

Robo-Agent (for Allstate) Getting Started Guide

(preliminary)

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It is believed that the information contained in this manual is accurate, however no responsibility, financial or otherwise will be accepted for any consequence arising out of the use of this material.

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License / Activation.....	Error! Bookmark not defined.

Description

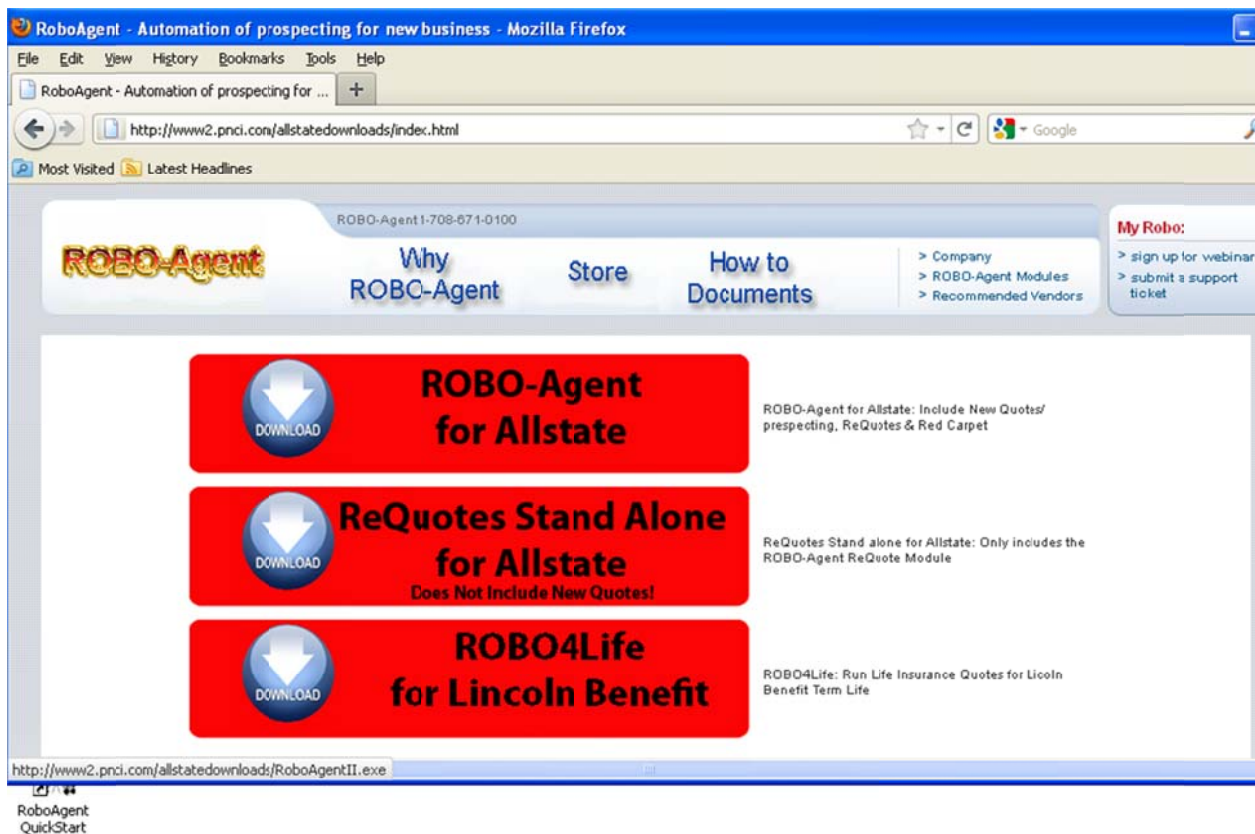
Robo-Agent is a Power Prospecting tool. It is software that enters specific information, generally available from various lead sources, like “home value” into the agents quoting system and gathers the specific quote and prepares it for printing and mailing. The result is a personalized quote which is much more effective than a generalized mail-merge quote.

