



Dynamo 2.0 Job Aid

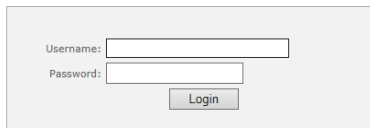
You will need to scrub for Current Customers before Quoting

Scrubbing Job Aid

Getting Started Quoting

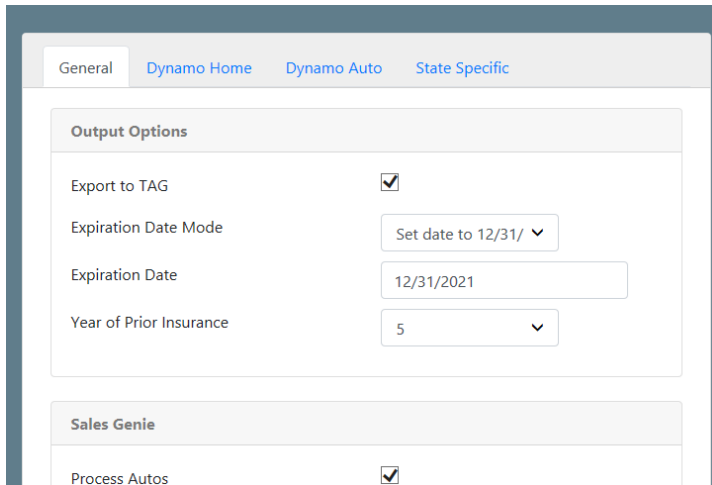
Scrubbing coming soon!!

1. Select the icon  from your desktop.
2. Click  to access Dynamo
3. Select Home & Auto First Quote
4. Log in (Click Forgot Password to create a password)



Username:
Password:

5. Go through General and Click Next (Under Agency Info – All fields are required beside Address 2, Web, Agency Title, Designation, and Agency License #)



