Agency Integrator

This TechNote highlights the new Memo Reply feature added to the **Preference Administration** and **Memo Trigger Administration** modules of Agency Integrator, available after November 16, 2013.

Introduction

Currently, when an agent (or other recipient) replies to a Memo emailed from Agency Integrator, the response is sent to the Memo sender's email account. If you wish to have that reply added to Agency Integrator, you would need to copy and paste the text into a **Comment** and save it in the system.

Enabling the new **Memo Reply System Preference** in your environment will enable those responses to be automatically added as **Comments** and **Tasks** on the User's **Command Center**, rather than the user manually adding a Comment. The preference can also enable a system-generated email

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notification to the Case Manager or User that a Memo reply was received, in addition to a Task being added to the Command Center.

There is also a second **System Preference** called **Memo Reply User** which will be used to help the system determine who the replies should be directed to.

If you would not like to make any changes to the way Memo replies are currently received, simply do not enable these two new System Preferences.

Enabling the Memo Reply System Preferences

Once the proper **User Rights** have been assigned, click on **Administration** on the top menu bar. Then, hover over **System** on the sub- menu bar and click **Preferences:**
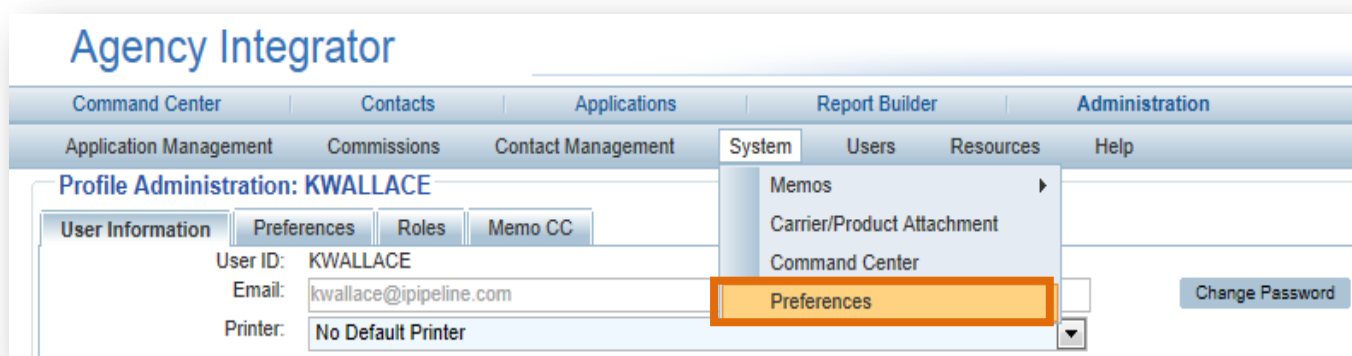
The **System Preferences** screen will appear, displaying two new Preferences: **Memo Reply** and **Memo Reply User**.

Memo Reply Preference

To enable the Memo Reply Preference, make a selection of either **CCNOTIFICATION** or **COMMAND CENTER:**

System Preferences

Preference ⇕	Code ⇕	Value	
Requirements - Inforce cases on Command Cen...	CMDCNTRPAIDREQS	☑	
Commissions - Adjust override by agent split	COMSPLITOVR	☐	
CRM Owner Required	CRMOWNERREQUIRED	☐	
Bypass Validation for ECP %	ECPNOVALIDATION	☐	
Requirements - L&A default follow up days	LICAPPREQFOLUPDAYS		
General - Mask Social Security #	MASKSSN	☐	
Memo Reply	MEMOREPLY	CCNOTIFICATION ▼	
Memo Reply User	MEMOREPLYUSER	select... CCNOTIFICATION COMMANDCENTER	
Applications - Premium Calculator	NEWAUTOPREMCALC		
Skip Appointment Check	NOAPTCHECK	☐	
Skip License Check	NOLICCHECK	☐	

A valid License will not be required on entry or open applications

[Ok] [Apply] [Cancel]

CCNOTIFICATION: Adds the reply as a Comment and Task to the receiving User's Command Center AND sends that user an email notification that a reply has been received.   Note that the email notification does not include the text of the reply, it simply alerts the user of the reply, and directs them to log in to Agency Integrator to view the reply.

