

# Processing Quotes Using ROBO-Agent JOB AID

**Purpose:** This job aid will help agencies use ROBO-Agent to run their Quotes through Alliance.

**When:** Use this job aid monthly or as needed to aid in Running ROBO-Agent.

**Materials** This job aid, access to the Allstate Intranet, Alliance, ROBO-Agent Quick Start and ROBO-Agent II Paid-up subscription to Red Carpet(annual).

**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

- |           |   |
|-----------|---|
| <b>A.</b> | Go to your Allstate Gateway using your desktop Icon. Login and go to the home page. Once on your home page you will see a list of links on the left side under “my quick links” section. Scroll down and select DNS Scrubbing Tool by clicking on it.   |
| <b>B.</b> | Now a series of screens will pop up. Do Not push anything until the DNS Scrubbing tool screen appears. Then click the file scrub tab. Click the browse button and a box will pop up to select your new leads file. Navigate to your new leads file and select open. Now check the next box and click submit.  |
| <b>C.</b> | In a few minutes click the file status tab and if your leads are done being scrubbed there will be a download link next to your file name. Click the download link and select save. When the file browsing screen appears select save.  |
| <b>D.</b> | Now you are ready to go back to your desktop and select the ROBO-Agent quick start icon.  |
| <b>1.</b> | Double –click ROBO-Agent QuickStart icon on your desktop.   |
| <b>2.</b> | Click New Quote Button  |
| <b>3.</b> | When the Quote Type Box appears use the drop down arrow to select the appropriate type of quote you want to perform.<br>XX-CONDO: Condo Insurance Leads<br>XX-HOME: Homeowners insurance leads<br>XX-MULTIDRVRAUTO: Single and Multiple car insurance auto leads<br>XX-RENTER: Renters insurance leads<br>XX-MOTORCYCLE: Motorcycle Insurance Leads |

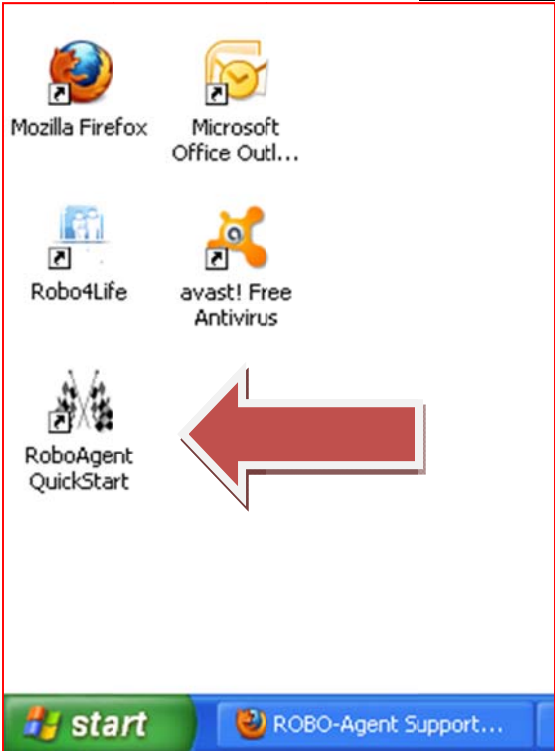
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Click Next Button	
4.	The Do You Need to change your defaults box will appear. Click YES. If you have already setup your defaults for the selected quote type click NO and skip to step 6.
5.	When the Default options appear ensure your settings on the tabs are correct and then select the DONE tab, save and exit.
6.	The Lead Prep Screen will now appear. Under the Choose One section choose “I need to Validate and Column-Align my LEADS with Alliance (Cleanse).” Change Follow-up year if desired. Finally click the Next button.
7.	When the Open screen pops up you need to browse to your new scrubbed leads file (must be in CSV format and contains [1] in the name) and click the Open button.
8.	<p>You now need to match the file headers to the appropriate boxes.</p> <p>Pink = required Blue=optional</p> <p>Using the drop down arrow in each box select the corresponding value.</p> <p>If you need to set a value because you leads file doesn't contained the needed information, simply check the “use Value” box and enter the designed data in the field next to the box. If you have selected the MULTIDRVRAUTO lead type, you need to map all the corresponding YEAR, MAKE and MODEL boxes for each car for the most amount of cars in your leads file.. Finally click the NEXT button</p>
9.	Once the “Save File as new Cleansed File Type” box appears, make note of the location and click the SAVE button.

