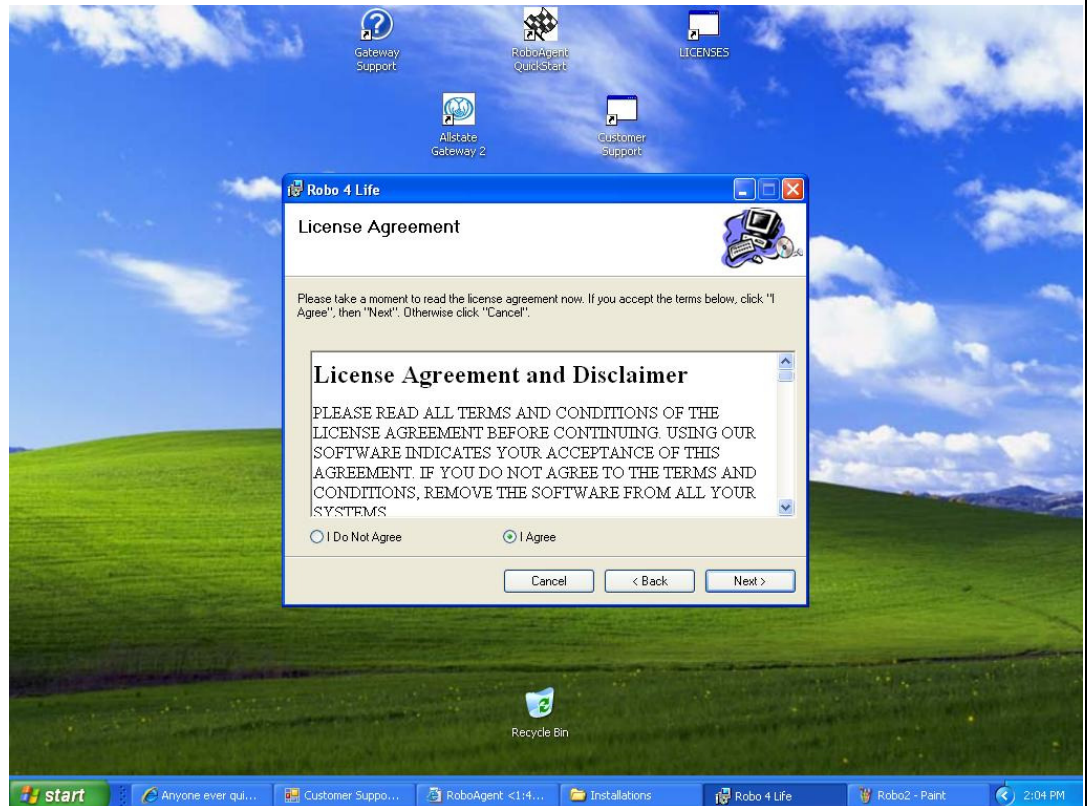


2. When prompted, click "Next".



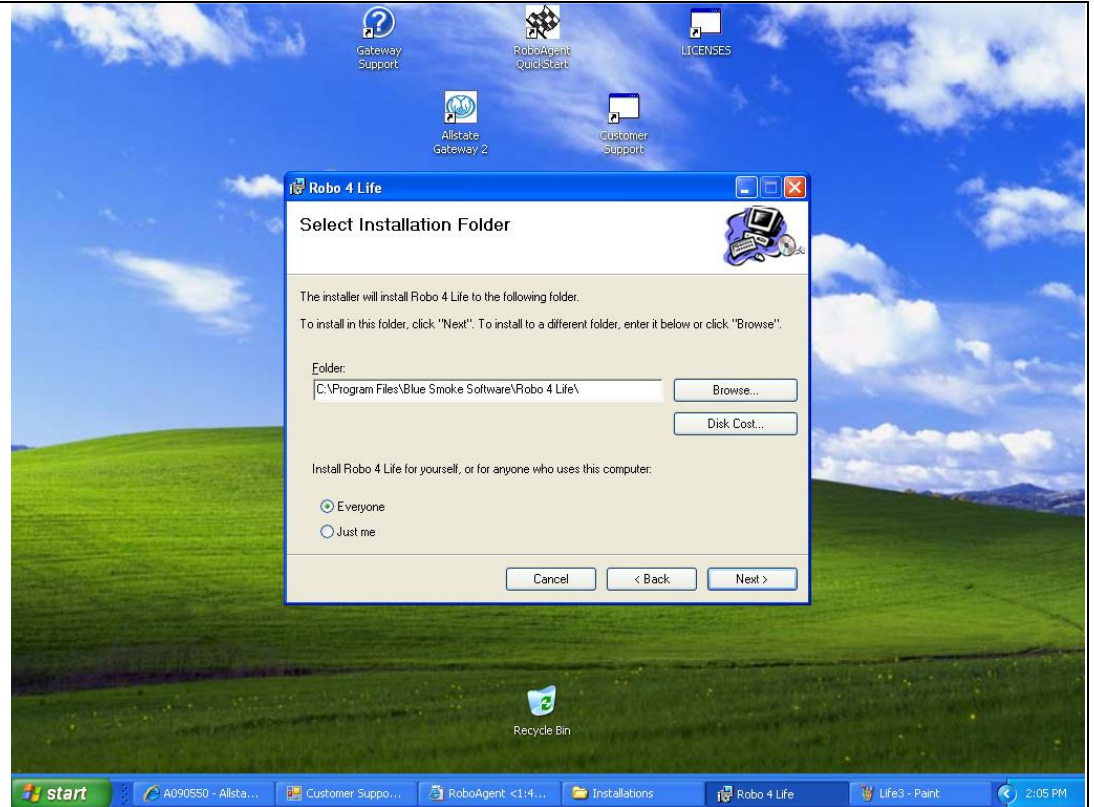
# Getting Started with Robo4Life

3. Accept the terms and agreements, and click "Next".



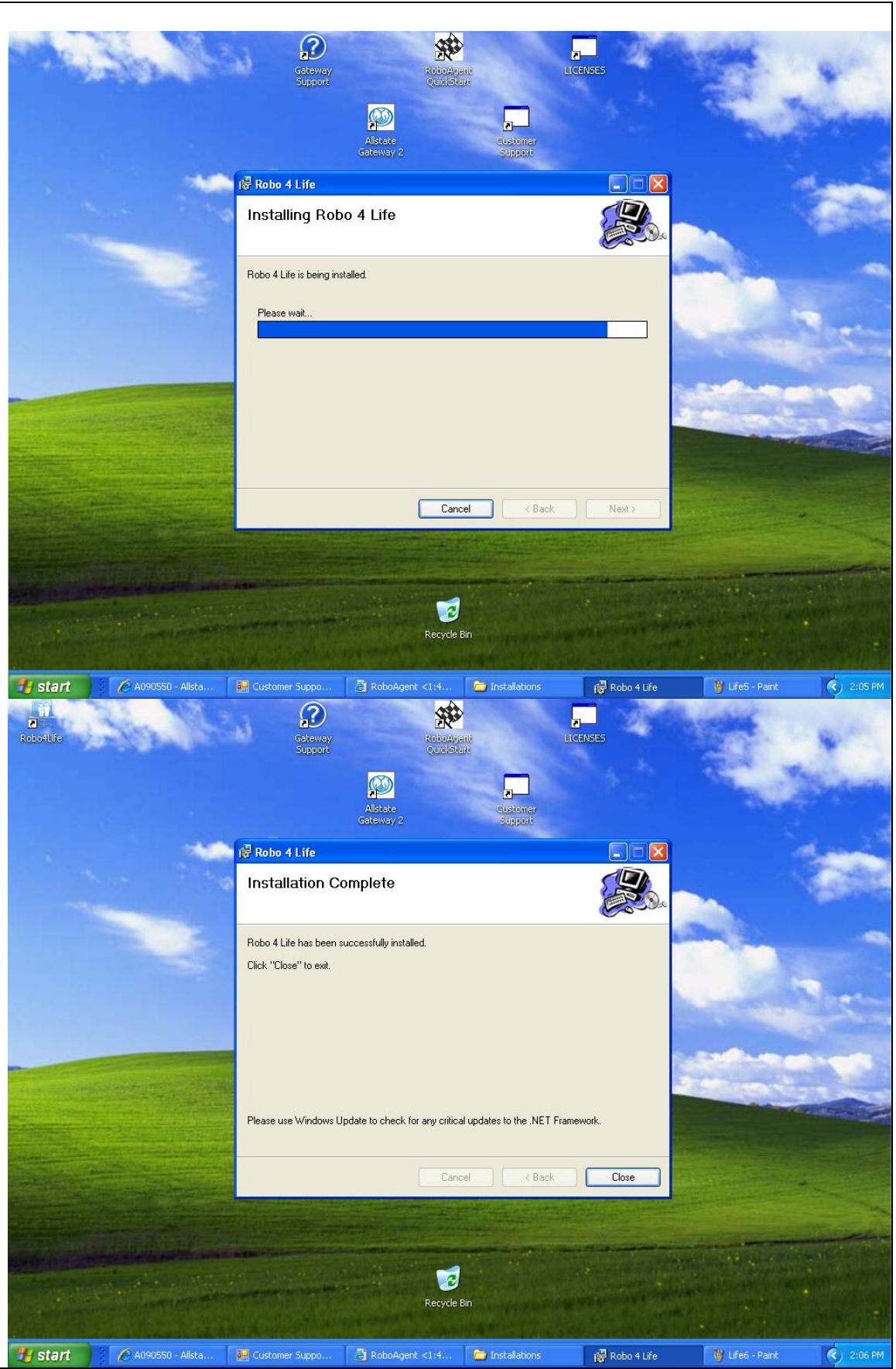
# Getting Started with Robo4Life

4 Leave the download folder as default, and click "Next".



