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**.
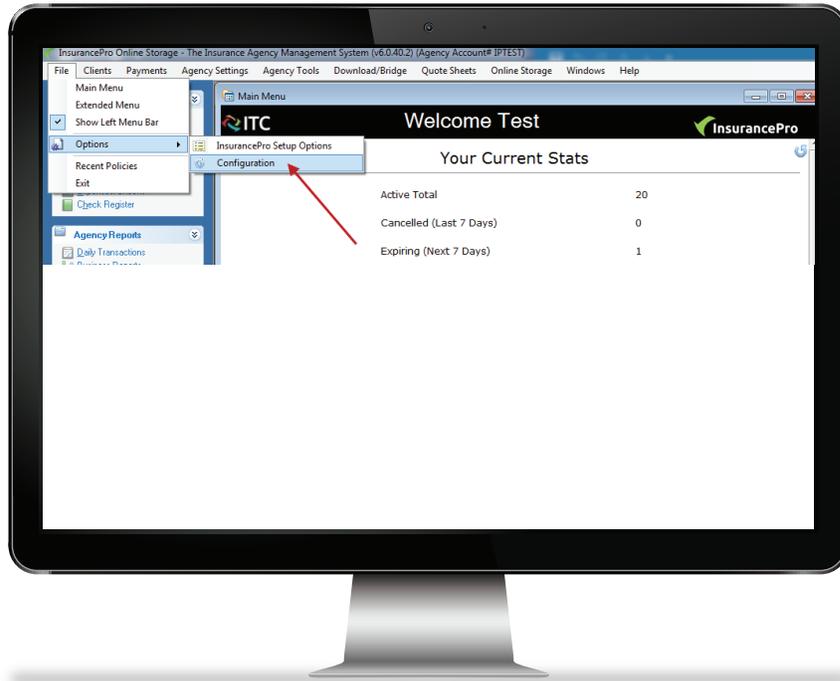
3. Click the **Integration** icon from the left-hand menu of the InsurancePro Configuration window.
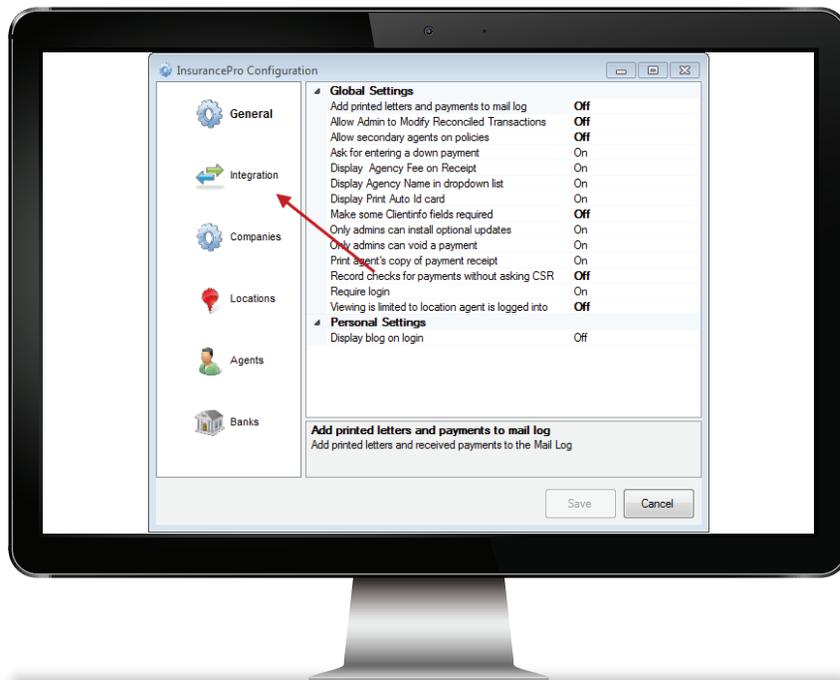
4.   In the **AgencyBuzz section**, enter your AgencyBuzz username and password. Please make sure that this user has

