Agency Integrator

Agency Integrator TECHNOTE

SureLC Integration

May 2013

This TechNote discusses integration between SuranceBay's **SureLC** and Agency Integrator. For agencies that use SureLC, this integration will allow Contacts, Licenses and Appointments to be created and updated in Agency Integrator, according to data present in SureLC.

Contents

Setting up the Integration

Please contact the AMS Help Desk at amssupport@ipipeline.com or your Customer Account manager to have the Integration turned on.

Contact Integration Details

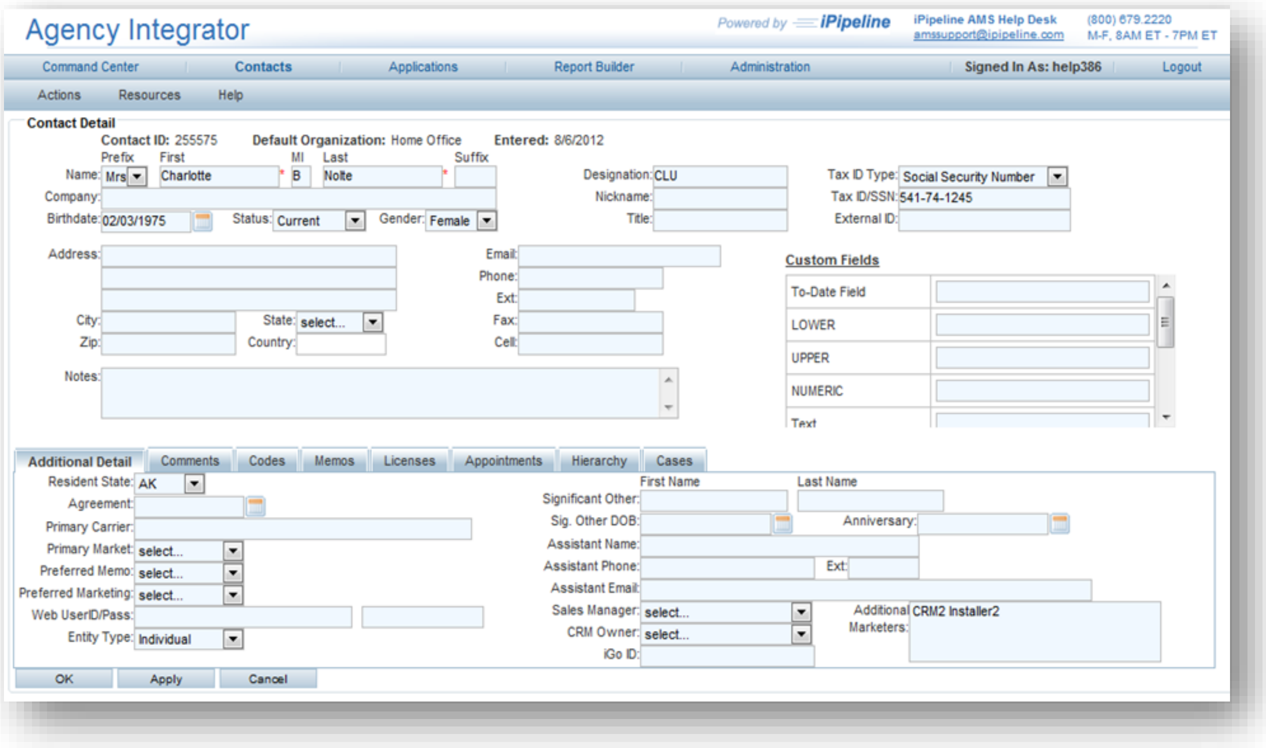
The Contact integration uses an existing contact's **Social Security Number** or **Tax ID** in Agency Integrator to match to one being sent from SureLC. If a matching Contact cannot be found, a new contact record is created in a default Organization of your choosing.

The new Contact will be created with the fields below:

- SSN/Tax ID
- Name (Prefix, First, Middle Initial, Last)
- Designation
- Title
- Date of Birth
- Gender

- Status
- Resident State

A sample of a Contact created by the Integration is below



License Integration Details

The License integration uses an existing License record's **State** and **License Number** or existing **SureLC license record** in Agency Integrator to match to one being sent from SureLC.