# Getting Started with Robo4Life

5. Allow Robo4Life to install on your computer, then click "Close".

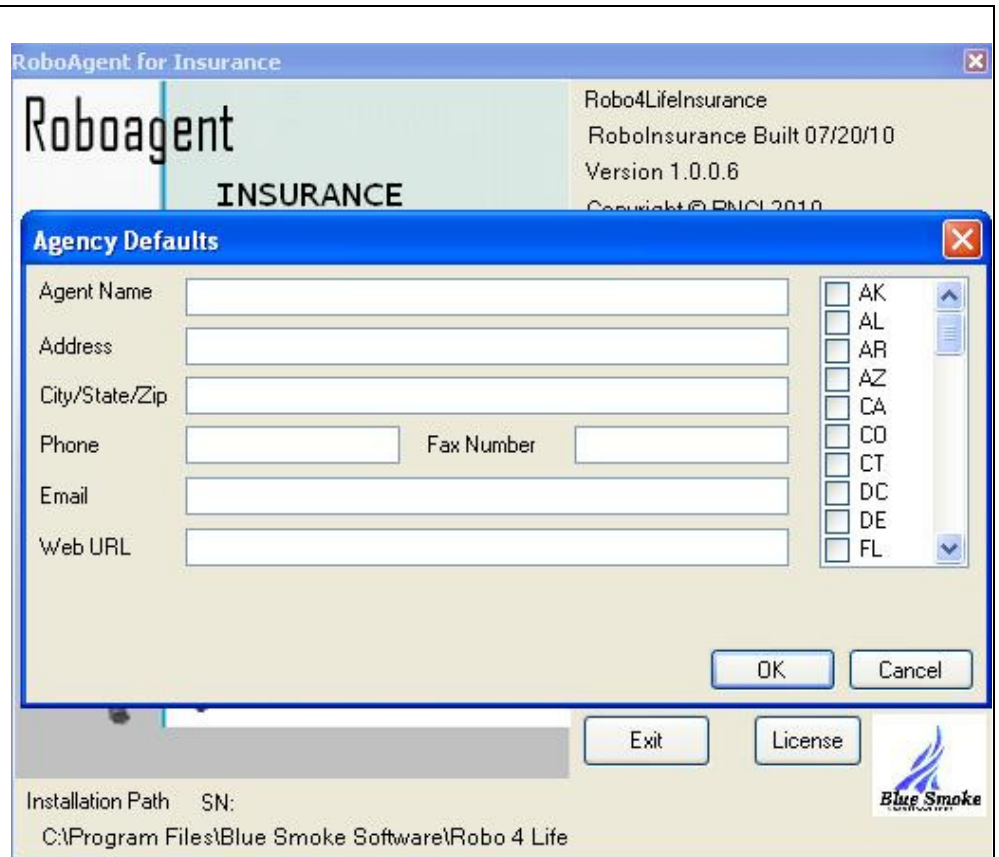


## Getting Started with Robo4Life

6. Click on the new "Robo4Life" icon on your desktop.



