

USER GUIDE



Dynamo

Bulk Lead Quoting Guide

Revised
2/3/2011

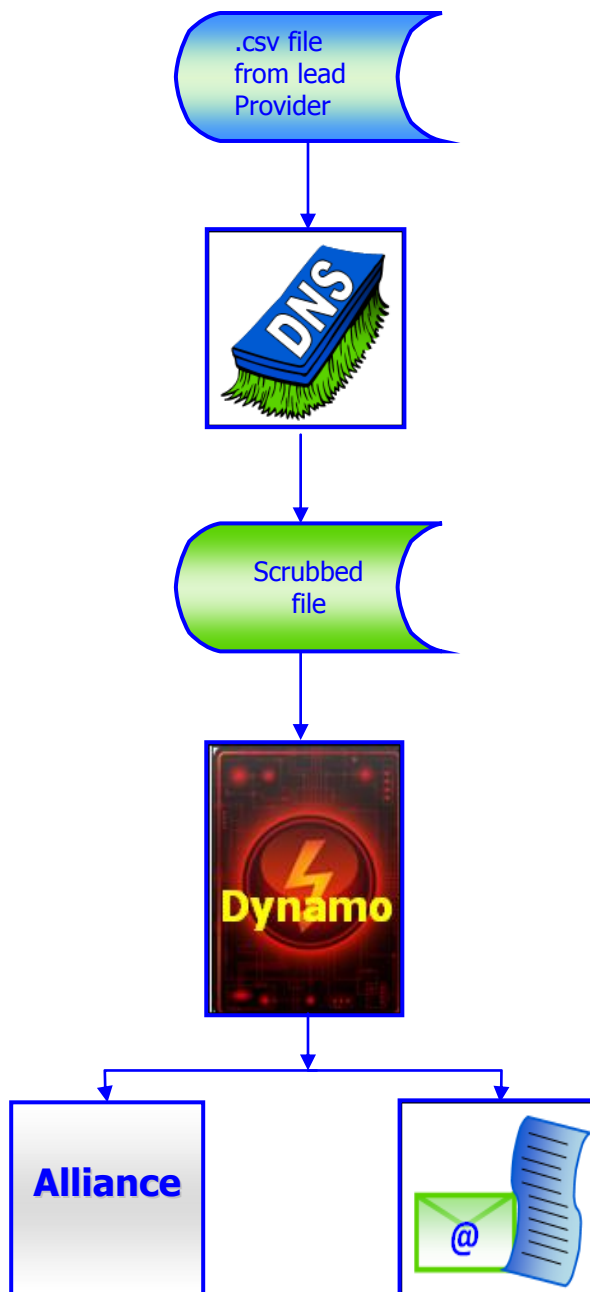
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Introduction

Dynamo is the way to automatically quote large numbers of leads provided by a lead source such as Sales Genie, Coles, or Dundee Direct. The agent has the option to print, email, create a mail merge file, or some combination of the three.



Did You Know...

... QuoteBurst is a result of collaboration of Allstate agent Bruce Thompson and IT guru Stephen Bentley?

...The products and services provided by QuoteBurst are offered exclusively to Allstate agents?

...QuoteBurst offers **free** technical support for all our products through www.quoteburst.com or 1-800-527-9395?

...Every time you start a QuoteBurst program you will have the latest version of the software automatically downloaded **free**?

...QuoteBurst is your employee to handle all your Internet leads (Typhoon), bulk mailing leads (Dynamo) and quoting (FlashBack) needs?

...Our goal is to make quoting as easy as possible for you so you can concentrate on other ways to make your business more profitable?

Let's get ready to start Dynamo

Getting Started

There are a few things to do before running Dynamo for the first time. You need to:



1. Ensure your computer has the right controls set
2. Install the software
3. Enter your user information into Dynamo
4. Agree to the Software License

Setting the right computer controls

There are two settings in the control panel that need to be checked in order for Dynamo to run properly. You will need Admin rights for the computer in order to make these changes.

First, we need to make sure the computer is not going to sleep.

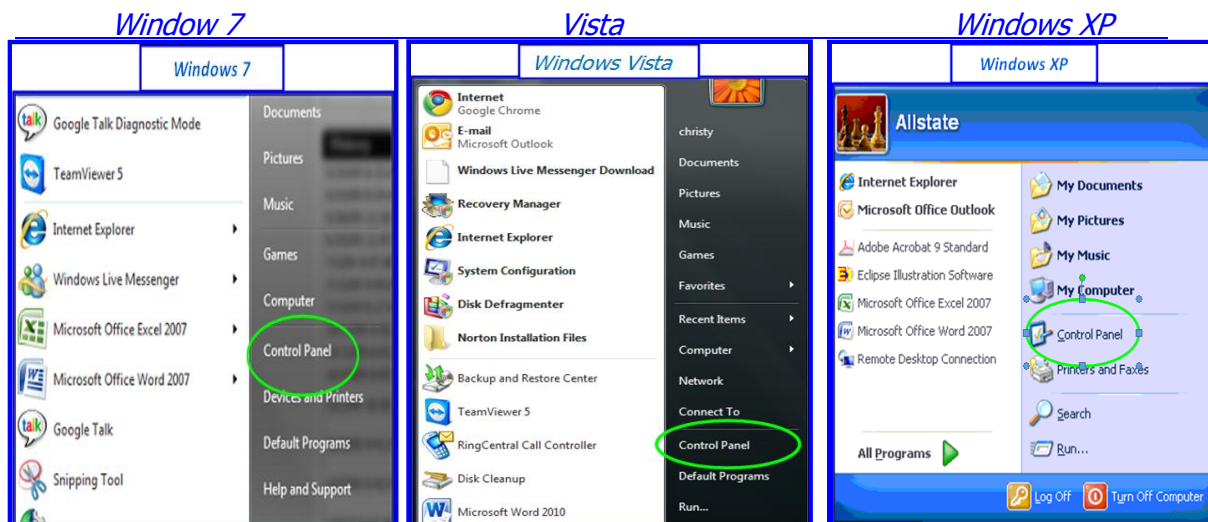
Secondly, we need to ensure that the updates to Windows are not occurring automatically. Updates could cause the system to shut down Dynamo when Windows restarts your machine.

Go to your  or  button in the bottom corner of the screen. Then select "Control Panel" or (some machines may have "Settings" instead of "Control Panel".)

Windows Automatic Updates

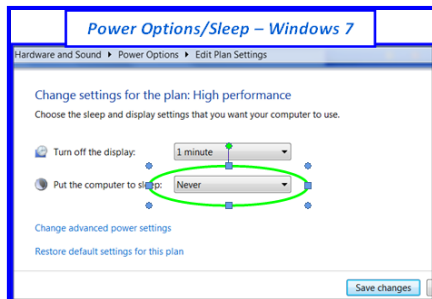
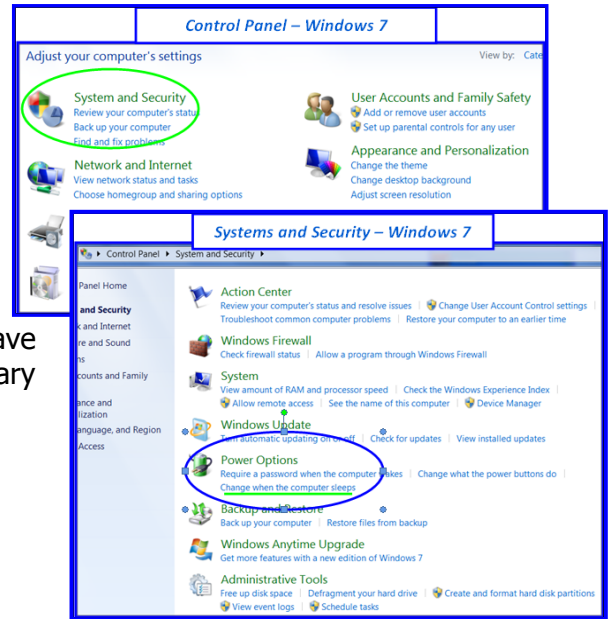
When your computer is online, Windows can automatically check online for updates and install them. Often, the updates require that the machine be restarted in order for the updates to become effective. If you have selected to have the updates applied automatically, then your machine would restart automatically as well. If Dynamo was running at that time, it would close Dynamo and not restart it. We recommend that you change the update to "Download updates but let me choose when to install them."