Downloading

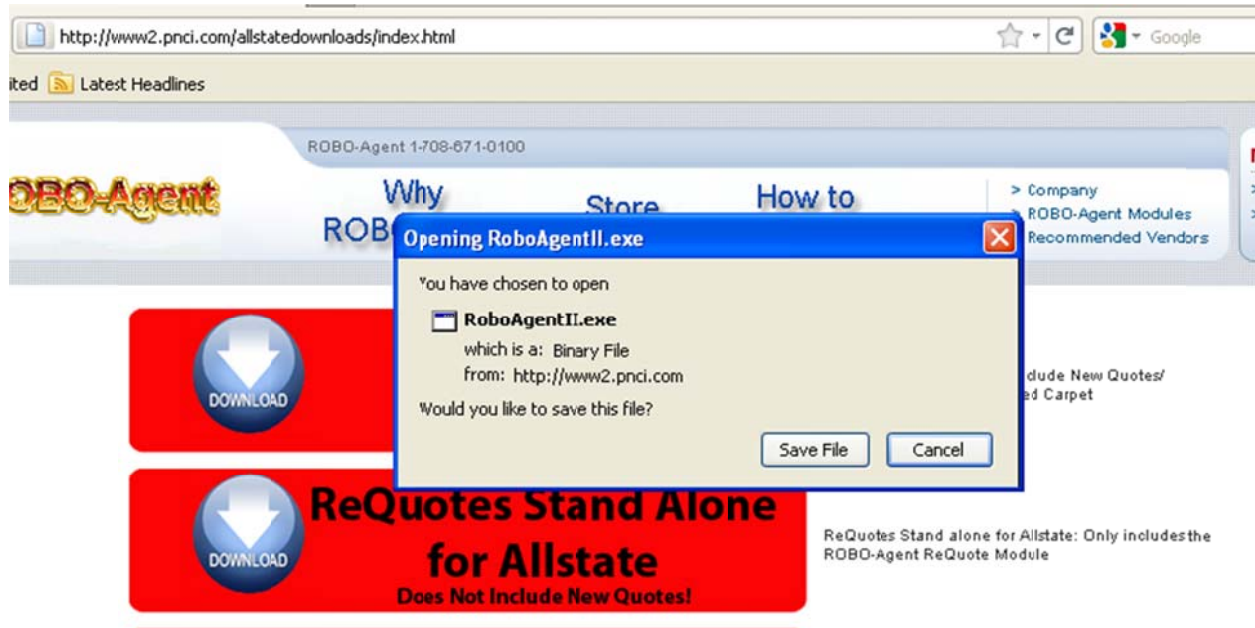
Using a web-browser, navigate to the following link.

<http://www2.pnci.com/allstatedownloads/index.html>

Your screen should look something like the sample below.

