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AutoAccepter 2.0

Installation Guide

AutoAccepter 2.0 Installation Procedures

Welcome, and thank you for downloading the Auto-Accepter 2.0! When you complete the following steps, you'll have a fully-functional version of the BPO Automation Group AutoAccepter 2.0, ready to work 24x7 as a virtual assistant to help grow your BPO business!

Pre-Installation Checklist:

- ✓ We recommend installing this software on a dedicated machine used solely for automated acceptance.
- ✓ The A2 requires a high-speed (cable or DSL) connection, one gigabyte+ of RAM, and Windows XP, Vista, or 7.

General Points to Consider:

1. The A2 currently accepts any available orders shown in your online BPO provider account.

2. The A2 does not currently track accepted orders, but that feature is coming soon!

3. The A2 limits you to 5 tasks at a time. More are available to clients.

Simple 3-Step Installation Process

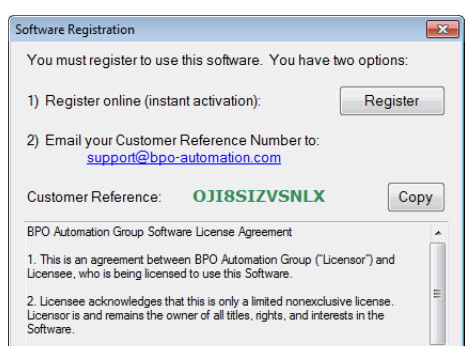
1 **Install iMacros:** Install the trial-version of iMacros 6.8:
http://www.iopus.com/download/imacros-setup.exe

2 **Install AutoAccepter 2.0:**
http://www.bpo-automation.com/software/customer/autoaccepter2/
→ *(Download not working? Try clicking here)*

3 **Register Online:** Launch the Auto-Accepter from the Windows Start Menu
Start → All Programs → BPO Automation Group → AutoAccepter 2.

When the application starts, click the "Register" button and enter your customer information to activate your new software.

After activation, you'll be prompted to begin creating order-acceptance tasks, which is outlined below as well as in our online knowledgebase.

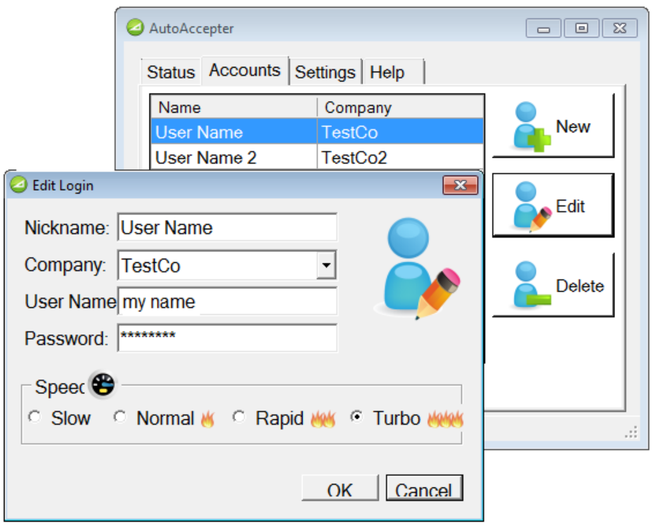


Getting Started

The AutoAccepter 2.0 gives you the freedom to select accounts to monitor from a comprehensive library of BPO companies. This tool is initially limited to 5 tasks at a time, which can be any mixture of users or companies – for instance, you can setup five users for one BPO company, five BPO companies for a single user, or any mixture of users & companies.

Use the instructions below to create & manage order-acceptance tasks, and additional task management instructions are available in our online knowledgebase.

Creating Order-Acceptance Tasks:



1. **Create a New Task:** In the "Accounts" tab of the Auto-Accepter window, click the button labeled 'New' to create a new account.

2. **Enter Account Info:** Give your new account a descriptive 'Nickname', select a BPO Company, and enter the 'User Name' and 'Password' that you normally use to login to that company with online.

