



This TechNote describes changes made to existing Carbon Copy functionality, allowing you to **Assign** CCs in Mass, and **Replace** one or multiple **CC For** contacts with other contacts in your system. These Changes will make it easier to manage who receives CCs on Memos for AI, and deal with internal staff changes that have necessitated tedious manual updates in the past.

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CC Contact Type

Carbon Copies will now be entered as a Contact in Agency Integrator with a new **Contact Type** of **CC**.

Creating a New CC Contact

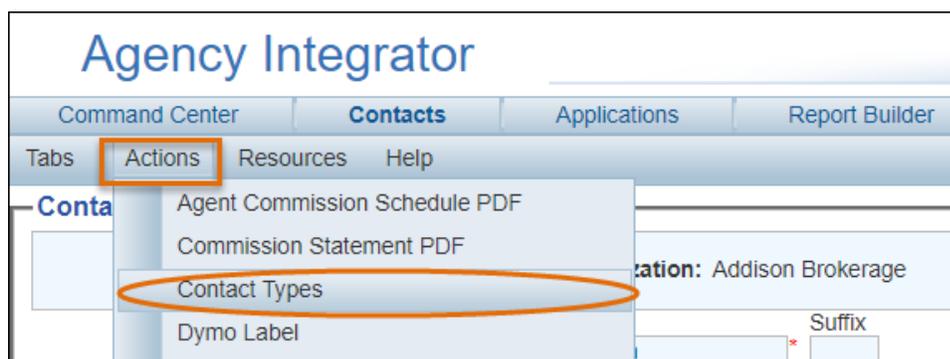
- 1) Click **Contacts** on the top menu bar. Click **Add Contact**.
- 2) Select **CC** from **Contact Type** drop-down, by selecting this option you will be prompted to enter your new CC Contact's **Email** address:

The screenshot shows the 'Create Contact' form with the following fields: Type: Individual, Name: Jason, MI: [empty], Last: Dean, Company: BayMirror, Contact Type: CC, and Email: JDeans@baymirror.com. The 'Contact Type' and 'Email' fields are highlighted with an orange box.

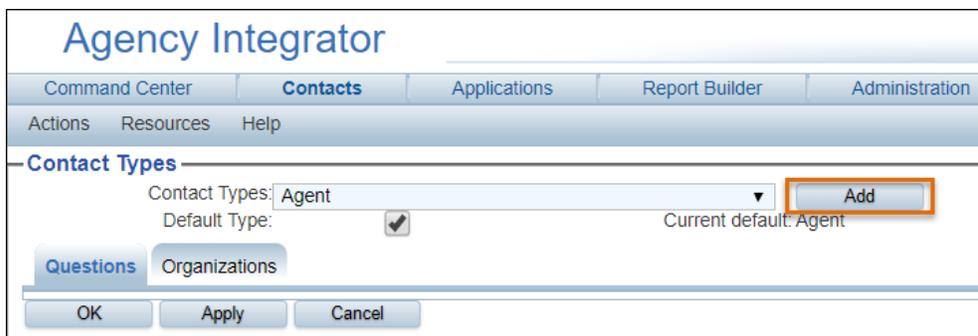
- 3) Click **Next**.
- 4) That is all that's required to save a CC Contact. It can now be added as a CC on any other contact record in the system. Note that the system can also auto-assign the CC Contact Type on records that are selected to be added as CCs.

Add the CC Contact Type to an Existing Contact

- 1) Access existing contact.
- 2) Select **Actions** then click **Contact Types**.

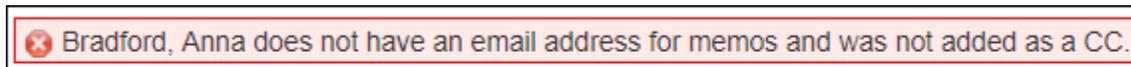


- 3) Click **Add**, and select **CC**.