Use the directions of the following pages for your particular Windows edition. QuoteBurst products are not engineered to run on Mac or virtual machines.

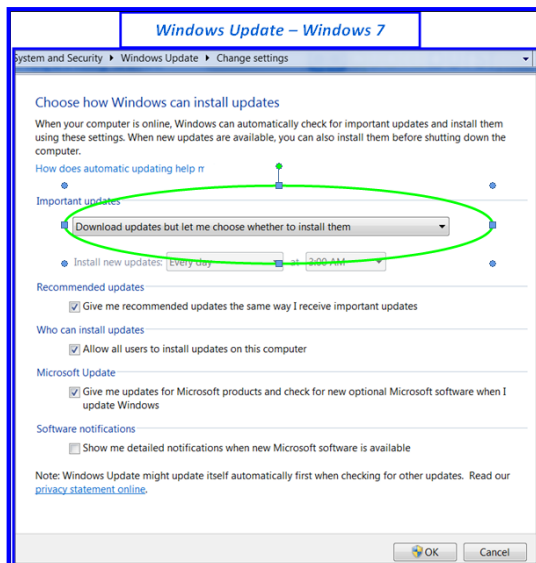
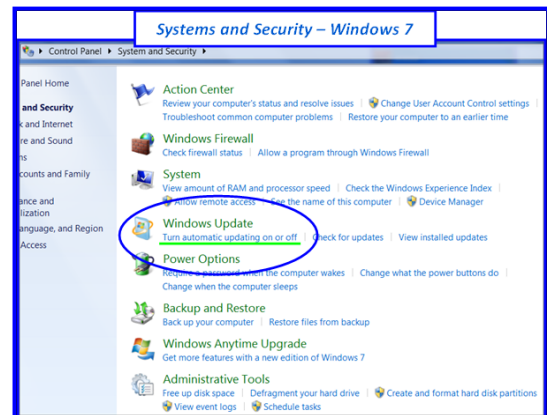


Window 7

1. Select the Systems and Security category.
2. Under the Power Options, select "Change when the computer sleeps."
3. Use the dropdown button to select "Never" and Save the changes. Turning off the display is not necessary for Dynamo.



4. Go back to the Systems and Security panel and under Windows Update, select "Turn automatic updates on or off."
5. Use the dropdown button to select "Download updates but let me choose whether to install

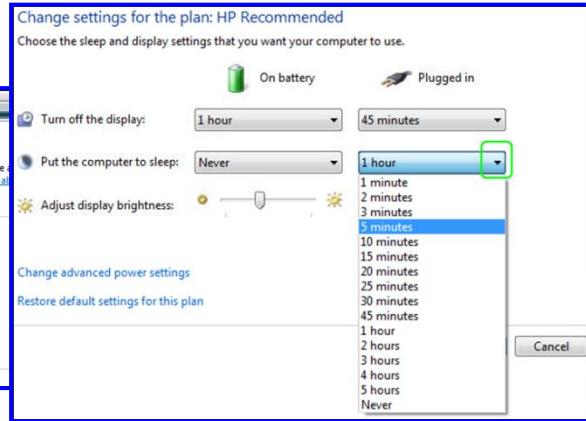
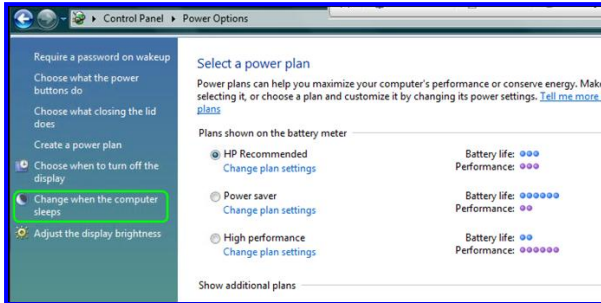


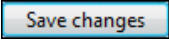
them" and then click OK.

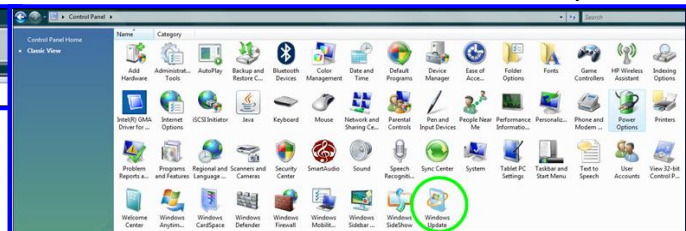
This completes the control panel changes. Click [here](#) to begin [Installing the Dynamo Software](#).

Vista

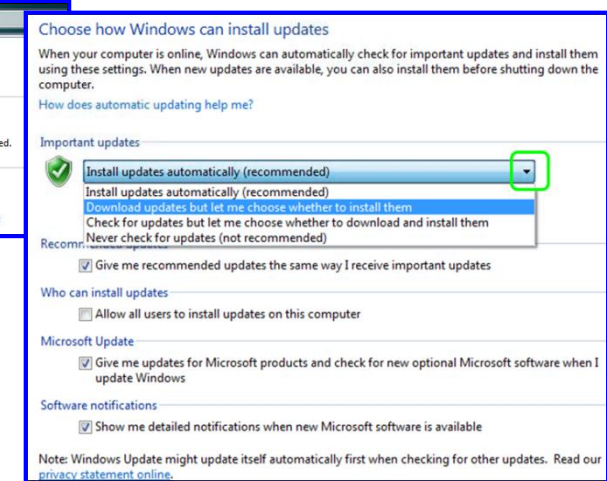
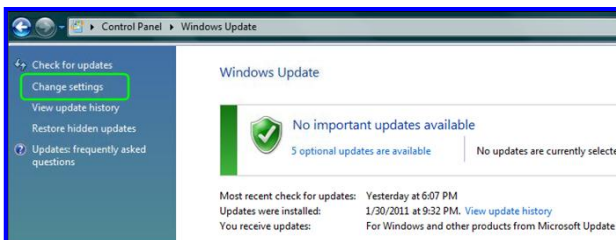
1. From the control panel double click the Power Option.
2. In the side panel locate the option to change when the computer sleeps and click it.




3. Use the drop down arrow to select "Never" from the list of when to put the computer to sleep.
4. Click  to save the changes.
5. Return to the control panel by clicking the word "Control Panel" in the bar at the top.



