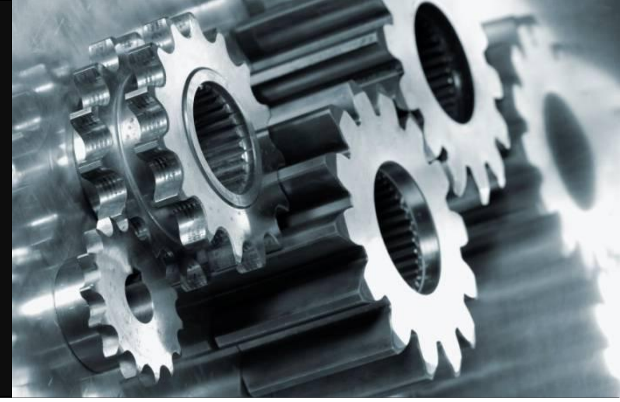
Agency Integrator

Agency Integrator TECHNOTE

CRM Opportunity Matching

March 2014



This TechNote highlights a new feature added to Applications module in Agency Integrator available after **March 27, 2014.** This feature is specifically for agencies that use **iPipeline CRM** to track sales opportunities.

Contents

Purpose

The purpose of this feature is to reduce duplicate records in Agency Integrator and CRM. It matches sales **Opportunities** entered by sales managers in CRM with new Applications that are being entered by Agency Integrator (AI) users, allowing the information already entered in CRM to be passed directly into AI. This reduces data entry and duplicate effort among users, and keeps both systems and reports clear of confusing duplicate Opportunities and Cases.

CRM Opportunity Matching

A **CRM Opportunity** will be "matched" with an AI Application if:

1. The Opportunity exists in CRM, is in an **Open** status, and has not already been synced with an Application in AI
   AND
2. The Opportunity has the same **Proposed Insured First Name** and **Proposed Insured Last Name** as the Application in AI
   OR

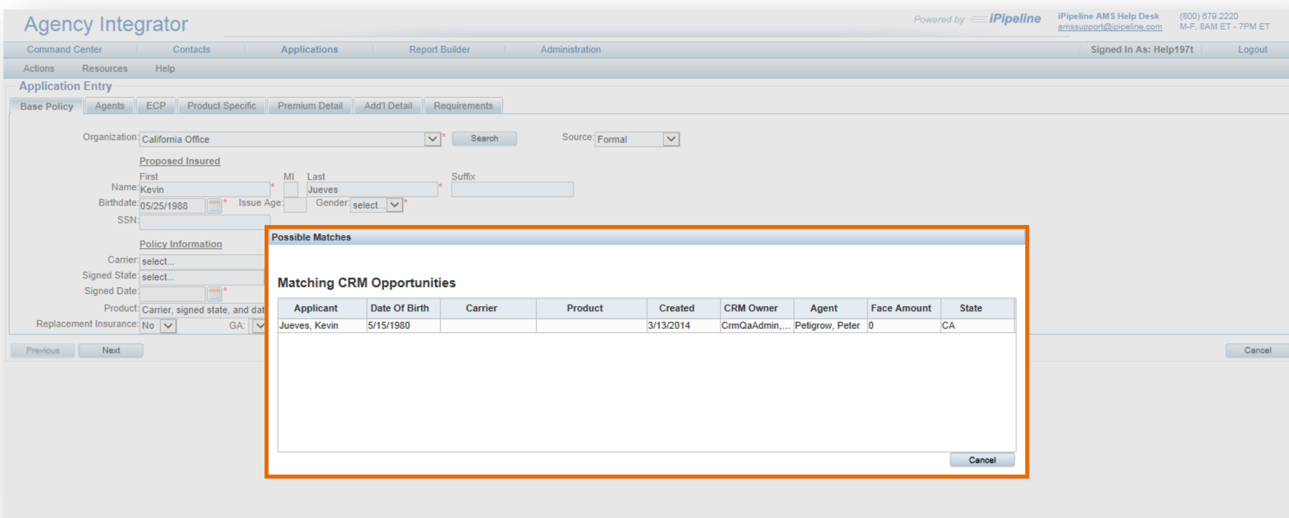
3. The Opportunity has the same **Proposed Insured Last Name** and **Proposed Insured Date of Birth** as the Application in AI

This means that if the CRM Opportunity didn't have the Proposed Insured's Date of Birth (it is not required in CRM), it could still be matched to an AI Application by First and Last Name.