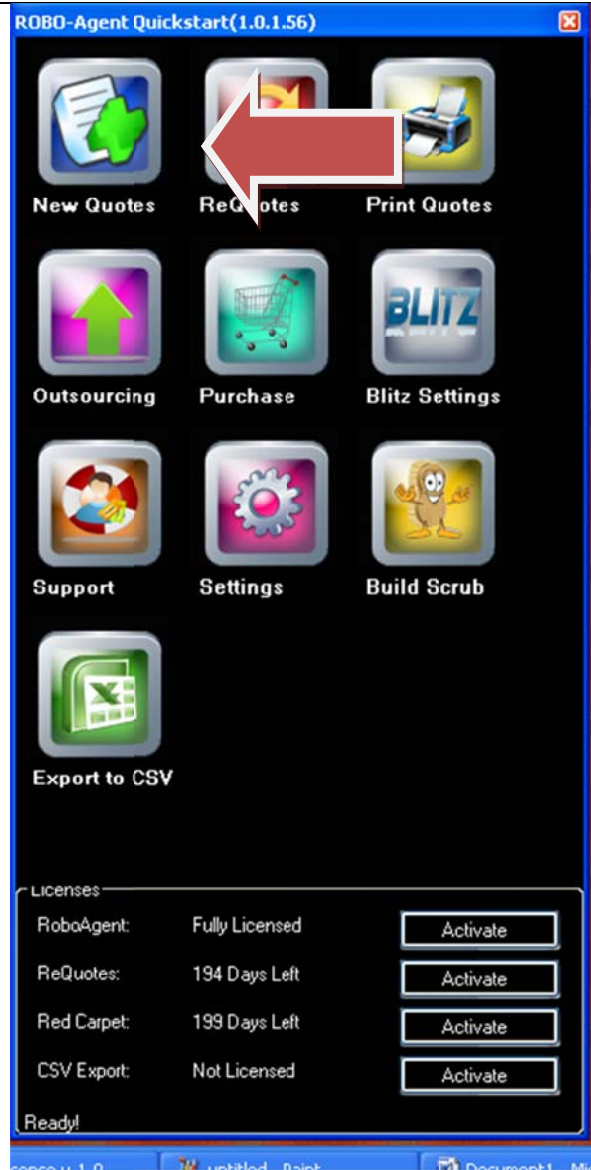
10.	Once ROBO-Agent pops up do not push anything until your Allstate Alliance menu screen appears. Click OK.
11.	Once the “finished loading files” screen appears click the OK button.
12.	If you do not see your Allstate Alliance menu. You need to change your login information. If your Allstate Alliance menu appears skip to step 14.
13.	Click the Agency Setup/Utilities/Help tab on the bottom of the ROBO-agent program. You will then see a series of boxes. You need to locate Alliance Main Menu URL box. Verify the Alliance Username is correct. Now Locate the Alliance Password field and enter your current Alliance password. Now click “Save Agency Information”. Once the Confirm box appears click yes. Click Ok on the notice screen. Finally click the Blue USR-PWD button and you should login into alliance through ROBO-Agent. This is will only be done once, when you have used ROBO-agent for the first time.
14.	If you need to change your alliance defaults, click my settings on the top of the alliance screen. If you have already set your defaults skip to step 16.
15.	Use the Tabs and Select your Quote type. Then Select your Company-Line. And click view. Set your coverages with your drop downs for your coverages. Click the save button and then the Ok button.
16.	Finally click the Yellow RUN ROBO button. When the “Your Quote Print file name is:” Screen appears click OK.
17.	Once ROBO-Agent runs through 1 quote it will ask you to verify the coverages. Click OK to view. If all coverages are correct, close the quote preview and click OK on the pop up. If you need to change your coverages, click NO and follow step 14.
18.	Once ROBO-Agent has finished, a popup window will appear to prepare your files for print click YES.
19.	Once the Print Output List (.xlsprintdata) screen appears. You will now need to make any changes to the print template you desire by clicking the teal edit template>> button. If no changes are needed, skip to step 22.
20.	Once Microsoft Excel loads you need to select the proper template using the tabs on the bottom of the screen. Print1->Letter Print2->Your choice chart PostCard4x5 ->4x5 postcard PostCard5x8 - .5x8 Postcard Then you can change any of the verbiage or add a picture as long as you don't change the % fields.

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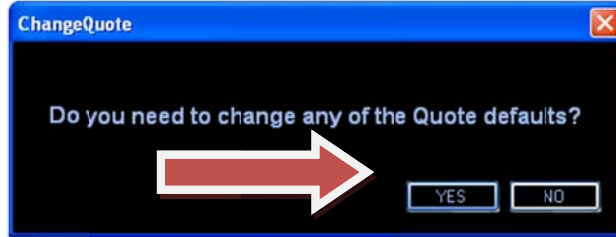
<b>21.</b>	To remove an image to your template click on the image and hit the delete key. To add an image, go to Insert and select picture, then browse to your image location and click open. Once the image appears you can move it to the desired location. Click save and close excel. On the Notice screen click ok and ROBO-Agent will reload the template.
<b>22.</b>	You now need to select the type of printout you want to use by using the Print Sheet selection drop down. Print1->letter Postcard4x5 -> Small 4x5 postcard PostCard8x5 -> Large 8x5 Postcard
<b>23.</b>	Next You need to set the number of quotes you want to print. Under the Print item Selection you can select all by hitting the all button or set the range by enter the lead from and to number and hitting set selection range.
<b>24.</b>	Now you need to verify your print settings by hitting the print settings button. Go to the middle tab (options). Make sure the correct printer is listed under the selected printer and if you are printing letters you need to set the print page 2 option True-> prints your choice chart False-> only prints the quote sheet Finally hit save and exit.
<b>25.</b>	You can now start printing using the Start quote Print button, print a summary to create a call sheet and Export to CSV file(add-on required) to send the files to an outside print house. Once you are done with your selection you have completed the ROBO-Agent Quote process.

