


# Job Aid

## Getting Started

1. Open software from desktop Icon.   
(If not installed go to [Quoteburst.com](http://Quoteburst.com) and Click Install under Flashback)

2. Select 
3. Select Quote Type: Homeowners, Date Type: Last Saved Date, State: LA and Range: A - Z

4. Select  Quotes  New Business
5. Select Months and Years to requote.

Month(s):  Jan  Feb  Mar  
 Apr  May  Jun  
 Jul  Aug  Sep  
 Oct  Nov  Dec

Year(s):  2006  2007  2008  
 2009  2010  2011  
 2012  2013  2014  
 2015  2016  2017  
 2018

## General Settings and Discounts



1. Check all Discounts and Override settings that you would like to apply

**General Settings and Discounts**


Discounts (where applicable)

- Future Effective (Early Signing)
- Premier Plus
- Single Auto Homeowner PPD
- Multi-Policy
- FullPay
- EasyPay
- DriveWise
- Auto/Life

Override Options and Requote Actions

- Set FUD to 11/ 6/2019
- Quote as Value Plan (if available)
- Set minimum annual miles to .000
- Override BI to 250/500
- Milewise Policy (if available)
- Enable 
- Enable 

IS Override Settings

Save Quotes: No  Start

- a. Enable Emailing to email and Tag sent to Tag

- Enable 
- Enable 

b. IS Override (You can requtoe with the same IS,Change all to a Flat IS /IS Tiers

**IS Override Options**

If you wish to override the IS scores found on your quotes check the "Engage IS Override" checkbox to choose which IS override option you wish to use.

Engage IS Override

Override all IS amounts to

Flat IS: All primary IS encountered on your quote will be overridden by the flat value specified.

If current IS is between  and  change to

If current IS is between  and  change to

IS Tiers: If current IS is between  and  change to

If an existing primary IS found on a quote matches a number which lies between any of the three tiers specified they will be overwritten with the value specified for that tier.

2. Save Quotes  (Most agents save the updated quote)

3. Click

### Advanced Filter Options

1. Select Advanced Filter Options (The more filter your select the less that is quoted)

**Advanced Filtering Options**

Ignore IFS Match IFS score of  or better

Skip Bulk Quotes  Include Bulk Quotes Only  
Skip or include only quotes generated with bulk quoting software by processing quotes only if LIS reports were run.

Current insurer contains:   
Include only quotes whose current insurer begins with the letters entered (e.g. State Fam, Travelers). Only one insurance company can be filtered per run.

Match Zip code to:  Include only quotes whose zip code or sub producer code matches the values requested

Match SubCode to:

Include multi-vehicle only.

Include multi-vehicle homeowners only.

Years of Prior Insurance with at least  years. (Auto Only)

Prior quoted BI of  or higher.

Only Include Quotes with Emails

2. Click

a. Running Auto Select if you want to EXCLUDED Line 19 and agree to Letter Template Warning and Click Continue.

b. Running Home click Continue to File Name

**Flashback - Notifications**

New Mail Merge File  
Your Mail Merge File will be saved to the Flashback Outputs folder as:  
**2020.01FBRequotes1Auto.csv**

Line 19 Handling  
Would you like to EXCLUDE Line 19 (Inventory) Auto Quotes?  
 Yes  No

Letter Template Warning  
Agents should not make any changes to the letter template as the template is the only legally Abstate®-approved document for use with Flashback, and is to be used as is.  
When sending CSV output files with customer information to a print vendor, you must follow all Abstate® data encryption requirements.  
 I agree that I have read the Letter Template Warning

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**Flashback - Notifications**

New Mail Merge File  
Your Mail Merge File will be saved to the Flashback Outputs folder as:  
**2020.01FBRequotes1Homeowners.csv**

\* Anything quoted by Thursday at Midnight is emailed the next Thursday\*  
\*List of who was emailed is uploaded to the EA Resource Center about a week after emails are sent\*

\*Files are sent to Tag on Mondays and Wednesdays\*  
\*Cut off time is Tuesdays and Saturdays at 8pm\*  
\*Agent should receive email from Tag with Instruction to select Template and pay for Mailings \*