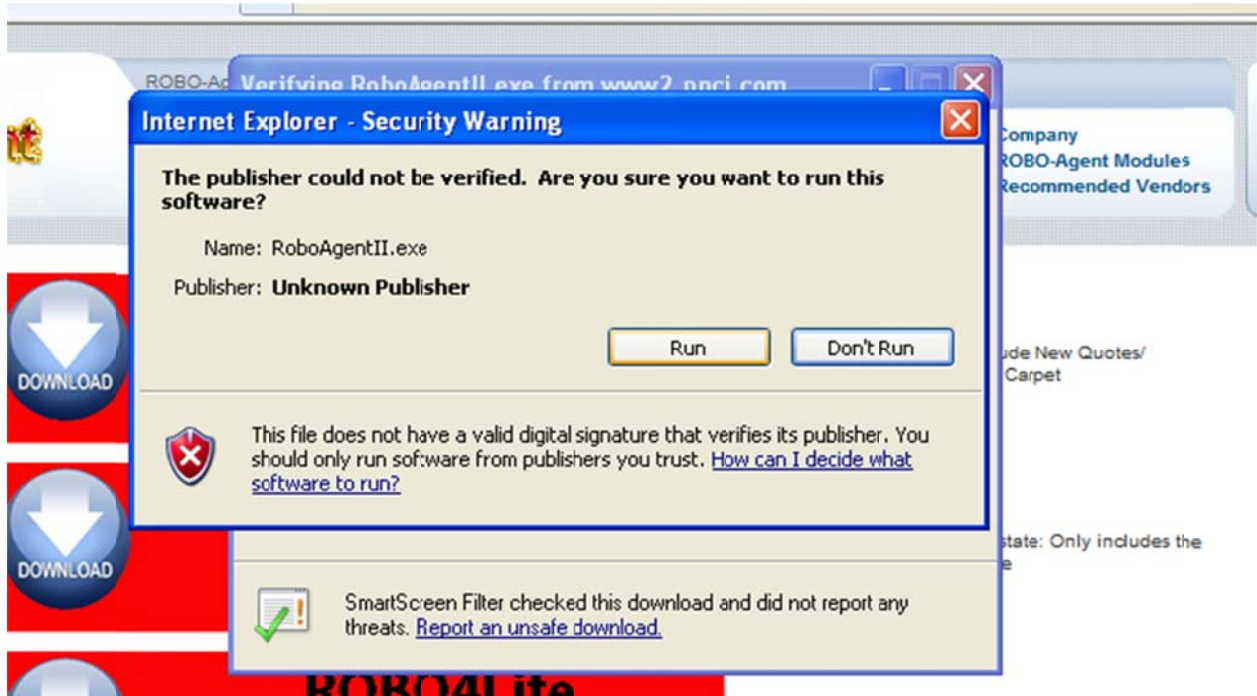


Click the “Download Robo-Agent for Allstate” button. A download dialog box as shown below should appear.

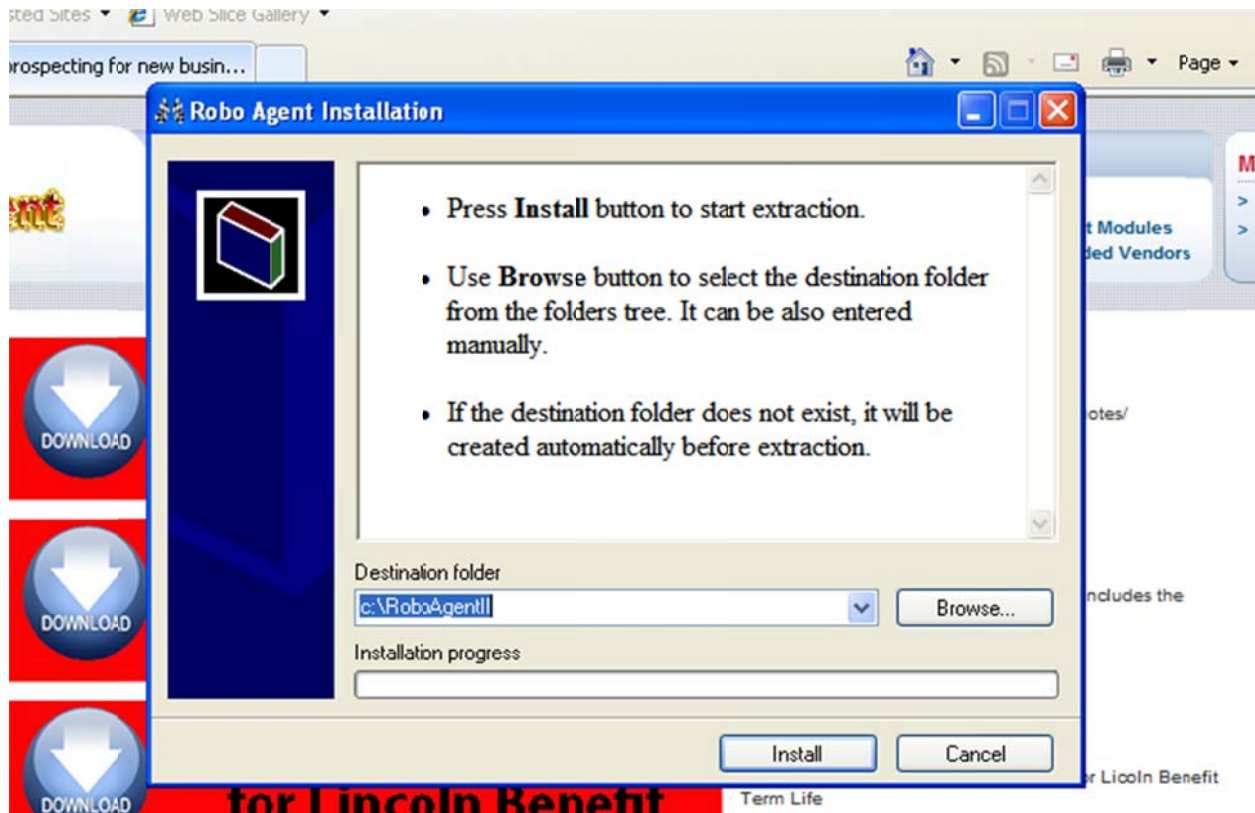


Click “Run”

The web-browser will Start the Download of Robo-Agent and your screen should now be displaying the download progress as shown below.