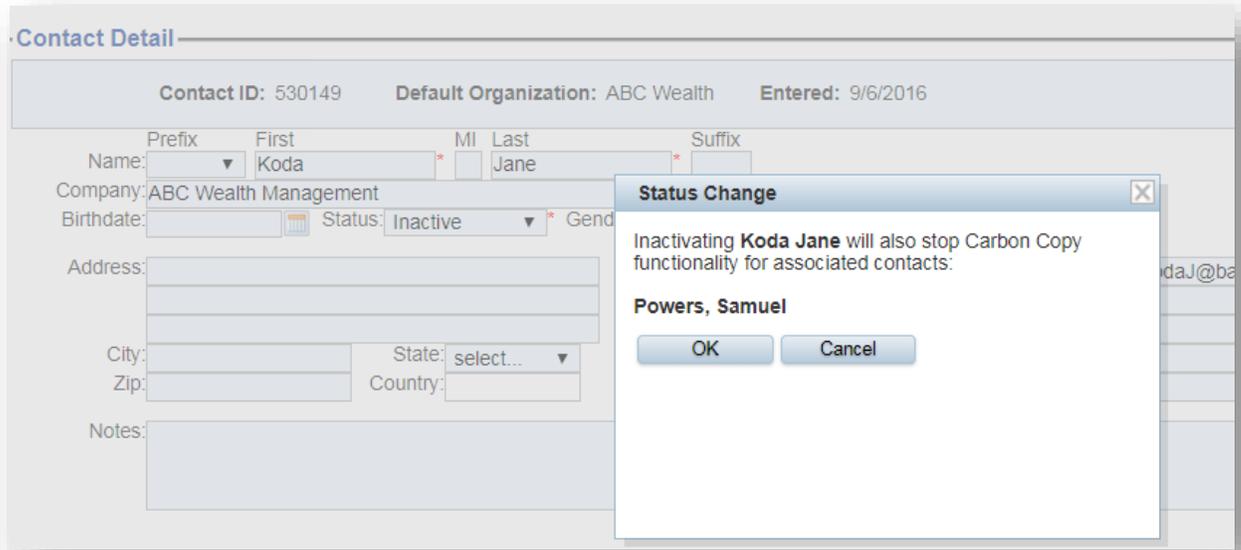
4) Click **OK** to save and exit. The contact can now be added as a CC to any other contact in the system.

Important Note: If you assign a Contact using the **CC** or **CC For** tab, and the contact doesn't already have the Contact type of **CC**, the system will automatically add the contact type CC to the contact you are attaching. However, if the contact doesn't have an email address, you will get the below error which indicates you have to add an email address to the contact before the contact can be added as a CC:



Inactivating a CC Contact

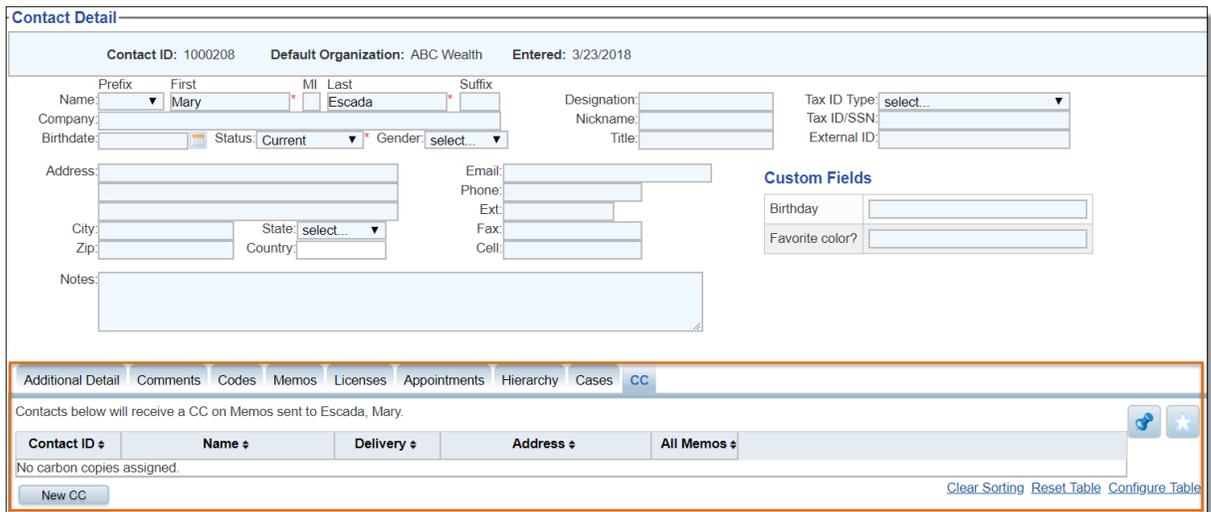
To inactivate a CC, you can change the contact's **Status** to **Inactive** or **Deceased**. Changing the CC to an Inactive status will prompt the warning message below, displaying a list of Contacts that will no longer receive CCs as a result of the Status change:



Note that if a CC is inactivated in this manner, it can later be re-activated by changing the Status back to an active status. If re-activated, the **CC For** relationships, including the selected Memos, will be retained.