AI Application Entry

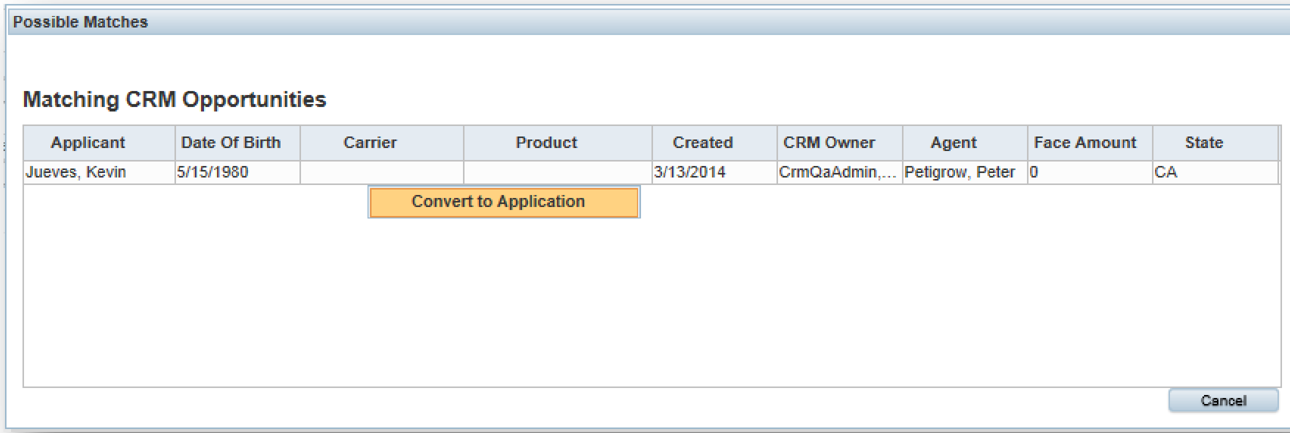
In Agency Integrator, click the **New Application** button to begin entering a new application per the usual process. In the **Application Entry Wizard**, enter the first few fields: Organization, First Name, Middle Initial, Last Name, and Date of Birth. Once you tab away from the Date of Birth field, the system will search for any matching cases inside of Agency Integrator, as well as any matching Opportunities in CRM.

If there is a match based on the criteria mentioned above, a modal window will appear displaying the matches:

