



AGENCY MATRIX

— *DOWNLOAD SETUP & USER GUIDE* —

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OVERVIEW

OVERVIEW

To ensure policy information is accurate and kept up to date in Agency Matrix, you need to install an application. This application will extract policy details from the previous day and download the data to a file. Examples of transactions downloaded are: cancellations, new business, or endorsements.



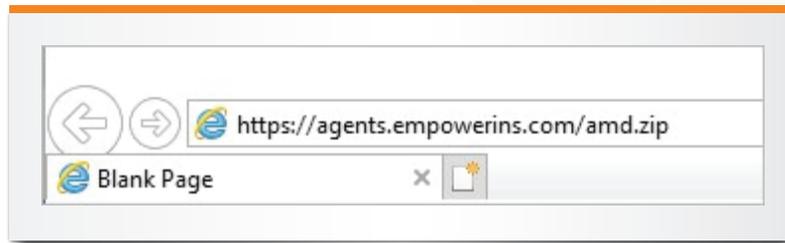
SET UP APPLICATION



SET UP APPLICATION

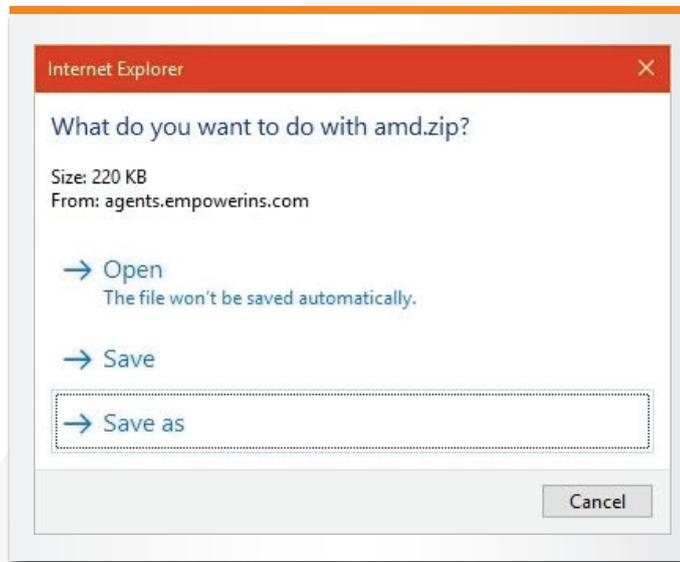
STEP 1 *Download the Compressed zip file*

Open a New Tab in your Browser (e.g. Internet Explorer or Chrome) and enter: <https://agents.empowerins.com/amd.zip>

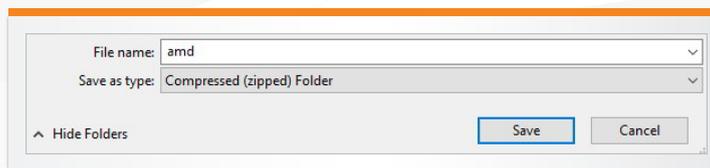


STEP 2 *Save the file*

Click on “**Save as**”, to save the file named, “amd”.



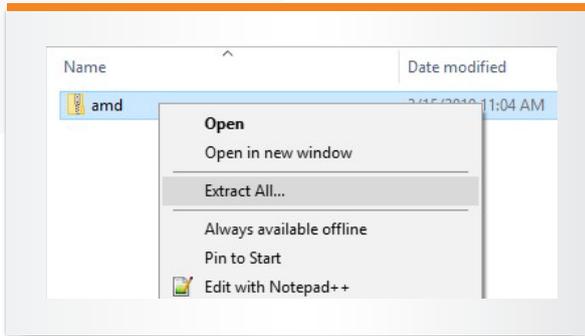
You may **SAVE** the file in Documents.



