

**Agency Technologies, Inc.**

Phone: 1-800-336-4284

Fax: 1-800-285-6877

Website: www.agencytechnologies.com

2141 Enterprise Drive

PO Box 100507

Florence, SC 29501

Dear Agency Owner:

First of all, we would like to thank you for your interest in upgrading to Windows Profiler.

Please review the System Requirements document. If you believe ALL of your systems meet the requirements, proceed to fill out pages 3-5 of the included survey. The attached survey allows us to gather information necessary to provide a smooth upgrade of Profiler in your office. Before you will be considered for the upgrade to Windows Profiler, we **must** receive all of the following items.

1. Pages 3-5 of this document **AND** all pages of the control database **AND** the type code database **AND** the transaction code database should be either mailed or faxed to us.

**Mail to:**

Agency Technologies, Inc.

P.O. Box 100507

Florence, SC 29501

**Fax to:** 1-800-285-6877

2. Email the MSINFO32 file generated from each pc to [atihelpdesk@agencytechnologies.com](mailto:atihelpdesk@agencytechnologies.com)

Upon review of your information, we will contact you via email.

If you need assistance filling out the survey please call 1-800-336-4284.

Regards,

Agency Technologies, Inc.

# Windows Policy Profiler System Requirements

## Supported Operating Systems (ON SERVER AND ALL WORKSTATIONS)

Windows 2003 Server with all released service packs

Windows XP (Home or Professional) with all released service packs

Windows 2000 with all released service packs

NOTE: Windows NT 4.0 Terminal Server Edition is not supported

## Printers

Rose Porter switch boxes or other port sharing devices are not supported.

## Processor Type and Speed

Pentium IV 1.6 GHZ or high processor is recommended.

## Hard Drive Space

### **Server:**

200 MB free space for the Profiler for Windows program.

### **Workstations:**

100 MB free space for the Visual FoxPro runtime and temporary files.

## Video

Super VGA or higher resolution monitor with 16 bit color. Video resolution of at least 800 x 600.

## Memory

256MB RAM (memory) is recommended.

## Mouse

Microsoft compatible mouse

## Adobe Reader

Adobe Reader 6.0 or higher

Agency Owner \_\_\_\_\_ Has the owner consented to this upgrade? \_\_\_\_\_

Agency Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Person for Upgrade \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Office email address: \_\_\_\_\_ Your email address \_\_\_\_\_

Could we reach you before/after business hours? If yes, please indicate number \_\_\_\_\_

What are your business hours? Pls include any lunch hour. \_\_\_\_\_

Are you a Nationwide Insurance agent? Yes \_\_\_\_\_ No \_\_\_\_\_

What type of Internet connection do you have? Cable \_\_\_\_\_ DSL \_\_\_\_\_ Dial Up \_\_\_\_\_

How many PCs have Policy Profiler installed (include the server)? \_\_\_\_\_

Does each PC that uses Profiler have access to the Internet? \_\_\_\_\_

What type of contracts do you print? Laser \_\_\_\_\_ Pre-printed (dot matrix) \_\_\_\_\_

What type of receipts do you print? Laser \_\_\_\_\_ Pre-printed (dot matrix ) \_\_\_\_\_

What type of drafts do you print? Laser (3 on 8.5 x 11) \_\_\_\_\_ by Hand \_\_\_\_\_

Carbon copy check size on Dot Matrix \_\_\_\_\_ Included in pre-printed contract \_\_\_\_\_

Do you use a Porter Rosebox to connect any dot matrix printers? \_\_\_\_\_

Do you use any printer port sharing boxes, such as an A-B switch? \_\_\_\_\_

Do you print money orders as receipts? \_\_\_\_\_

Do you hand write or print money orders? \_\_\_\_\_

Do you export to Quicken or QuickBooks? If so, which one? \_\_\_\_\_

Do you finance with any premium finance companies besides Prime Rate? \_\_\_\_\_

What percentage of your business do you finance using company pay plans? \_\_\_\_\_

SC Agents: Do you use any portion of Profiler that refers to DESIGNATED business? \_\_\_\_\_

If so, please explain \_\_\_\_\_

Which commercial lines do you sell? \_\_\_\_\_

Do you use Profiler in any manner that you believe might be unique to your office? \_\_\_\_\_