Steps	Looks Like This
<p>1. Double –click RoboAgent QuickStart icon on your desktop.</p>	 <p>The screenshot shows a Windows desktop with the following icons: Mozilla Firefox, Microsoft Office Outlook, Robo4Life, avast! Free Antivirus, and RoboAgent QuickStart. A large red arrow points to the RoboAgent QuickStart icon. The taskbar at the bottom shows the 'start' button and a 'ROBO-Agent Support...' window.</p>

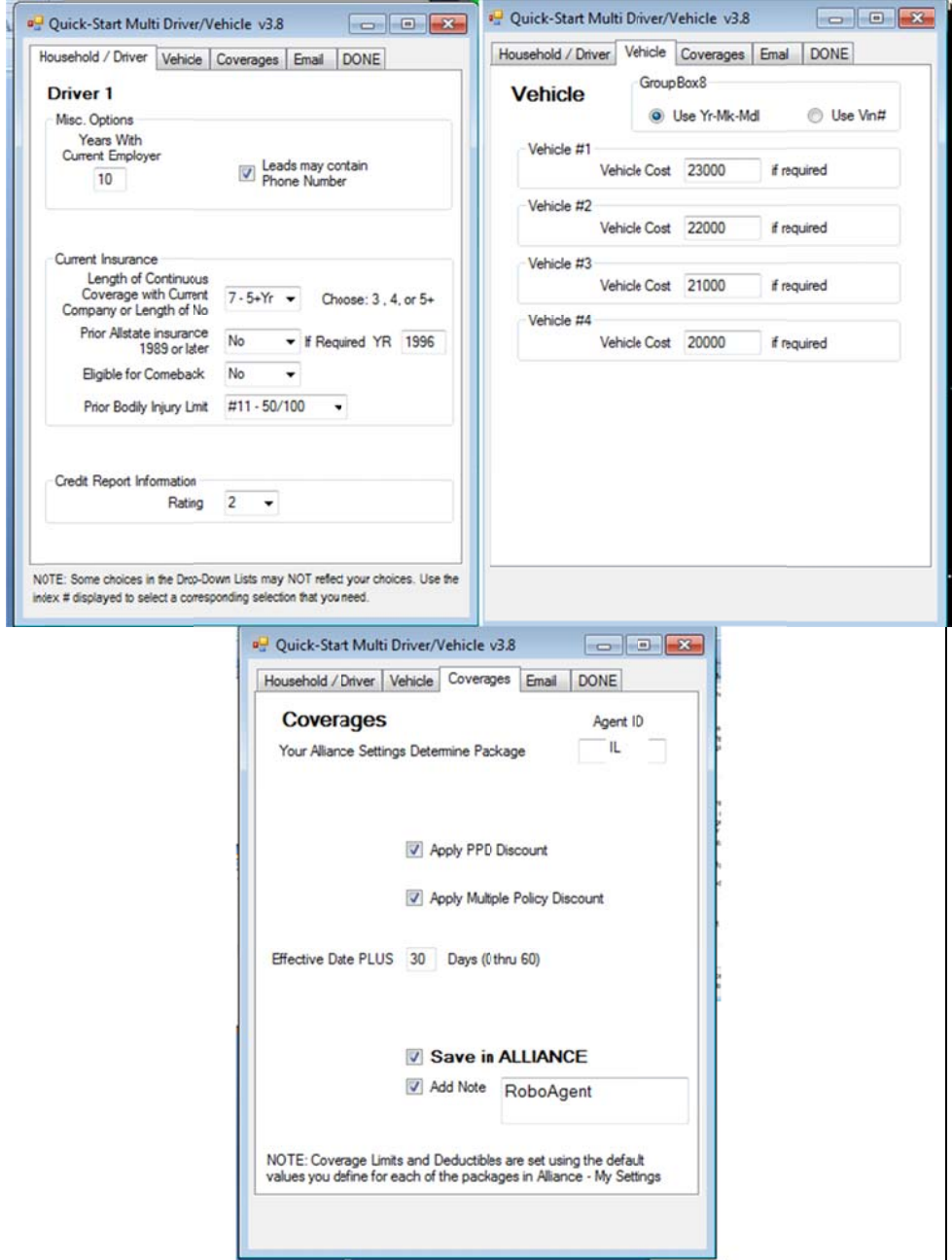
2.  
Click New Quotes Button

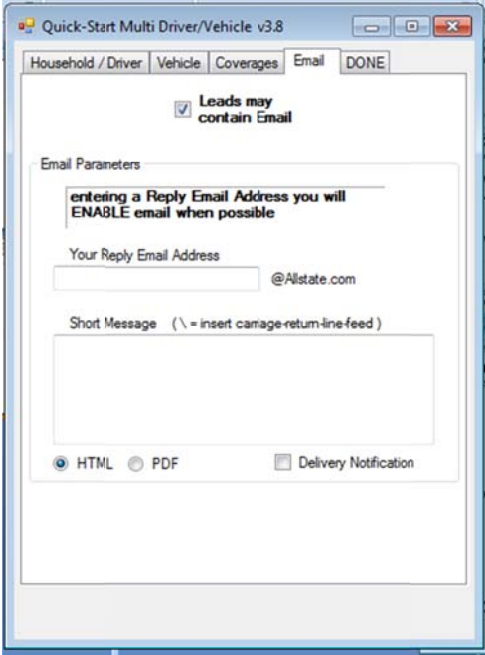
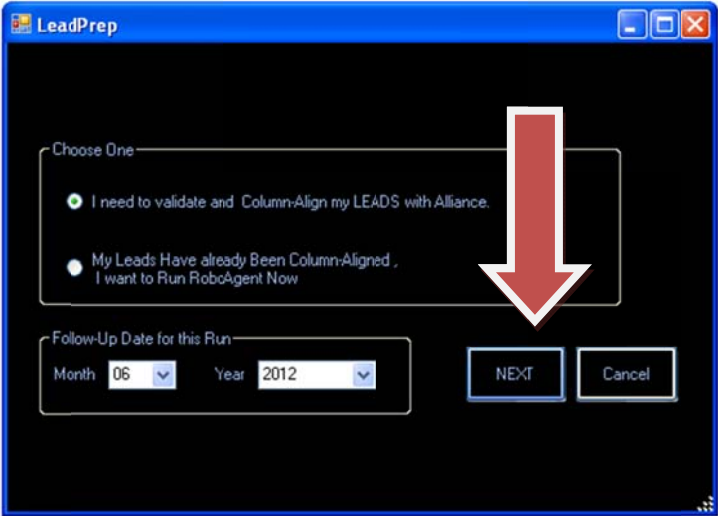


4. The Do You Need to change your defaults box will appear. Click YES. If you have already setup your defaults for the selected quote type click NO and skip to step 6.