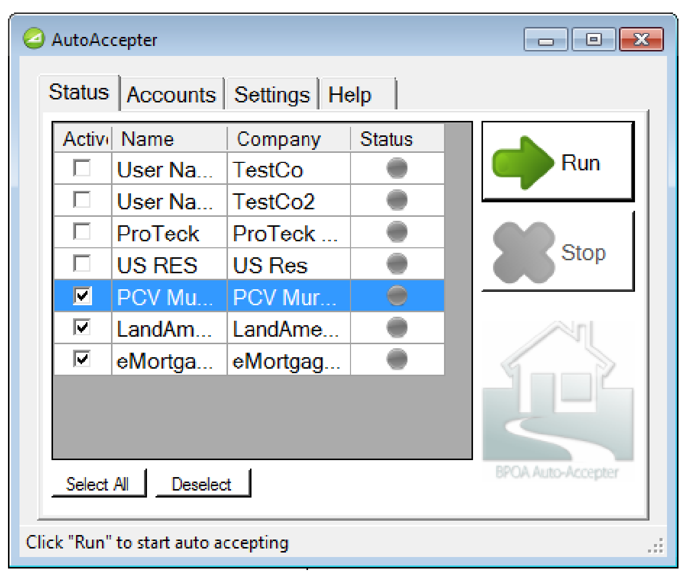
3. **Select a Speed:** You should probably leave this set at 'Normal' unless your market is competitive. Click 'OK' and you're ready to go!

Initiating Order Acceptance:

4. **Select Accounts:** In the "Status" tab of the Auto-Accepter window, check the boxes of all accounts you wish to begin checking.

5. **Run The AutoAccepter:** After you've selected accounts, click the 'Run' button to begin accepting orders. If you want to add more accounts, make sure to click 'Stop' before trying to create or launch additional auto-accept tasks.

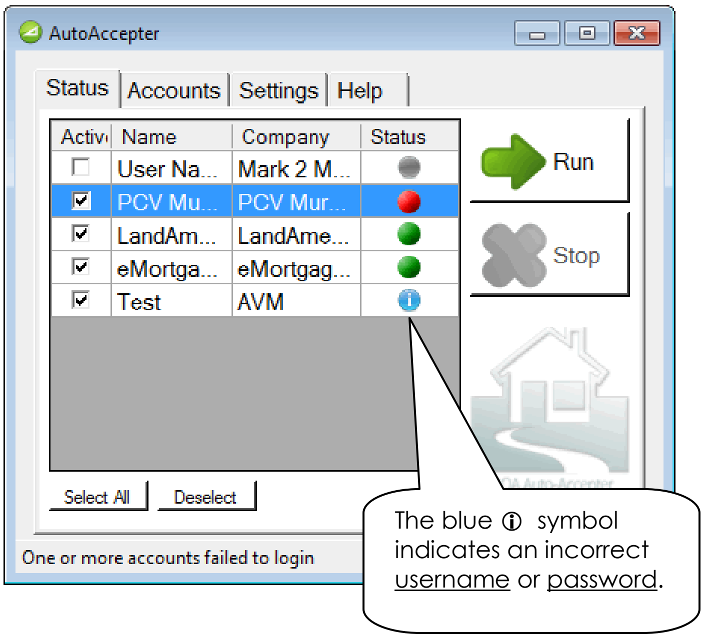
6. **Wrapping Up:** That's it! You're all set, but remember to keep an eye on your email for new orders.



Task Status Indicators & Settings

The AutoAccepter 2.0 contains a complex set of features that work behind the scenes to effectively accept orders from your BPO providers. The beta-version does <u>not</u> provide notification when an order is accepted, and agents are urged to periodically check their accounts for new orders. The indicators & settings below help users to ensure that the application is functioning properly and that account usernames & passwords are entered correctly.

Task Status Indicators:



The status of each order-acceptance task is indicated by a colored indicator light shown next to the task name:

Green: This indicates that the task is actively running & checking for orders.

Blue: The ⓘ symbol is an information indicator & indicates an incorrect account <u>username</u> or <u>password</u>.

Gray: This indicates that the task is currently not running.

Red: Indicates a critical application error & may require technical support.