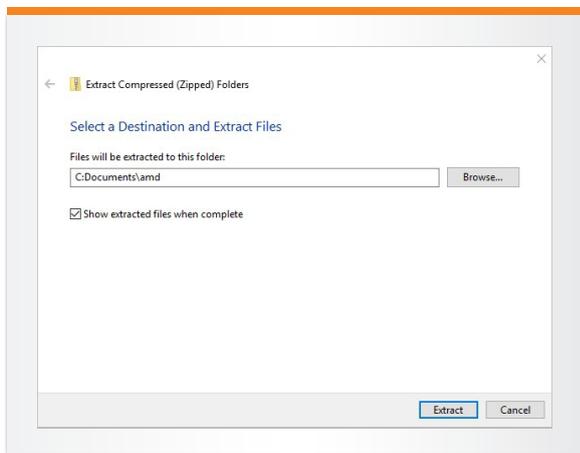
SET UP APPLICATION

STEP 3 *Extract the files*

Open the Folder where you saved it, **right click** on it and Select **“Extract All...”**

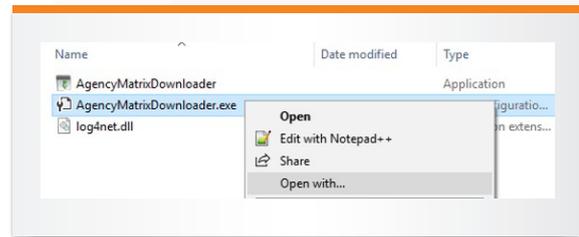


Select the Destination *(The place you want to save it, It may also be in Documents)* and **Click Extract.**

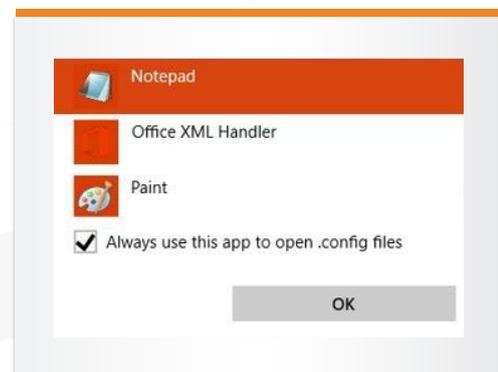
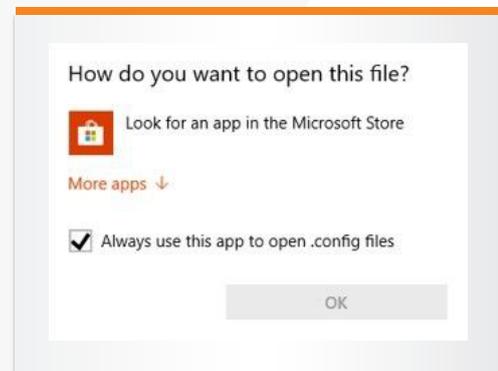


STEP 4 *Opening the files*

Right click on the **AgencyMatrixDownloader.exe** and select to open with... **Select Notepad** and click Ok.



On Windows 10 click **“More apps”** and **Select Notepad.**



SET UP APPLICATION

STEP 5 *Enter your information*

Replace the highlighted values with your information, you will change the data between the quotes "".

```
<!--What agent are you pulling data down for? If you want to do separate files per agent, you can also pass this via the command line
IE.. AgencyMatrixDownloader.exe agent=99999
-->
<add key="agent" value="99999"/>

<!--Do you want to get all policies you have access too? For instance if you have linked stores do you want all the data or just the data for the agent you sent in request.-->
<add key="getall" value="true"/>

<!--What is the user name and password that agent uses to log in?-->
<add key="user" value="99999"/>
<add key="pass" value="NNNNNNN"/>
```

Save and close the file.

STEP 6 *Extra step (You may skip this)*

Do you want to send an email notifications? Need to have access to a **SMTP** server service. If you don't have one, you can use google.

