E-AGENT INTEGRATION INSTRUCTION SETUP

Please Note: the following steps must be completed for each user.

1. Add the E-Agent website address into your DYL Account :

    a. Click the <u>Settings</u> tab and then click <u>Phone Numbers</u> (admin settings)

        I. For User Accounts, log in as agent and access Settings page.

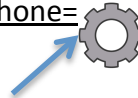   b. Scroll down to **Webpage Launcher** and click on <u>Edit Launch URL</u>

Webpage Launcher:

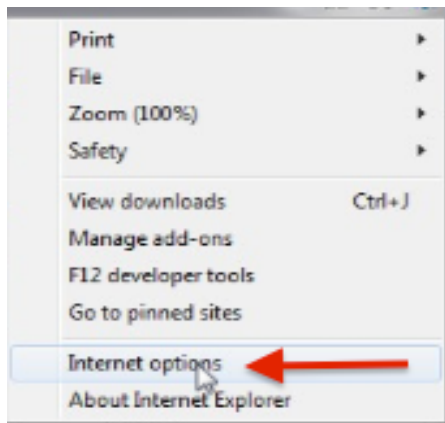Open URL when an inbound phone call is answered.

Launch URL:	

(Update) | **Cancel**

Copy & paste in this link:

<u>https://eagent1.allstate.com/account/login.aspx?phone=</u> ⚙ hone_number%%

2. Edit Browser Settings to allow for E-Agent pop ups

    a. Access **Settings** by clicking on the <u>Cog Symbol</u> on the top right of Internet Explorer (if unable to locate symbol, press Alt + X)

    b. Click <u>Internet Options</u>:

Print	▶
File	▶
Zoom (100%)	▶
Safety	▶
View downloads	Ctrl+J
Manage add-ons	
F12 developer tools	
Go to pinned sites	
Internet options	←
About Internet Explorer	

E-AGENT INTEGRATION INSTRUCTION SETUP

Please Note: the following steps must be completed for each user.
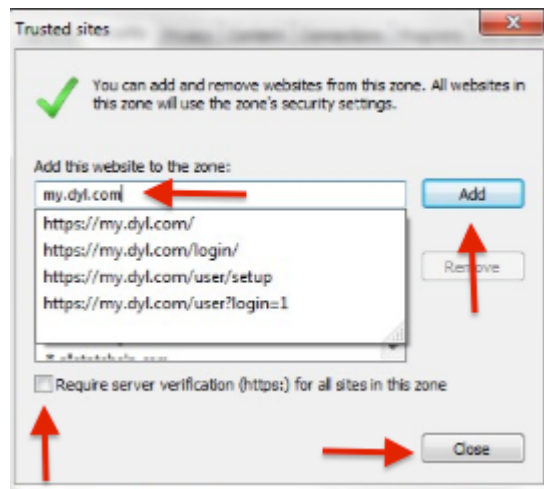
c. Select the Security tab

d. Remove the checkmark on the bottom next to: Enable Protected Mode

e. Click on Sites
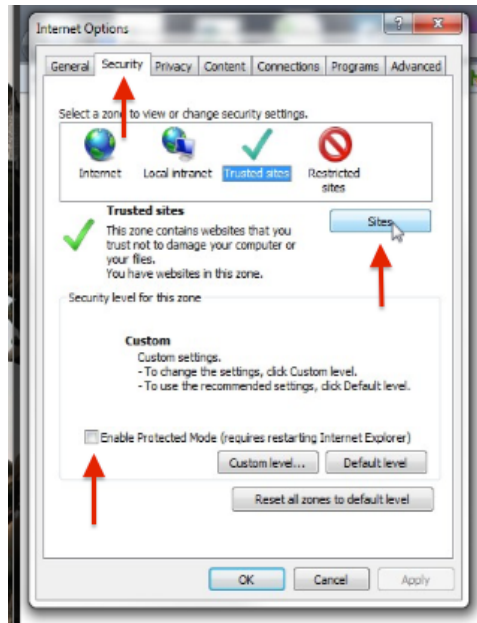
f. Type in www.*my.dyl.com*, remove the checkmark next to Require server verification, and click Add to save then Close to exit.
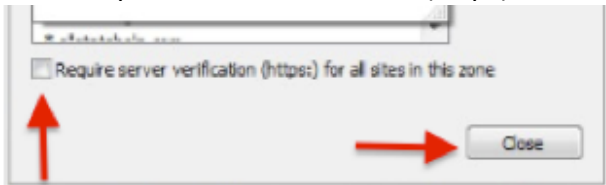
E-AGENT INTEGRATION INSTRUCTION SETUP

Please Note: the following steps must be completed for each user.

g. Update **Pop Up Blocker** by clicking <u>Tools</u> and then clicking <u>Compatibility View Settings</u>:

Uncheck "Require server verification (https) for all sites in this zone

Close ALL Internet Explorer windows to reset new configuration changes.

