

# Re-Quote Module

For

## ROBO-Agent

(Allstate version)

### Product Overview

RoboAgent Re-Quotes module is a “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”).

- ◆ “Scrubbed” csv file is input for RoboAgent who generates new quotes to be e-mail/printed on your Letter, 4X5 postcard, 5X8 postcard. E-Mail as “html” (default) or “pdf”.

### 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 \$ 75.00/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

- ◆ RoboAgentII.
- ◆ Current Red Carpet subscription
- ◆ Allstate owned PC or Agency Choice Technology PC with access to Alliance

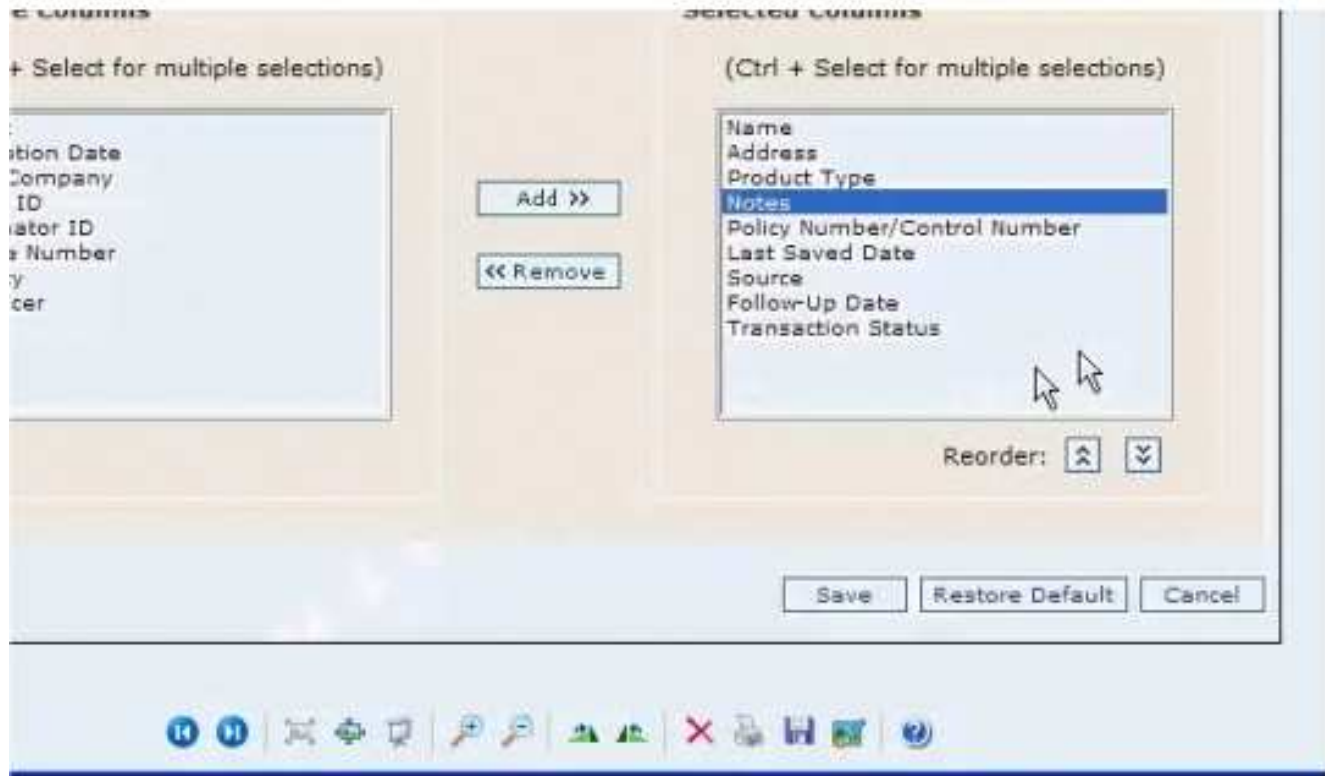


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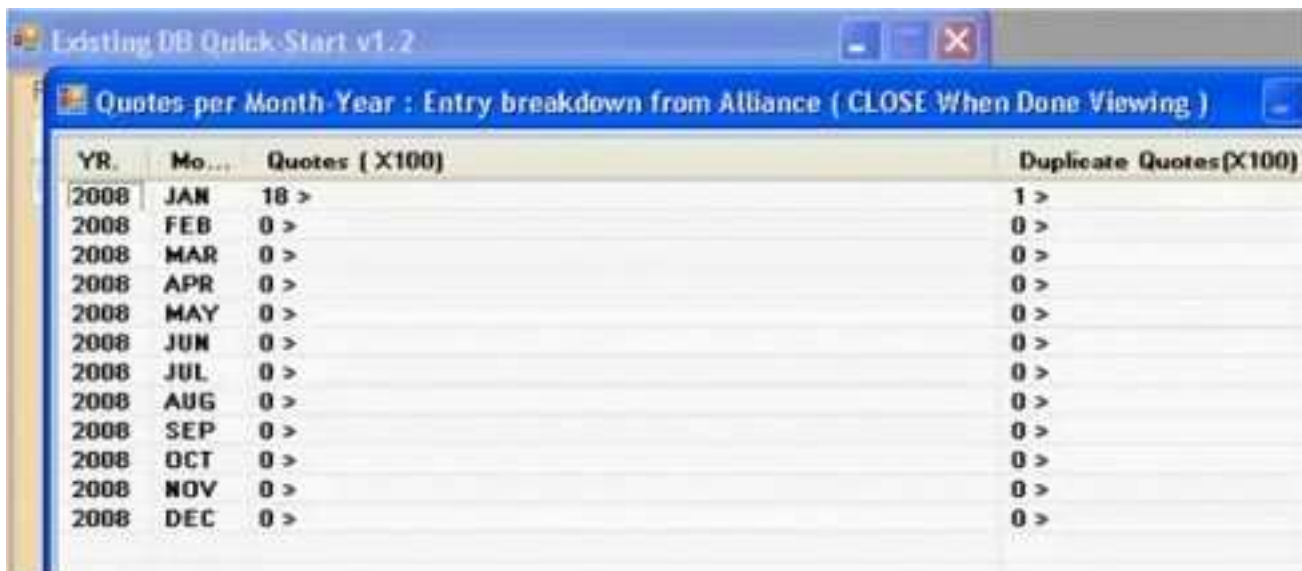
Telephone (708)671-0100 Extension #222

## Re-Quote Column Selection

### RoboAgent and Requotes



## 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 >



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