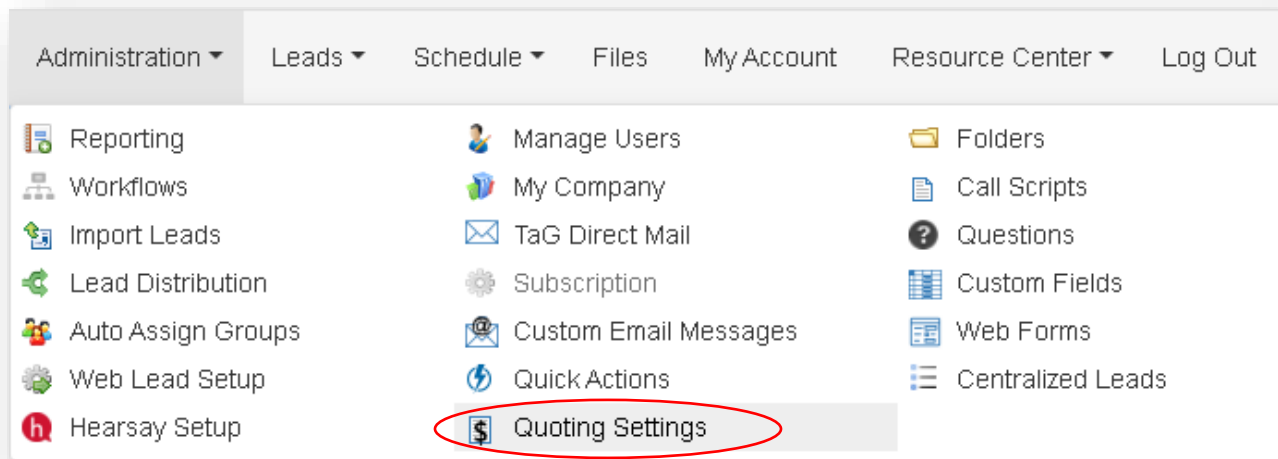


# LEAD MANAGER: BULK QUOTING

**Details:** This job aid will instruct you on how to set up your Bulk Quoting settings as well as how to queue leads for Bulk Quoting.

*\*Pre-requisite Special Note: In order to utilize the auto and/or home bulk quote features in LM, all leads require first name, last name, full address and date of birth. Additionally, auto quotes require year, make and model on all vehicles; home quotes require purchase date, home value, year built and square footage\**

**Step 1:** From the Lead Manager Main Menu, navigate to **Administration** → **Quoting Settings**.



**Step 2:** Update your Auto and Home defaults and click **Save Settings** at the bottom once completed.

Quoting Settings

Use Defaults When Quoting

- Web Leads
- From the Lead Log
- From the Lead List
- Via Workflows

Auto Quote Defaults

Emailed Quote Subject: See how much you could be saving with us, {CUSTOMER\_...