6. Double click on the Windows Update.
7. In the side panel locate the option to change the settings and click it.

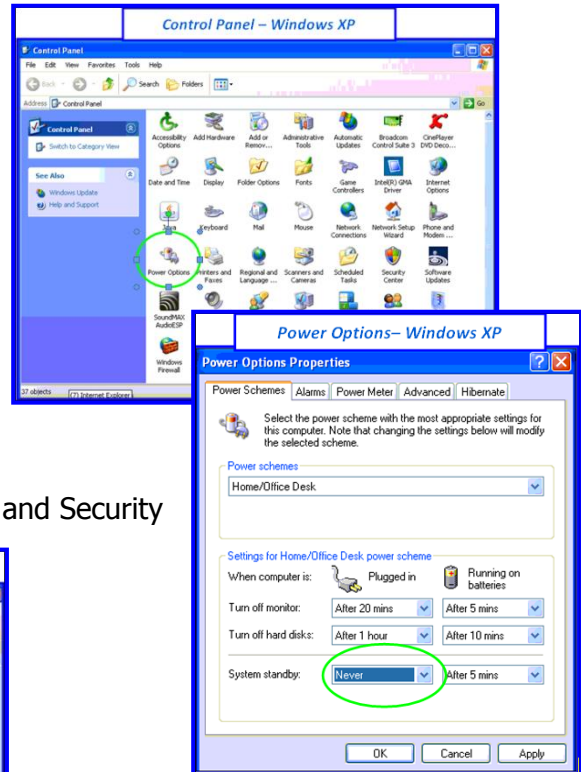


8. Use the drop down arrow to select "Download updates but let me choose whether to install them" from the list.
9. Click  to save the changes.

This completes the control panel changes. Click here to begin [Installing the Dynamo Software](#).

Windows XP

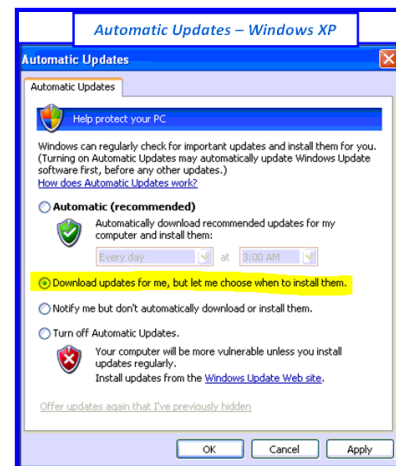
1. From the control panel choose Power Option.
2. Locate the System Standby. Use the dropdown button to select "Never" and Save the changes. Turning off the display is not necessary for Dynamo.
3. Click 'OK' to save the changes, and then return to the control panel.
4. Return to the Control Panel and select the Systems and Security category.




5. Choose Automatic updates.
6. Use the dropdown button to choose "Download updates but let me choose when to install them," then save the changes.

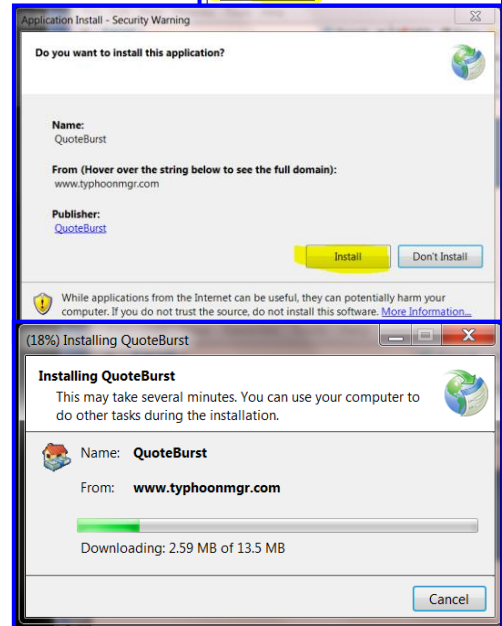
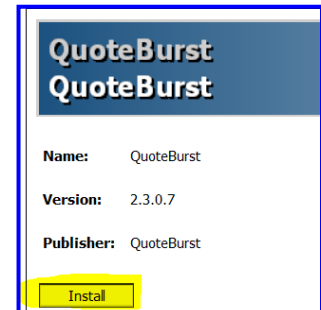


This completes the control panel changes. Click here to begin [Installing the Dynamo Software](#).



Installing the Dynamo Software

1. Go to www.typhoonmgr.com/qblauncher. Click on the install button.
2. You need to allow the program access to install by clicking install. NOTE: Some security programs like McAfee may require additional steps to install programs on your computer. Check with the security program providers for the steps to allow the Dynamo installation.
3. During the install you will see a screen like the one on the right informing you of the download progress.
4. The program will create an  icon on your desktop
5. Once the install is complete, Dynamo is automatically activated for you.



The QuoteBurst Twins

Dynamo and Typhoon are the twins that come in the QuoteBurst car. Dynamo quotes the bulk leads that come from the provider in a .csv file and Typhoon quotes the Internet leads.

Since they share the same engine, only one can drive at a time. That means you can run either Typhoon or Dynamo but you cannot run both at the same time on the same machine.

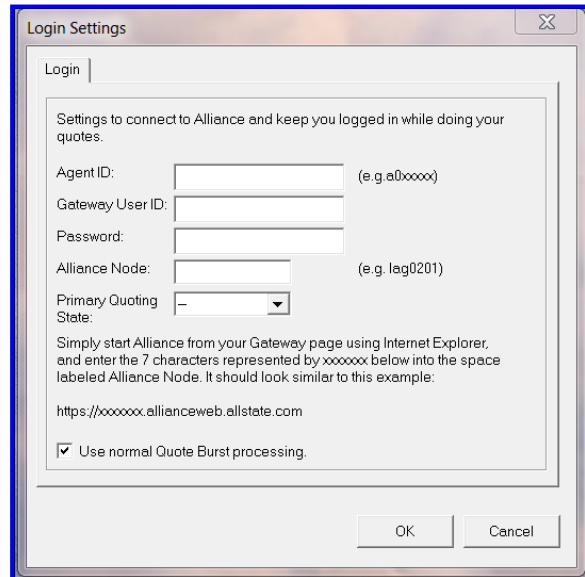
In order to save you money on products you don't need, you can subscribe to either or both services to fit your business needs.

Entering Basic Agent Info

Before running Typhoon or Dynamo for the first time, you will need to enter the settings required to keep you logged into Alliance while running your quotes.

Dynamo works by logging into Alliance and filling out the screens just as you would. In order to do so, it needs your Alliance information.

- **Agent ID** – This is your agent number beginning with A0.
- **Gateway User ID** – In most cases this will be same as the agent ID. Sub-producers will have a number that begins with an “S”.
- **Password** – this is the current Gateway for the user ID entered in the previous field.
- **Alliance Node** – Allstate has divided the nation into processing regions within the computer system. Each processing area is assigned a Node. To locate your node, simply start the Alliance Apps from your Gateway page. Look at the address displayed. It will read <https://xxG#####.allianceweb.allstate.com>. The node will be the region, the letter “G” then a 4 digit number. An example would be LAG0101.
- **Primary Quoting State** – Dynamo allows you to quote in multiple states, but the primary state needs to be selected here.
- The “Use normal QuoteBurst” should always be checked. This is a failsafe protocol. If there were a severe server problem we would switch over to an alternate server and email all the agents to unselect this box.



Click OK.

You will need to verify your gateway password and then click OK again.



QuoteBurst Conventions

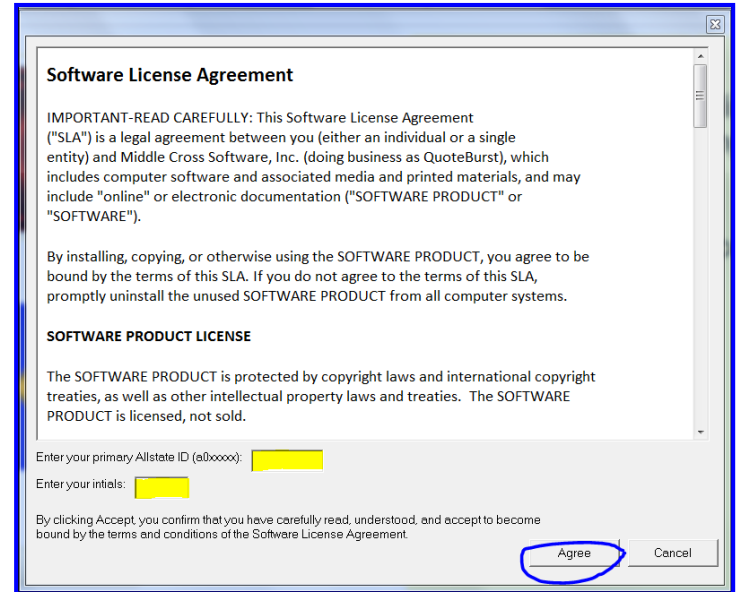
Throughout all the QuoteBurst products the agent ID is always the A0#####.