COMMANDCENTER: Adds the reply as a Comment and Task to the receiving user's Command Center, but no email notification is sent.

If neither option is selected, nothing will change from the way replies are received today. Any replies will be sent directly to the Reply To address specified on the memo, no Comments will be added to Applications or Contacts, and no notification within Agency Integrator will occur.

Click **OK** or **Apply** to save your changes.

Sample Memo Reply Comment
If an Agent, License, or Appointment Memo is sent, the agent/recipient's reply will be added as a Comment on the **Contact Detail Screen**. If an Application, Informal, Informal Quote, or Requirement Memo is sent, the agent/recipient's reply will be added as a Comment on the

Application Detail Screen. The Comment will be Created By the **Agent**, in the Category of **General,** in an **Open** status:


Sample Command Center Task

If an Agent, License, or Appointment Memo is sent, the agent/recipient's reply will be added as an **Agt Cmt** to the User's Command Center. If an Application, Informal, Informal Quote, or Requirement Memo is sent, the agent/recipient's reply will be added as an **App Cmt** to the User's Command Center:

Sample Email Notification

If you selected the CCNOTIFICATION option, the email notification will look similar to the below:
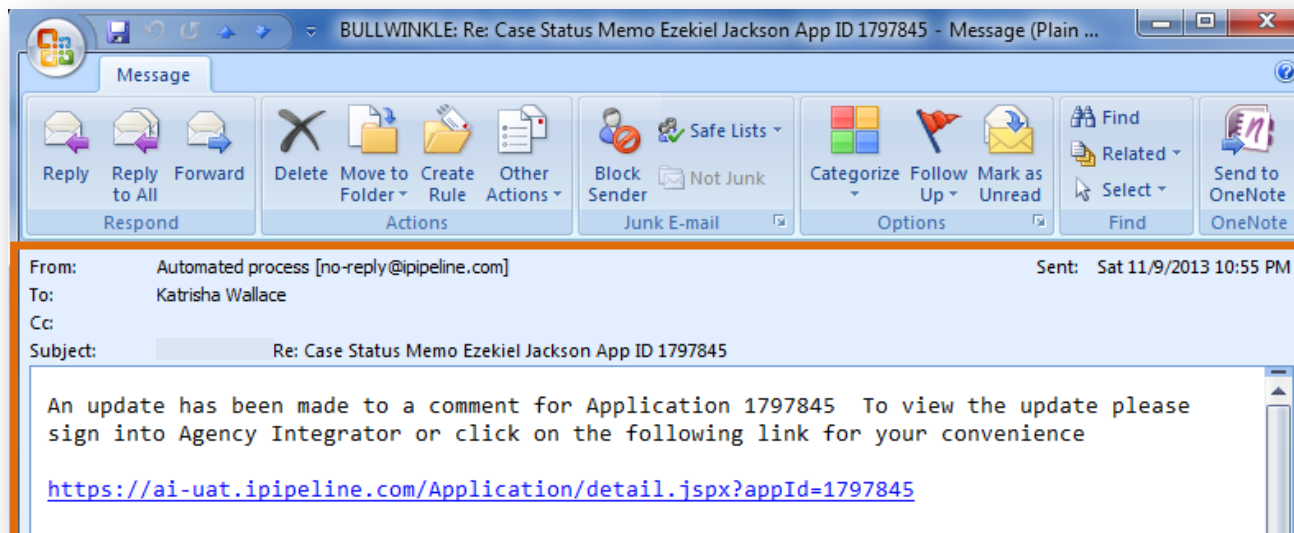
For Application, Informal, Informal Quote, and Requirement memos, the hyperlink contained in the email notification will link you directly to the newly created Comment, so you can view the agent's reply. Note there is no hyperlink for Agent, License, or Appointment emails.

Memo Reply User Preference

If you enable the **Memo Reply** Preference, it is also necessary to enable the **Memo Reply User** Preference as well, which allows you to select a **Default Reply to User**. This is necessary for those instances where there is no identifiable User to send the reply to. For example, if the Memo was auto-generated by a weekly Trigger, or through Auto-Receipting, the system needs to know who the recipient's replies should be directed to.

