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User Experience

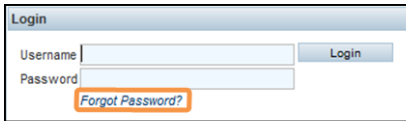
This section will describe features that give users ease of access in Agency Integrator.

Reset your password

You can reset your own password for the Agency Integrator program by following the steps below.

Steps to Reset Password

1. Go the Web address <https://ai.ipipeline.com>, and click the **Forgot Password** link.

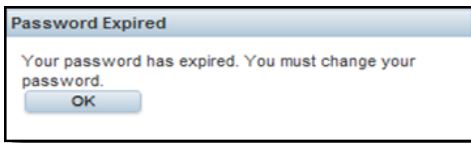


2. Enter in your User ID and click Reset.

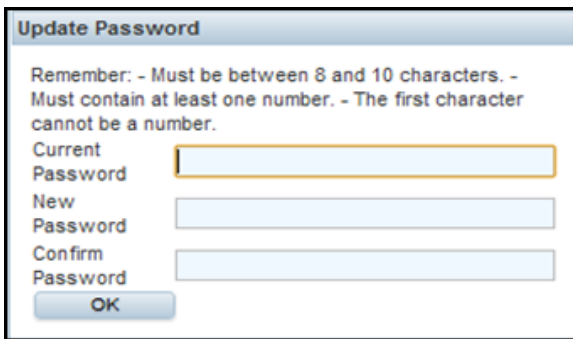
This will email you a new password.

3. Enter your User ID and copy and paste the password Provided into Agency Integrator.

This will force you to change your password. You will get a message saying your password has expired.



5. Click **OK** and you will get the update password window. Enter the password that was just emailed to you and then enter your new password. See password criteria below.



Password Criteria

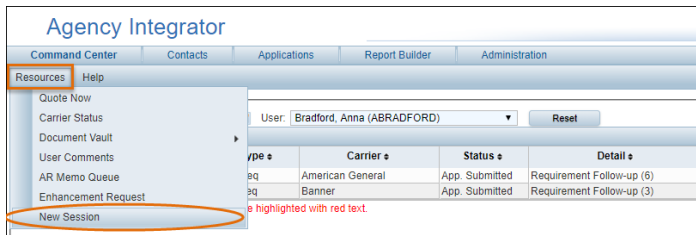
- A password must be between 8 and 10 characters long
- Must have at least one number and one letter
- Must start with a letter

- Cannot be one of your previous 5 passwords
- Cannot be used in the last 90 days
- Cannot include symbols
- Must not contain the User ID, First Name or Last Name on the profile
- The password is case If you add a capital letter, you will always need to use one
- Patterns are recognized in successive passwords and cannot be used

Note: If one of the password rules is broken when changing the password, a message will be displayed.

Multiple AI Sessions

Selecting **Resources**, **New Session** allows you to open multiple session of Agency Integrator.



Default Tab and Pinning

You can set a default tab, as well as 'pin' and 'un-pin' tabs, allowing you to customize your **Contact** and **Application** view to show the areas of the system you frequently use and hide the tabs you don't visit as often.

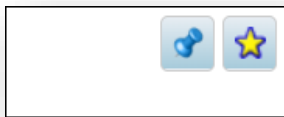
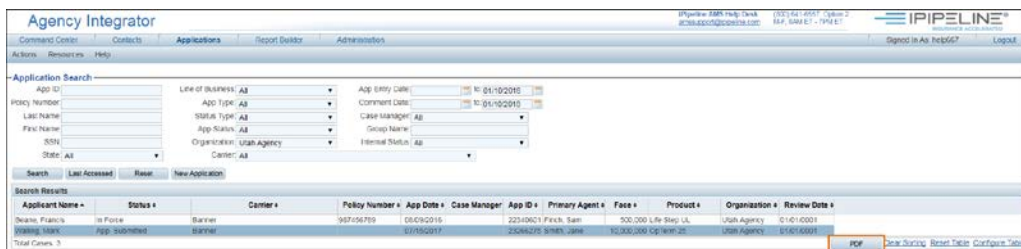


Table PDF Print

1. Click PDF will generate a PDF in a new window that displays your current search results.



PDF view.

