

This TechNote highlights a new feature. You can download and install a plugin to your computer that will allow you to drag Outlook emails (.msg files), and drop them into any of the Comments tabs in Agency Integrator, and a new Comment will be created from the text of the email.

Getting Started

First, you will need to download and install the plug-in.

1. Click **Administration**

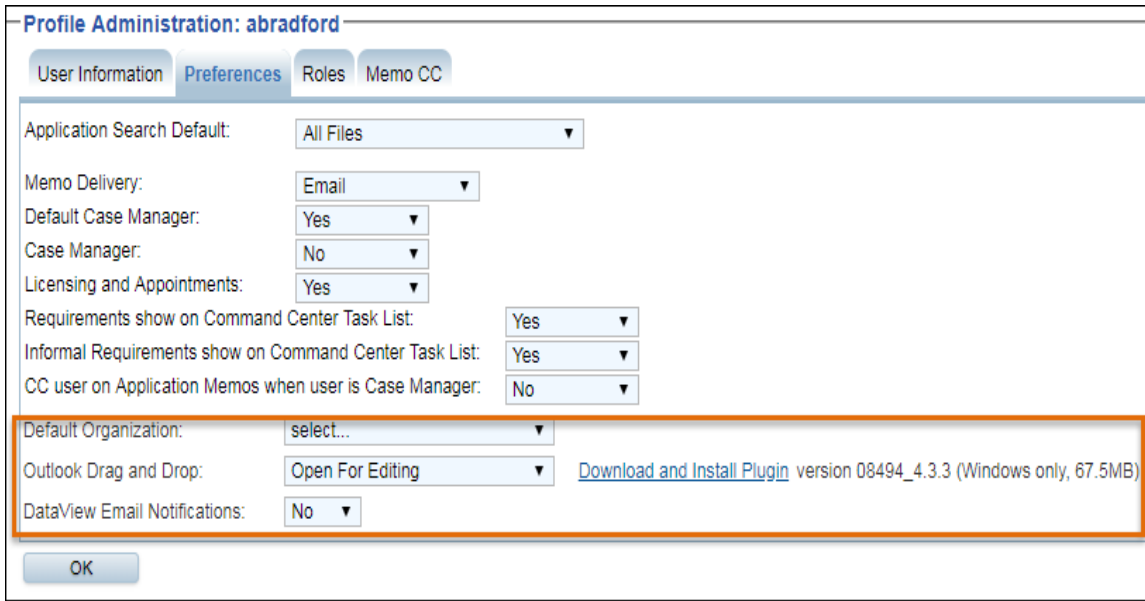
The **Profile Administration** for your user will display.

The screenshot shows the Agency Integrator web application interface. At the top, there is a navigation bar with tabs for Command Center, Contacts, Applications, Report Builder, and Administration. Below this is a sub-menu for Profile Administration: abradford, with tabs for User Information, Preferences (highlighted with a red box), Roles, and Memo CC. The main content area contains a form with the following fields:

- User ID: abradford
- Email: abradford@pipeline.com
- Printer: No Default Printer
- Signature Information:
 - Name: First (Anna), Last (Bradford)
 - Address: (multiple empty text boxes)
 - City: (empty text box)
 - State: (select dropdown)
 - Zip: (empty text box)
 - Phone: (empty text box)
 - Website: (empty text box)
 - Fax: (empty text box)

An OK button is located at the bottom left of the form. The footer of the page reads © 2018 - IPIPELINE.

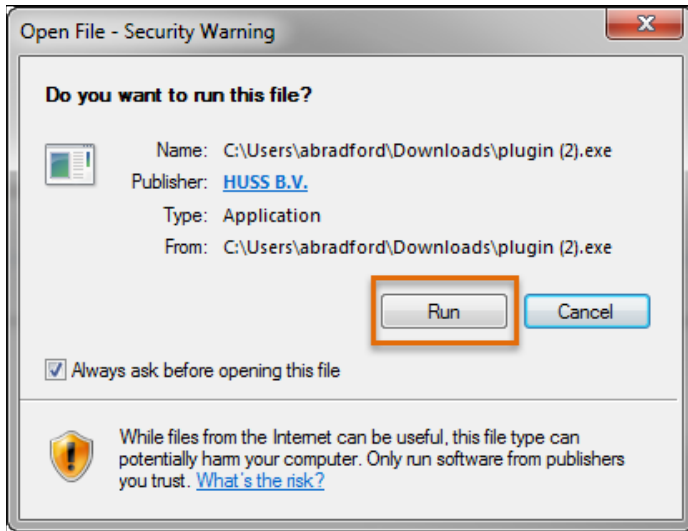
2. Select the **Preferences** tab.



