

# AGENCY MATRIX

- DOWNLOAD SETUP & USER GUIDE •

# **TABLE OF CONTENTS**

| OVERVIEW                         | P. 3  |
|----------------------------------|-------|
| STEP-BY-STEP GUIDE               |       |
| 1. SET UP THE APPLICATION        | P. 4  |
| 2. RUN THE APPLICATION           | P. 8  |
| 3. SET IT UP ON A SCHEDULED TASK | P. 10 |



### **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.





### **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".

| :e: 220 KB<br>om: agents.empowerins.com |  |
|---|--|
| om: agents.empowerins.com               |  |
|   |  |
| → Open                                  |  |
| The file won't be saved automatically.  |  |
| → Save                                  |  |
| → Save as                               |  |

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

| File name:     | amd                        |      |        |
|----------------|----------------------------|------|--------|
| Save as type:  | Compressed (zipped) Folder |      |        |
| ∧ Hide Folders |                            | Save | Cancel |



### **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.** 

| ÷ | Extract Compressed (Zipped) Folders     |
|---|---|
|   | Select a Destination and Extract Files  |
|   | Files will be extracted to this folder: |
|   | C:Documents\amd Browse                  |
|   | Show extracted files when complete      |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   | Extract Cancel                          |
|   |   |
| - |   |
| _ |   |
| _ |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   | ONGOING                                 |
|   |   |
|   |   |

### STEP 4 Opening the files

Right click on the **AgencyMatrixDownload**er.exe and select to open with... **Select Note**pad and click Ok.

| Name                       | Date modified | Type       |
|----------------------------|---------------|------------|
| AgencyMatrixDownloader.exe | _             | iguratio   |
| log4net.dll                | Open          | in extens. |
|                            | Open with     |            |

On Windows 10 click **"More apps"** and **Select Notepad.** 

|            | Look for an app in the Microsoft Store                   |
|------------|--|
| More       | apps 4   |
| ✓ A        | lways use this app to open .config files                 |
|            | OK   |
|            |  |
|            |  |
|            |  |
|            |  |
|            |  |
| 1          | Notepad  |
|            | Office XML Handler                                       |
| 1223       |  |
|            | Print  |
| Ċ          | Paint  |
| <b>(1)</b> | Paint<br>Iways use this app to open .config files        |
| <b>A</b>   | Paint<br>Wways use this app to open .config files<br>OK  |
| <b>A</b>   | Paint<br>Always use this app to open .config files<br>OK |

#### **STEP 5** Enter your information

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

| Wh</th <th>at agent are you pulling data down for? If you want to do separate files per agent, you can also pass this v</th> | at agent are you pulling data down for? If you want to do separate files per agent, you can also pass this v |
|--|--|
| e comn   | nand line  |
| IE Age   | ncyMatrixDownloader.exe agent=99999  |
| >  |  |
| <add ke<="" td=""><td>2y="agent" value="99999"/&gt;</td></add>   | 2y="agent" value="99999"/>   |
| Do</td <td>you want to get all policies you have access too? For instance if you have linked stores do you want all</td>     | you want to get all policies you have access too? For instance if you have linked stores do you want all     |
| the dat  | a or just the data for the agent you sent in request>  |
| <add ke<="" td=""><td>ey="getall" value="true"/&gt;</td></add>   | ey="getall" value="true"/>   |
| Wh</td <td>at is the user name and password that agent uses to log in?&gt;</td>  | at is the user name and password that agent uses to log in?>   |
| <add ke<="" td=""><td>ey="user" value="99999"/&gt;</td></add>  | ey="user" value="99999"/>  |
| <add ke<="" td=""><td>ey="pass" value="NNNNNN"/&gt;</td></add>   | ey="pass" value="NNNNNN"/>   |
|  |  |

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>                    |
|---|
| <add key="SmtpPort" value="25"></add>                                     |
| <add key="EmailFrom" value="user@youremail.com"></add>                    |
| Do you want to send messages when down load fails? Fill this stuff out    |
| <add key="SendFailEmail" value="false"></add>                             |
| <add key="FailMailTo" value="user@youremail.com"></add>                   |
| Do you want to send messages when down load succeeds? Fill this stuff out |
| <add key="SendSuccessEmail" value="false"></add>                          |
| <add key="SuccessMailTo" value="user@youremail.com"></add>                |
|   |