Admin Access Level
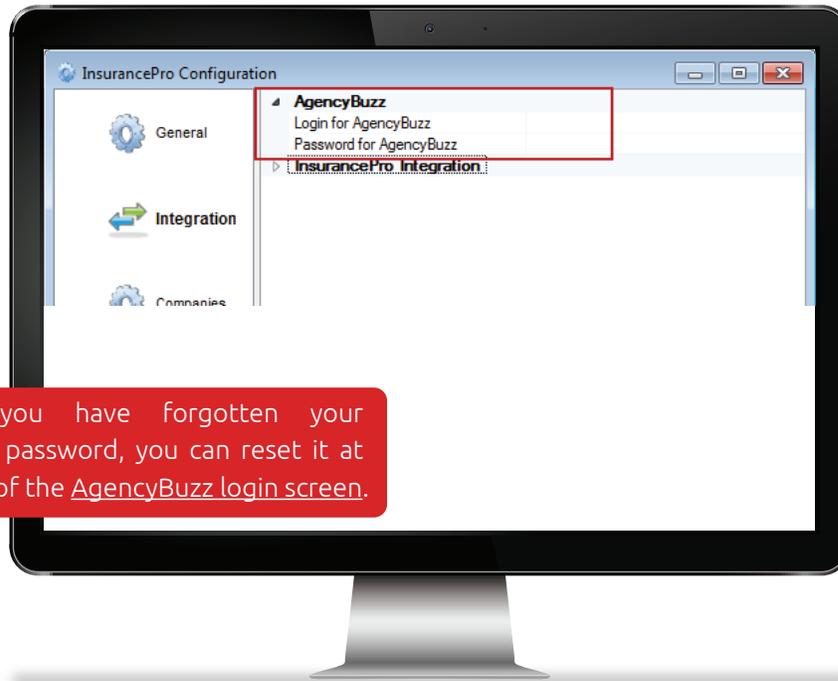
Note: If you have forgotten your AgencyBuzz password, you can reset it at the bottom of the AgencyBuzz login screen.

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.
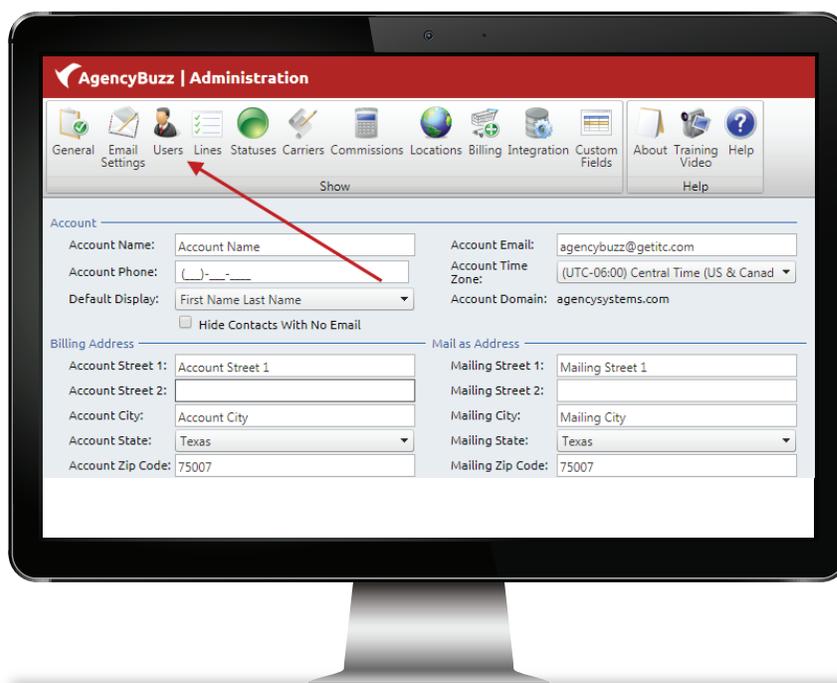
Create AgencyBuzz Users