Note: The AutoAccepter 2.0 is able to recognize login failures from incorrect usernames & passwords, and will not continue to run each task after a failed attempt until you enter the correct info.

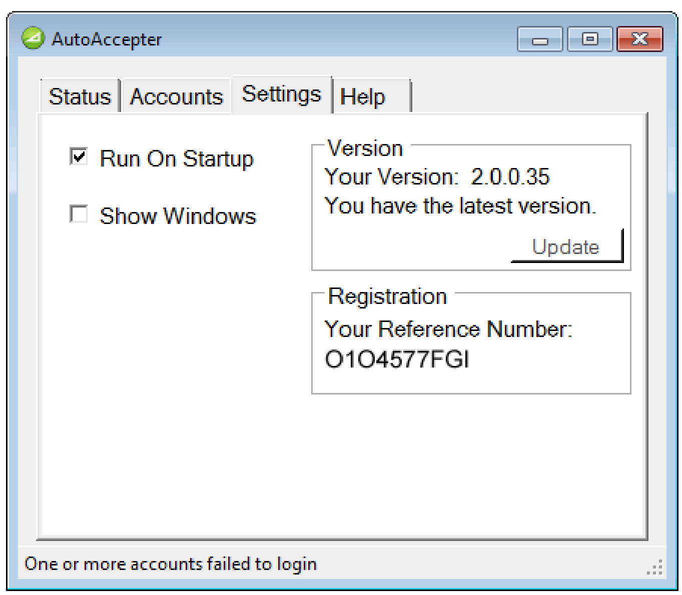
General Application Settings:

The "Settings" tab of the AutoAccepter 2.0 contains configuration options to facilitate testing & application setup:

Run on Startup: Checking this box will automatically load the application when the computer boots, which is recommended for standalone installations.

Show Windows: Checking this box makes the order-acceptance tasks visible, and is used for testing.

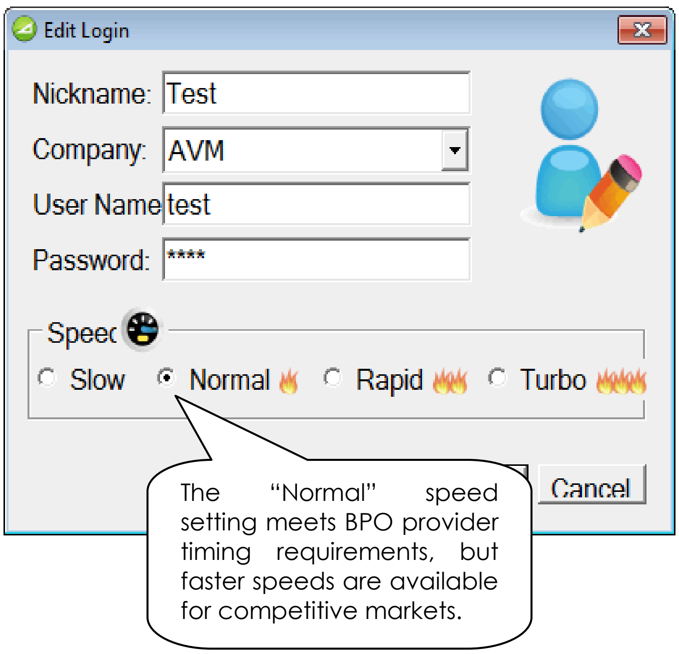
Update Button: This button checks for new updates to the application software & automatically installs them.



Timing & Bandwidth

Due to limitations in network bandwidth, several top BPO providers have provided timing schedules for automated order-acceptance applications, and may dismiss agents who check more frequently than requested. Thus, the AutoAccepter 2.0 has taken these requests into account with the "Normal" setting, but also allows agents to check more frequently (at their own risk) should the demand arise in highly-competitive BPO markets.

Task Timing Options:



Each task contains 4 speed settings that determine how frequently the application will check for orders.

Slow: Checks less frequently, typically every few minutes.

Normal: Designed to meet the requests of BPO providers (when available).

Rapid: Tasks run more frequently, typically twice per minute.

Turbo: Tasks run as frequently as possible, typically every 5 to 10 seconds, depending on provider.