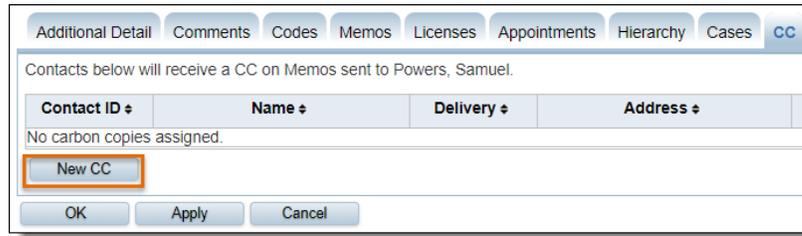
CC Tab

Visit the **CC Tab** (previously named **Carbon Copy**) on a contact to assign, remove, or view CCs attached to a contact. Contacts on the CC tab will receive a CC on memos sent to the contact. If you do not have the CC tab pinned, click **Tabs**, and select **CC**. You can then click the **pin icon** on the top-right side of the tab to make it always appear as a visible tab on the Contact Detail screen.



Assigning a New CC Contact

1) Click **New CC**.



2) Search for the desired contact(s) to assign as CC to the contact.

3) You can select a single record, or multi-select to assign multiple records.

ID	Name	Suffix	Company	Nickname	Tax ID/SSN	Phone	State	Default Type	Manager	Codes	Status	CRM Owner	Organization
530147	Powers, Samuel		ABC Wealth m		*****1555			Agent		No	Manager		ABC Wealth
283999	Dean, Jason		Bay Mirror Insu	JD	*****3210	(801) 555-6363	UT	Agent	Bradford, A	Yes	Current		Addison Brokera
530154	Bradford, Anna							ECP		No	Current		ABC Brokerage
530155	Banana, Anna							Agent		No	Current		Home office
530156	Bradford, Addison					59-8542	UT	Agent		Yes	Manager		Addison Brokera
530169	KIRK, HAEFNER							Agent		No	Current		ABC Brokerage
530170	Keatin, Zachary B							Agent		Yes	Manager		Addison Brokera
253740	Farnsworth, Huber		Planet Express		*****6666			Agent		Yes	Manager		Addison Brokera
530148	Dudeson, Mitchell		ABC Wealth M					Agent		No	Current		ABC Wealth
530156	Sun investments		Sun investmen		*****5551			Agent		No	Manager		SIS
530152	NBIA		NBIA		*****9991			Agent		No	Manager		NBIA
530150	CCWB National		CCWB Nationa		*****5553		UT	Agent		No	Manager		CCWB National
530150	Jane, Koda		ABC Wealth M		*****2221			Agent		No	Current		ABC Wealth
353287	Nic, Micha							Agent		No	Current		Addison Brokera

Total Contacts: 14

4) After making your selection(s), right-click and **Select Highlighted** or **Select All Results**, which, if selected in the example above, would assign all 14 records returned in the search results.

5) You are now returned to the CC tab and can see that your selected contacts have been attached as CCs. If the contact(s) couldn't be attached, or the system automatically added the contact type of CC to any contacts, it will be indicated bottom of the screen through one or more universal messages:

Additional Detail Comments Codes Memos Licenses Appointments Hierarchy Cases **CC**

Contacts below will receive a CC on Memos sent to Powers, Samuel.

Contact ID	Name	Delivery	Address	All Memos
498408	Bradford, Anna	Email	Abradford@baymirror.com	<input checked="" type="checkbox"/>
530149	Jane, Koda	Email	KodaJ@baymirror.com	<input checked="" type="checkbox"/>

New CC

OK Apply Cancel

The Contact Type CC has been added to Jane, Koda

Keatin, Zachary B does not have an email address for memos and was not added as a CC.