Also, you never need to double click to select an item – a single click will suffice.

Software License Agreement Overview

On your first use of Dynamo, you will be required to enter your agent ID number, your initials, and click Agree.

Below is an overview of the software agreement. For the complete agreement, scroll down through the agreement before agreeing to the contract.



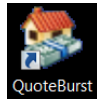
Software License Agreement Overview

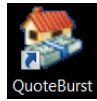
1. *Flashback uses Comma Separated Values files (.csv). Microsoft Excel is commonly used to open .csv files. There is a problem however, with saving the Flashback history files with Excel. The control numbers beginning with the 1 (those generated after January 2010) will not save correctly using Excel, so no match can be made between the scrub data and the audit e*
GRANT OF LICENSE -You may install and use the SOFTWARE PRODUCT on any number of computers for a single agency owner.
2. **DESCRIPTION OF OTHER RIGHTS AND LIMITATIONS** - You may not reverse engineer, decompile, or disassemble the SOFTWARE PRODUCT. You may not rent or lease the SOFTWARE PRODUCT.
3. **CONFIDENTIAL DATA** - QuoteBurst agrees not to disclose Confidential Information received through the processing of Internet leads or consumer lists to any third parties.
4. **COPYRIGHT** - All software, images, audio, etc. in any of the programs, or support material is protected by copyright laws and international treaty provisions.
5. **MISCELLANEOUS** - QuoteBurst reserves the right to modify this Agreement at any time.
6. **LIMITED WARRANTY** - There is a limited warranty for 90 days from receipt.
7. **CUSTOMER REMEDIES** -QuoteBurst's and its suppliers' entire liability and your exclusive remedy shall be, at QuoteBurst's option, either (a) return of the price paid within 90 days, or (b) repair or replacement of the SOFTWARE PRODUCT.
8. **NO OTHER WARRANTIES, NO LIABILITY FOR CONSEQUENTIAL DAMAGES.**


Dynamo – Bulk Lead Quoting

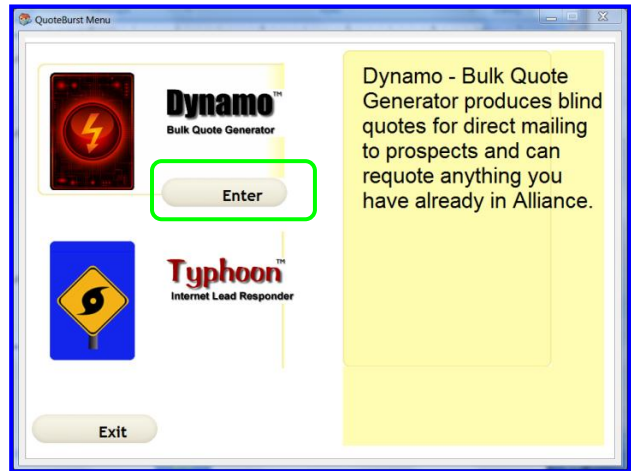


Running Dynamo



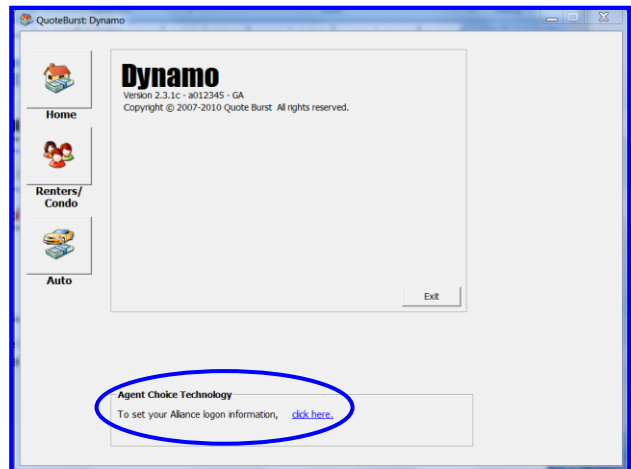
When you click the  icon on your desktop, you will see the menu. Select Dynamo.

You can minimize this screen at any time using the  button in the top right corner.



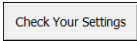
From the Dynamo menu, select which of the products you wish to quote by clicking on the icon. All the products follow the same pattern but our examples below will follow the home quotes.

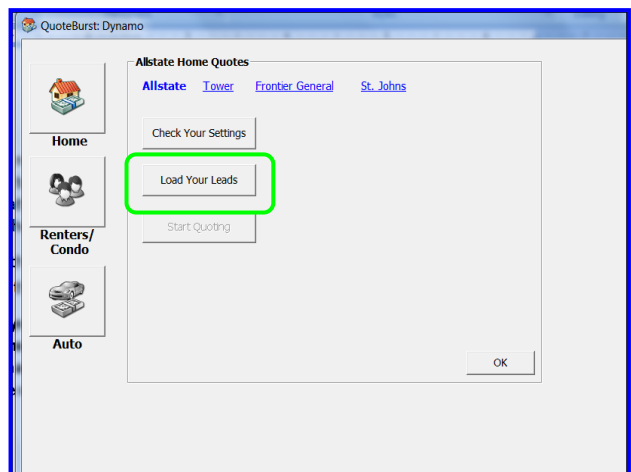
****Note – when you change your gateway password, you must change your password in Dynamo. Click the [“click here”](#) link on the menu screen.**



Check Your Settings

Setting your quoting options is the most important concern. Once these are set, you won't need to change them.

Click .



The settings are stored on the QuoteBurst server and are common to Typhoon and Dynamo. Across the top are the tabs for the different groups of settings. The **Save Changes** button will save the changes to all the settings in all the tabs. Therefore, you do not need to click **Save Changes** at the end of each screen.

Agent

The information on this screen is used in the mail merge option as the header on the quote.

General

The general settings tab displays a synopsis of the different rules.

For each type indicate whether generate a quote, send an auto response or do nothing. For Auto-Response Only - The lead will not be quoted through Typhoon. You must manually do the quote in Alliance. The prospect will only get an email letting them know you are working on the quote.

If you wish to add a separate rule for home or auto, use the add buttons below the type Rule.

Click on the **Edit** Action to modify the details.

Rules

The rules allow quoting in various states with different settings, different providers, etc. Keep in mind that the rules are "processed" in the order they are listed.

In this case, and TX leads will be processed via Allstate. This is because Allstate is the first in the list. If you want TX home leads to be processed with Tower, use the "Up" link on Tower record

Home Leads		Generate Quotes			
Home Rules					
Company	Products	States	Enabled	Action	
Allstate	Homeowners	TX	✓	Edit	Up Down
Tower	Homeowners	TX	✓	Edit	Up Down

to move Tower above Allstate.

Now, when a home lead comes in for TX, it will be processed via Tower.

