Preference Center FAQ

Managing Customer Communication Preferences

Preference Center Application FAQ

I. What is the Preference Center?
The Preference Center is a designated space where customers, and those acting on behalf of customers, can validate how the customer would like to be communicated with through the management of various communications preferences. The Preference Center also makes visible pertinent contact information such as "primary" email address and mobile phone number. It is important to remember that these are customer preferences and should only be changed or modified when specifically requested by the customer.

II. Who can access the Preference Center?
Agencies, the CCC and customers are able to access the Preference Center. However, the functionality available in the Preference Center is more robust for CCC and Agents.

III. How can the Preference Center be accessed?
Agencies can access the Preference Center via the Manage Preferences link found in Gateway Household View and on the Gateway Edit Customer Information screen. Agencies currently do not have the ability to access the Preference Center via eAgent.

The Customer Care Center (CCC) can access the Preference Center via the Manage Preferences link found in 1View Household View and on the 1View Edit Customer Information screen, and via the Customer Support Tool (CST), and via Microsoft CRM.

Customers may access the Preference Center from preference enabled email communications. Additionally, customers can manage their communication preferences via My Account and their mobile app.

IV. What type of changes can be made in the Preference Center?
Agencies and the CCC have the ability to:

- Manage the Customer's existing email and text communication preference information (Payment Confirmation vs. Allstate Updates, etc.).
- Manage the customer's 'Primary' Email Address and Mobile Phone Number used for email and text communications (as well as other email communications from Allstate such as Drivewise and ACES).
- View email and text samples for each of the preference types listed within the Preference Center.
- Enroll into ePolicy and eBill when available.
- Promote Allstate Apps &Tools.
- Remove customers from the Do Not Email list.

Customers have the ability to:

- Manage existing email and text communication preference information

(Payment Confirmation vs. Allstate Updates, etc.).

- Manage their 'Primary' Email Address and Mobile Phone Number used for email and text communications (as well as other email communications from Allstate such as Drivewise and ACES).
- View email and text samples for each of the preference types listed within the Preference Center.
- Unsubscribe from receiving email communications from Allstate via the Unsubscribe link found in the footer of preference enabled email communications.

V. Which communication preferences are managed in the Preference Center?
Agencies, the CCC and customers can manage communication preferences for the following modes of communication:

- **Payment Confirmations:** Confirmation that their payment was made (email or text).
- **Late Bill Payment Notifications:** Notification when they have a bill that is upcoming or past due (email or text).
- **New Policy Communications:** Important details about their new policy, including features and benefits (email).
- **Pre-Renewal Notifications:** Notification before their policy renews (email).
- **Policy Notifications:** Notification when updated policy documentation is available online (email).
- **eNewsletter:** Helpful articles and tips about saving money and protecting what matters most to them (email).
- **Product Offers & Discounts:** Information about products and services to help them stay protected and save money (email).
- **Announcements:** Notification when new Allstate services or features are available in their account (email).
- **Personal Greetings:** Special-occasion messages including birthday, holiday and thank you communications (email).

If the customer is enrolled in the automatic payment program, they may also opt in to receive:

- **Easy Pay Payment Reminders:** Notification about upcoming payments from their bank account (email or text).
- **Recurring Credit Card Payment Reminders:** Notification about upcoming automatic credit card payments (email or text).
- **Recurring Credit Card Payment Expiration Date Reminders:** Notification when their credit card is about to expire (email or text).

VI. How can I edit customer contact information?
To change a customer's Mobile Phone Number:

1. Select the “Edit” link next to the customer’s mobile phone number in the Contact Information section within the Notifications tab.
2. Enter the customer’s updated mobile phone number in the input box, and hit the return key.
3. Select the “Cancel” link to abandon changes. **Select the “Save” button** on the bottom right of the Notifications tab to confirm changes.

If a phone number is updated and the customer is in a pending enrollment status then the user will need to reply Y from their mobile device to confirm this enrollment. The text preferences cannot be further edited until this enrollment has been confirmed or 24 hours has elapsed. After 24 hours their preferences will be returned to its original state.

To change a customer’s “Primary” Email Address:

1. Select the “Edit” link next to the customer’s “Primary” Email Address under the Contact Information section within the Notifications tab.
2. Enter the customer’s updated “Primary” Email Address into the input box, and hit the return key.
3. Select the “Cancel” link to abandon changes. Select the “Save” button on the bottom right of the Notifications tab to confirm changes.

Customers can also follow the steps above to edit their contact information in the customer view.