Open new internet explorer window, log into DYL and into E-Agent

Perform test inbound call. After call is answered, E-Agent should automatically pop up and pull information based off of caller ID.
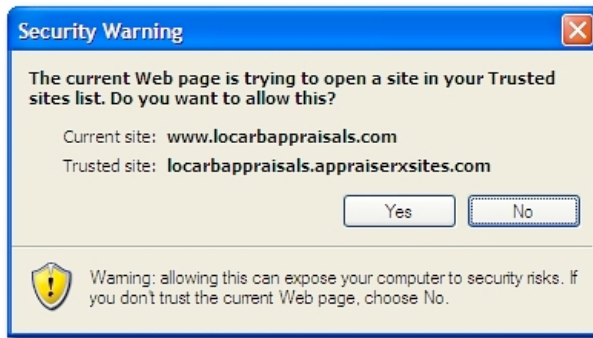
E-AGENT NOT WORKING?

Follow The Tips Below

Q:E-AGENT NOT POPPING UP?

A: Make sure you're logged into DYL & E-Agent in the same web browser.
A: A call must be answered in order for the pop-up to occur.
A: Make sure you disable your pop-up blocker or add www.*my.dyl.com* to your safe list.

Q: I RECEIVED A SECURITY WARNING POP-UP?

By default, Internet Explorer prompts you about opening sites in your Trusted Sites list as a precautionary measure. While this can be beneficial for when unfamiliar sites find their way into the list, it can become more of a nuisance when you manually add familiar sites to your Trusted Sites list to permit them appropriate access to the Internet.
If you're receiving a Security Warning such as the one below when accessing your XSite, you may need to adjust Internet Explorer's *Trusted Sites* setting.

With Internet Explorer open, click Tools, then Internet Options.
Now, click the Security tab, followed by the Trusted Sites icon.
Click Custom Level at the bottom of the window to access the advanced options for your Trusted Sites list.
Scroll down to Web sites in less privileged web content zones can navigate into this zone. By default, this option is set to Prompt – change it to Enable.

E-AGENT NOT WORKING?

Please Note: the following steps must be completed for each user.
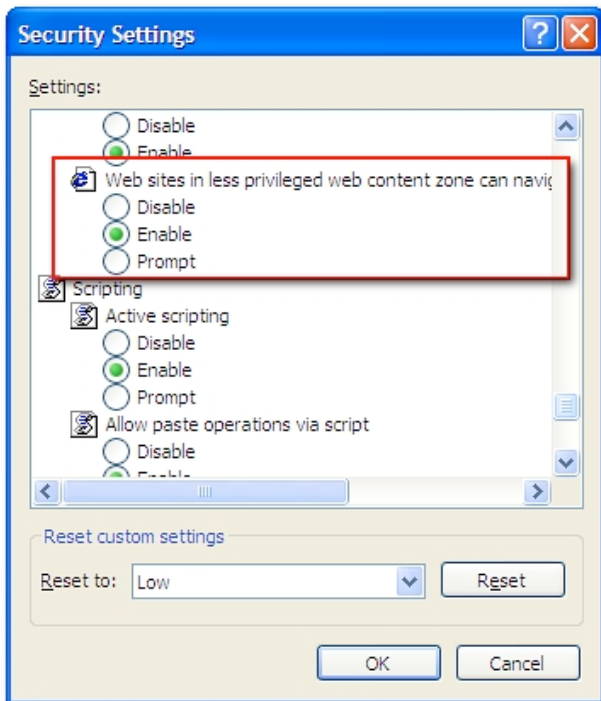
 Click OK at the bottom of the window, then click Yes when a warning prompts you about whether you want to change this option.
    Finally, click OK on the Internet Options window to save your settings.

That's it! You will no longer be prompted to permit opening your XSite whenever you access it in the future.