Important Note: If you do NOT specify a **Default Reply to User**, there is a chance that recipient's replies could fall through the cracks. The system will still automatically add the reply as a **Comment**, but no Users will be notified via email or through the Command Center.

Select your desired user from the drop-down list. After you have made your selection, click **OK** or **Apply** to save your changes before visiting another module or exiting the system.

Setting up a Default Reply User on Memo Triggers

As an additional safeguard for Memos that may be generated by automated processes like Auto Receipting or date-based Memo Triggers, you can associate a Memo Reply Default User to a specific **Memo Trigger**.

Click on **Administration** then, hover over **System** on the sub- menu bar and click **Memos-Memo Triggers.**

The **Memo Trigger List** screen will appear: Right click, and select **Edit** on the trigger you want to add a **Memo Reply Default User** to.
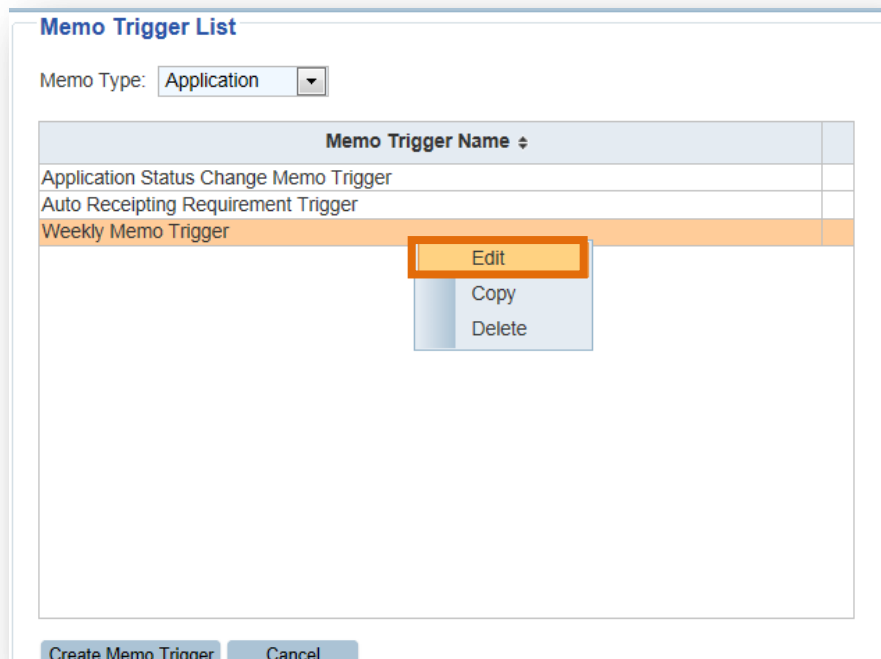
The **Memo Trigger Detail** screen will appear. Note that a new field called **Default Reply To** has been added to this screen:

Select a User from the drop-down list. This is the user that will receive replies if the memo is created via Auto Receipting, Date-based, or a Weekly/monthly Trigger and there is no Case Manager (on application memos). Click **OK** or **Apply** to save your changes before visiting another module or exiting the system.

Frequently Asked Questions

How does the system know who to direct a reply to? What criteria are used in what situations?

For Memos Generated by a User:

1. **Default Signature/Reply** selections (first Primary, then Secondary) on the memo, which is determined by the Memo Template:

2. If the **Default Signature/Reply** selections on the memo are not a User (Organization or Agency), then following is used:
   a. Case manager – if the memo is an Application memo and the application has a case manager assigned
   b. The User that generated the memo

For System Generated Memos (Auto Receipting, Monthly/Weekly Memos):

1. **Default Signature/Reply** selections (first Primary, then Secondary) on the memo, which is determined by the Memo Template.
2. If the **Default Signature/Reply** selections on the memo are not a user (Organization or Agency) then the following is used:
   a. Case manager – if the memo is an Application memo
   b. **Default Reply To** on the Memo Trigger:

c. The Default User in Administration

d. If no user can be determined, the reply will be added to the application or contact, assigned to General, and will not appear on any user's Command Center

Can a User reply to a Memo Comment?

No, if additional communication with the agent is needed, another Memo needs to be generated.

How will I know which Memo is being replied to?

The Command Center task, Comments, and system-generated email notifications provide a description containing the Memo Name and the Application or Contact ID.