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



# **RUN THE APPLICATION**



Ő,

### **RUN THE APPLICATION**

#### **STEP 1** Running the Application

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

| Name                       | Date modified Type            | Size   |
|----------------------------|-------------------------------|--------|
| E AgencyMatrixDownloader   | 2/15/2010 2-52 DM Application | 230 KB |
| AgencyMatrixDownloader.exe | Open                          | 4 KB   |
| 🗟 log4net.dll              | 😌 Run as administrator        | 294 KB |
|                            | Troubleshoot compatibility    |        |
|                            | Pin to Start                  |        |
|                            | Edit with Notepad++           |        |
|                            | 🖻 Share                       |        |

#### **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.** 

| Windows protected your PC  | Windows protected your PC  |
|--|--|
| Windows Defender SmartScreen prevented an unrecognized app from<br>starting. Running this app might put your PC at risk. | Windows Defender SmartScreen prevented an unrecognized app from<br>starting. Running this app might put your PC at risk. |
| More_info  | App AgencyMatrixDownloaderexe<br>Publisher: Uninown publisher  |
| Den'trun   | Run anywey Don't run   |

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.

| ← → × ↑ 📙 > This PC | > Local Disk (C:) > Datadownload > |
|---------------------|------------------------------------|
| 🖈 Quick access      | Name                               |
|                     | tas inpowerbatackport              |



# **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

|   |                                    | Filters $\lor$ |
|---|------------------------------------|----------------|
| ŵ | Best match                         |                |
| 0 | Desktop app                        |                |
| 8 | Settings                           |                |
|   | Schedule tasks                     |                |
|   | C Schedule your restart            |                |
|   | ${\mathcal C}$ Change active hours |                |
|   | Store                              |                |
|   | Schedule Planner                   |                |
|   | ScheduleTile                       |                |
| 0 | Search suggestions                 |                |
| 2 | 𝒫 schedule - See web results       | >              |
|   |                                    |                |

#### 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 desctription 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.

| Task Trigger        |   |
|---------------------|---|
|                     |   |
| Create a Basic Task | When do you want the task to start?                 |
| Ingger              | Daily   |
| Finish              | O Weekly  |
|                     | Monthly   |
|                     | One time  |
|                     | O When the computer starts                          |
|                     | O When I log on                                     |
|                     | <ul> <li>When a specific event is logged</li> </ul> |
|                     | < Back Next > Cancel                                |

### STEP 6 Select the program

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

| Start a Progra                 | m   |   |
|--------------------------------|---|---|
| Create a Basic Task<br>Trigger | Program/script:                                   |   |
| Daily                          | C:\Users\Documents\amd\AgencyMatrixDownloader.exe |   |
| Start a Program                | Add arguments (optional):                         | ] |
| Finish                         | Start in (optional):                              | ] |
|                                | < Back Next > Cance                               | ł |
|                                |   |   |

### STEP 5 Set the action

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

| Action                                    |   |
|---|---|
| Create a Basic Task<br>Trigger<br>Monthly | What action do you want the task to perform?    |
| Action<br>Finish                          | Start a program     Send an e-mail (deprecated) |
|   | 2   |
|   | < Back Next > Cancel                            |

### STEP 7 Save the task

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

| Create Basic Task Wizard                                |                       |   |
|---|-----------------------|---|
| Create a Basic Task                                     |                       | Auron Matin   |
| Trigger<br>Daily<br>Action<br>Start a Program<br>Finish | Name:<br>Description: | Agency Matrix This basic task runs everyday to extract the details on policies that had a transaction from the day before.                            |
|   |                       |   |
|   | Trigger:              | Daily; At 8:00 AM every day   |
|   | Trigger:<br>Action:   | Daily; At 8:00 AM every day<br>Start a program; C\User\Document\amd\AgencyMatrixDownloader.exe<br>Properties dialog for this task when I click Finish |