Applicant Name	Status	Carrier	Policy Number	App Date	Case Manager	App ID	Primary Agent	Face	Product	Organization	Review Date
Agent, Primary	App. Submitted	Banner		12/16/2016		22662721	Ipson, Scott	50000	OPTerm 10 (2009)	Brokerage West	01/01/1
Alabama, Jeremy	App. Submitted	Banner	21944394	02/22/2016		21944394	Ipson, Scott	50000	OPTerm 10 - App Assist	Brokerage West	01/01/1
Anderson, Harry	In Force	Banner	998855	01/09/2017		22723980	Ipson, Scott	500000	OPTerm 30 - App Assist	Brokerage West	01/09/2017
Apple, Malcolm	Unfinished	Banner		04/30/2015		21120886	Ipson, Scott	0	OPTerm 15 (guar 15)	Brokerage West	04/30/2015
Banks, Mark	In Force	Banner	21946396	02/23/2016	Stauffer, Jeremy	21946396	Ipson, Scott	500000	OPTerm 10 - App Assist	Brokerage West	03/07/2016

Outlook Drag and Drop

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. For a complete walk through of this process please reference iPipeline Customer Portal. <https://www.customerportal.ipipeline.com/agency-integrator-archive/>

Application Comments Detail

Comment -

Edit Comment ID: 7381735

Application ID: 1963117 Policy Number: Proposed Insured: Carrier: American General Life Companies - All states except NY (AGL)	Application Type: Formal Date Created: 01/16/2018 04:18pm MT Last Updated: 01/16/2018 04:18pm MT Created By: Wallace, Katrisha (KWALLACE)	Contact: Danielson, Gary Contact Tax ID: 888-99-7777 Contact Email: kwallone@gmail.com Contact Phone:
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Changed By: Wallace, Katrisha (KWALLACE)

To: General <input type="button" value="Search"/> Agent: Crosby, Rick (RCROSBY) Status: Completed Category: General	Notification Date: 01/16/2018 Follow-up Date: <input type="checkbox"/> Reoccur Type: Select... Confidential: <input checked="" type="checkbox"/> Priority: Select...	
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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) 413-7805
 Support: 800-679-2220 (6 am -5 pm MST) | amssupport@ipipeline.com
 Website: <http://www.ipipeline.com>

Mass Assign/Unassign

Hierarchy

Manage Contacts screen of **Hierarchy Administration** to allow you to assign multiple Contacts to a Hierarchy Tier at once, rather than having to attach contacts one at a time. For a complete walk through of this process please reference iPipeline Customer Portal.