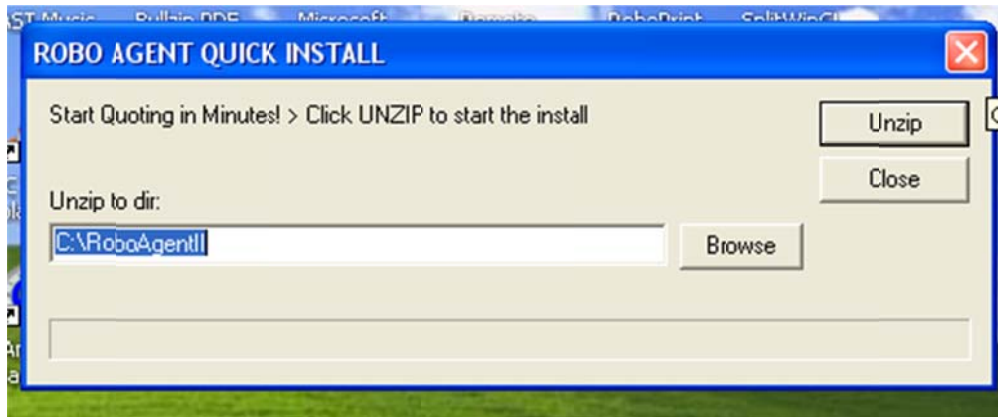
A security warning may appear, as shown below, if it does click “Run”



This completes the Downloading of Robo-agent. Installation will now begin.

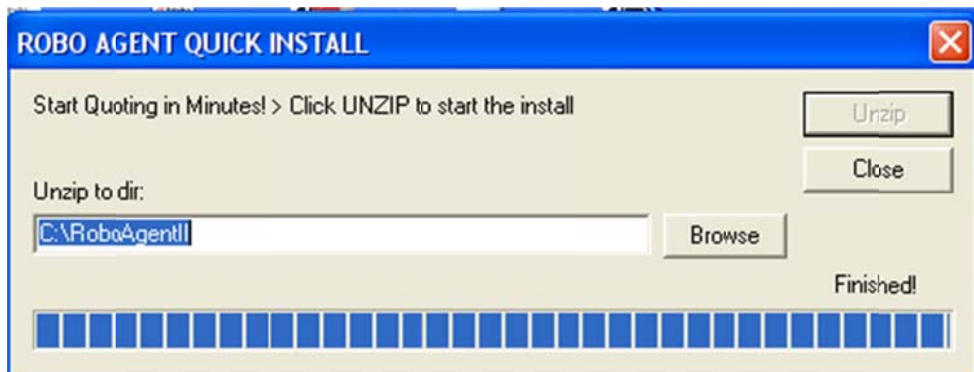
Installation

After you click “run” in the prior section, the robo-agent installer will prompt you to unzip the Robo-Agent files, as shown below:



Click the “Unzip” Button.

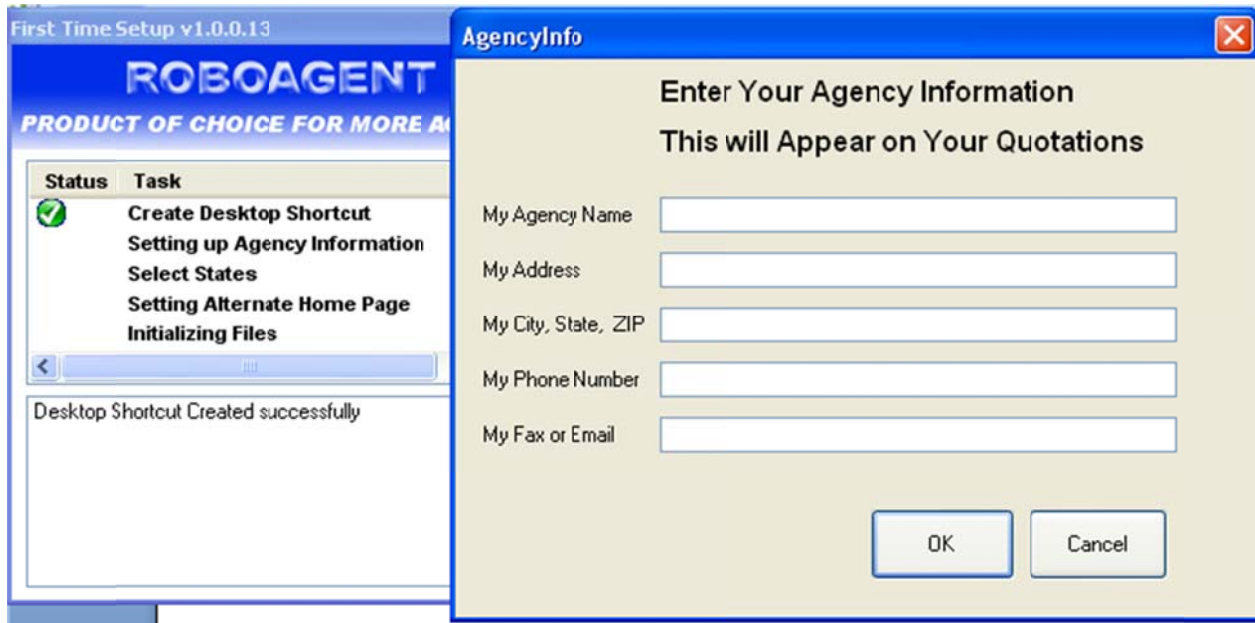
When the Installer says “Finished”, Click the Close Button.