Bradford, Addison E does not have an email address for memos and was not added as a CC.

The Contact Type CC has been added to Bradford, Anna

Note that CC Contacts appear in blue, hyperlinked text, indicating that you can click on [Bradford, Anna](#) or [Jane, Koda](#) to view their Contact Records.

Once on Anna Bradford’s contact record, you will notice a new tab available by default called **CC For**. This tab displays the Contact(s) that Anna is a **CC For**. See the **CC For Tab** section later in this TechNote for more details.

Right-click Options on CC Tab

Once the CC has been added, you can right click to see two options, **Edit** and **Remove CC Association**.

Contacts below will receive a CC on Memos sent to Powers, Samuel.

Contact ID	Name	Delivery	Address	All Memos
267214	Bradford, Addison E	Email		
267215	Keatin, Zachary B	Email		
498408	Bradford, Anna	Email		
530149	Jane, Koda	Email	KodaJ@baymirror.com	<input checked="" type="checkbox"/>

New CC

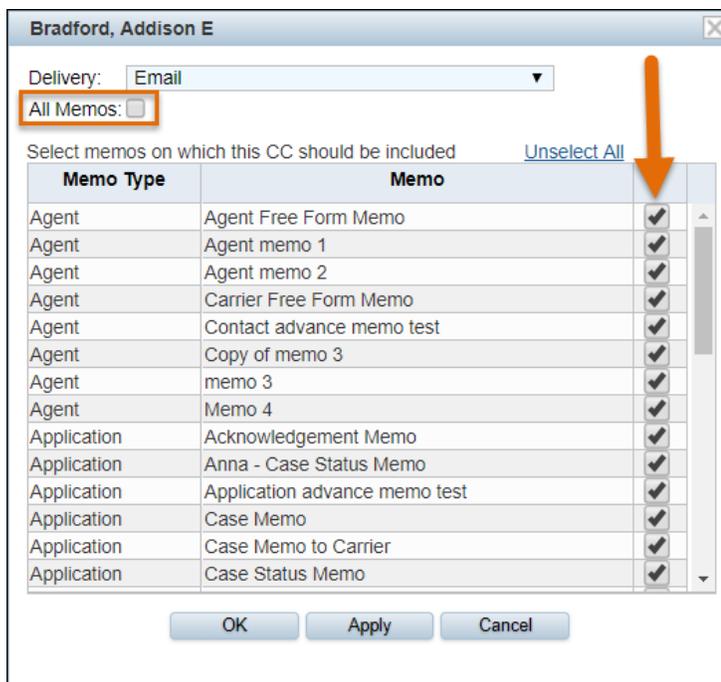
OK Apply Cancel

Edit

Remove CC Association

Edit

Selecting **Edit** allows you to change the **Delivery** method from the default of **Email** to **Print** if desired.

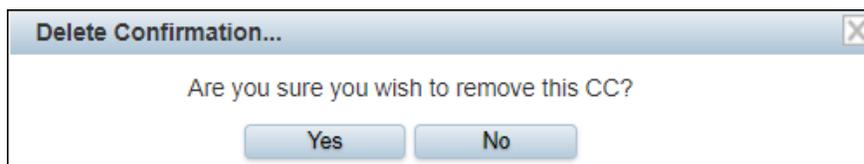


You can also select specific memos for your Contact to be CC'd on. By default, CCs will be sent on **All Memos**. Uncheck the **All Memos** box to select certain memos only.

Remove CC Association

Select one or more CCs and right-click to **Remove CC Association**. This will remove the association between the CC and the Contact, but does NOT inactivate or delete the CC contact record. The CC Contact is still available and can be added as a CC to other contacts, but is no longer visible on the CC tab for this contact.

Prior to removing the CC association, this message will appear for confirmation:



Important Note: Removing associations in this manner permanently removes the selected Memos for that CC/ CC For relationship. If you intend to make this association active again in the future and

want to retain the selected Memos included if that happens, you should change the **Status** of the CC Contact to **Inactive**, instead of Removing the CC Association.