Consumer Age: 45

Home Quote Defaults

Emailed Quote Subject: {CUSTOMER\_FIRST\_NAME}, here's your estimated home

Consumer Age: 45

Age of Home (years): 25

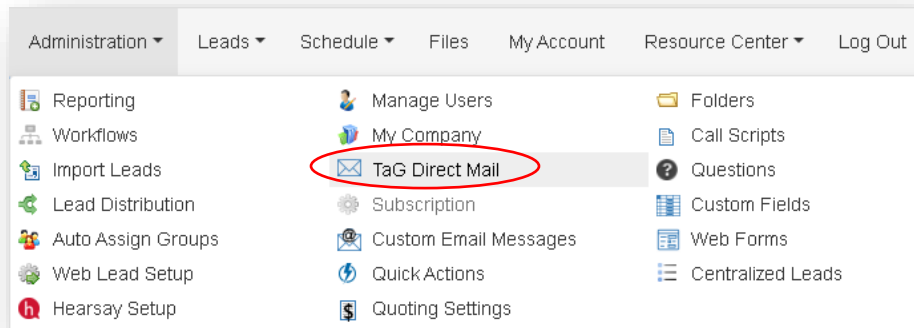
Years in Home: 10

Square Footage: 2,000

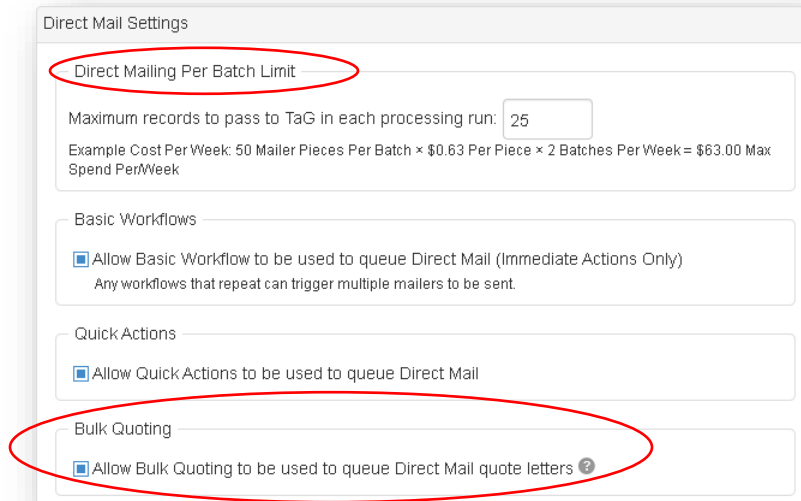
Home Value: \$350,000

Save Settings

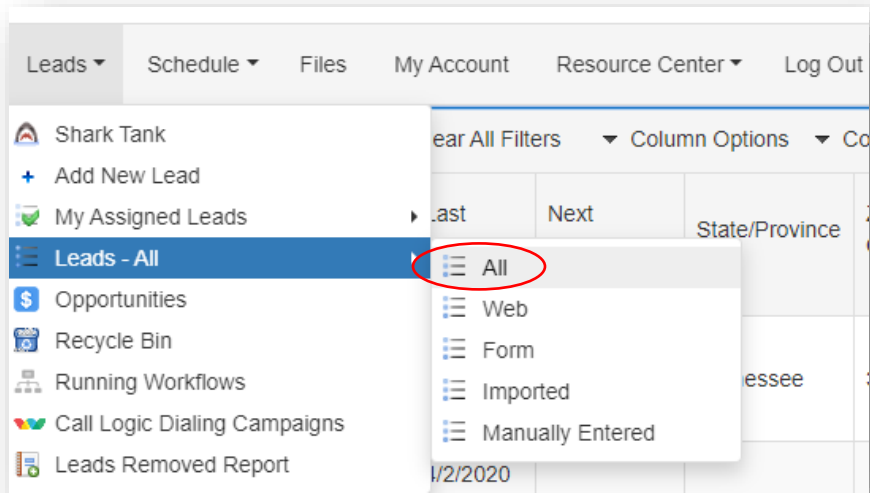
**Step 3:** Navigate back to the Main Menu bar and select **Administration** → **Tag Direct Mail**.



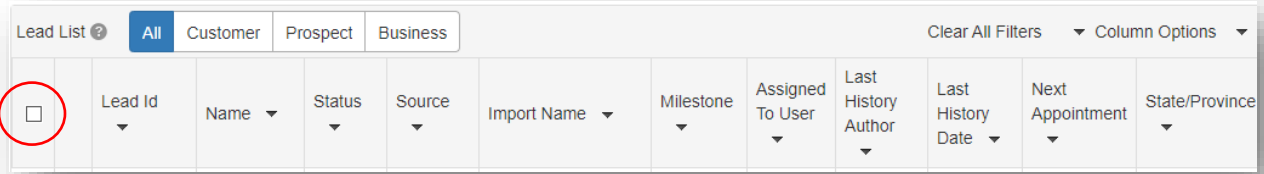
**Step 4:** From the Direct Mail Settings, set your weekly batch limit and check the boxes to allow for bulk quoting to be used to queue Direct Mail quote letters.



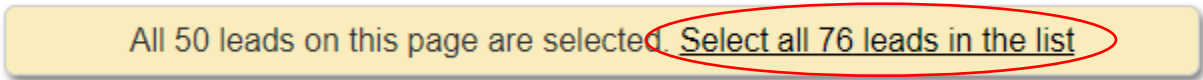
**Step 5:** Locate and filter to the list of leads you want to queue for Bulk Quoting.



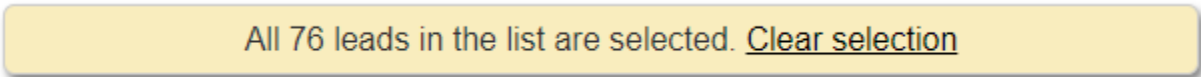
**Step 6:** Once you have identified your lead list, check the **Select All** box (first column) to the far left of the column headers.