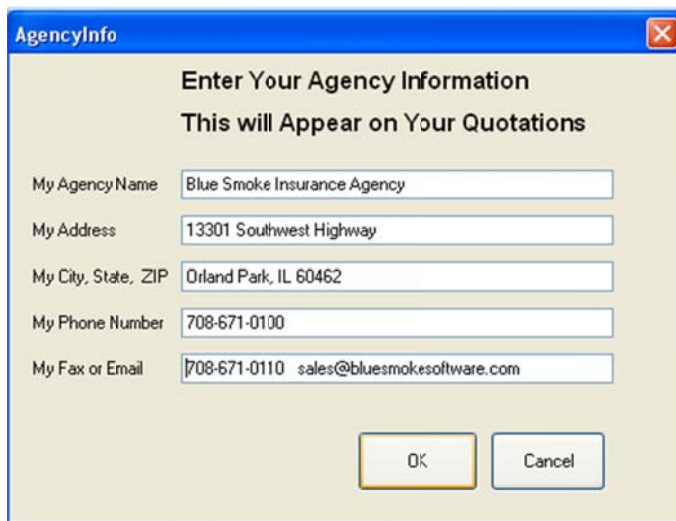
This will then complete the Installation process and Robo-Agent will automatically start the configuration process.

Configuring

In this section, we will describe the step by step procedure to configure Robo-Agent. Your screen should look like the below snapshot.



Fill in your Agency Information in the form provided.



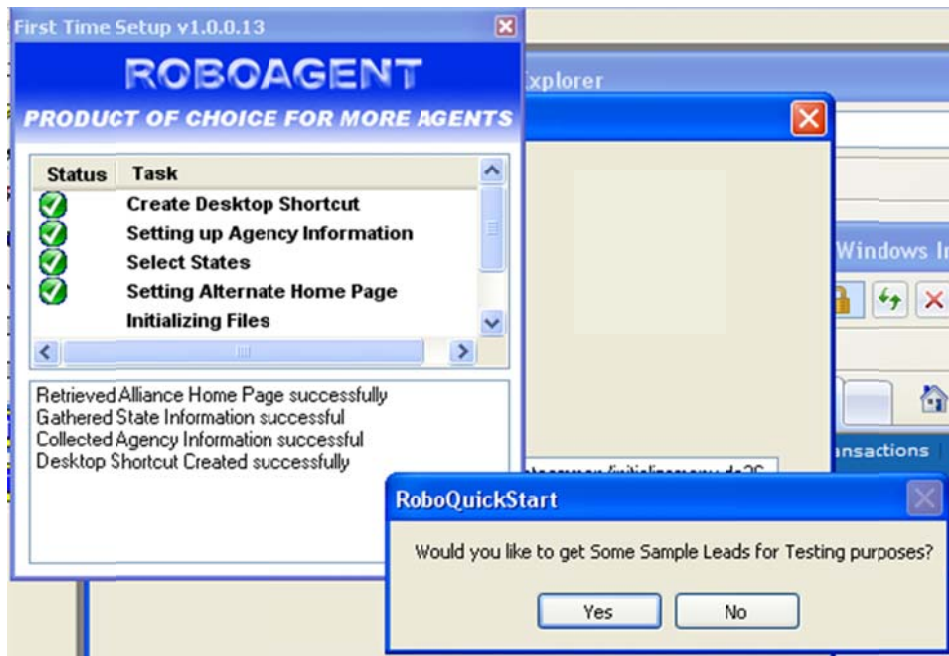
Click "OK" when finished.