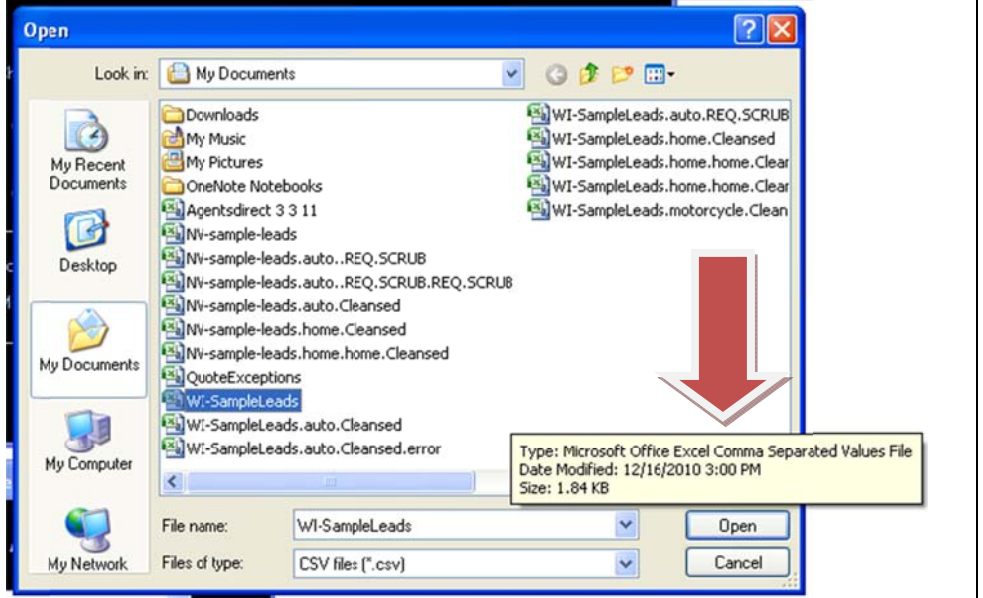


5. When the Default options appears, ensure your settings on the tabs are correct, and then select the DONE tab, save and exit.



	
<p>6. The LeadPrep Screen will now appear. Under the Choose One section choose "I need to Validate and Column-Align my LEADS with Alliance (Cleanse)." Change Follow-up year if desired. Finally click the Next button.</p>	

7. When the Open screen pops up you need to browse to your new scrubbed leads file (must be in CSV format and contains [1] in the name) and click the Open button.



8.

You now need to match the file headers to the appropriate boxes.

Pink = required

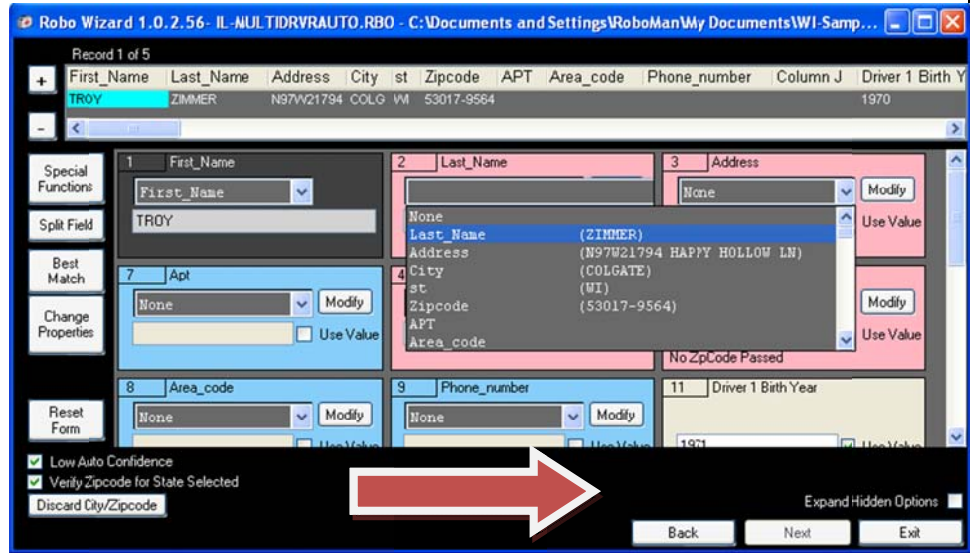
Blue=optional

Using the drop down arrow in each box select the corresponding value.

If you need to set a value because you leads file doesn't contained the needed information, simply check the "use Value" box and enter the designed data in the field next to the box.