CC For Tab

Once a Contact has been assigned as a CC, the **CC For** tab will be available. Use this tab to add a new CC For, to remove or replace existing CC Associations for this Contact. In the example below, Addison Bradford, a CC contact, receives a CC on memos sent to the five contacts below that she is a **CC For**:

Contact Detail

Contact ID: 267214 Default Organization: Addison Brokerage Entered: 10/21/2010

Name:	Prefix: <input type="text"/> First: <input type="text" value="Addison"/> MI: <input type="text" value="E"/> Last: <input type="text" value="Jones"/> Suffix: <input type="text"/>	Designation: <input type="text"/>
Company:	<input type="text"/>	
Birthdate: <input type="text"/>	Status: <input type="text" value="Manager"/> Gender: <input type="text" value="select..."/>	Nickname: <input type="text"/>
Address: <input type="text" value="1420 w Telegraph hill drive"/>		Email: <input type="text" value="Addison@baymirror.com"/>
<input type="text"/>		Phone: <input type="text" value="(801) 569-8542"/>
<input type="text"/>		Ext: <input type="text" value="132"/>
City: <input type="text" value="Taylorsville"/>	State: <input type="text" value="UT"/>	Fax: <input type="text" value="(801) 698-6542"/>
Zip: <input type="text" value="84123"/>	Country: <input type="text" value="United States"/>	Cell: <input type="text" value="(801) 875-6985"/>

Notes:

Additional Detail Comments Codes Memos Licenses Appointments Hierarchy Cases CC CC For

Bradford, Addison E receives a CC on Memos sent to the contacts below.

Contact ID	Name	Delivery	Address	All Memos
353287	Nic, Micha	Email		<input checked="" type="checkbox"/>
530169	KIRK, HAEFNER	Email		<input checked="" type="checkbox"/>
530147	Powers, Samuel	Email		<input checked="" type="checkbox"/>
530148	Dudeson, Mitchell	Email		<input checked="" type="checkbox"/>
253740	Farnsworth, Hubert J	Email		<input checked="" type="checkbox"/>

Right-click Options on CC For Tab

Edit

Right-click and select **Edit** to view/change the delivery method and included Memos for the selected CC Association.

Remove CC Association

Select one or more Contacts on the CC For tab, right-click and select **Remove CC Association** to dissociate the selected CC For Contact(s) from their CC.

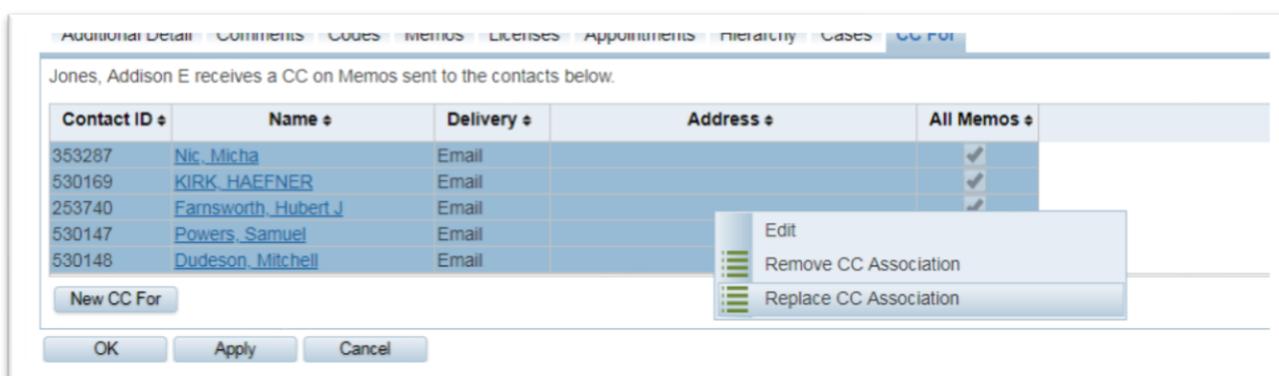
Important Note: Removing associations in this manner permanently removes the selected Memos for that CC/ CC For relationship. If you intend to make this association active again in the future and

want to retain the selected Memos included if that happens, you should change the **Status** of the CC Contact to **Inactive**, instead of Removing the CC Association.

Replace CC Association

In the example above, Addison Jones (a CC Contact) is an internal employee who is leaving the agency. We would like to replace Addison with Anna Bradford, so that Anna will now get CCd on the Memos sent to all five contacts, instead of Addison.