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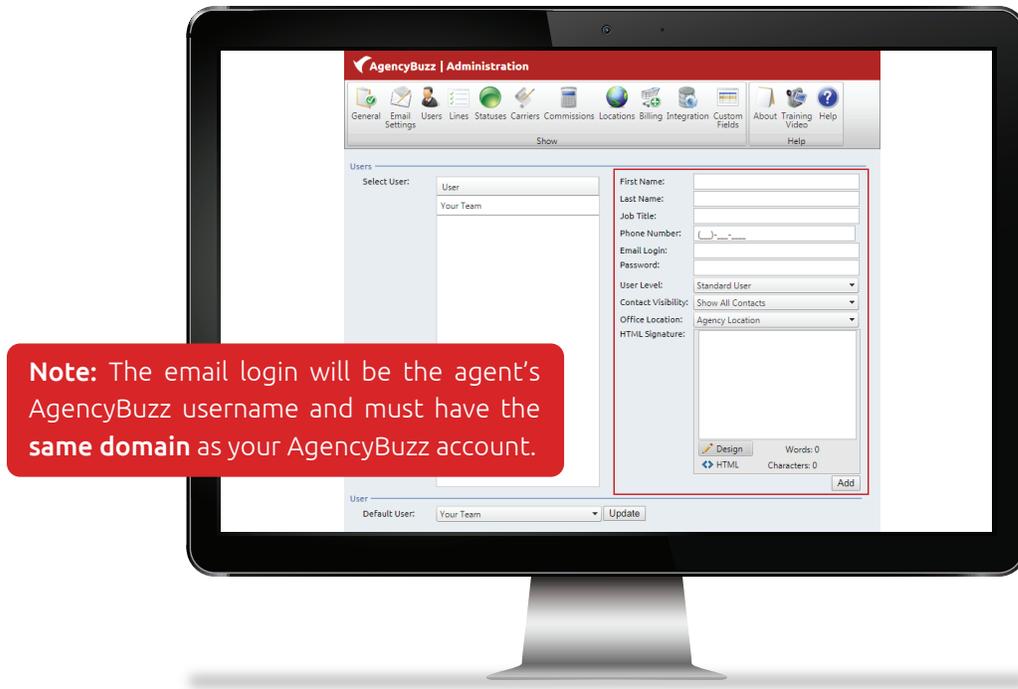
1.   Log into AgencyBuzz.

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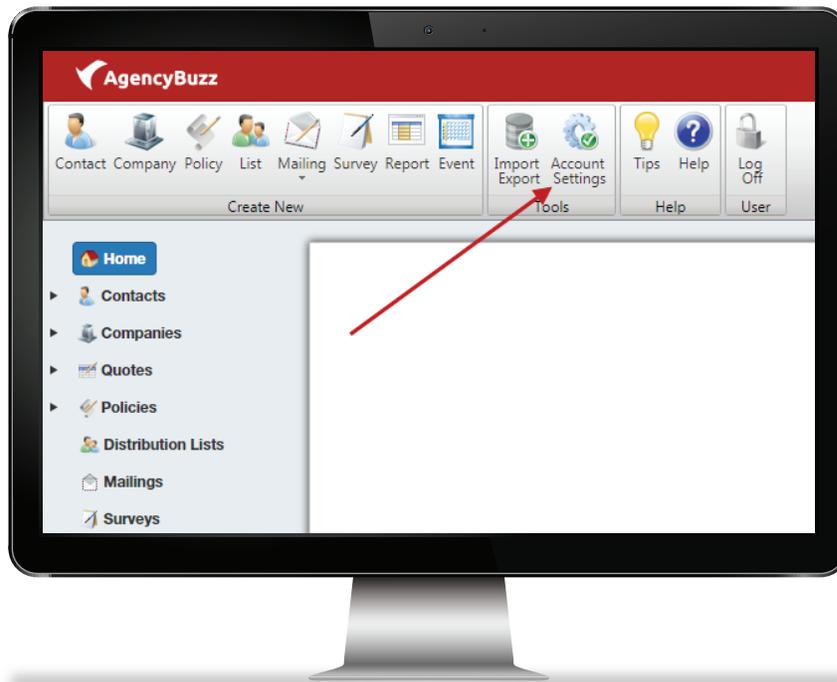
3.   Click on the **Users** icon located in the top toolbar of the window pops up.