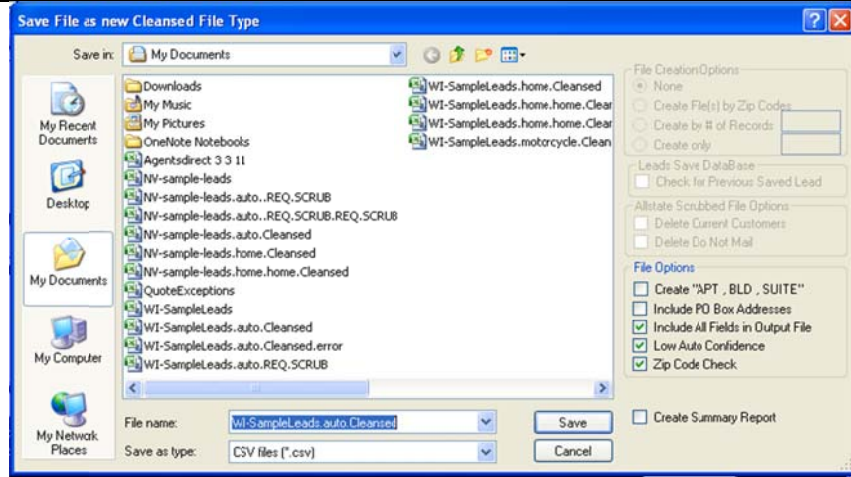
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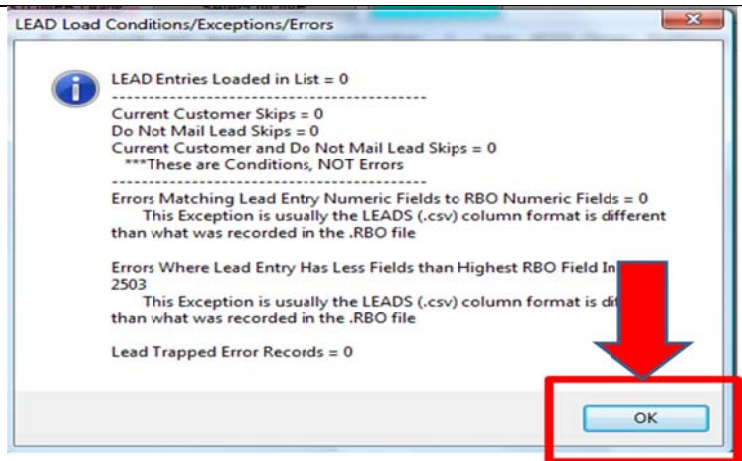


9.

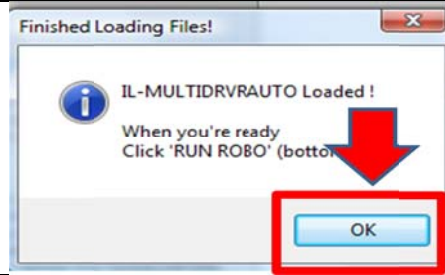
Once the "Save File as new Cleansed File Type" box appears make note of the location and click the SAVE button.



10. Once ROBO-Agent pops up do not push anything until the "LEAD Load conditions/exceptions/errors" screen appears. Click OK.