7. You will be prompted to enter your agency information, fill out the required fields.



The image shows a screenshot of the "RoboAgent for Insurance" application window. The main window title is "RoboAgent for Insurance" and the application name is "Robo4LifeInsurance". The version is "RoboInsurance Built 07/20/10" and "Version 1.0.0.6". The copyright is "Copyright © PNC 2010".

The "Agency Defaults" dialog box is open, prompting for the following information:

- Agent Name
- Address
- City/State/Zip
- Phone
- Fax Number
- Email
- Web URL

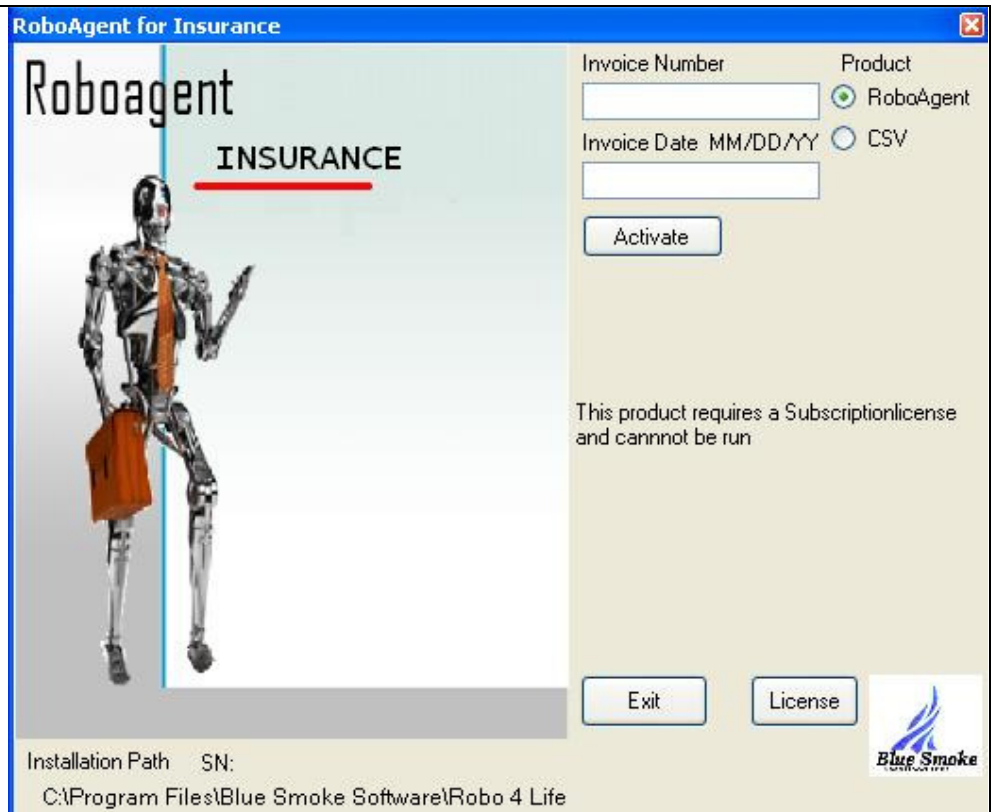
On the right side of the dialog box, there is a list of states with checkboxes:

- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE
- FL

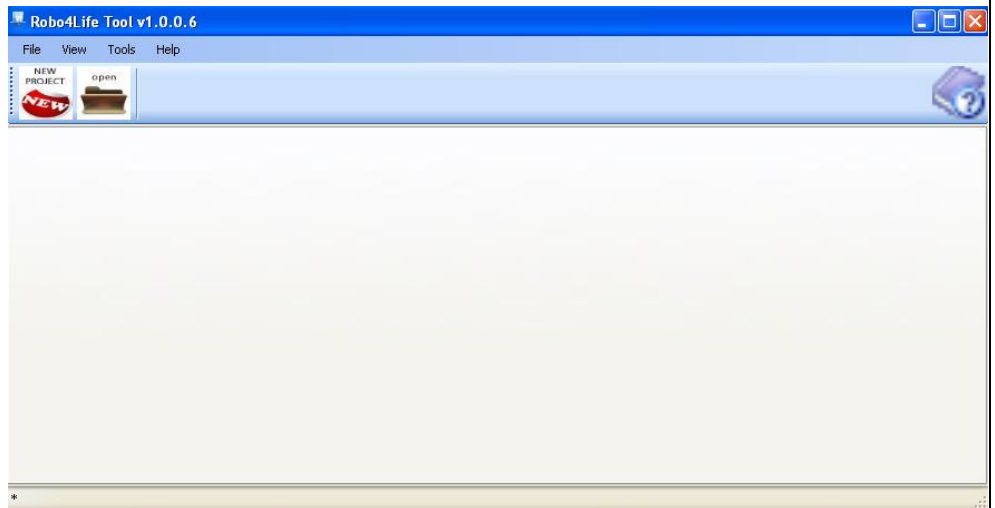
At the bottom of the dialog box, there are "OK" and "Cancel" buttons. Below the dialog box, there are "Exit" and "License" buttons. The "Installation Path" is "C:\Program Files\Blue Smoke Software\Robo 4 Life" and the "SN:" field is empty. The "Blue Smoke" logo is visible in the bottom right corner.

