FAQs

Q: **How can Agency Integrator help my case managers and admin staff?**

A: Agency Integrator helps your case managers and admin staff perform their daily tasks more efficiently, allowing you to manage more cases, reduce cycle times, oversee case management operations, and improve placement ratios for the business they receive.

Q: **Does this solution integrate with other iPipeline products?**

A: Agency Integrator easily integrates with other iPipeline products including:

- **iGO®** *(e-Application)* - Relevant data and forms from iGO feed into Agency Integrator eliminating the need to manually enter cases, significantly reducing data entry time. The integration with iGO also allows you to approve or deny cases before they get finalized and are sent to the carrier. With Agency Integrator's dashboard, you can approve multiple cases at once

- **DocFast®** *(e-Delivery)* - The integration between Agency Integrator and DocFast allows you to view the status history of electronically delivered policies from the case within Agency Integrator

- **InsureSight®** *(Data Analytics)* - Our case analytics are designed to help you benchmark yourself against industry data - get insights, recommendations, and predictions to improve your business operations

Q: **Does Agency Integrator integrate with third-party industry tools?**

A: To help your agents drive efficient growth and increase productivity, this solution easily integrates with many vendors and offers key integrations such as:

- Ordering paramed exams or APSs from the case in Agency Integrator without re-keying client information through APS and exam vendors

- Accessing image documents with a single click through imaging vendors

- Eliminating duplicate data entry within Agency Integrator through appointment and license management companies

- Enabling native secure email functionality

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Q: **Can my agents view case status information directly from Agency Integrator?**

A: Agents can view current case status information through **DataView,** an online case status portal. This information is directly updated by Agency Integrator to help agents stay up to date on their cases without having to call their case managers. The following features help agents seamlessly track and monitor their case status:

- An alert will appear in the DataView dashboard when a case manager sends a comment regarding a case through Agency Integrator
- Agents can respond in DataView, and the comments will appear in the associated case manager's "Command Center" in Agency Integrator
- Comments are tracked in both DataView and Agency Integrator
- Agents can directly access iGO, iPipeline's e-app solution, from DataView to auto-populate and approve cases in iGO

Q: **Does the solution allow for different types of commission payment tracking?**

A: Agency Integrator's **commission module** accepts many different types of commission payment tracking. This module can also set up schedules and reconcile commissions for any level in the hierarchy, from the writing agent, up to the BGA, including upline bonus management.

Q: **Does Agency Integrator have a CRM solution to manage agent relationships?**

A: Agency Integrator can integrate with iPipeline's CRM offering, allowing your agency sales staff to use the power of CRM without the headaches associated with traditional client management solutions.

Because our CRM offering uses the same database as Agency Integrator, there are no issues with data synchronization, agents can quickly and easily access pending and historical business to keep a pulse on cases.