

### AgencyBuzz Integration with InsurancePro

This document provides information about the data bridge from InsurancePro to AgencyBuzz including setup, field mapping, and FAQs.

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### Integration Requirements

In order for the integration to be set up properly and continue to function, the following prerequisites have to be met:

- 1. You have a valid account login for an AgencyBuzz user with Admin Access Level.
- 2. You have an InsurancePro administrator account login.
- 3. You have installed InsurancePro on your machine.

## **Contact/Policy Records**

For policy owner information to bridge, the following must all be true:

- 1. InsurancePro must be configured to integrate with AgencyBuzz.
- 2. The policy must have an email address.
- 3. The email address field cannot contain multiple email addresses.
- 4. The policy must have a driver or a homeowner specified.



Tip: To maintain data consistency across policies, duplicate the InsurancePro policy manually. This retains the AgencyBuzz ID that is used to link the policy information between InsurancePro and AgencyBuzz.

### Integration Setup

To set up the bridge of data from InsurancePro to AgencyBuzz, you will need to configure InsurancePro for the integration.

#### **Current InsurancePro Records**

Your AgencyBuzz coordinator will work with the InsurancePro team to move your existing InsurancePro records into AgencyBuzz. This process typically takes 3-5 business days and does not require you to take any action.

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## InsurancePro Configuration

Follow the steps below to set up the integration in your InsurancePro account.

- 1. Log into InsurancePro as an **administrator**.
- 2. Click the **File** tab located in the top menu bar and select **Options** then click **Configuration**.



3. Click the **Integration** icon from the left-hand menu of the InsurancePro Configuration window.

		•		
[	InsurancePro Configurat	tion		
		▲ Global Settings		
	Contract (	Add printed letters and payments to mail log	Off	
	Verierai	Allow Admin to Modify Reconciled Transactions	Off	
		Allow secondary agents on policies	Off	
		Ask for entering a down payment	On	
		Display Agency Fee on Receipt	On	
		Display Agency Name in dropdown list	On	
	<b>X</b>	Display Print Auto Id card	On	
		Make some Clientinfo fields required	Off	
	Companies	Only admins can install optional updates	On	
	Companies	Only admins can void a payment	On	
		Print agent's copy of payment receipt	On	
		Record checks for payments without asking CSR	Off	
	Locations	Require login	On	
		Viewing is limited to location agent is logged into	Off	
		Personal Settings		
		Display blog on login	Off	
	Ayonia			
	Banks	Add printed letters and payments to mail log Add printed letters and received payments to the Mail L	og	
			Save Cancel	
				1.15





4. In the **AgencyBuzz section**, enter your AgencyBuzz username and password. Please make sure that this user has Admin Access Level

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🧼 InsurancePro Configurat	tion 🗖 🗖 💌
General	AgencyBuzz     Login for AgencyBuzz     Password for AgencyBuzz      InsurancePro Integration
Integration	
Comnanies	
Notes If you have forget	
AgencyBuzz password, you can r the bottom of the AgencyBuzz loc	eset it at jin screen.

- 5. Click **Save** and close the InsurancePro Configuration window.
- 6. All **new and updated** InsurancePro contact and policy records from this point forward will bridge into your AgencyBuzz account when you click **Save** on the InsurancePro record.



If at any time your AgencyBuzz username or password changes, you will need to update the AgencyBuzz login credentials in the InsurancePro Configuration window.

## **Bridge Assigned Agents**

If you want the integration to pull the assigned agents from InsurancePro to AgencyBuzz, you will need to link the InsurancePro agent to an AgencyBuzz user.





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## Create AgencyBuzz Users

First, you will need to create an AgencyBuzz user login for each agent assigned to InsurancePro records.

- 1. Log into AgencyBuzz.
- 2. Click on the **Account Settings** icon located in the top toolbar.



3. Click on the **Users** icon located in the top toolbar of the window pops up.

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General Email Use Settings	rs Lines Statuses Carriers Commissions	Locations Billing Integrati	ion Custom About Training Hel Fields Video	р
	Show		Help	
Account				
Account Name:	Account Name	Account Email:	agencybuzz@getitc.com	
Account Phone:	L)	Account Time Zone'	(UTC-06:00) Central Time (US & C	anad 🔻
Default Display:	First Name Last Name	Account Domain:	agencysystems.com	
	Hide Contacts With No Email			
Billing Address		— Mail as Address ——		
Account Street 1:	Account Street 1	Mailing Street 1:	Mailing Street 1	
Account Street 2:		Mailing Street 2:		
Account City:	Account City	Mailing City:	Mailing City	
Account State:	Texas 👻	Mailing State:	Texas	•
Account Zip Code:	75007	Mailing Zip Code:	75007	





4. Fill out the information for the new AgencyBuzz user. Note that **First Name, Last Name, Email Login,** and **Password** are required.