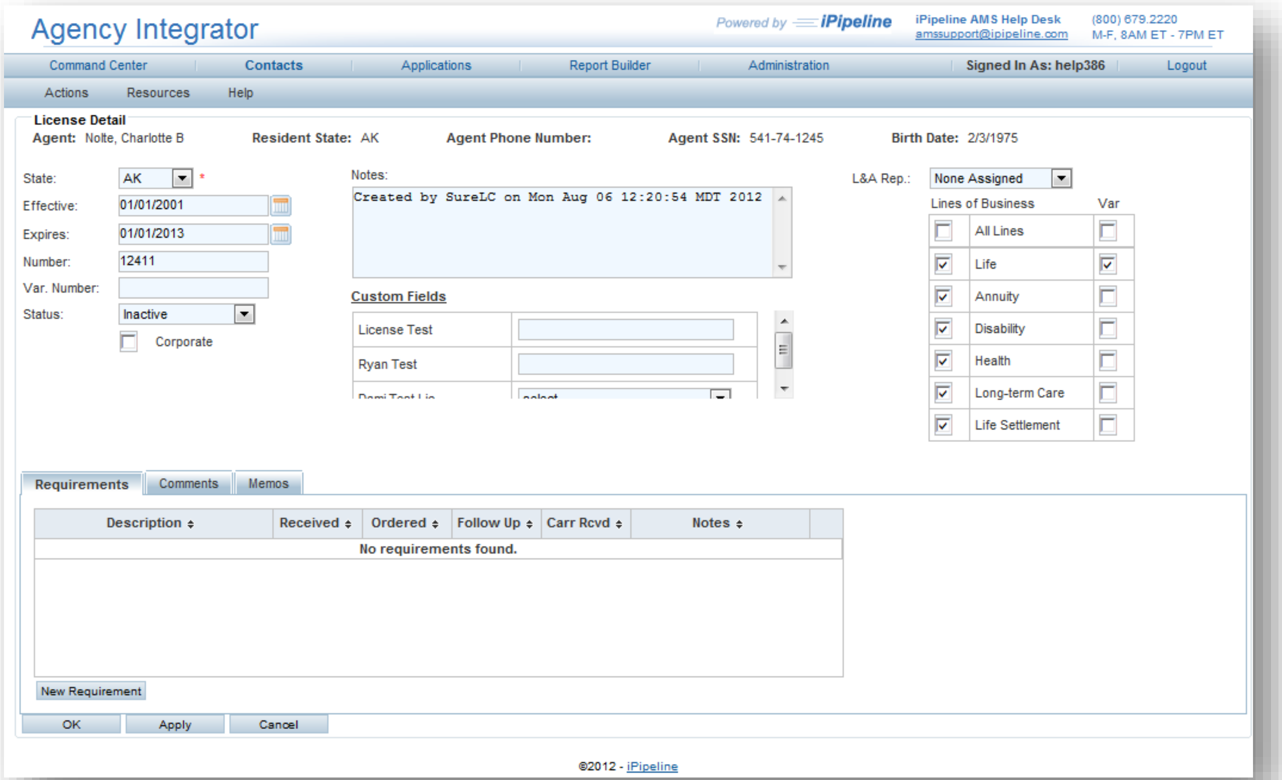
- If a matching License cannot be found, a new License record is created. You will be able to identify a License created by the integration, because the text "**Created by SureLC**" will display in the **Notes** box on the **License Detail screen** in Agency Integrator.

The new License will be created with the fields below:

- State
- License Number
- Effective Date
- Expiration Date
- Line of Business
- Notes

- Status

A sample of a License created by the integration is below:



- If a matching License is found, it will be updated with any changes from the SureLC record. The fields below will be updated:
  - Status
  - Effective Date
  - Expiration Date
  - Line of Business

Appointment Integration Details

The Appointment integration uses an existing Appointment record's **Carrier, State** and **Appointment Number** or existing **SureLC appointment record** in Agency Integrator to match to one being sent from SureLC.

- If a matching Appointment cannot be found, a new Appointment record is created. You will be able to identify an Appointment created by the integration, because the text "**Created by**

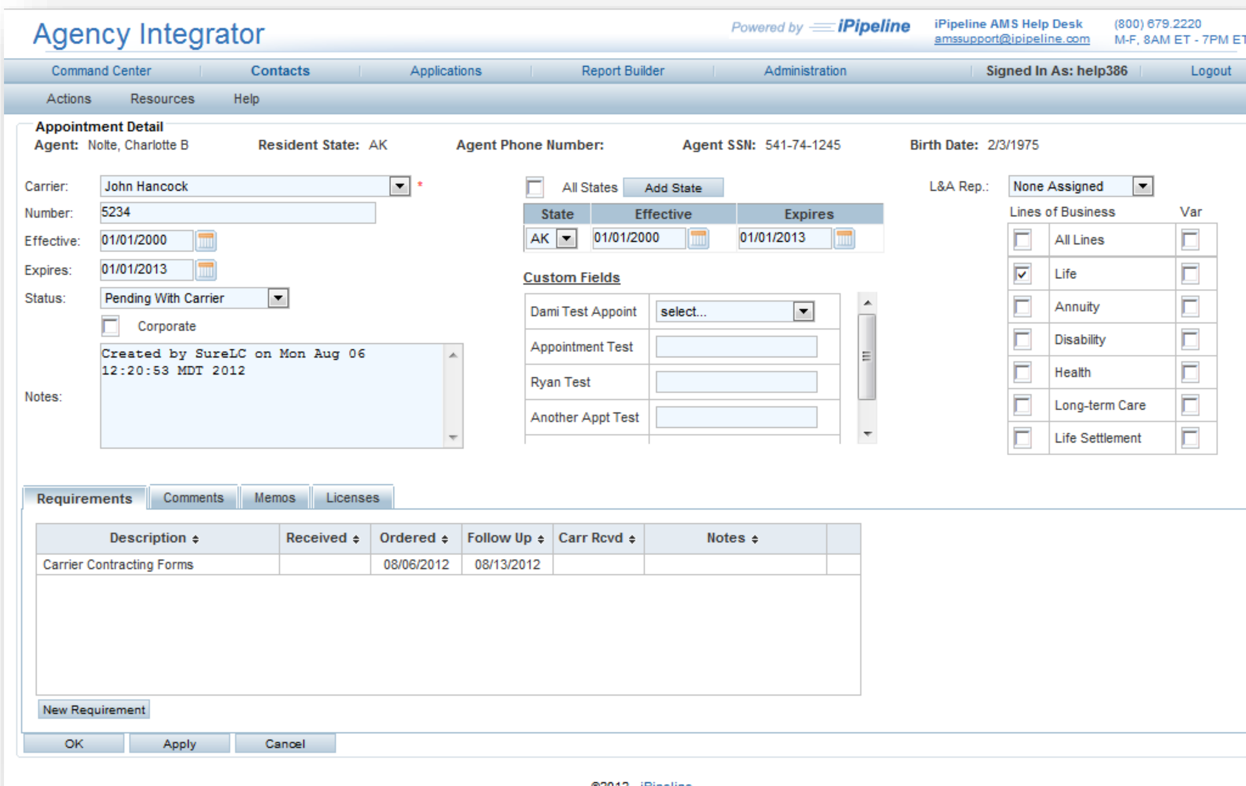
SureLC" will display in the **Notes** box on the **Appointment Detail screen** in Agency Integrator.