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

Note: The email login will be the agent's AgencyBuzz username and must have the **same domain** as your AgencyBuzz account.
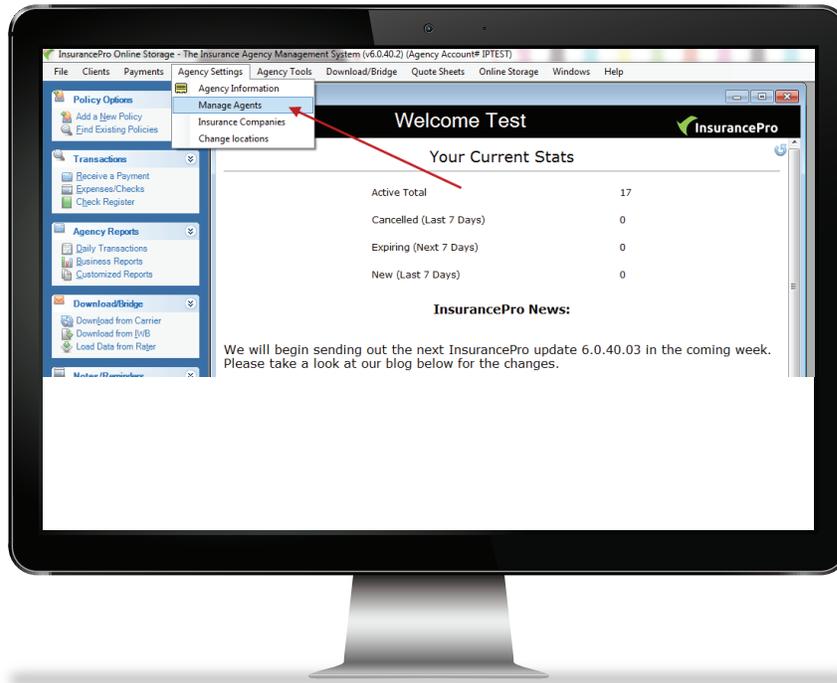
5.   Click **Add** when finished.

6.   **Repeat** the previous steps for each agent you want to pull from InsurancePro.