General | **Dynamo Home** | Dynamo Auto | State Specific

Output Options

Export to TAG

Expiration Date Mode

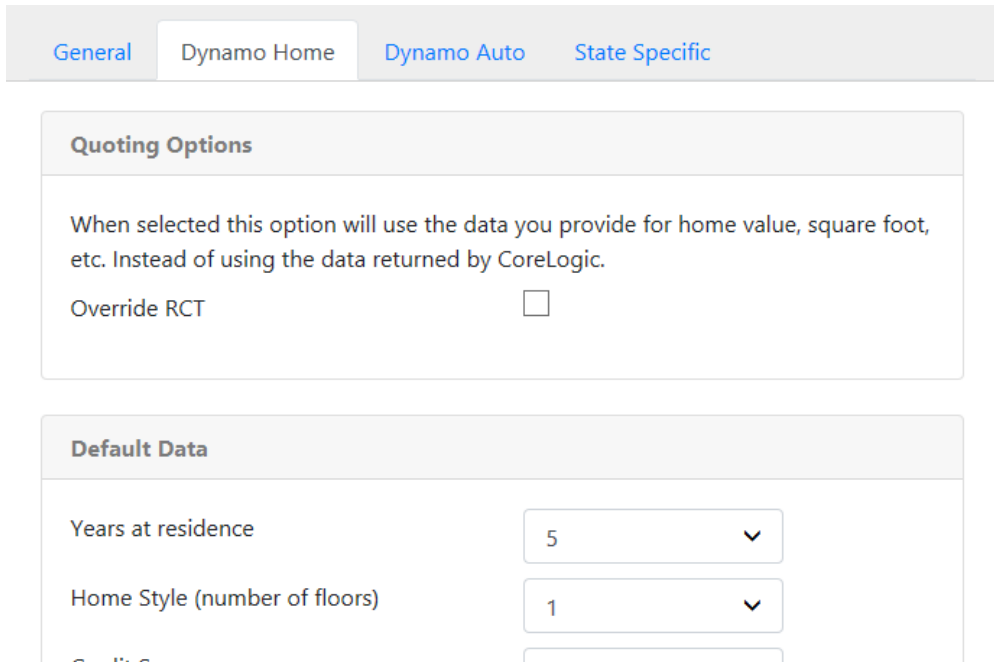
Expiration Date

Year of Prior Insurance

Sales Genie

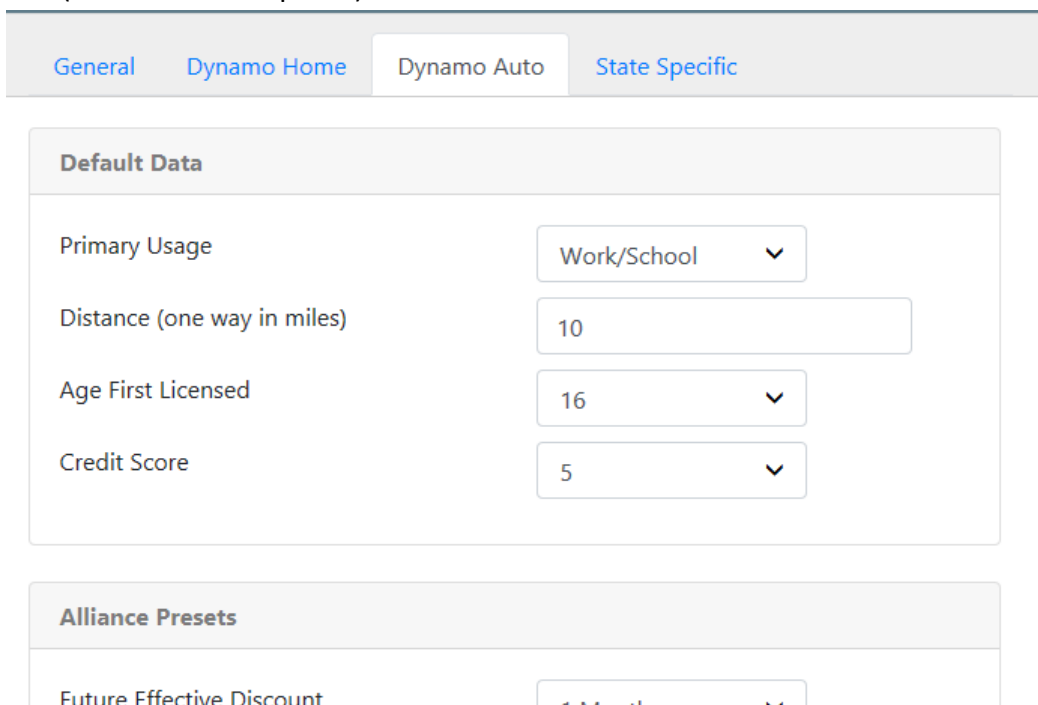
Process Autos

6. Select Options for how you want to have your Home leads quoted under the Dynamo Home Tab (All fields are required) and Click Next