VII. Are contact information changes made in the Preference Center reflected in other Allstate applications?

Yes, when the customer’s “Primary” Email Address is changed in the Preference Center the change will be reflected in other agency/CCC applications (i.e. Gateway HHV, Alliance, 1View, etc.). Changes made to the “Primary” Email Address in the Preference Center will not be updated in eAgent at this time.

When the eBill and/or ePolicy email address is changed in the Preference Center, that change will be reflected in the following; Gateway HHV, 1View, and CST. IPS will show eBill changes as well. Alliance will only display the enrollment status (enrolled vs. not enrolled).

VIII. Will changes in the customer view of the Preference Center be reflected in my view, and vice-versa?

Yes, changes made in the customer view of the Preference Center will be reflected in the agency/CCC view of the Preference Center in real time, and vice-versa. Changes made in either version of the Preference Center will also be reflected in My Account and on their mobile device, and vice-versa.

IX. How can I enroll the customer in text message communications?
To enroll the customer in text message notifications for the first time, select the corresponding checkboxes for the specific preferences and communication type(s) that the customer would like to receive text notifications for.

1. Select the “Save” button on the bottom right of the Notifications tab to confirm changes.
2. A window will appear asking you to confirm text preferences and confirm a mobile phone number.
3. Confirm if the preferences listed are correct and enter a mobile phone number.
4. Terms and Conditions **MUST** be read to the customer, then select the “Submit” button. Select the “Cancel” link to go back and edit your preferences.

The customer must then respond “Y” or “Yes” to an enrollment text message within a 24 hour period to confirm their enrollment.

Once enrolled, customers and those acting on behalf of customers can make changes to text preferences within the Billing and Payments section within the Notifications tab without going back through the text enrollment process. They can simply make changes by selecting or deselecting the desired communication types and selecting “Save” at the bottom of the Notifications tab to confirm changes.

X. What happens if the customer does not respond to the text message enrollment request?
If the customer does not respond with texting “Y” or “Yes” to their enrollment text message within 24 hours, the customer (or someone acting on behalf of the customer) must re-submit their request via the Preference Center application.

XI. How can I manage preferences for multiple Household members?
You can manage the preferences of multiple members of a household by selecting the household member’s name listed in the Household Members section on the right side of the Preference Center homepage. By selecting the name link, you will be directed to that member’s Preference Center.

XII. Will transactions that take place in the Preference Center be recorded?
Yes, the following transactions will be recorded to Relationship History in Gateway Household View and Household Activity in 1View as they take place:

- Text Enrollment Requests
- Text Enrollment Confirmations (customer responds texting “Y” or “Yes” to enroll)
- Communication Preference Changes (email or text)
- Mobile Phone Number Changes
- Payment Confirmation Sent (email or text)
- Easy Pay Payment Reminder Sent (email or text)

- Recurring Credit Card Payment Reminder Sent (email or text)
- Recurring Credit Card Payment Expiration Date Reminder Sent (email or text)
- Late Bill Payment Notification Sent (email or text)
- Promotional Apps & Tools Email Sent
- eBill Enrollment Requests
- ePolicy Enrollment Requests

XIII. How can I enroll all policies in ePolicy?
Depending on the current enrollment status of the profile owner's existing policies, you may or may not be able to enroll the eligible policies in ePolicy.

When the customer has at least one policy enrolled in ePolicy, and/or has accepted the consolidated terms & conditions within My Account, you can then enroll all eligible policies in ePolicy in the Preference Center. You can also complete enrollment on a policy that was previously marked as “intent established.”
If the customer has not previously enrolled a policy and/or accepted the consolidated terms & conditions within My Account, you can send them an email via the Preference Center which will direct them to My Account to complete enrollment on all eligible policies.

XIV. How can I enroll all policies in eBill?
If the customer has accepted the consolidated terms and conditions within My Account, the agent will be able to enroll policies on the customer’s behalf.

Even if the customer has previously enrolled a policy, they will not be able to enroll in eBill unless the terms and conditions have been accepted. If the customer has not accepted the terms and conditions, you can send an email via the Preference Center directing them to accept the terms and conditions in My Account.

XV. How do the terms and conditions effect enrollments?
If the customer has accepted the terms and conditions for ePolicy, they can enroll in ePolicy. If the customer has accepted the universal terms and conditions, they can enroll in any enrollment. If the customer has not agreed to any terms and conditions, they will need to agree to the terms and conditions located in My Account or to the universal terms and conditions to enroll.

XVI. Where do I go for support if I experience problems with the Preference Center?
Contact the ATSC at: 800.336.9400.

XVII. Where do customers go for support if they experience problems with the Preference Center?
Customers will be directed to call their agent, or call 800.255.7828.