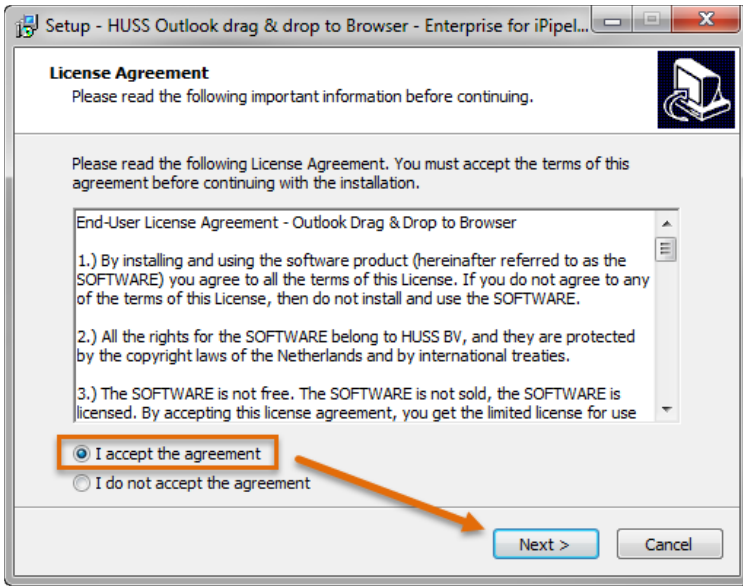
3. Click **Download and Install Plugin** hyperlink.



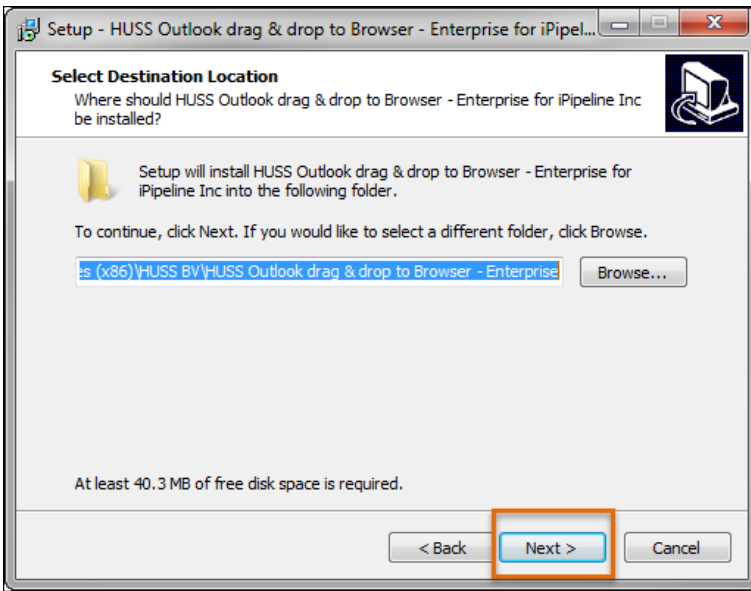
4. Click **Run**.



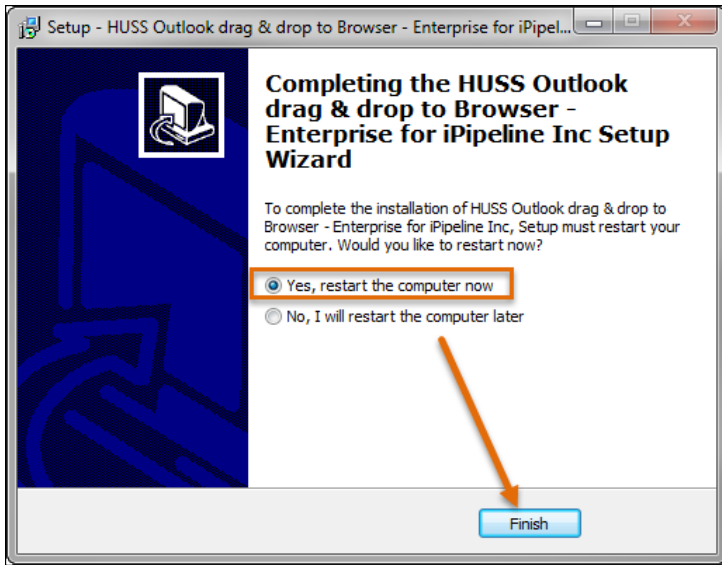
5. Select **I accept the agreement**, then click **Next**.