Ctrl+Click to select all five contacts (or a single contact if desired), then right-click and select **Replace CC Association**.



You will be taken to the Contact Search screen where you can search for the contact that will be replacing Addison. Select the contact to reassign, and double click to select. Note that only one single contact can be chosen.

After selecting, you will be returned to Addison Jones' **CC For** tab, which is now blank, because she has been replaced by Anna Bradford, and is no longer a CC For those five contacts.

A notification will appear at the bottom of the screen to indicate the replacement:

Additional Detail Comments Codes Memos Licenses Appointments Hierarchy Cases **CC For**

Jones, Addison E receives a CC on Memos sent to the contacts below.

Contact ID ↕	Name ↕	Delivery ↕	Address ↕	All Memos ↕
No carbon copies assigned.				

New CC For

OK Apply Cancel

⚠ Jones, Addison E has been replaced by Bradford, Anna for selected contacts.

Reporting

To report on Carbon Copies in report builder, you can run an Agent Info Data Group report that contains **Contact Type** as a Criteria.

Report Name: List of CC contact type Title: Logo: select...

Columns: Quick Find: contact type. Drag columns to criteria, preview, summaries.

- Agent Info
 - Address Info
 - Agent Application Info
 - Basic Info
 - Agent Status
 - Anniversary Date
 - Assistant
 - Assistant Email
 - Assistant Extension
 - Assistant Phone
 - Broker Gear Login
 - Company Name
 - Contact ID
 - Contact Type
 - Conversion ID
 - CRM Owner
 - Date of Birth
 - Designation
 - E&O Amount
 - E&O Carr
 - E&O Expiration Date
 - E&O Policy
 - E-mail Address
 - ECP Contact Name

Criteria: Remove All Criteria. Contact Type X

Preview: Remove All Columns Relabel Columns Reset Sorting

Drop groups here.

Contact ID X	Name of Contact X	Company Name X	E-mail Address X	Phone Number X	Contact Type X
No data.					
<input type="checkbox"/> Wrap					

Summaries (PDF reports): Drop summaries here.

Column Only Criteria Only Group Only Criteria or Column

Reports - Run

Report: List of CC contact type
Title:
Format: PDF *Columns may be truncated when many are selected.*
Output: Screen

Ad Hoc Criteria

Contact Type

- ALL
- Agent
- Carrier
- CC
- Doctor

Run Cancel

Contact ID	Name of Contact	Company Name	E-mail Address	Phone Number	Contact Type
267214	Bradford, Addison E		Addison@baymirror.com	(801) 569-8542	Agent
267215	Keatin, Zachary B		KeatB@baymirror.com		Agent
283999	Dean, Jason	Bay Mirror Insurance	Abradford@pipeline.com	(801) 555-6363	Agent
498408	Bradford, Anna		Abradford@baymirror.com		ECP
530149	Jane, Koda	ABC Wealth Management	KodaJ@baymirror.com		Agent
1000584	, Anna		Abradford@pipeline.com		CC
1000611	Hall, Phobe		Phall@baymirror ins.com	(801) 555-6362	CC

The Contact Type column will reflect the contact’s Default Contact Type.

Data Replicator

The ENTITY_CARBON_COPY table in Data Replicator contains CC Contacts. If you would like new CC contacts to be included in your Data Replicator file, visit the Data Replicator Administration screen and check the desired fields.

Selected	Name	Custom Name	Data Type	Description
<input type="checkbox"/>	ID		Bigint	Unique ID
<input type="checkbox"/>	Entity_ID		Bigint	Foreign key to ENTITY (ENTITYID)
<input type="checkbox"/>	CC_Entity_ID		Bigint	Carbon Copy ID - Foreign key to ENTITY (ENTITYID)
<input type="checkbox"/>	ALL_TEMPLATES_FLAG		Integer	Attach CC on all memo templates flag (1=Yes)
<input type="checkbox"/>	DELIVERY		Varchar(128)	CC Memo delivery method (E=Email, P=Print)
<input type="checkbox"/>	CREATED		Timestamp	Created timestamp
<input type="checkbox"/>	CREATED_BY_USERID		Varchar(128)	Created by user