Home Leads		Generate Quotes			
Home Rules					
Company	Products	States	Enabled	Action	
Tower	Homeowners	TX	✓	Edit	Up Down
Allstate	Homeowners	TX	✓	Edit	Up Down

In this example, we've used the rules to quote in different states. Since I have both Texas and Oklahoma using Allstate Base and they are on the same node of TXG0101, I combined them. In Georgia, I am using Deluxe and the node is LAG0201, and Florida is using St. John's with a node of FLG0201. For information on finding the node, see [Error! Reference source not found.](#)

Home Leads		Generate Quotes			
Home Rules					
Company	Products	States	Enabled	Action	
Allstate	Homeowners	OK, TX	✓	Edit	Up Down
Allstate	Homeowners	GA	✓	Edit	Up Down
St.Johns	Homeowners	FL	✓	Edit	Up Down

Non-Alliance Rules

If you have a non-Alliance rule and you have another rule of that type, you have the option to permanently delete rule.

Edit Rule

Company: St. Johns

Product: Homeowners

State: Florida

Starting URL: https://www.sjcsips.com

Is Rule Active: Check this box to make this rule active

[Permanently Delete this Rule](#)

[Save Changes](#) [Cancel](#)

Auto Rule

Company - prefilled and locked

Product Type - prefilled and locked

State – use the dropdown arrow to select the appropriate states in which you are licensed to insure.

Alliance Node – This is the same node that is on the Basic Agent Info and should be prefilled. (See [Entering Basic Agent Info](#))

Package Type – use the dropdown arrow to select the package you wish to quote from a list of packages available in your state.

Comprehensive Type - use the dropdown arrow to select the type of comprehensive you have selected in your Alliance presets. This must match the Alliance preset.

Apply multiple policy discount – Click the box to indicate that you do want to apply the multi policy discount.

Is Rule Active - the default is checked but you can uncheck it by clicking the box if you no longer wish to use this rule.

Edit Rule

Company Allstate/Alliance
Product Auto
State Alaska, Georgia
Alliance Node lag0201
Package Type Allstate Standard
Comprehensive Type Comprehensive
MultiPolicy Apply multiple policy discount?
Is Rule Active Check this box to make this rule active

Save Changes Cancel

Home Rule & Renters/Condo Rule

Product Type - prefilled and locked

State – use the dropdown arrow to select the appropriate states in which you are licensed to insure.

Alliance Node – This is the same node that is on the Basic Agent Info and should be prefilled. (See [Entering Basic Agent Info](#))

Policy Type – use the dropdown arrow to select the policy type you wish to quote from a list of types available in your state.

Is Rule Active - the default is checked but you can deselect it if you no longer wish use.

Edit Rule

Company Allstate/Alliance
Product Homeowners
State Alabama, Georgia, Texas
Alliance Node lag0201
Policy Type Deluxe
Is Rule Active Check this box to make this rule active

Save Changes Cancel

Auto

The auto settings tab allows the agent to detail how the leads should be quoted. Click the box next to the option to select it. Some options like, the Uninsured Motorist or the Collision Waiver are not available in your state and will be ignored.

Agent	General	Automobile	Property	Insurance Score	Printing	
Automobile Settings						
<input checked="" type="checkbox"/> Send Sample Have a quote for a Toyota Camry sent to the prospect if Typhoon cannot clearly match the vehicle in the lead with Alliance. If you do not select this option, a "sorry" email will be sent instead.						
<input type="checkbox"/> Liability Only Option For vehicle model year <input type="text" value="1985"/> and older, quote liability only						
<input type="checkbox"/> Anti-Theft Option For vehicle model year <input type="text" value="1995"/> and newer, assume Anti-Theft device is present						
<input type="checkbox"/> Uninsured Motorist Send all quotes without UM coverage (Florida Only)						
<input type="checkbox"/> Force Miles Override all incoming leads to use <input type="text" value="12"/> ,000 annual miles						
<input type="checkbox"/> Include Your Choice Include the Your Choice Package comparison.						
<input type="checkbox"/> Ignore Accidents Ignore accident information in leads.						
Distance <input type="text" value="10"/> Distance one way in miles						
<input checked="" type="radio"/> Future Effective Discount? No <input type="radio"/> 1 Week <input type="radio"/> 1 Month						
<input type="checkbox"/> Drive Wise Apply Drive Wise discount?						
<input type="checkbox"/> MultiPolicy Setting moved to General, Auto setting for Multi-State processing						
<input checked="" type="checkbox"/> Full Pay Apply FullPay Discount						
<input type="checkbox"/> Annual Saver Annual Saver Option?						
<input type="checkbox"/> PPD Force PPD on single vehicle quotes						
<input type="checkbox"/> Collision Waiver Waiver of Collision Deductible (CA)						
<input type="radio"/> Prior Insurance 3 Years <input checked="" type="radio"/> 5 Years						
Bodily Injury <input type="text" value="100000/300000"/> <input type="checkbox"/> Always use this value.						
Collision Deductible <input type="text" value="500"/> <input type="checkbox"/> Always use this value.						
Comprehensive Deductible <input type="text" value="500"/> <input type="checkbox"/> Always use this value.						
Age First Licensed <input type="text" value="16"/>						
Collision Type <input type="text" value="Collision"/> <small>Verify anything other than 'Collision' is an option in your state's Alliance</small>						
Driver Age <input type="text" value="41"/>						
Gender <input type="text" value="Female"/>						
Usage <input type="text" value="Work/School"/>						
NOTE: Some settings may not be applicable to your state and will be ignored					<input type="button" value="Save Changes"/>	<input type="button" value="Close"/>

The **Bodily Injury** cannot be lower than your preset BI in Alliance.

The **Collision Deductible** and the **Comprehensive Deductible** should match your presets in Alliance as well.

Property

The property settings tab allows the agent to detail how home, renters and condo leads should be quoted. Click the box next to the option to select it.

The top half of the screen shows the Alliance settings and the bottom half are used if you quote through St. John's

Allstate Property Settings

Construction Class: 1.0
 Construction Type: Frame
 Miles to Responding Fire Dept: 2
 Distance to Closest Fire Hydrant: 1 - 500 feet

Protective Devices

- Dead-bolt Locks
- Smoke Detector
- Fire Extinguisher
- Central Fire Alarm
- Local Burglar Alarm
- Central Burglar Alarm
- 24 Hour Manned Security

Multi-Line Discount Multi-line Discount for Home/Auto

Personal Property Reimbursement Clearing the check box gives you Actual Cash Value

Extended Protection

Building Property Protection (Rent/Condo)

Personal Property (Rent/Condo) 20000 Always use Use as minimum

Original Owner

Dynamo House Deductible Use Requested

Default SF 1800

St. Johns Property Settings

Default Home Value (\$/SF): 150

When SF is not returned... Skip It Use Default SF

Construction: Masonry

Construction Override Use Always When Not Present

Hurricane Shutter Discount

Wind clips for older homes?

Insurance Score Settings

Set the Insurance Score you wish to use to quote the leads. The **IS Mode** should always be checked when using Dynamo

Insurance Score Settings

IS Mode Override any self-credit scores and use the following IS scores:

Credit Score (Auto): 1
 Non-Preferred Credit Score (Auto): 1
 Credit Information (Home): 1
 Credit Information (Rent/Condo): 1

Print Settings

The default is for Dynamo to email the quotes to the prospect. If you choose mail merge or print, only the quotes without email address will be added to the mail merge file or be printed.

If printing, you can indicate which page(s) you want printed and the number of copies.