If so, please explain \_\_\_\_\_

What version of Profiler do you have installed? (On the main menu in the upper right hand Corner)

Version \_\_\_\_\_ Rel Date: \_\_\_\_\_

Do you currently have or recently had any viruses, worms, or Trojan horses on any PCs? \_\_\_\_\_

Do you see any error messages when starting any of the PCs? \_\_\_\_\_

Do you have any networking or printing problems? \_\_\_\_\_

**PRINTERS**

Do you ever take one type of paper out of a printer and then insert another type of paper to print another form? For instance, taking receipt paper out of the dot matrix printer and then inserting money orders. Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain: \_\_\_\_\_

<u>Brand/Model</u>	<u>List ALL forms printed to this printer</u>	<u>Physically cabled to to which PC?</u>
1) _____	_____	_____
2) _____	_____	_____
3) _____	_____	_____
4) _____	_____	_____

**SUPPLEMENTAL PRODUCTS**

Do you use the MVR server? SC Agents Only Yes \_\_\_\_\_ No \_\_\_\_\_

Do you use DPS Imaging? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you use Phonetree? Yes \_\_\_\_\_ No \_\_\_\_\_

**BRIDGING/IMPORTING**

Will you be bridging from any of the following programs into Profiler?

Accuauto Yes No      Southern General Yes No      Universal Yes No

Integon Yes No      Turborater Yes No

**NON-OWNERS (SC Agents Only)**

Do you do any Non-Owners? Yes No If yes, with which company? \_\_\_\_\_

**ADD-ONS**

Are you licensed with Reliable Policy Management to sell any of the following products?

Nations Safe Driver \_\_\_\_\_ Roadmaster Motorclub \_\_\_\_\_

American Bankers Prime AD \_\_\_\_\_ American Bankers Prime Family \_\_\_\_\_

## PRINT CONTROL, TYPE AND TRANSACTION CODE DATABASES

- Open and login to Profiler
- Select option 60
- Select Control database
- Generate Report
- Press the Esc key
- Select Type Code database
- Generate Report
- Press the Esc key
- Select Transaction Code database
- Generate Report
- Press the Esc key.
- Retrieve reports from the printer and fax to 1-800-285-6877, along with page 3-5.

## COMPUTERS

Using the instructions on page 6, generate and email the MSINFO32.exe file from each PC.

- PC #1: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #2: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #3: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #4: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #5: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #6: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #7: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #8: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #9: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #10: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #11: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #12: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #13: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #14: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_
- PC #15: Email the MSINFO32 file \_\_\_\_\_ Does this PC have a WORKING CD-ROM? \_\_\_\_\_

## Generating the MSINFO32 File

- Click on Start
- Click on Run
- Click into the Open: field and press the backspace key to remove the contents.
- Type in **MSINFO32.EXE**
- Click on OK
- Click on File (If you have Windows 2000, click on Action)
- Click on Export (If you have Windows 2000, click on Export List)
- If you do not have the capability to send an email from this machine please call us for assistance. If you do have email capability from this machine, proceed to the next step.
- Click on the drop down arrow to the right of the SAVE IN field
- Scroll up to the top and click on Desktop
- Click into the FILENAME field
- Type in a filename that describes your agency and the pc and/or user. If this is the server, type in your agency number and then the word Server. Example: If your Agency number is 1000 and this is the server, type in **1000 SERVER**. If this is Betty's pc, type in **1000 BETTY**
- Click on the SAVE button
- Wait a few minutes for the system information to refresh
- Click on File and then on Exit to close the window. If you have Windows 2000 click on the X in the upper right hand corner to close the window.
- Connect to the Internet and then open your Email program (Yahoo, Hotmail, etc.)
- Click on either COMPOSE MAIL or NEW to begin a new mail message
- Click into the TO field
- Type in [atihelpdesk@agencytechnologies.com](mailto:atihelpdesk@agencytechnologies.com)
- Click into the subject field
- Type in your ATI Agency Number (ex. **1000**)
- Click on the either Attach File, Insert File, or the paperclip icon
- Click on the drop down arrow to the right of the LOOK IN field
- Scroll up to the top and select Desktop
- Scroll down in the list and find the file you just saved
- Click on the name of the file you just saved. You might have to double click on the filename.
- You should now see the filename on the email screen indicating that the file is attached.
- Click into the big blank window.
- Type the name of your agency.
- Click on the Send button