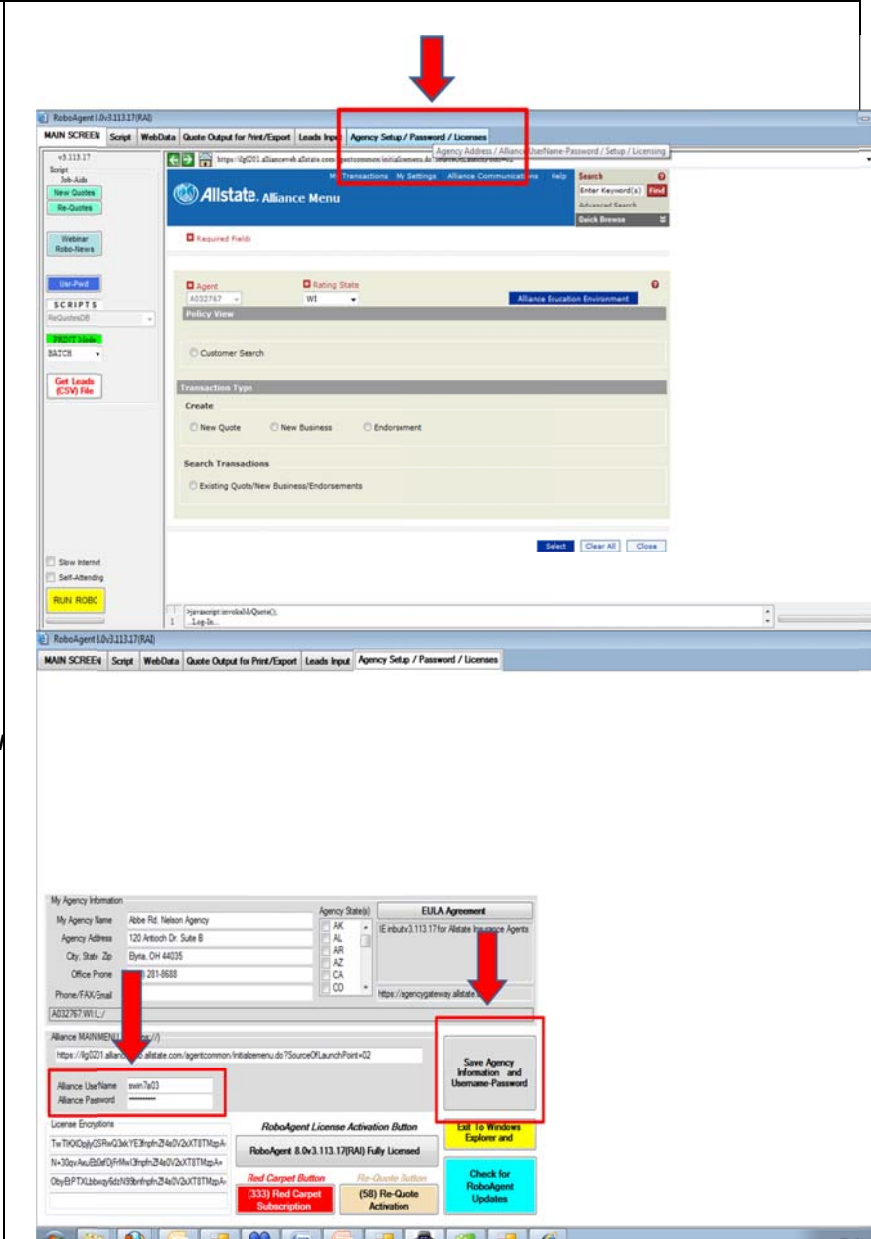


11. Once the "finished loading files" screen appears click the OK button.

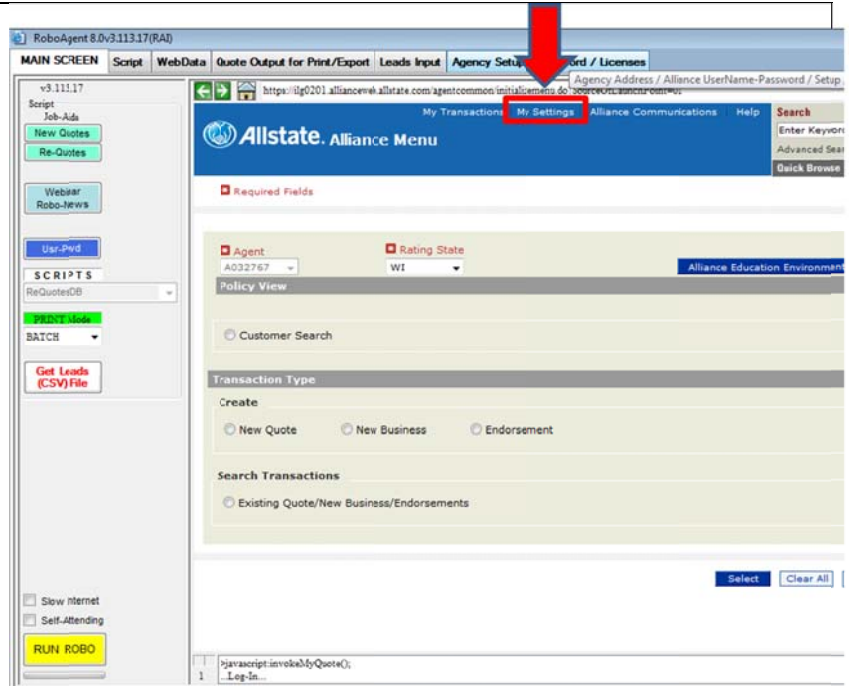


12. If you do not see Your Allstate Alliance menu. You need to change your login information. If your Allstate Alliance menu appears skip to step 14.

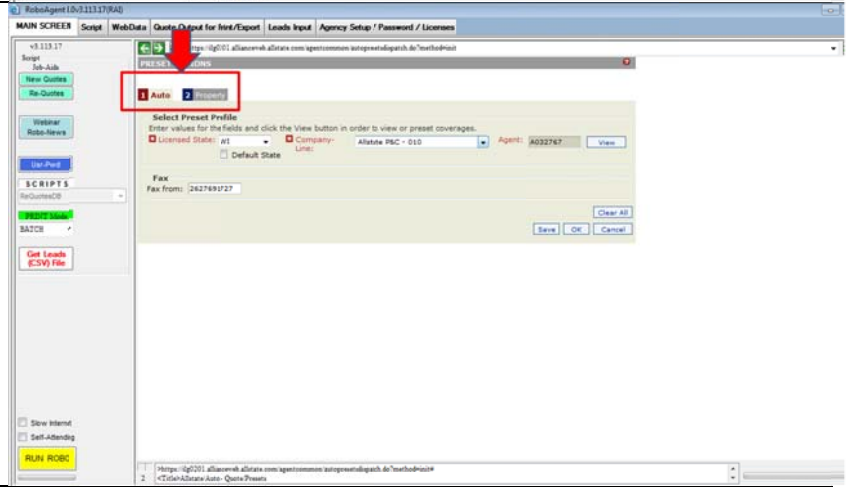
13. Click the Agency Setup/Utilities/Help tab on the bottom of the ROBO-agent program. You will then see a series of boxes. You need to locate Alliance Main Menu URL box. Verify the Alliance Username is correct. Now Locate the Alliance Password field and enter your current Alliance password. Now click "Save Agency Information". Once the Confirm box appears click yes. Click Ok on the notice screen. Finally click the Blue USR-PWD button and you should login into alliance through ROBO-Agent.