6. Click **Next**, then **Install**.

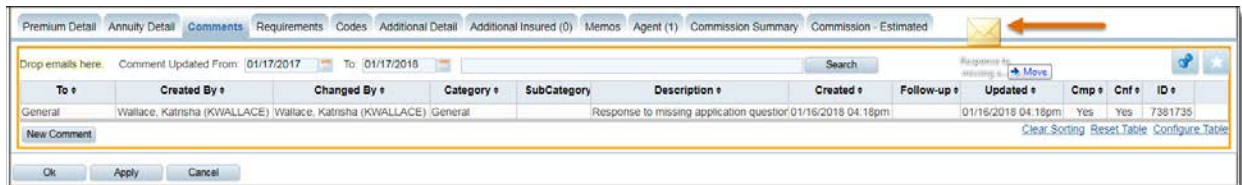


7. Select **Yes**, restart the computer now and click **Finish**.



How It Works

1. Drag the email from outlook and drop it into the **Drop Zone**, which is indicated by the highlighted section of the Comments tab. By default, these comments will be automatically added to the **Comments** table with default comment properties.



The subject line of the email is automatically populated as the comment **Description**. The body of the email is populated as the Comment.

Important Note: Images will be stripped from the email.

2. Double-click to open the **Comment** to make any changes (add a Category, send to someone's **Command Center**, change the Follow-up Date, etc.).

Important Notes: You can edit any field on the comment detail screen.

Application Comments Detail

Comment -
 Edit Comment ID: 7381735

Application ID: 1983117	Application Type: Formal	Contact: Danielson, Gary	Changed By: Wallace, Katrisha (KWALLACE)
Policy Number:	Date Created: 01/16/2018 04:18pm MT	Contact Tax ID: 888-99-7777	
Proposed Insured: Jensen, Latrice	Last Updated: 01/16/2018 04:18pm MT	Contact Email: kwallone@gmail.com	
Carrier: American General Life Companies - All states except NY (AGL)	Created By: Wallace, Katrisha (KWALLACE)	Contact Phone:	

To:

Status:

Notification Date: Reoccur

Follow-up Date:

Type:

Confidential:

Priority:

Description
 Response to missing application questions/ Latrice Jensen

Comments

History
 Entered on 01/16/2018 04:18pm MT by Wallace, Katrisha (KWALLACE)
 From: Katrisha Wallace
 Sent: 01/16/2018 16:04 PM
 To: Katrisha Wallace

Katrisha Wallace
 Customer Account Manager
 Email: kwallace@pipeline.com
 Phone: (801) 410-7805
 Support: 800-678-2220 (6 am -5 pm MST) | amssupport@pipeline.com
 Website: <http://www.pipeline.com>

Thread Comment

To add additional emails to the existing Comment History:

1. Drag and Drop the latest email to the Comments Section **Drop Zone**.
2. Click **OK** or **Apply** to save the thread to the comment **History**.

Application Comments Detail

Comment +

Edit Comment ID: 7381735

Application ID: 1983117	Application Type: Formal	Contact: Danielson, Gary	Changed By: Wallace, Katrisha (KWALLACE)
Policy Number:	Date Created: 01/16/2018 04:18pm MT	Contact Tax ID: 888-99-7777	
Proposed Insured: Jensen, Latrice	Last Updated: 01/16/2018 04:18pm MT	Contact Email: kwallone@gmail.com	
Carrier: American General Life Companies - All states except NY (AGL)	Created By: Wallace, Katrisha (KWALLACE)	Contact Phone:	

To: *

Status:

Category:

Notification Date:

Follow-up Date: Reoccur

Type:

Confidential:

Priority:

Description
Response to missing application questions/ Latrice Jensen

Comments

History

Entered on 01/16/2018 04:18pm MT by Wallace, Katrisha (KWALLACE)