Now select the state(s) in which you do business in.

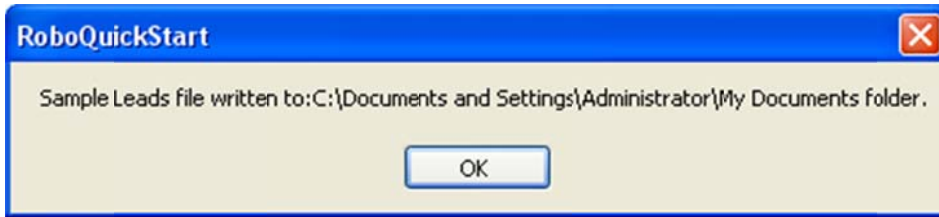


Click "OK" when finished

Next the RoboQuickstart program will ask you if you want to get some sample leads for testing purposes.



This is highly recommended, as you will immediately be able to see Robo-Agent work.

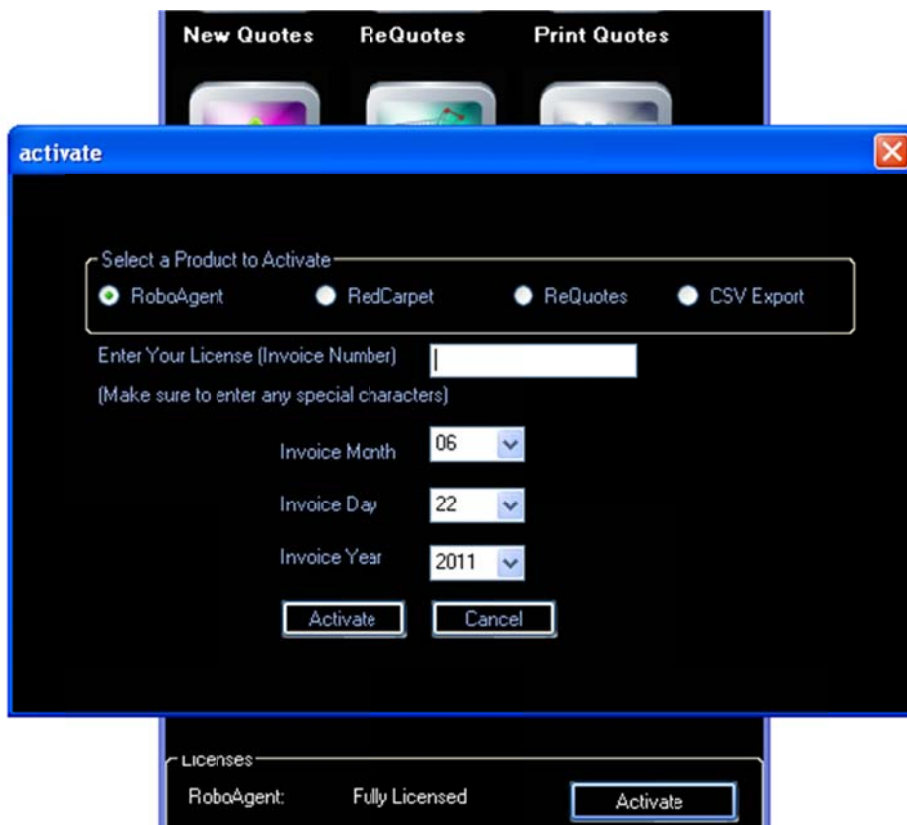


Click the "OK" .This will conclude the Configuration Process.

ROBO will then ask in a message box if you have a license you want to activate. If you already purchased ROBO, click yes.

Next, an "ERROR" message will appear stating that the license number could not be found, yet click "OK" anyway. ROBO will then congratulate you on installing ROBO and will immediately update your QUICKSTART.

Before you begin running your quotes you will have to activate any other ROBO licenses that you have purchased, such as REQUOTES, CSV or RED CARPET by clicking their ACTIVATE buttons, on the bottom of the QUICKSTART. Type in the Order Number and you will then scroll down the date of transaction.



You have now completed the downloading process of ROBO-Agent! For questions, call (708)671-0100.