## Getting Started with Robo4Life

8. Enter your invoice number and invoice date, and click “Activate”.

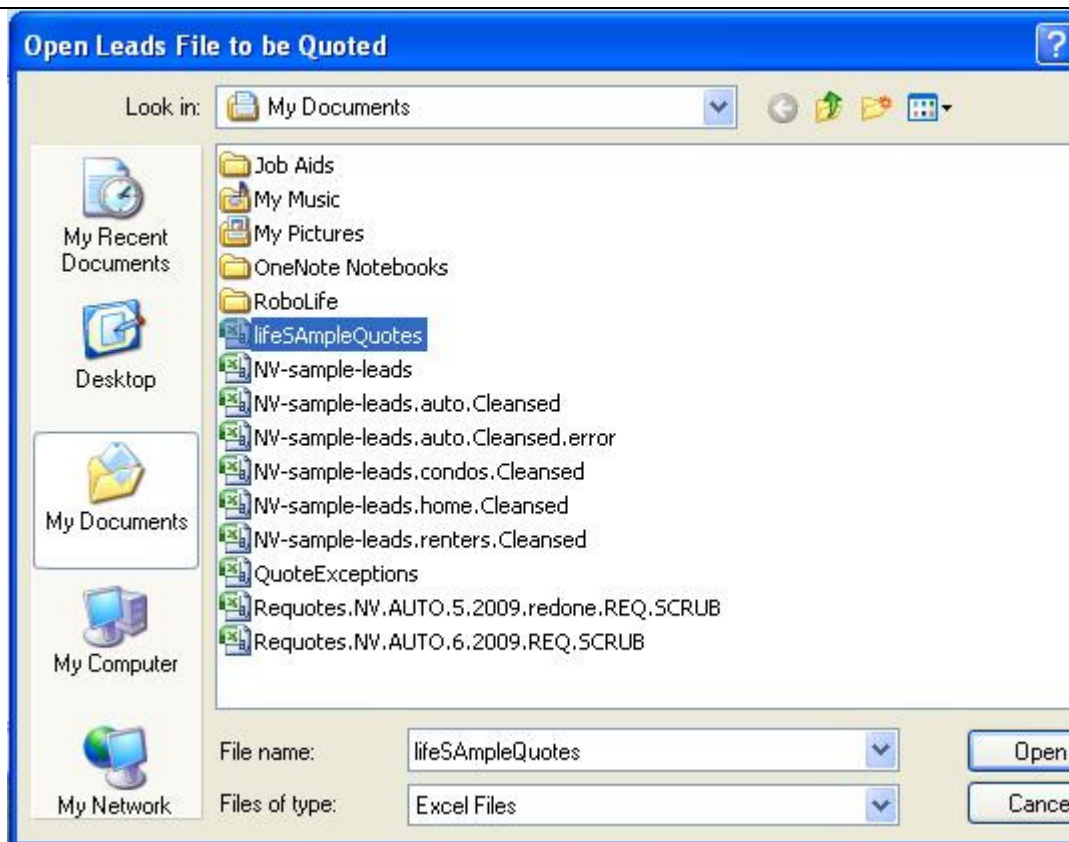


9. After a few moments, the main Robo4Life window will open. Click the “New Project” button on the top left.

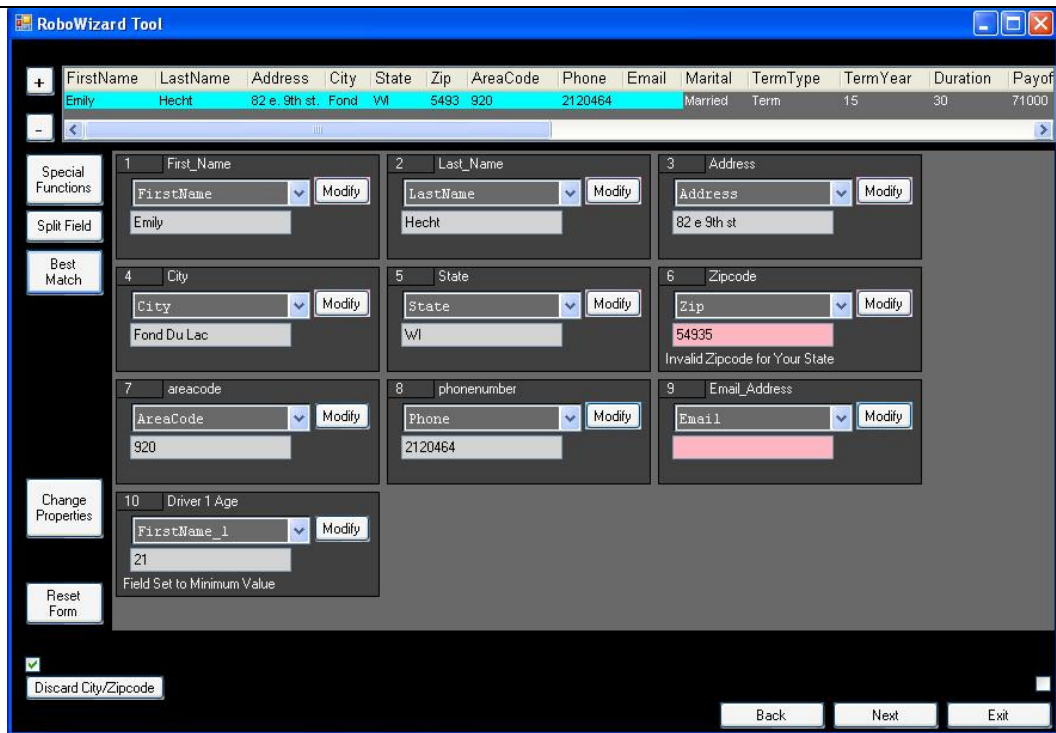


## Getting Started with Robo4Life

10. Select your leads file, and click “Open”.



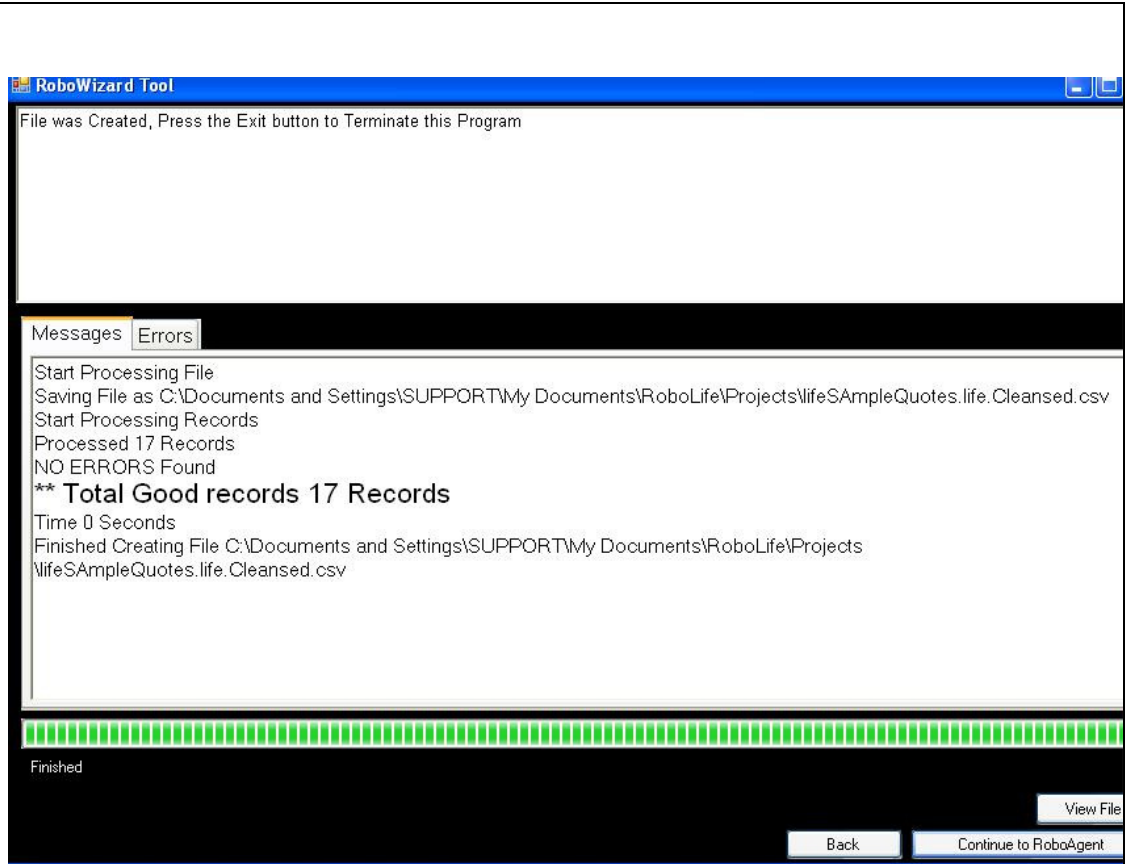
11. You will now be taken to the column alignment wizard. This is to ensure Robo4Life knows how to properly label the columns. If there is a best match button, use that. Otherwise, manually use the drop down arrows to select the proper columns for each pink box. Then click “Next”.



## Getting Started with Robo4Life

---

12. A summary screen will be displayed, with the amount of good leads and errors. A few errors are acceptable. Click "Continue to Roboagent".



# Getting Started with Robo4Life

16. Robo4Life will now prepare a quote the selected leads file. Depending on the size of the file, this may take a few moments.