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	✓AgencyBuz	z   Administration		
	General Email Us	ers Lines Statuses Carriers Commissions	Coations Billing Integration Custom About Training Help	
	Settings	Show	Fields Video Help	
	Users	User	First Name:	
		Your Team	Last Name: Job Title:	
			Phone Number:	
			User Level: Standard User   Contact Visibility: Show All Contacts	
			Office Location: Agency Location	
Note: The email login wi	ll be th	e agent's		
AgencyBuzz username an	d must	have the		
same domain as your Age	ncvBuzz	account.	Contraction Design Words: 0	
			HTML Characters: 0     Add	
	User Default User:	Your Team	Update	

- 5. Click **Add** when finished.
- 6. **Repeat** the previous steps for each agent you want to pull from InsurancePro.





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## Configure InsurancePro Agents

Next you will need to match the InsurancePro agent to its respective AgencyBuzz user.

- 1. Log into InsurancePro as an **administrator**.
- 2. Click the **Agency Settings** tab located in the top menu bar and select **Manage Agents**.

InsurancePro Online Storag	e - The Insurance Agency Managem	• • • • • • • • • • • • • • • • • • •	(PTEST)	
File         Clients         Payments           Policy Options         State         Add a New Policy           Add a New Policy         Find Existing Policies	Agency Settings Agency Tools Agency Information Manage Agents Insurance Companies Change locations	Download/Bridge Quote Sheets 0 Welcome	online Storage Windows Help Test	InsurancePro
<ul> <li>Transactions</li> <li>Receive a Payment</li> <li>Expenses/Checks</li> <li>Check Register</li> <li>Agency Reports</li> <li>Daily Transactions</li> </ul>	*	Your CL Active Total Cancelled (Last 7 Days) Expiring (Next 7 Days)	17 0 0	
Business Reports     Customized Reports     Customized Reports     Download/Bridge     Download from Carrier     Download from [WB     Sounload from Reter	♥ We will begin a Please take a l	New (Last 7 Days) Insuran sending out the next Insura ook at our blog below for t	o ccePro News: ancePro update 6.0.40.03 i be chances	n the coming week.
Notae Demission			ne enanges.	

3. In the **Setup Agents/CSRs/Users** window, select the desired agent from the list of available **Agents/CSR**.

Se	arch	
gents/CSR	- Contact I	Information
Chris	Name	Coach Shawn
coach Ken Coach Shawn	Address	123
.ori Wilten		
Tara McGuire	Phone	
Test TestRC	Email	support@getitc.com
	Login —	Locked-out
	User ID	Coachb
	Password	d
	Default Ba	ank Default Bank Account 🔹





## AGENCYBUZZ AND INSURANCEPRO

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### 4. Under **Options**, click **Edit Agent Info**.

	Agent Name Search	General Locations Notes Permissions Integration
	Agents/CSR	Contact Information
	Chris	Name TestRC
	coach Ken Coach Shawn	Address
	Lori Wilten	
	Tara McGuire	Phone
	TestRC	Emal
		Login Locked-out
		User ID TestRC
		Deseward
		Account
	Add a New Agent	
	Edit Agent Info	Commission
	Change Password	Commission % 0.00 OR Flat Fee 0.00
	Delete Agent	
	View Deleted Agents	
	view / Attach Signature	

5. Click the **Integration** tab located in the top menu bar for the agent.

Igent Name	General	Locations	Notes	Permissions	Integration
gents/CSR	Contac	t Informati	on		<b>X</b>
hris	Name	Coa	ch Shawr		
oach Ken oach Shawn	Addres	s <b>123</b>			
ori Wilten lot Mark			/	-	
ara McGuire	Phone				
estRC	Email	supp	ort@geti	tc.com	





6. Under the AgencyBuzz ID section, select Click Here to Configure.

General Locations Notes	Permissions	Integration
AgencyDuzz ID		
Click Here to Configure		
TurboRater User Name		
EZLynx User Name		

7. Select the **AgencyBuzz User Email** for this InsurancePro agent. If the desired email is not listed, you will need to create a new AgencyBuzz user.