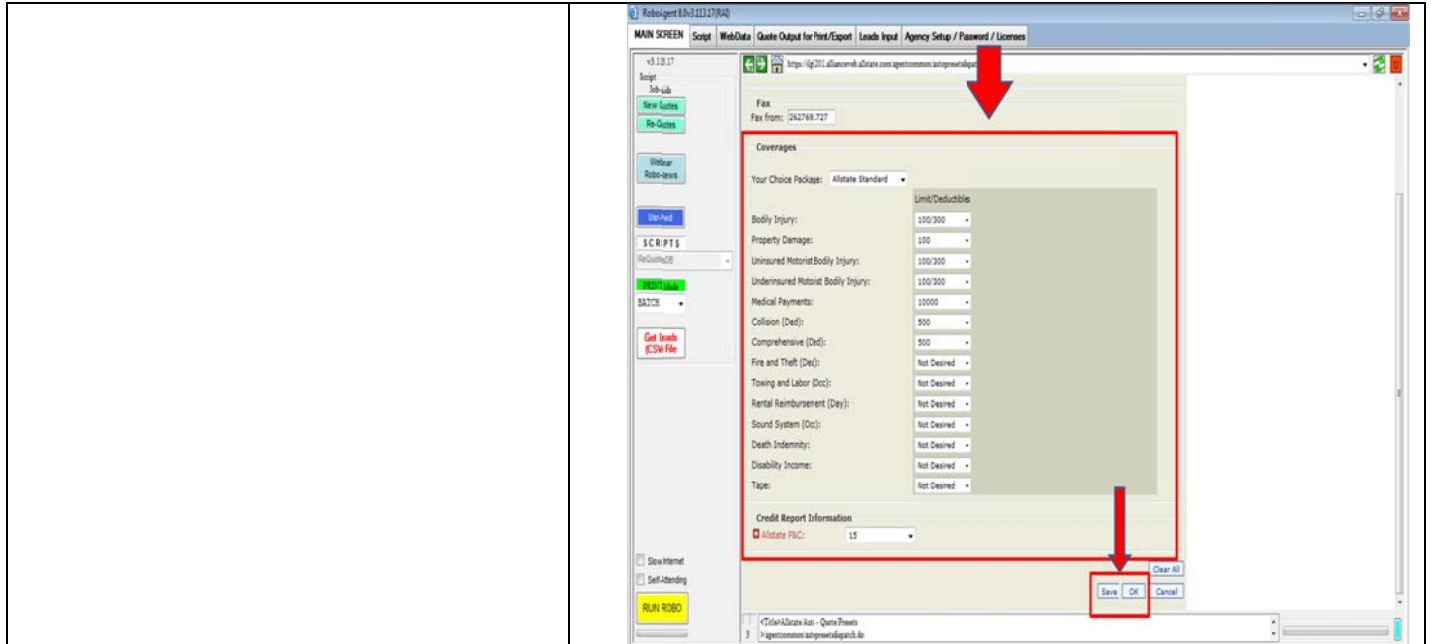


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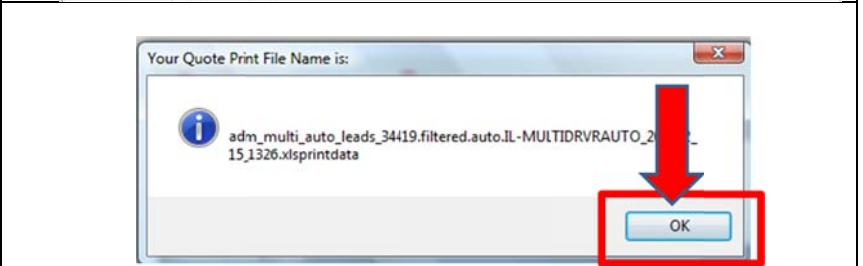


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 Use the Tabs and Select your Quote type. Then Select your Company-Line. And click view.  
 Set your coverages with your drop downs for your coverages. Click the save button and then the Ok button.

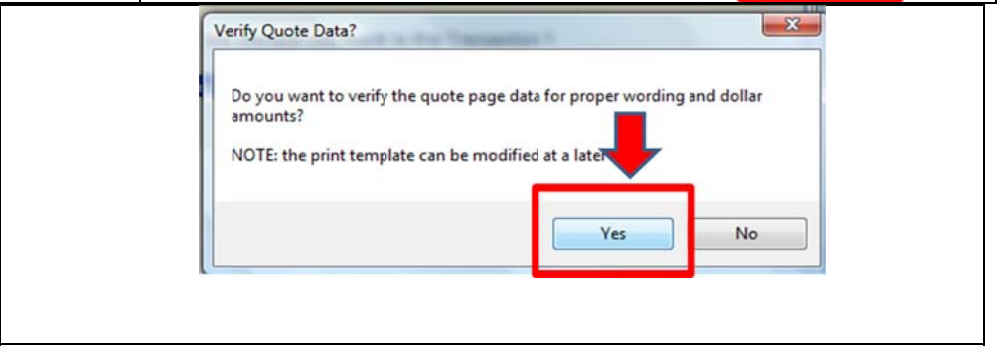




16. Finally click the Yellow RUN ROBO button. When the "Your Quote Print file name is." Screen appears click OK.



17. Once ROBO-Agent runs through 1 quote it will ask you to verify the coverages. Click ok to view. If all coverages are correct close the quote preview and click ok on the pop up. If you need to change your coverages click no and follow step 14.





20.

Once Microsoft Excel loads you need to select the proper template using the tabs on the bottom of the screen.