Appointment types of **Contracts**, **Add State** and **Transfers** from SureLC will be populated in Agency Integrator. Other types will not.

The new Appointment will be created with the fields below:

- State
- Appointment Number (if present)
- Carrier
- Effective Date
- Expiration Date
- Line of Business
- Status

A sample of an Appointment created by the integration is below:



- If a matching Appointment is found, it will be updated with any changes from the SureLC record. The fields below will be updated:

- **Appointment Number** (only if blank, existing Appointment numbers will never be updated, even if they are different from the number being sent by SureLC)
- **Effective Date**
- **Expiration Date**
- **Line of Business**

Important Note: The **Status** and **Notes** fields will NOT be updated on an existing Appointment record. So, if the Status of an Appointment is changed to Terminated in SureLC, it will not be changed to Terminated in Agency Integrator, it will remain in the status it was created in, unless manually edited by a user

Frequently Asked Questions

1. How will users know when a record was updated by SureLC?
   - There will be a note in the **Notes** field with a date and time stamp. Sample note: "Created by SureLC on Fri May 03 16:36:47 MDT 2013"
2. If there is existing information in the Notes section, will SureLC overwrite that data?
   - No, if there is existing information in the notes field, no note will be added by SureLC.
3. How will SureLC know an agency is using iPipeline's AMS – Agency Integrator?
   - Agencies contact SureLC and they will reach out to iPipeline to confirm
4. What is the cost?
   - There is no charge from iPipeline to use the integration. Check with Sure LC on any possible fees.
5. If the agent is already in Agency Integrator, will the system create a duplicate record?
   - No. The feed will first look for an agent record in your system that has a matching SSN/ Tax ID #, and will update the record if it finds a match, instead of creating a duplicate. It will only create a new contact if no matching SSN can be found anywhere in your system.
6. Is there a way to not automatically have the licensing/appointment paperwork sent to the carriers?
   - Yes. Agency needs to email Support support@surancebay.com
7. Are all lines of business supported?
   - No. P&C and other lines of business that iPipeline does not support will not populate.

8. If a record is terminated, and then a new one is received, will it update the existing record or create a new one?
    - A new record will be created.
9. Is a trial period offered?
    - No, but SureLC offers a 30-day money-back guarantee. Contact SureLC for details.
10. What is SureLC's contact phone number?
    - 877-264-9888
11. What if a carrier is in SureLC's database, but not Agency Integrator's?
    - The contact record will populate, but the data will not in Agency Integrator.
12. What happens if an agent has more than one state appointment?
    - The integration will create an appointment record for each state under the same Carrier. So—you will have multiple Appointments for the same Carrier.

Helpful Tidbits

- Be sure to exit the producer's file in the SureLC system, because that triggers the update to Agency Integrator. If the record is still open in SureLC, the update has not yet been sent.
- Once appointment status is set Agency Integrator, SureLC does not automatically update it. If an Appointment's status changes (to Terminated, for example), you must manually change it in Agency Integrator. The feed will not update it.
- Although SureLC displays a full middle name, only the initial will appear in Agency Integrator.
- Currently there is no option to mass update.
- Hierarchy/Solicitor/Commission information from SureLC will not be transferred to AI at this time.
- This is a one-direction feed from SureLC to AI. Changes you make in AI do not get sent back to SureLC.
- SureLC uses NIPR (National Insurance Producer Registry) two times a month. If an agent renews a license, this information will be fed over to Agency Integrator.