<https://support.google.com/a/answer/2956491?hl=en>

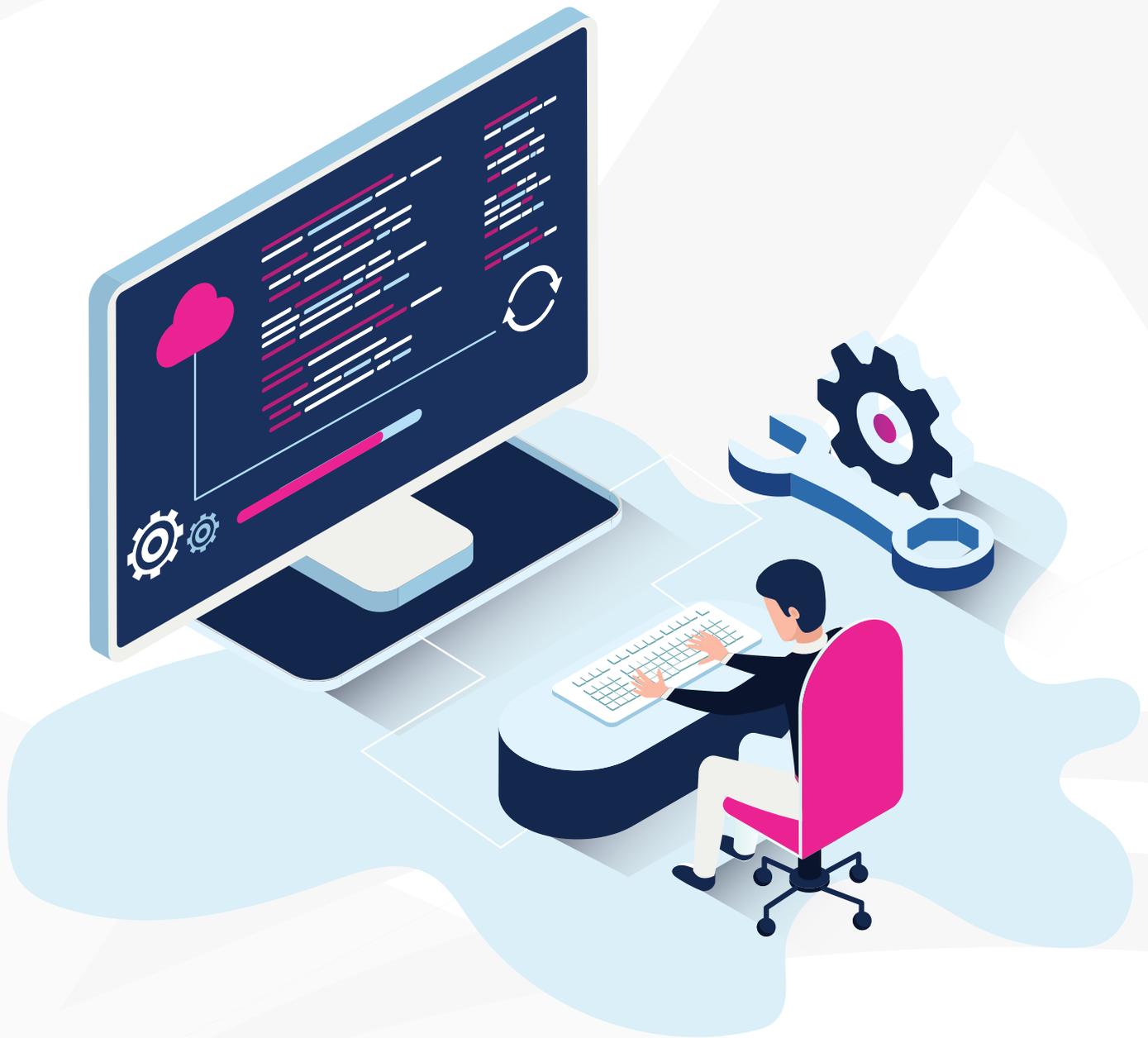
```
<add key="SmtpServer" value="mail.yourSmtp.com"/>
<add key="SmtpPort" value="25"/>
<add key="EmailFrom" value="user@youreemail.com"/>

<!--Do you want to send messages when down load fails? Fill this stuff out.-->
<add key="SendFailEmail" value="false"/>
<add key="FailMailTo" value="user@youreemail.com"/>

<!--Do you want to send messages when down load succeeds? Fill this stuff out.-->
<add key="SendSuccessEmail" value="false"/>
<add key="SuccessMailTo" value="user@youreemail.com"/>
```

Replace these values with your **SMTP server service**. You may **Save and close** the file.