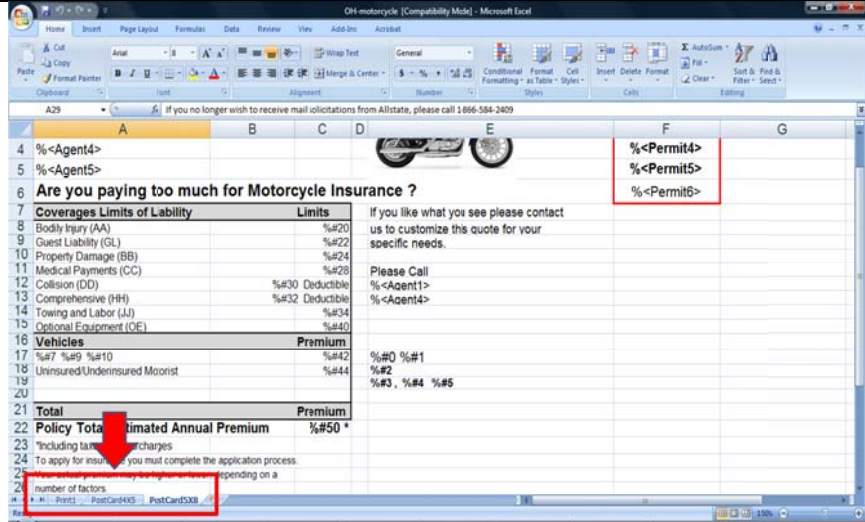
Print1->Letter

Print2->>Your choice chart

PostCard4x5 ->4x5 postcard

PostCard5x8 - .5x8 Postcard

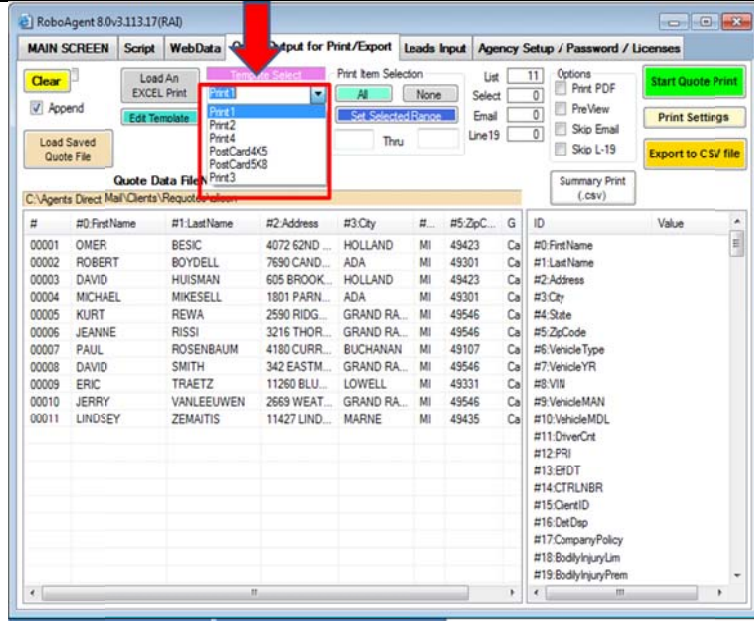
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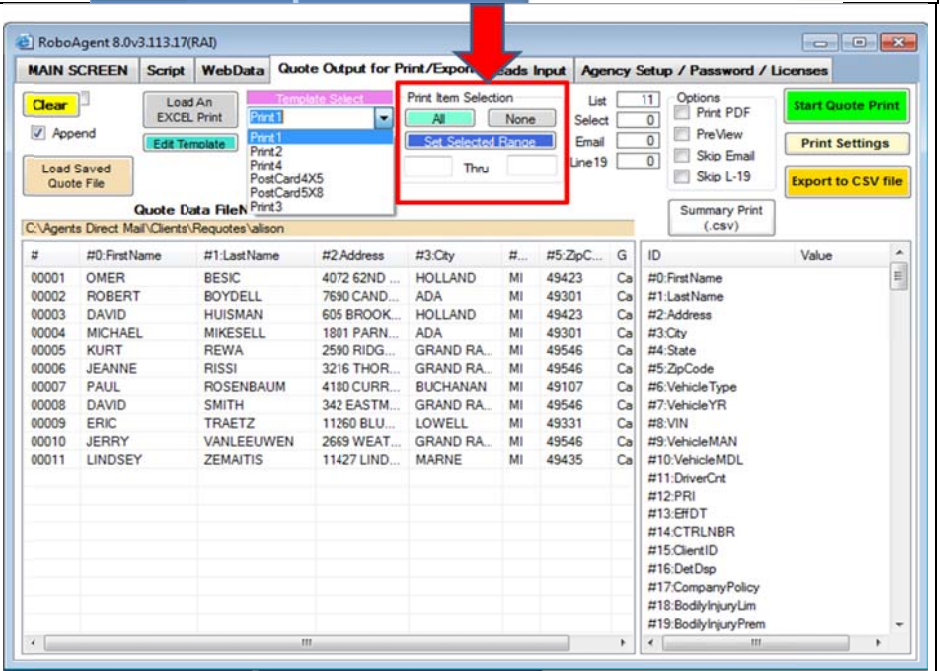
21. To remove an image to your template click on the image and hit the delete key. To add an image, go to Insert and select picture, then browse to your image location and click open. Once the image appears you can move it to the desired location. Click save and close excel. On the Notice screen click ok and ROBO-Agent will reload the template.

The image contains two screenshots of Microsoft Excel. The top screenshot shows a worksheet with a motorcycle insurance quote template. A blue motorcycle image is selected with a red box. A red arrow points to the image with a text box that says "Select and hit delete key." The bottom screenshot shows the "Insert" > "Picture" menu path highlighted with a red box and arrow. Below this, a "Notice" dialog box is shown with the text "RoboAgent will reload print template OH-MOTORCYCLIS When you click 'OK'" and the "OK" button highlighted with a red box and arrow.

22.  
 You now need to select the type of printout you want to use by using the Print Sheet selection drop down.  
 Print1->letter  
 Postcard4x5 -> Small 4x5 postcard  
 PostCard8x5 -> Large 8x5 Postcard



23.  
 Next You need to set the number of quotes you want to print. Under the Print item Selection you can select all by hitting the all button or set the range by enter the lead from and to number and hitting set selection range.



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Finally hit save and exit.

