

Robo Agent “Lead File” Requirement Specification
For Home Owners Quotations
Version 1.0

When ordering data, please make sure it conforms to the following:

File Format

The file needs to be a CSV(comma separated value) file.

All records are terminated with a CRLF.(carriage return-line feed)

All Fields shall be delimited by a comma character.

(NOTE) If the data within the field contains a comma, the field shall begin and end with double-quote characters.(“)

The file must contain a Header Record to identify columns

Required Fields

First Name (must be a standalone field, do not combine with last name or middle initial)

Last Name (must be a standalone field, do not combine with First name or Suffix jr,sr,III etc)

Address (must be a standalone field, do not combine with city state or zip)
(address must contain house number and street)

City (must be a standalone field, do not combine with state or zip code)

State 2 Byte State Code (must be a standalone field, do not combine with zip code)

Zipcode (5 digit zip is mandatory, 9 digit zip code is optional)

Home Value (no special characters such as dollar signs, commas or decimal points)

Optional Fields

Year Built

Gender

Purchase Date-MM

Purchase Date-YYYYYY

Existing Policy Renewal Date

Date of Birth

Email

Phone Number

Field Order

Column A – First Name

Column B – Last Name

Column C – Address

Column D – City

Column E – State

Column F – Zip

Column G – Phone Number or empty field if not provided.(just a comma)

Column H – Home Value

All other fields may follow