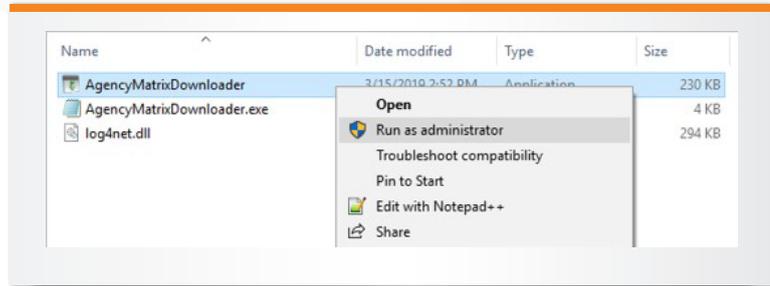
RUN THE APPLICATION



RUN THE APPLICATION

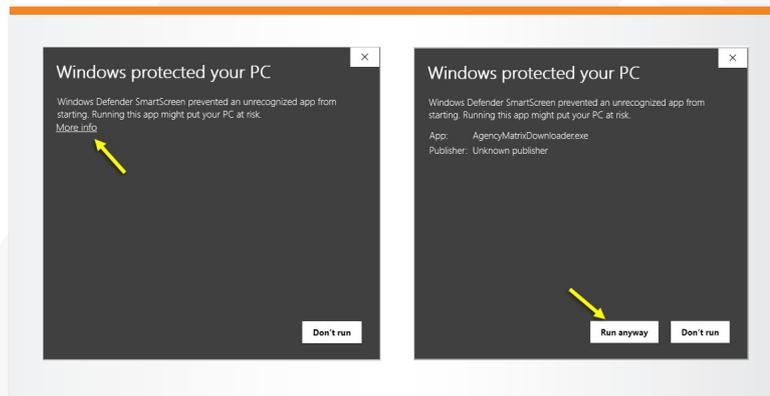
STEP 1 *Running the Application*

To run this Application manually, right click on **Agency Matrix Downloader** and select **Run as Administrator**.



STEP 2 *Flag Application as secure*

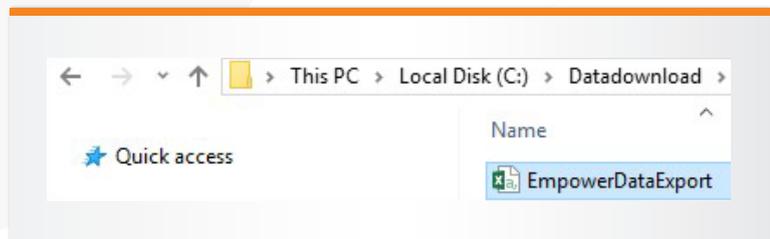
Your Antivirus might prevent this App to run. You just need to flag the Application as **secure** on **Antivirus Settings** - A notification will appear– See example in Win10: **Click More info > Run anyways**.



You may also may contact Support Department if any questions

STEP 3 *Data Location*

Go to your (C): Drive and find the New Folder Created **“Datadownload”** and navigate through it until you see Excel file with today’s data, named **“EmpowerDataExport”**



Path: C:\Datadownload\

The App can either be manually ran every time needed or we can set it on a scheduler, so Windows automatically run it on a daily basis.

SET UP ON A SCHEDULED TASK



SET UP ON A SCHEDULED TASK

STEP 1 *Running the Application*

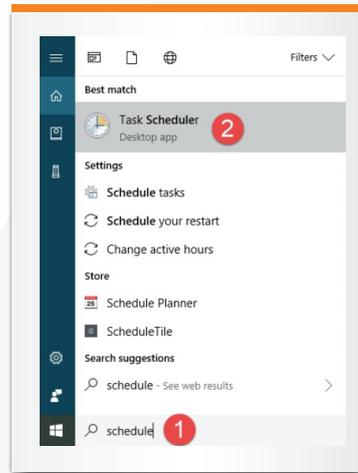
Set up a scheduled task in Windows to run the download process every day.

(<http://www.digitalcitizen.life/how-create-task-basic-task-wizard>)

Type the word **schedule** in the search field on the taskbar.