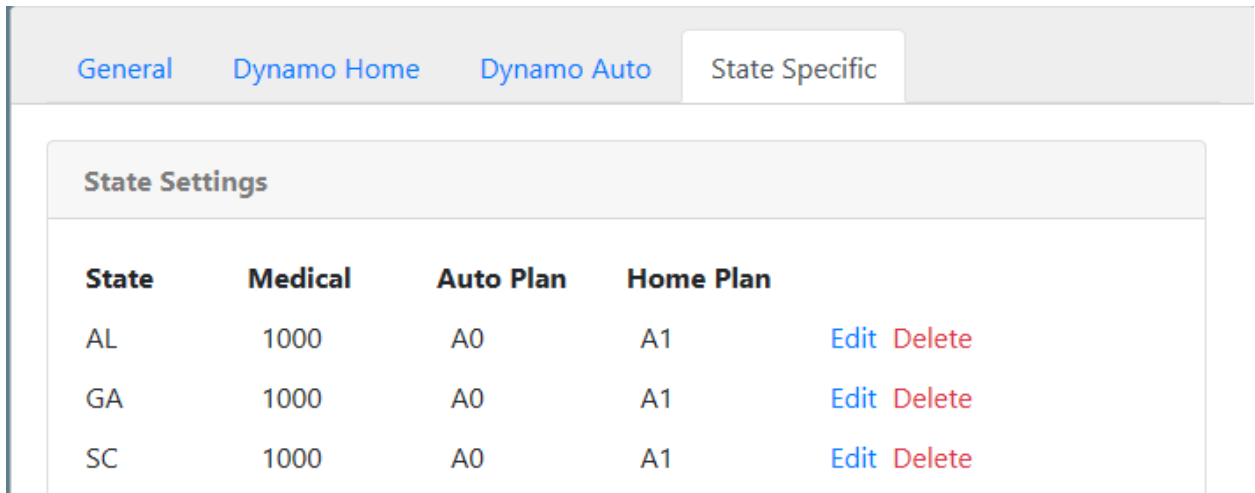
The screenshot shows the 'Dynamo Home' configuration tab. At the top, there are four tabs: 'General', 'Dynamo Home' (selected), 'Dynamo Auto', and 'State Specific'. Below the tabs, there are two main sections: 'Quoting Options' and 'Default Data'. The 'Quoting Options' section contains a text box explaining that the selected option will use user-provided data for home value and square foot instead of CoreLogic data, and an unchecked checkbox for 'Override RCT'. The 'Default Data' section contains three dropdown menus: 'Years at residence' set to 5, 'Home Style (number of floors)' set to 1, and 'Credit Score' (partially visible).

7. Select Options for how you want to have you Auto Leads quoted under the Dynamo Auto Tab (All Fields are required) and Click Next



The screenshot shows the 'Dynamo Auto' configuration tab. At the top, there are four tabs: 'General', 'Dynamo Home', 'Dynamo Auto' (selected), and 'State Specific'. Below the tabs, there are two main sections: 'Default Data' and 'Alliance Presets'. The 'Default Data' section contains four dropdown menus: 'Primary Usage' set to 'Work/School', 'Distance (one way in miles)' set to 10, 'Age First Licensed' set to 16, and 'Credit Score' set to 5. The 'Alliance Presets' section contains one dropdown menu: 'Future Effective Discount' set to '1 Month'.

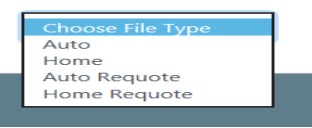
8. Select All States that you quote in Under State Specific and click Save



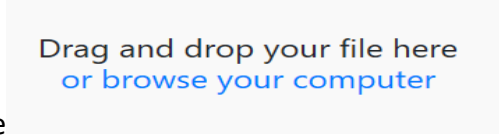
State	Medical	Auto Plan	Home Plan	
AL	1000	A0	A1	Edit Delete
GA	1000	A0	A1	Edit Delete
SC	1000	A0	A1	Edit Delete

9. Click 

Step 1 of 3



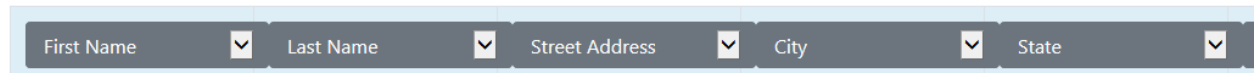
10. Select File Type





11. Drag and drop your file


12. Make sure all Required Columns are recognized

3 unmatched columns.



13. Scroll to the Right and Click Next  

14. Click Submit 

15. To Check file status, Click 

16. Click [Download](#) for output file

Files are sent to Tag on Tuesday and Thursday

Cut off time is Tuesdays and Saturdays at 8pm

**Agent should receive email from Tag with Instruction to select Template and pay for Mailings **