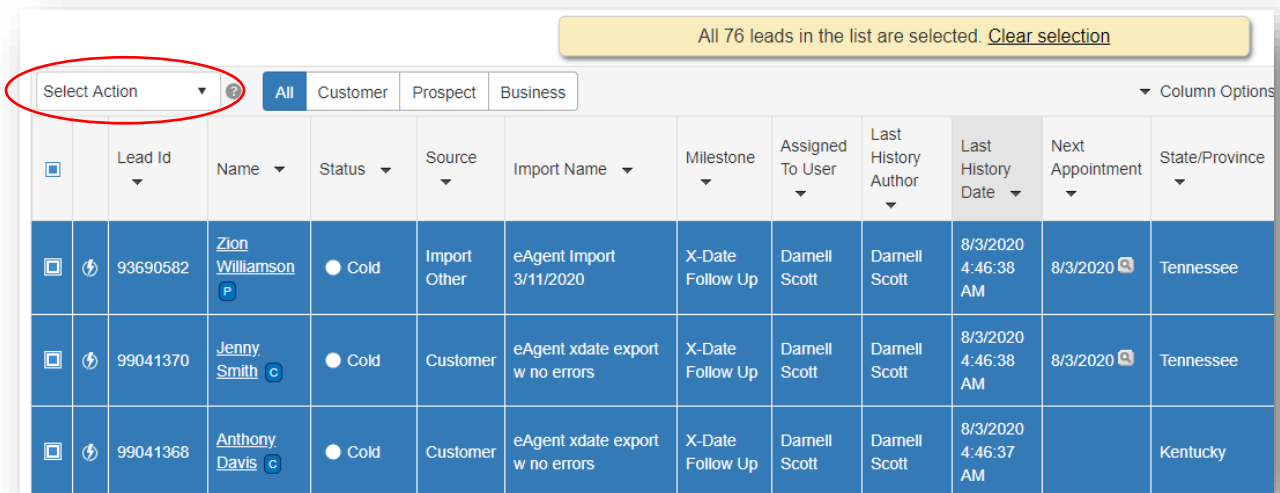
**Step 7:** If there are more leads on the list than the page quantity limit allows, you will receive a message in a yellow bar at the top. It is very important you choose all the leads on the list if you intend to quote all your filtered leads.



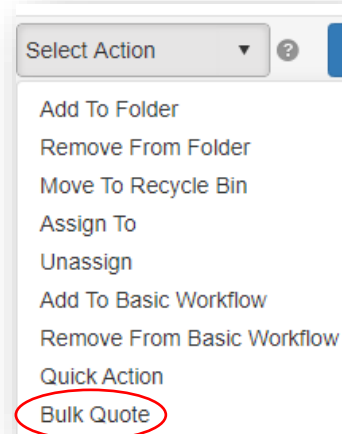
**Step 8:** Once you **select all** the leads on the list, the yellow bar will confirm your action.



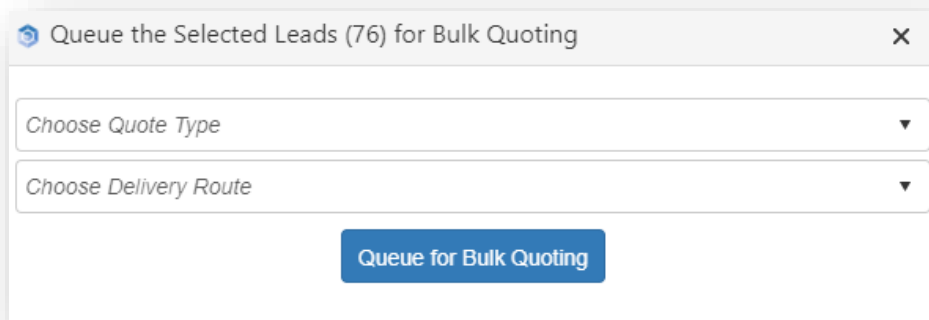
**Step 9:** Click **Select Action** from the drop-down menu.



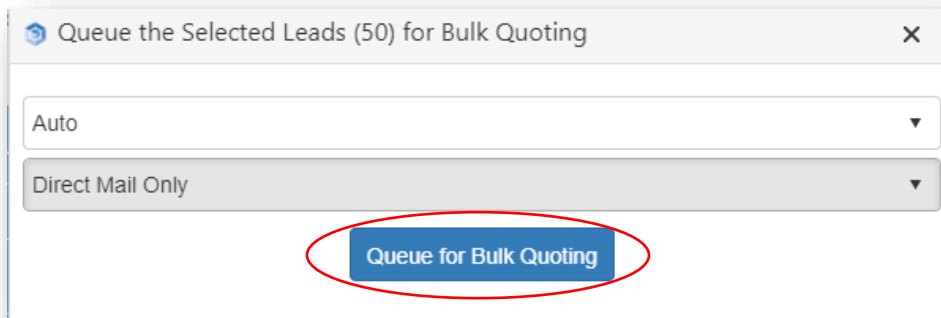
**Step 10:** Choose **Bulk Quote**.



**Step 11:** Select your Quote Type (Auto or Home) and Delivery Route (Email, Direct Mail or Both).



**Step 12:** Click **Queue for Bulk Quoting**.



**Step 13:** Success will be indicated by the red message displayed near the top of the account.

Successfully queued 2 leads for Bulk Quoting. Some leads did not have the required fields to perform a quote or were not eligible for quote delivery.

**Step 14:** There is a Bulk Quoting report available in the “Administration” tab.

Report List <span>?</span>	
Report	Description
<a href="#">Bulk Quoting</a>	Lists of quotes that are queued, in process or completed.