Print Settings

Print Home Quotes Mail Merge Yes No

Print Auto Quotes Mail Merge Yes No

If printing, the following settings will be used:

Print Setting Print All Pages Print Range

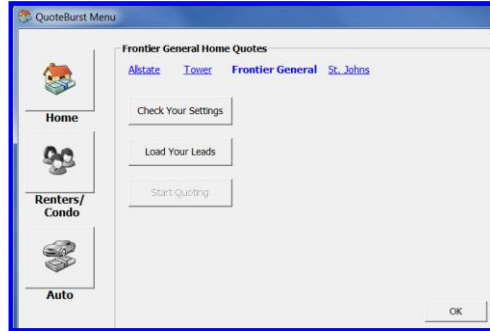
Pages To Print 1 Examples: 1, 1-3, 1-2

Copies To Print 1

Click save changes before closing the settings.

Quoting through other companies

Typhoon not only supports quoting through Allstate, but also quotes using Frontier General, St. John's and Tower. Below are the steps to set the login information for the various companies. If you are only using Allstate, go to

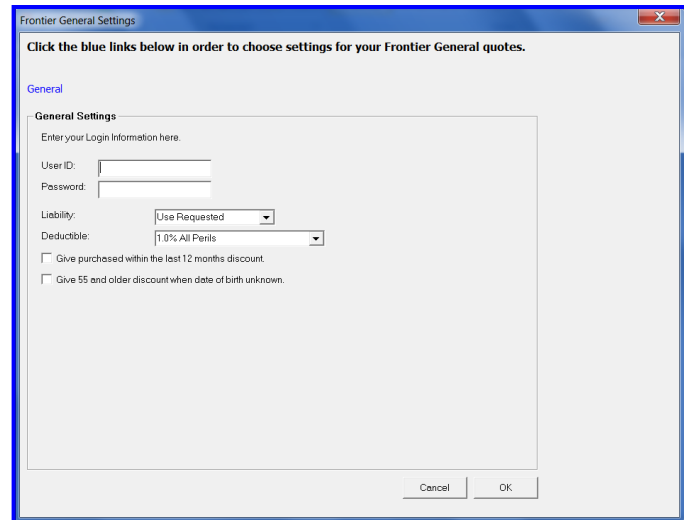


[Load Your](#) Leads

Frontier

To set your login settings for Frontier you must set the information in Typhoon.

- A. Click **Frontier General**.
- B. Click .
- C. Enter the Frontier user Id and password.
- D. Set the liability and deductible using the drop down buttons.
- E. Indicate you wish to use the new purchase or 55+ discounts.
- F. Click to save and return to the Dynamo menu.
- G. Go to



Frontier General Settings

Click the blue links below in order to choose settings for your Frontier General quotes.

General

General Settings

Enter your Login Information here.

User ID:

Password:

Liability:

Deductible:

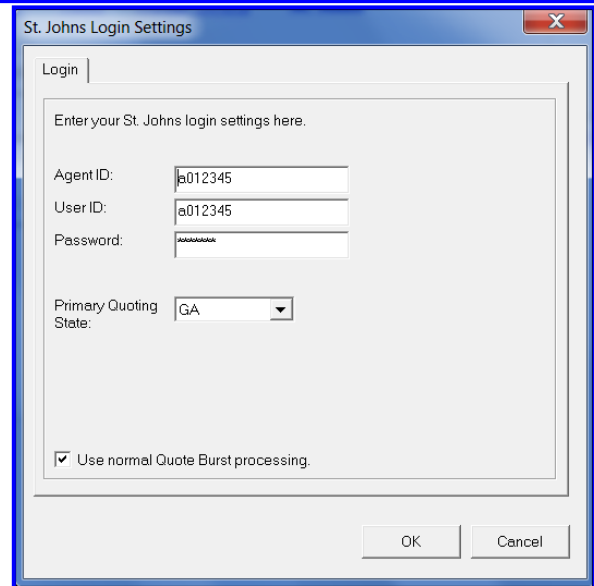
Give purchased within the last 12 months discount.

Give 55 and older discount when date of birth unknown.

H. [Load Your](#) Leads

St. John's

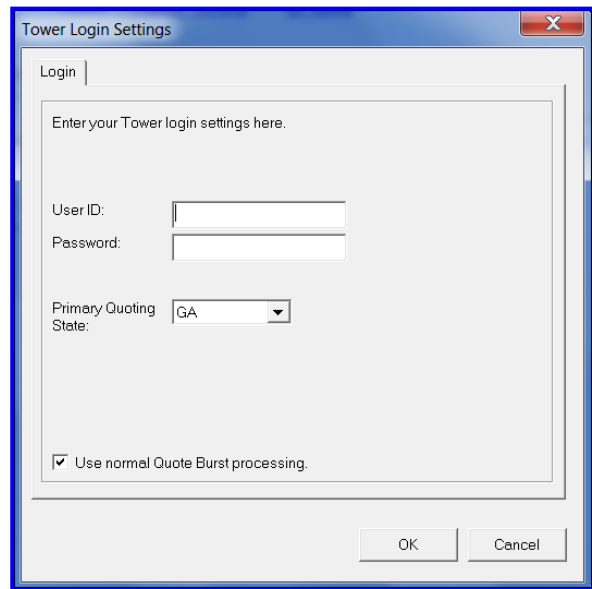
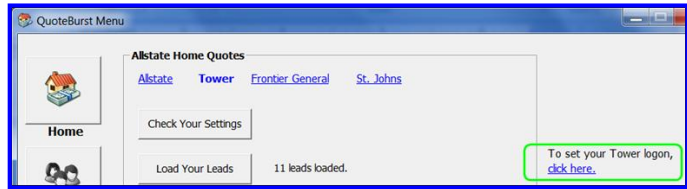
- A. Click on the word [St. Johns](#) to highlight it.
- B. Click on the [click here](#) to set the St. John's login data.
- C. Enter your agent ID, St John's user ID, the password, and the primary quoting state.
- D. The "Use normal QuoteBurst" should always be checked. This is a failsafe protocol. If there were a severe server problem we would switch over to an alternate server and email all the agents to unselect this box.
- E. Remember, there are settings for St. Johns at the bottom of the Settings Property page.
- F. Click .
- G. Go to



H. [Load Your](#) Leads

Tower

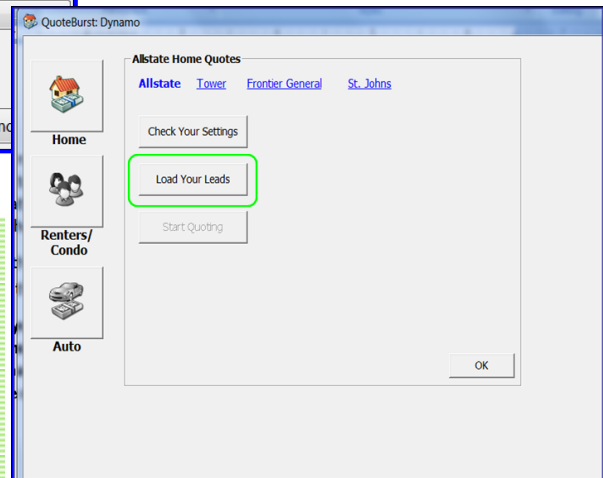
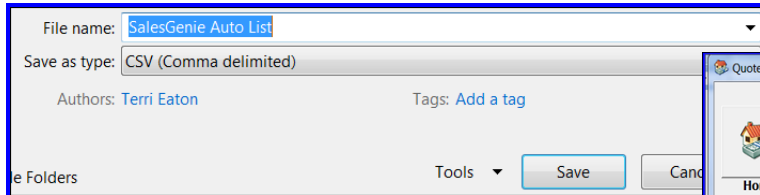
- A. Click the word [Tower](#) to highlight it.
- B. Click the [click here](#) to set the Tower options.
- C. Enter your Tower user ID, the password, and the primary quoting state.
- D. The “Use normal QuoteBurst” should always be checked. This is a failsafe protocol. If there were a severe server problem we would switch over to an alternate server and email all the agents to unselect this box.
- E. Click .
- F. Go to



G. [Load Your](#) Leads

Load Your Leads

Leads for Dynamo come from a bulk lead provider such as Sales Genie, Coles, or Dundee Direct. You should scrub the file using the Allstate Gateway DNC or DNS tool. The file must be in the Comma Separated Values (.csv) format. If you have an Excel file, use the "Save As" feature, and use the drop down button to change the type to CSV.