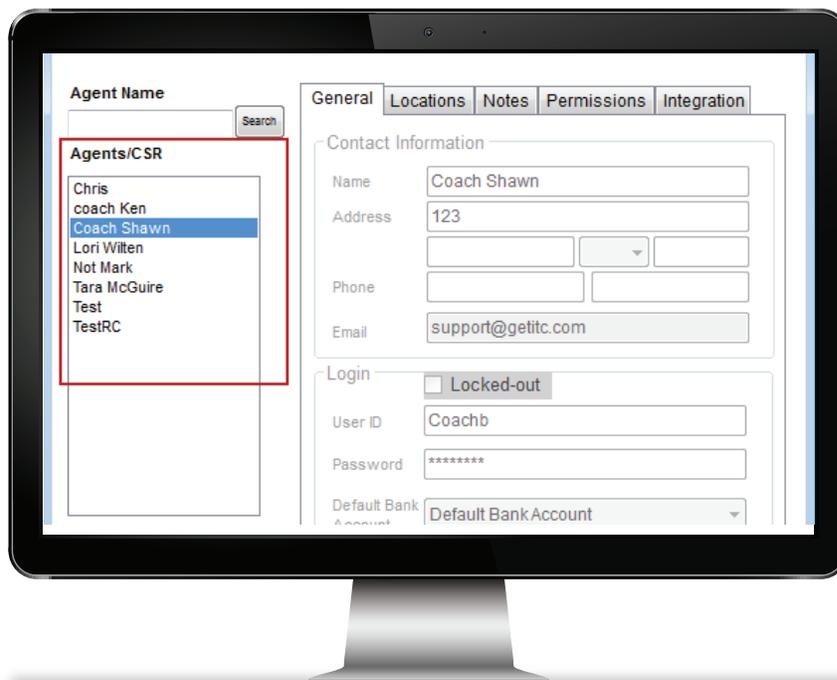## Configure InsurancePro Agents

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

1.   Log into InsurancePro as an **administrator**.

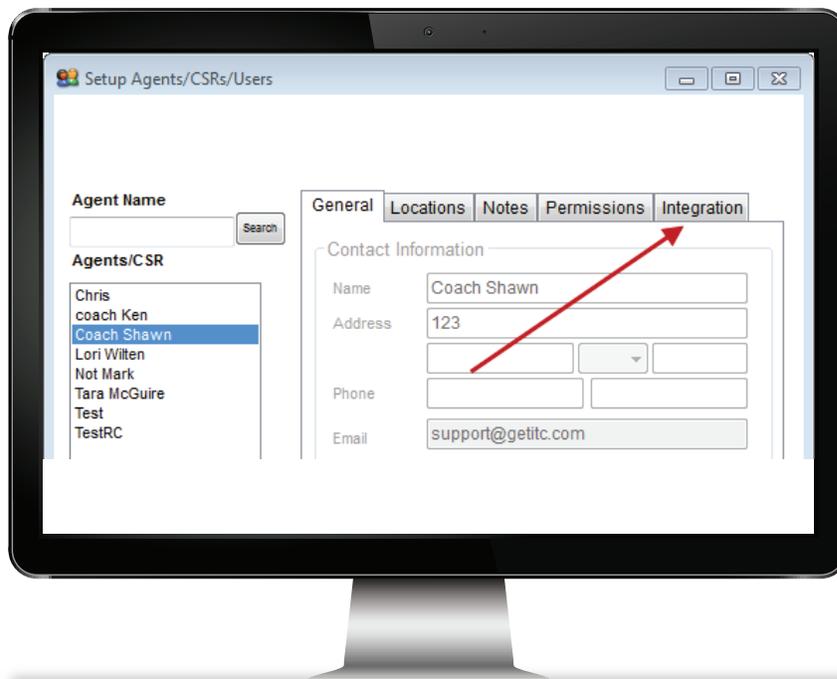2.   Click the **Agency Settings** tab located in the top menu bar and select **Manage Agents**.

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

4.   Under **Options**, click **Edit Agent Info**.
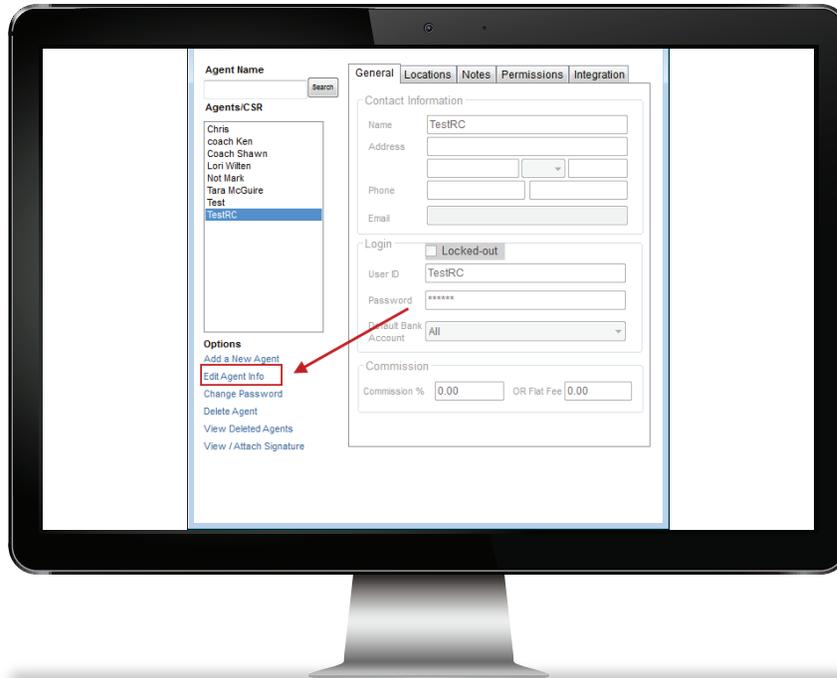
5.   Click the **Integration** tab located in the top menu bar for the agent.