This is what a completed quote looks like. The leads list is on the left, and a print preview is on the right. The names highlighted in light blue are the names that will be printed. To print all the quotes, click "Select All" and then "Print".

Project: lifeSampleQuotes.life.rbl

File Tools Help

NEW PROJECT open Select All Set Selection Clear Selection Set Range Print

File Info Print Info

Index	FirstName	LastName	Address
1	Emily	Hecht	82 e 9th st
2	Randell	Smith	2228 jefferst
3	Mike	Angshed	3100 w 30th
4	Paula	Hyde	208 s 4thSt
5	Josh	Moe	23halten av
6	Colleen	Reavly	549 radcliffe
7	Thomas	Forczek	3184 s 37th
8	Arthur	Orth	962 holzer s
9	Ken	Yauck	17134 maple
10	John	Barry	400 forest gl
11	Andi	Gallert	2817 south
12	Harold	Munzner	1212 carr pl
13	Joe	Schaetz	1006 state s
14	Alicia	Baiel	3772 novak
15	Mike	Rebholz	1305 gilson
16	Eric	Johnson	220 s holly e
17	Susan	Jaszkowski	7394 canine

**ALLSTATE Insurance Company**  
Sample Life Insurance Quote

Date: 1/18/2010  
Especially Prepared For: Prepared By:  
Cary Insurance Co.  
18288 Lange St  
Lombard, IL 60148  
708-822-0483

Emily Hecht  
82 e 9th st  
Pond Du Lac, WI 54986

Emily  
You can protect your love ones for less than the cost of your daily coffee!

We offer a low cost solution for protecting your family's future. Our excellent policies can be converted into a permanent type policy. Our outstanding term life insurance policy offers low rates and is among the most complete in the nation. Let us help protect what is precious to you!

No one knows what tomorrow will bring. Please don't hesitate to call for a free estimate.  
708-822-0483

Lincoln Benefit Life 15-Year TrueTerm Life Insurance from Allstate  
Monthly Rates

Term	\$100,000		\$150,000		\$250,000	
Age	Male	Female	Male	Female	Male	Female
21	\$19.91	\$17.15	\$25.29	\$21.61	\$29.97	\$25.38
24	\$19.91	\$17.15	\$25.29	\$21.61	\$29.97	\$25.38
27	\$19.91	\$17.15	\$25.29	\$21.61	\$29.97	\$25.38
30	\$20.17	\$17.61	\$25.64	\$22.06	\$30.41	\$25.69

Please see monthly rates shown as of September 1, 2009 for the Lincoln Benefit Life TrueTerm (LBT 0903) series, term to age 99 life insurance policy issued by Lincoln Benefit Life Company, Home Office, Lincoln, NE, a wholly owned subsidiary of Allstate Life Insurance Company, Home Office, Northbrook, IL. The premium will be the same for the first 10 policy years, then beginning with the 11th anniversary of the policy, the company reserves the right to change premiums for the policy each year, but rates cannot be more than the maximum guaranteed amount stated in the policy. Rates shown are for the best underwriting class (Preferred Extra) rates for other underwriting classifications would be higher. Please quoted amounts are subject to change and are not of the company's sole discretion. Further underwriting restrictions may apply. Other face amounts and guaranteed premium terms are available, but will have different rates than those shown here. \*Premium may be paid annually, semi-annually, quarterly or monthly, premium paid may differ based on payment mode selected. A medical exam may be required depending on age, health, or amount of coverage requested.

All guarantees subject to change pending study of Lincoln Benefit Life Company.  
Policy insurance is subject to availability and qualifications. The policy has exclusions, limitations, and terms that may affect coverage, renewal, cancellation, reinstatement or other contract rights and benefits. For details and complete details of coverage, call an Allstate Agent. Use of first issue dates.  
If you no longer wish to receive mail solicitations from Allstate, please call 800-848-8484.

Project: lifeSampleQuotes.life.rbl Loaded

start Robo4Life Starting Jo... Search by Course | B... Project: lifeSampleQu...