		© •			
n .	Gen	eral Locations Notes Permissions Integration			
	Se	elect your AgencyBuzz ID			
		AgencyBuzz ID			
		Not Set			
		heather@heathercherry.com			
	Þ	jody@heathergalloway.com			
		john@heathergalloway.com			
		kthornton@heathercherry.com			
		AgencyBuzz user, the AgencyBuzz record			
		will be assigned to the AgencyBuzz Default			
		изег.			





- 8. Click **Save** to apply your changes.
- 9. **Repeat** the previous steps for each agent you want to pull from InsurancePro.

## Field Mapping

Since AgencyBuzz and InsurancePro manage different types of data, not all fields stored in InsurancePro will come into AgencyBuzz. Below is a chart of the information is pulled from the InsurancePro record and the AgencyBuzz field it goes into.

Contac	: Record
InsurancePro Field	AgencyBuzz Field
First Name	First Name
Last Name	Last Name
Occupation	Job Title
Email	Email Address
Home Phone	Home Phone
Cell Phone	Mobile Phone
Work Phone	Work Phone
Physical Address Street	Street 1
Physical Address City	City
Physical Address State	State
Physical Address Zip Code	Zip Code
Date of Birth	Birthdate
Anniversary	Anniversary
Referral Source	Referral Source
Primary Agent	Agency Contact
Email Status	Email Status





# AGENCYBUZZ AND INSURANCEPRO

Policy Record		
InsurancePro Field	AgencyBuzz Field	
Туре	Type/Line of Business	
Status	Status	
Company	Carrier	
Effective Date	Effective Date	
Expiration Date	Expiration Date	
Policy #	Policy #	
Effective Date	Effective Date	
	Initial Payment Date	
Term	Term	
Expiration Date	Expiration Date	
Initial Premium	Total Premium	
Monthly Payment	Payment Amount	
Down Payment	Down Payment	
Policy Term + Payment Option	#Monthly Payments	
Payment Option + Payment Due Day	Recurrence Date	
File Number	Internal File Number	





Policy Status	
InsurancePro Policy Status	AgencyBuzz Policy Status
New Business	Active
Renewal	
Reinstated	
Rewrite	
Prospect	
Quote	Unsold
Declined	
Expired	Expired
Cancelled	Cancelled

## **Integration FAQ**

This section answers frequently asked questions about the integration between AgencyBuzz and InsurancePro.

### When does the integration run and how often are AgencyBuzz records updated?

Once the **Save** button is clicked on an InsurancePro record the data will automatically push to AgencyBuzz in real-time. If the record did not previously exist in AgencyBuzz it will be created as a new contact/policy. If an existing record was modified it will be updated in AgencyBuzz accordingly.

### My contacts seem to have stopped coming into AgencyBuzz from InsurancePro. What happened?

Invalid login credentials are the most common reason for the integration to stop running. Follow the steps below to check the integration configuration.

- 1. Verify your **AgencyBuzz admin user** login credentials.
- 2. Re-enter your AgencyBuzz username and password in the **Integration** section of your **InsurancePro Configuration** and click Save.
- 3. Create and Save a **test policy record** in InsurancePro with an email address not already in AgencyBuzz. A new contact record should be added to AgencyBuzz.
- 4. If records continue to not come into AgencyBuzz, contact our support department at 800-383-3482, Option 4.





### Why did a specific contact not come into AgencyBuzz?

There are several reasons a specific contact or policy record may not come into AgencyBuzz from InsurancePro. Follow the steps below to research further.

- 1. Log into AgencyBuzz and search for the record by **email address**.
- 2. Verify the record meets the requirements for integration.
- 3. If the email address on the InsurancePro record had previously been added to AgencyBuzz, then any new modifications or policies saved to the InsurancePro record will be updated in AgencyBuzz.
- 4. Send a screen shot of the **Policy** and **Household/Driver** windows to your AgencyBuzz coordinator for further research.

### Can I set the integration to only pull specific types of records?

No. The integration will pull all data from InsurancePro.

### A client changed their contact information. Where do I update the record?

Since the integration between InsurancePro and AgencyBuzz is a one-way push from InsurancePro, any updates or changes need to be made in InsurancePro and the AgencyBuzz record will update accordingly. Conversely, any updates made to AgencyBuzz records will revert to the data in InsurancePro when the integration runs again.

(Note: If you change the email address in the InsurancePro record the integration will create a new AgencyBuzz contact record with that email address.)