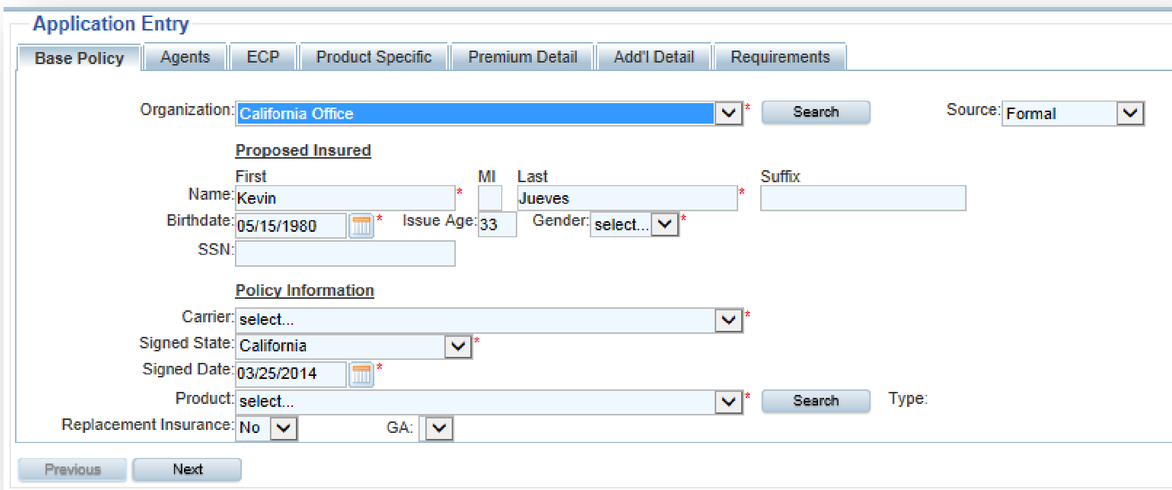


Converting a CRM Opportunity to an AI Application

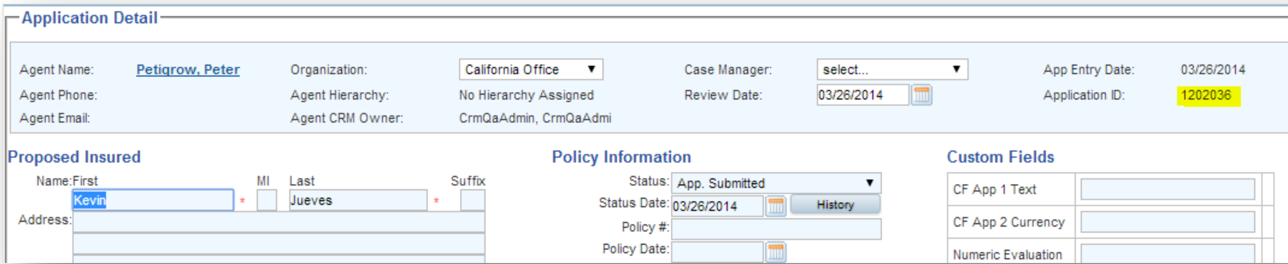
All matches are displayed in the Possible Matches window. The **Carrier**, **Product**, **Created Date**, **CRM Owner** of the Agent, **Agent Name**, **Face Amount**, and **State** are displayed in the grid (if these fields were populated on the Opportunity in CRM) to help you determine if the possible match should be used. To transfer the information from CRM into the new Application, right click on the desired opportunity and select **Convert to Application**:



You can now continue through the Application Wizard as normal, but you will notice that some fields have already been completed for you, containing the values from the CRM Opportunity.



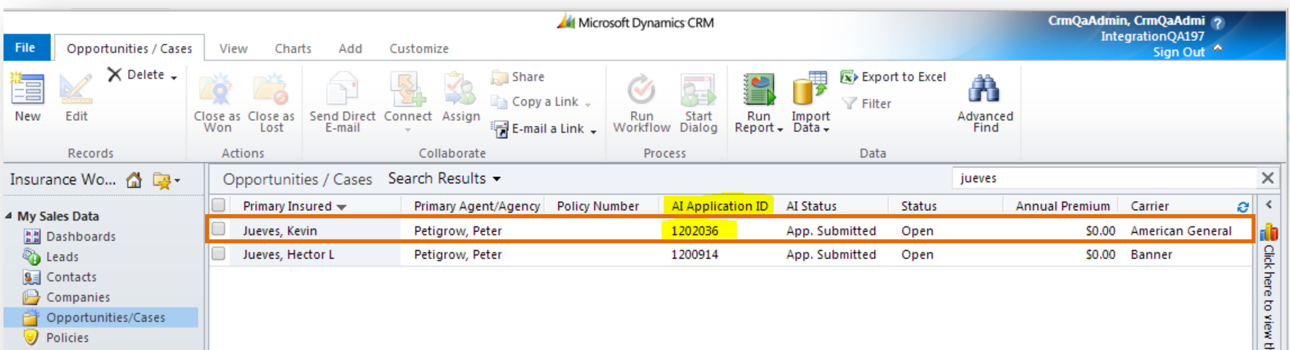
Make sure to complete all other desired fields and information if it was not already added to the CRM Opportunity, and click Finish to save the application. An Application ID number is assigned to the case at that time:



Once you click **OK** to save the finished case, the matched Application will sync back to the matching CRM Opportunity.

Verifying the Match

To verify that the AI Application has been successfully matched and synced, go to the **Opportunities/Cases** module in CRM and search for the insured's name. In the screen shot below, you can see our sample Opportunity for Kevin Jueves has an AI Application ID number that matches the one above, verifying that the two have matched and synced successfully:



Going forward, the two will sync back and forth as other synced Applications and Opportunities do today.

List of Fields From CRM to AI

It's unlikely that a majority of the fields below would be populated by a CRM user before the AI user receives the application and enters it into AI. However, if there is information in the fields below in CRM, it will transfer to the AI Application when the Opportunity is matched:

Required AI Application fields like: Signed State, Signed Date, Carrier, Product, Face Amount, and Gender

Primary Insured fields like: First Name, Middle Initial, Last Name, Suffix, Date of Birth, Tax ID, Issue Age, Address, Phone Numbers, Email Address, Tobacco, and Class

Premium fields like: Modal Premium, Annual Premium, Excess Premium, Base Premium, Target Premium, Dump In / Lump Sum, and 1035 Exchange

Policy specific fields like: Hierarchy, Policy Number, Policy Date, Owner, Primary Beneficiary and Relationship, Contingent Beneficiary and Relationship

Additional Insured fields like: Name, Date of Birth, Gender, Issue Age, Tax ID, Class, Tobacco and Face Amount

Product Specific Fields for Life, Annuities, LTC, Disability, etc.