From: Katrisha Wallace
Sent: 01/16/2018 16:04 PM
To: Katrisha Wallace

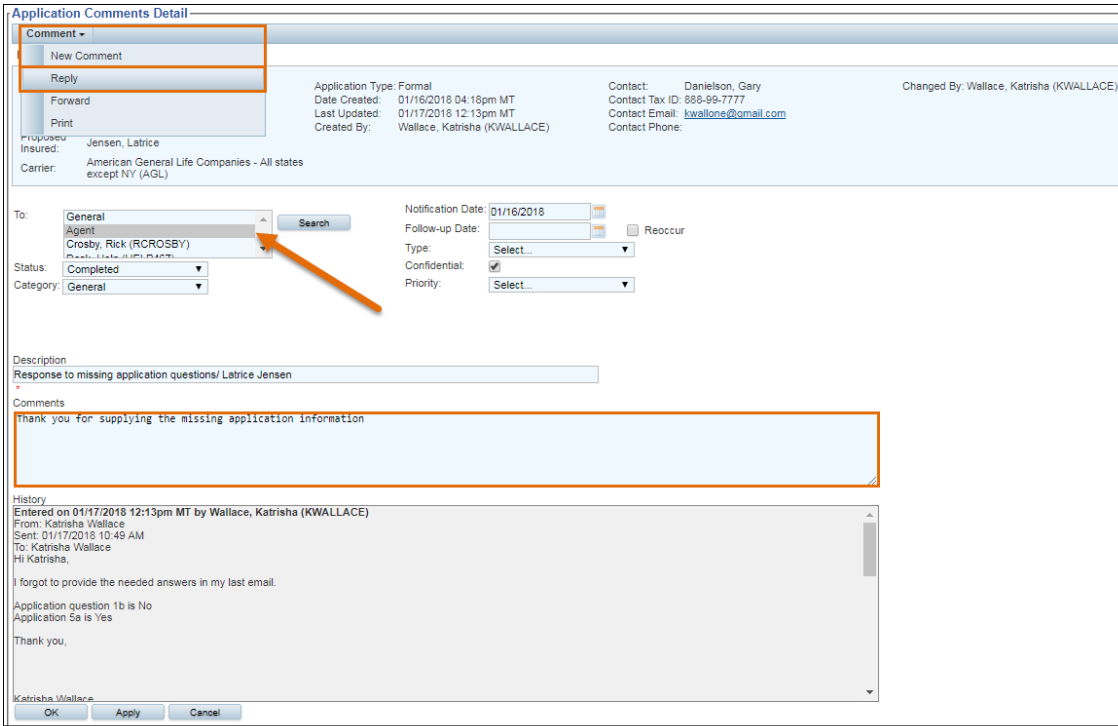
Katrisha Wallace
Customer Account Manager

Email: kwallace@ipipeline.com
Phone: (801) 410-7805
Support: 800-679-2220 (6 am -5 pm MST) | amssupport@ipipeline.com
Website: <http://www.ipipeline.com>

The comments **History** will display in a chronological order according to when each thread of text was added. There is no limit to the number of threads that can be added to the comment History.

Reply to Agent

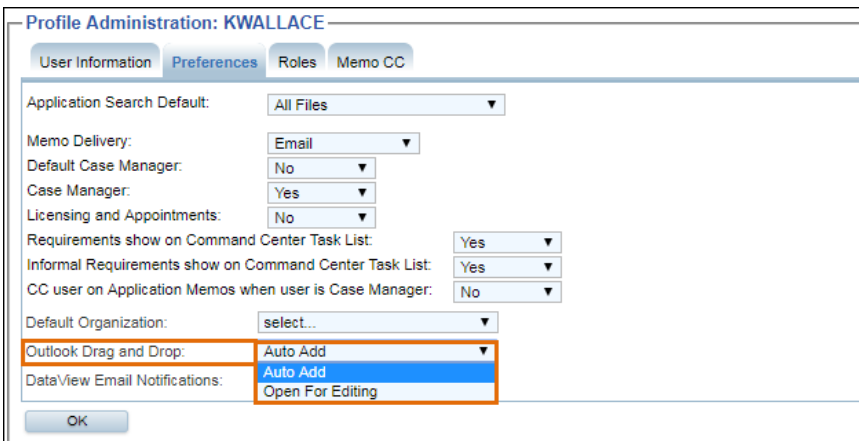
Now your email conversation has been added as a comment. If your agency uses Data View, you can reply to the agent and the entire thread will send to the Agent in DataView.



Change Default Settings

1. Click **Administration** from the main navigation bar.

Profile Administration for your user will display.



2. Click **Preferences** tab.

3. The new **Outlook Drag and Drop** User Preference has two options:

- **Auto Add:** Default option, each time an email is dropped to the comments tab, a new Comment is added to the table automatically, without opening to the New Comment screen. **To** is defaulted to **General** and a **Status** of **Completed**.
- **Open For Editing:** Each time an email is dropped to the Comments tab, the New Comment screen will appear, allowing you to make any desired changes before clicking **OK** to save and return to the **Comments** tab.