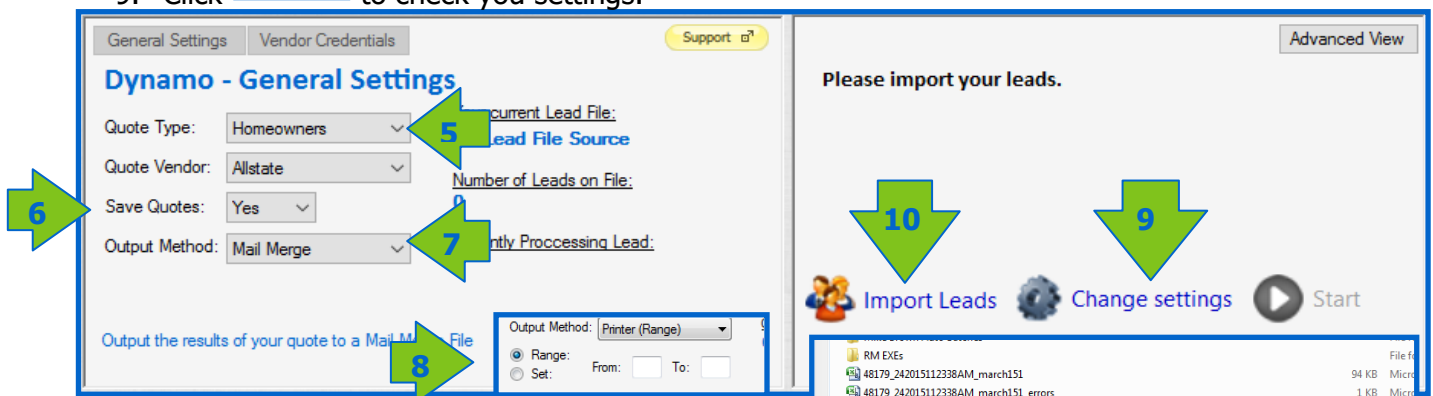
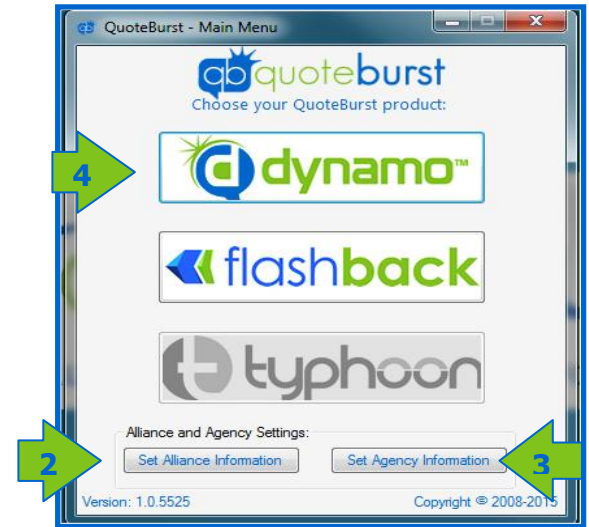


Job Aid

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

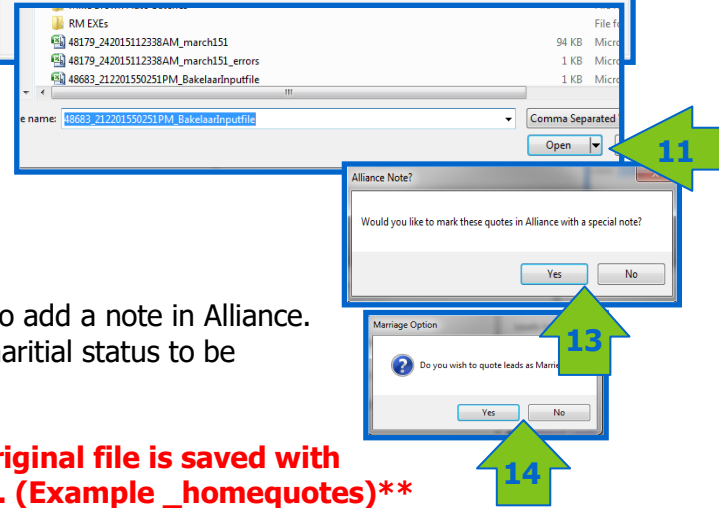
Getting started

1. Select the icon from your desktop.
2. Click to verify your gateway password.
3. Click to set your mail merge information.
4. Click to access Dynamo
5. Select the Line to quote.
6. Choose whether you wish to save the quotes in Alliance.
7. Choose your output method – Mail Merge or Print
8. If you chose to print a range, set the range.
9. Click to check you settings.



Start quoting

10. Click Import Leads
11. Select List and Click Open
12. Click
13. If you are saving the quotes, select if you want to add a note in Alliance.
14. If quoting auto, choose if you wish the default marital status to be married.



****Mail Merge files are saved where your original file is saved with the same name but has _quotes at the end. (Example _homequotes)****
****Quotes will not print until Dynamo has completed quoting the list****