1. On the menu screen choose

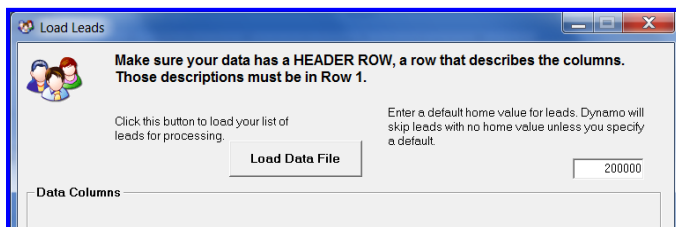
Use Excel to sort the input file

Did you know you can sort your input file before loading it into Dynamo? You can sort by zip code, and then alphabetize it to help with bulk mailing.

2. If you are quoting home, renters, or condos, set the default home Value.

Property Load Option – Default Home Value

Dynamo will skip leads without a home value. When you load your data file be sure to set the default home value to ensure you are quoting all your leads. You may also have a "Home Value" as a column header in your input file.



Dynamo Emails

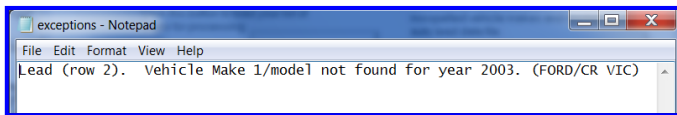
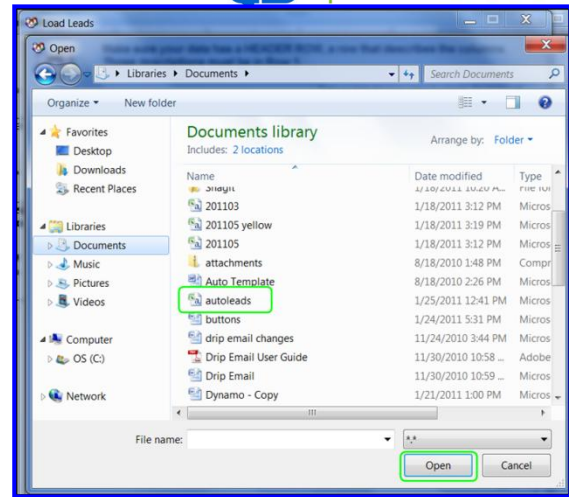
Because of the economy and speed of emailing, Dynamo is set to email the quote directly to the prospect if it has the email address.

If you do not wish to use this option, you must clear the email column heading. Dynamo then will not see the email address and will resort to printing or mail merging, whichever you have chosen.

Of course that means that the email address will not be in Alliance.

Dynamo – Bulk Lead Quoting

- Click
- You can now choose the data file you wish to load. This file should be scrubbed prior to loading into Dynamo. Click .
- Dynamo will validate the data on the file.
 - If an error is found, Dynamo will return an exceptions list detailing the error. You may want to print this list in order to correct the errors before proceeding. Use the to close the exceptions file.



- For instruction on correcting errors with vehicle makes and models, go to [Restart options](#)
-
- [After loading](#) the data, you will see the blue link at the bottom of the screen, that says [Click here for restart options](#). This allows you to start quoting somewhere other than the first lead in your data file. You can either resume immediately after the last record quote or you can designate the name with which you wish to begin.

Resuming – Dynamo keeps track of the last lead it successfully quoted. If you would like to continue with the next lead in the file:

- Click
- Click to return to the load screen
- Click and then go to [Start Quoting](#).

Starting at a specific point – There may be times you wish to skip leads and start at a specific lead.

- Enter the first and last name in the corresponding boxes.
- Click
- Click to return to the load screen
- Click and then go to [Start Quoting](#).

The Lead File

Dynamo is very flexible in accepting the data from the lead file. There are a few things that need to be in place.

It must be a .csv file. If you have an Excel worksheet, use the “Save as” option to save it as a Comma Separate Values (csv) file.

It must have a header record in the first line. Based on the column headings in the input file, Dynamo will match the columns to the fields listed.

Auto Load Option - AutoCorrect

- If you have data in the file that is not matched, change the column heading to the heading listed on the screen, save the file and click again.

Below are the required fields and the optional data you can supply through the data load. The more data you supply the better the quote and the less you need to enter manually into Alliance.

Auto Fields

Data Columns	
REQUIRED DATA COLUMNS	
First Name:	Column A
Last Name:	Column B
Address:	Column C
City:	Column D
State:	Column E
Zip Code:	Column F
Vehicle Year 1:	Column G
Vehicle Make 1:	Column I
Vehicle Model 1:	Column J
OPTIONAL DATA COLUMNS	
Email:	
DOB:	

Home, Renters, and Condo Fields

Data Columns	
REQUIRED DATA COLUMNS	
First Name:	Column A
Last Name:	Column B
Address:	Column C
City:	Column D
State:	Column E
Zip Code:	Column F
OPTIONAL DATA COLUMNS	
Suffix:	
Unit/Apt:	

For the optional fields, you can change the column heading to match the label here. For example by changing the column heading to "Home Phone" you can reload and Dynamo will map that data as well.

Note: Don't forget that there are values that can be predetermined in the Settings, on the Auto and Property screens.

Data Columns	
REQUIRED DATA COLUMNS	
First Name:	Column A
Last Name:	Column B
Address:	Column C
City:	Column D
State:	Column E
Zip Code:	Column F
Vehicle Year 1:	Column G
Vehicle Make 1:	Column I
Vehicle Model 1:	Column J
OPTIONAL DATA COLUMNS	
Email:	
DOB:	

- After loading the leads, Dynamo returns the number of leads.
- If you are ready to start quoting this file for the first time, click and then go to [Start Quoting](#).

12 leads have been loaded successfully.

[Click here for restart options.](#)

Restart options

After loading the data, you will see the blue link at the bottom of the screen, that says [Click here for restart options](#). This allows you to start quoting somewhere other than the first lead in your data file. You can either resume immediately after the last record quote or you can designate the name with which you wish to begin.

Resuming – Dynamo keeps track of the last lead it successfully quoted. If you would like to continue with the next lead in the file:

4. Click
5. Click to return to the load screen
6. Click and then go to [Start Quoting](#).

Starting at a specific point – There may be times you wish to skip leads and start at a specific lead.

5. Enter the first and last name in the corresponding boxes.
6. Click
7. Click to return to the load screen
8. Click and then go to [Start Quoting](#).

The screenshot shows a web interface for loading and quoting data. At the top, it says "Make sure your data has a HEADER ROW, a row that describes the columns. Those descriptions must be in Row 1." Below this are two instructions: "Click this button to load your list of leads for processing." with a "Load Data File" button, and "Enter a default home value for leads. Dynamo will skip leads with no home value unless you specify a default." with a text input field containing "200000".

The "Restart Options" section is highlighted with a green border. It contains the text: "Restart Options allows you to start quoting somewhere other than the first lead in your lead data file. Using a Row Number is not accurate since all rows of your file may not get loaded because they are filtered out." Below this, it says "Your last home quote was for **Chronister, Kurt**" and "If you would like to restart your quoting with the next lead in your file, click the 'Resume' button." A "Resume" button is present.