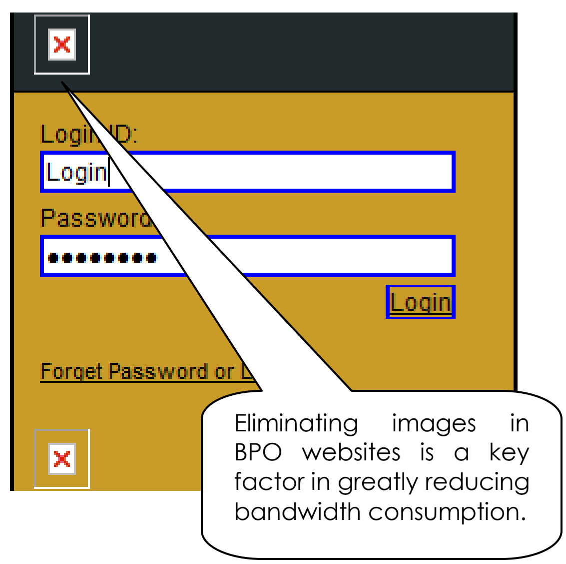
Note: Some providers, such as Mark 2 Market & eMortgage Logic, have indicated that they do not approve of automated order-acceptance and will dismiss agents using it on their systems.

Bandwidth Utilization:

The AutoAccepter 2.0 has been designed from the ground-up to maximize available bandwidth and reduce network congestion both for the user as well as BPO providers they work with.

By suppressing web-page images & several other proprietary technologies, the AutoAccepter 2.0 uses less bandwidth than manually checking a BPO website for orders by the average human being.

Even so, because of the load it places on client machines, it is recommended that the AutoAccepter by run by itself on a low-usage machine to avoid user inconvenience.



Sales & Technical Support

The BPO Automation prompts itself on being a leader in both technology and customer support, and we have both sales & support professionals in place to help get you the maximum benefit from adding automation to your growing BPO business.

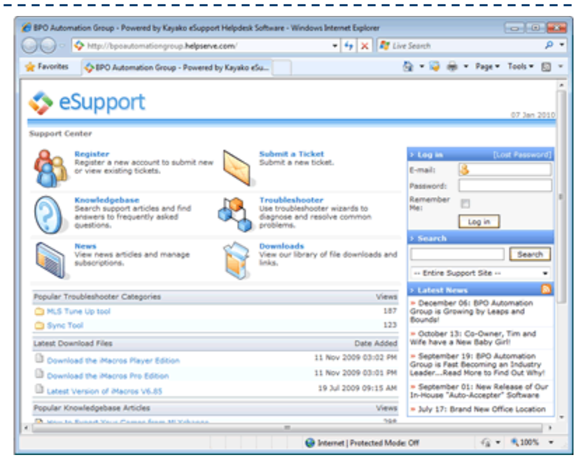
Purchase Information:

If you've downloaded the BPO AutoAccepter 2.0 on a free trial-basis and you're having a good experience with it, then check out our product catalog for pricing & purchase details.

If you've taken a look at the product catalog and still have questions, or you just want to talk to a person, then give us a call at (360) 223-2482 to speak with a sales representative about purchase & licensing options, or email us at: info@bpo-automation.com.

Technical Support:

Having trouble? Check out our free online knowledgebase and application help files, and if you're a client, consider submitting a trouble ticket. Live, personal support is also available via remote-desktop for a nominal fee of $59.99 per issue (contact support@bpo-automation.com to schedule a priority-support request).



Online Knowledgebase: Tips, tricks, and instructions for the AutoAccepter 2.0 are available in the BPO Automation Group's free online knowledgebase

AutoAccepter Help: The 'Help' tab in the AutoAccepter 2.0 application contains detailed setup & installation instructions as well as a quick-start user guide.

How to Submit a Trouble Ticket: If you are a paying client and you're having trouble with the AutoAccepter 2.0 application, then consider registering at our tech support portal, reviewing our detailed troubleshooting materials to see if there's an easy fix for your issue. If you're still having trouble, submit a ticket for expert assistance by our support staff