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6. Under the **AgencyBuzz ID** section, select **Click Here to Configure**.
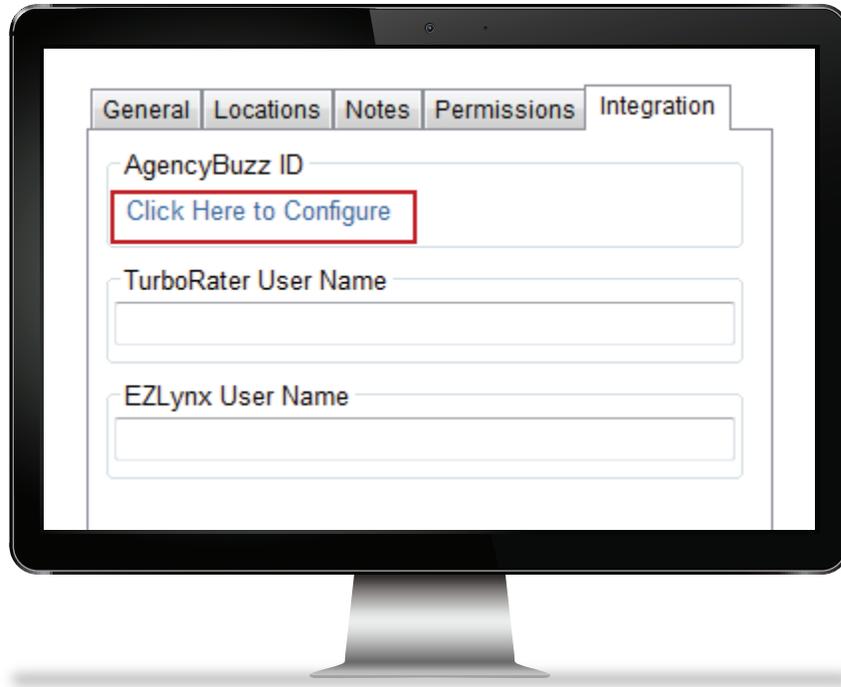
7. Select the **AgencyBuzz User Email** for this InsurancePro agent. If the desired email is not listed, you will need to create a new AgencyBuzz user.

Note: If a contact is assigned to an InsurancePro agent that is not linked to an AgencyBuzz user, the AgencyBuzz record will be assigned to the **AgencyBuzz Default user**.
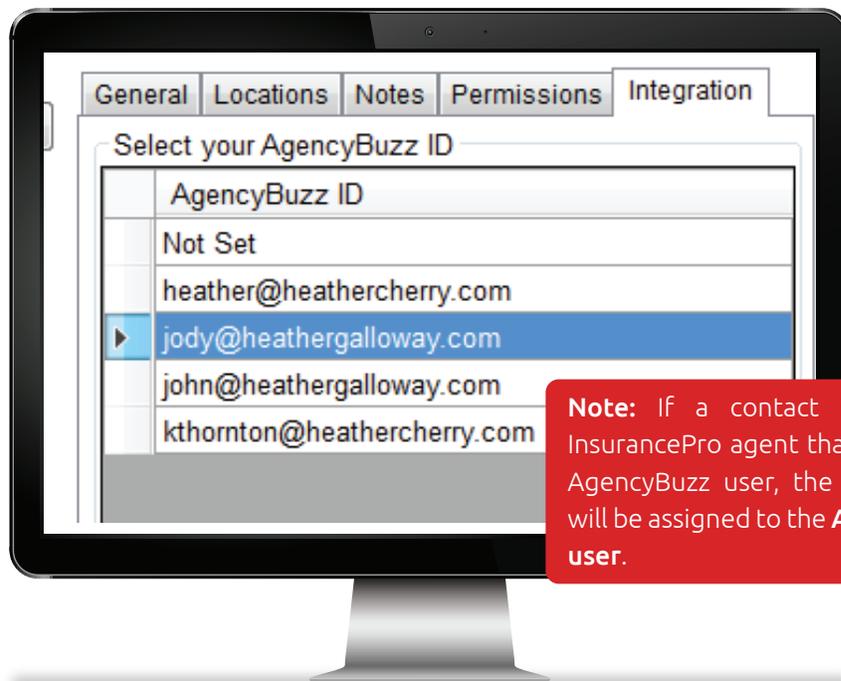
8. Click **Save** to apply your changes.

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.

Contact 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

Policy Record	
InsurancePro Field	**AgencyBuzz Field**
Type	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	Unsold
Quote	
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.)