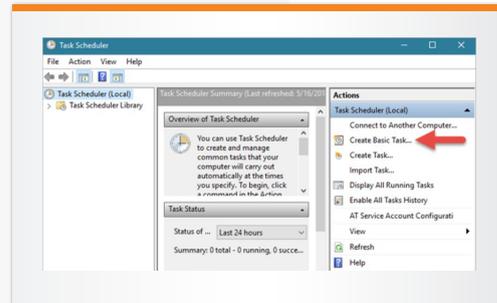
To set up Scheduled Task in Win7:

Go to Control Panel > System and Security > Administrative Tools > Task Scheduler



STEP 2 *Create Basic Task*

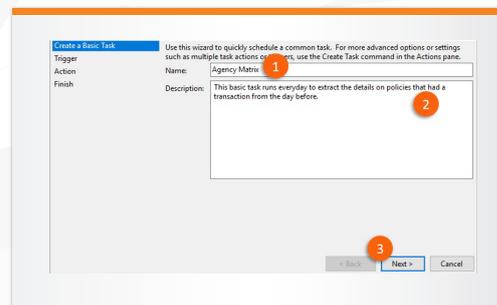
Click the "Create Basic Task" link, to open the wizard.



STEP 3 *Name the Task*

Name the task and give it a description.

1. Name the task as "Agency Matrix".
2. Add a simple description on the functionality of the task.
3. Click next.

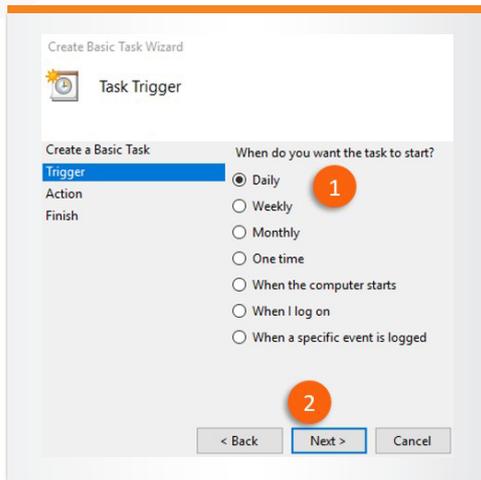


SET UP ON A SCHEDULED TASK

STEP 4 *Set up schedule*

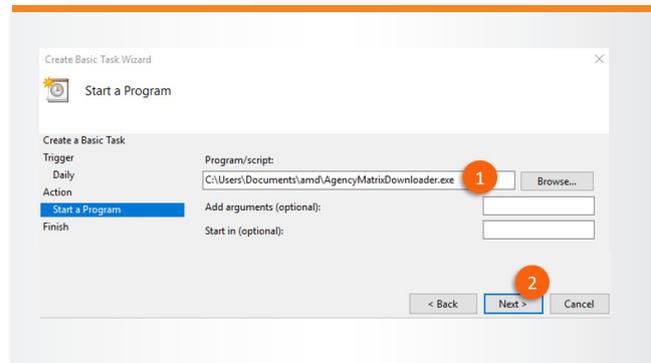
Choose when to execute the new task.

Then select desired Start Date and Time Recur Every: 1 Day and Click Next.



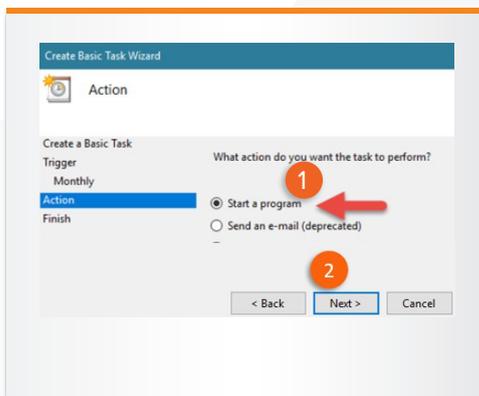
STEP 6 *Select the program*

Click **“Browse”**, select the **MatrixDownloader.exe** to run, and then press Open.



STEP 5 *Set the action*

Set the action that you want executed. Select **“Start a program”** and click next.



STEP 7 *Save the task*

Check the details of the new task and save it by clicking **“Finish”**.