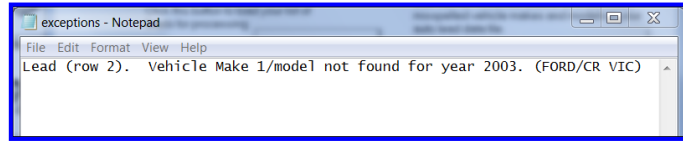
Below the "Resume" section, it says "If you would like to start with a specific lead, enter their first and last name and click the 'Start Here' button." There are two text input fields labeled "First Name:" and "Last Name:". A "Start Here" button is below them.

At the bottom right of the form, there are "Cancel" and "OK" buttons.

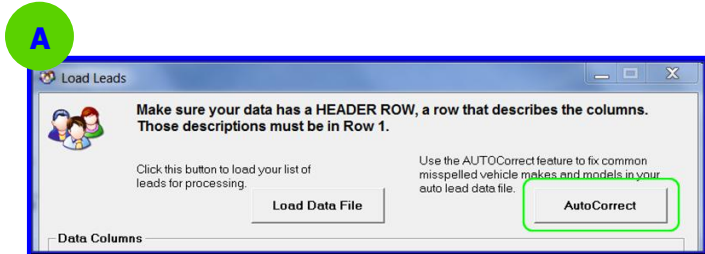
Auto Load Option - AutoCorrect

One problem you may encounter with the lead data is that the make or model may be misspelled. The AutoCorrect feature of Dynamo allows you to correct those misspellings as they occur.

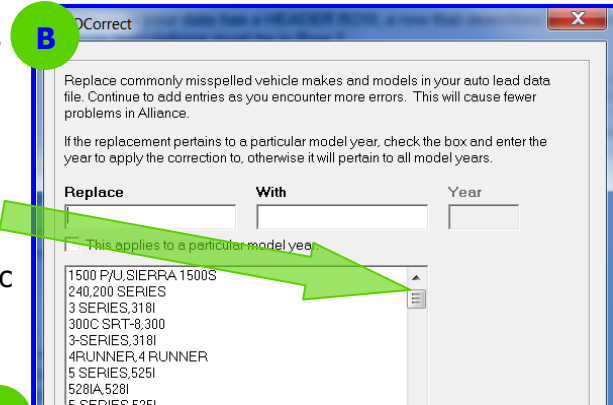
In the case to the right, a Crown Victoria was abbreviated to CR VIC. You could change the data in the file or use the AutoCorrect to fix this error and all future errors of this nature.



A. Click

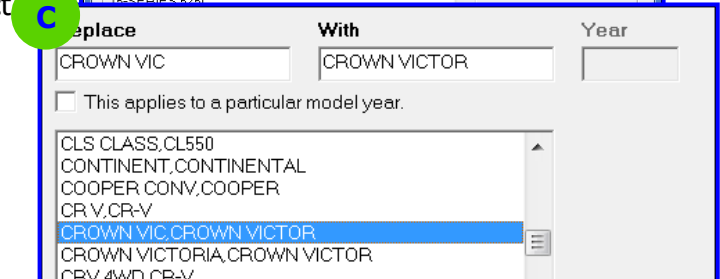
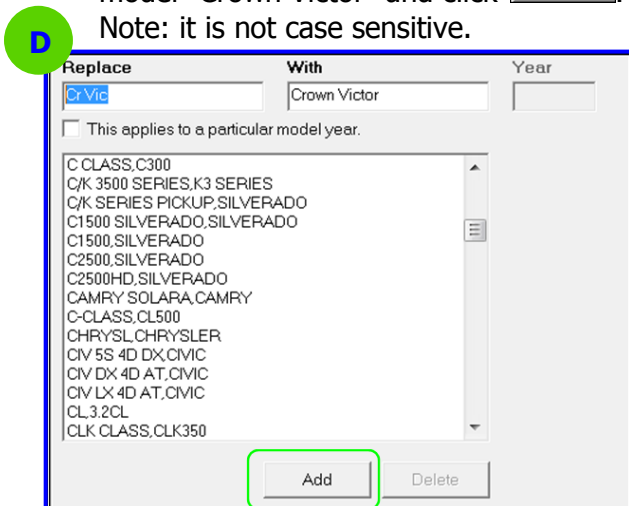


B. The AutoCorrect screen allows you to replace commonly misspelled vehicle Makes or Models with the Alliance standards. In our case we want to replace CR VIC with the Alliance standard. Say we're not sure about the standard so we'll use the slide button to scroll down to similar corrections.



C. We did find other corrections for the Crown Vic so now we know that Alliance accepts "Crown Victor."

D. We type in the error CR Vic and the correct model "Crown Victor" and click . Note: it is not case sensitive.



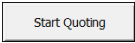



E. Dynamo assumes the corrections are for all years. However, you can specify a single year by click the box below the Replace field and entering the year.

F. Click to return to the load screen.

Start Quoting

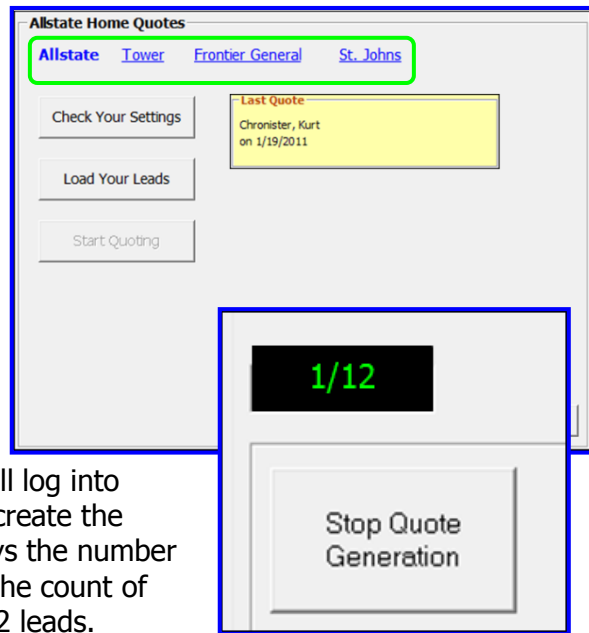
If you are quoting home leads you will notice the different companies Dynamo supports across the top. Select which company you wish to use.

You are now ready to start quoting.

1. Click .
2. Dynamo will open another window where it will log into Alliance, enter the data into the screens, and create the quote. In the bottom corner, Dynamo displays the number of the lead it is currently quoting followed by the count of loaded leads. In this case it is on the first of 12 leads.
3. You can stop Dynamo by using the  button. Dynamo will finish the current quote, and the button will change to . You can use the resume feature to continue quoting later.
4. You can minimize both Dynamo screens using the  at the top right corner of the screen. While Dynamo is quoting you can use Alliance, Flashback or any other application except Typhoon.

Remember, Dynamo will email the quote to the prospects whenever it has the email address.

- If you have selected to create a **mail merge file** it will be created in the same folder as the input file, and it will be named the same as the input file but have a suffix of _quotes. For example, if the input file is HomeLeads and it is in the My Documents folder, the mail merge will be HomeLeads_quotes in the My Documents folder.
- If you have selected to print quotes that do not have an email address, Dynamo prints these at the end of all the quoting.



Dynamo Printing

When Dynamo sends a quote to print, it is actually creating a .pdf of the quote and placing it in a temporary folder in the QuoteBurst folder on you C: drive. The folder is named the same as the input file.

When all the quoting is complete and you click exit, Dynamo moves the files in the temporary folder to the Batches folder and names it with the run time and date. The empty PRT can be deleted but does not need to be deleted.

If you have a power failure or other loss of connection, you can go into the temporary folder, select the pdfs, and send them to print manually.