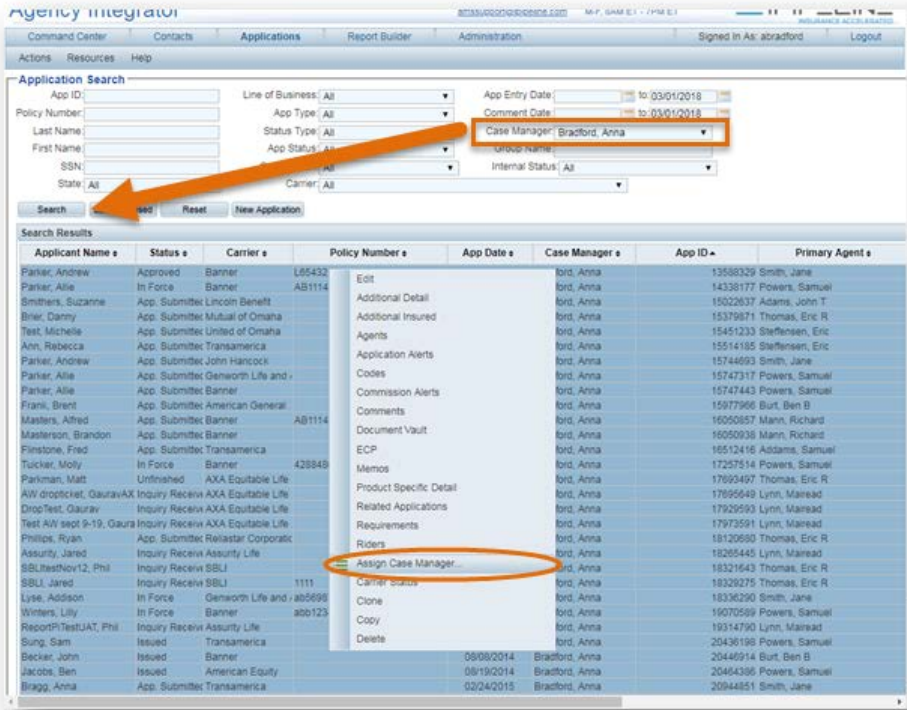
<https://www.customerportal.ipipeline.com/agency-integrator-archive/>

The screenshot shows the 'Contact Search' interface. The 'Hierarchy' dropdown menu is highlighted with an orange box and labeled 'Hierarchy: ABC Agency 55'. An orange arrow points to the 'Search' button. Below the search results table, the 'Select All Results (24)' option is highlighted with an orange circle.

ID #	Name #	Suffix #	Company #	Nickname	Tax ID/SSN #	Phone #	State	Default Type #	Manager	Codes	Status #	CRM Owner #	Organization #	
544866	ABD Agency		ABD Agency								Yes	Current	Innes, Carla	_National Account
328374	Adams and Assoc.		Adams and Assoc.						2004, Dem	Yes	Manager	Demo, Brenda		
328374	Adams and Assoc.		Adams and Assoc.						2004, Dem	Yes	Manager	Demo, Brenda		
1860965	Agent, James J. Jr.		Lawson Insura	Jimmy	333-55-6666	(801) 555-5555	MI	Agent			Yes	Current		_National Account
1874293	Banker, Brent P.						UT	Agent			Yes	Current	Innes, Carla	
766358	Bond, James		British Insuranc	007	007-00-0007	(800) 742-7005	UT	Agent			Yes	Current	Demo, Brenda	Los Angeles
328358	Carlin, Michael		Agency		213-54-6987	(801) 537-8963	UT	Agent			Yes	Preferred	Eric, Demo	New York
328360	Early, Dee Dee		CP Agency		430-12-4578	(818) 704-5555	CA	Agent			Yes	Current	Demo, Angela	
2170122	Fayak, Mark		American Finar		430-55-8888		UT	Agent			Yes	Current	Hunter, Scott	_National Account
328372	Fordham, James A.Jr.		Ford Agency	Jim	418-41-4541	(999) 999-9999	AZ	Agent			Yes	Manager	Demo, Angela	AgencyWorks De
695742	Harris Bancorp Ins.		Harris Bancorp		987-65-4320	(312) 461-4072	IL	Agent			Yes	Current	Innes, Carla	_National Account
695742	Harris Bancorp Ins.		Harris Bancorp		987-65-4320	(312) 461-4072	IL	Agent			Yes	Current	Innes, Carla	_National Account
695742	Harris Bancorp Ins.		Harris Bancorp		987-65-4320	(312) 461-4072	IL	Agent			Yes	Current	Innes, Carla	_National Account
566499	Orits, William		Voyager Insura	Bill	125-60-5421	(204) 555-2123	LA	Agent			Yes	Current	Demo, Angela	_National Account
328359	Rosenthal, Michael		CP Agency		554-67-8879	(801) 535-4789	UT	Agent			Yes	Preferred	Demo, Angela	New York
4306563	Rubbie, Barney		Dudes	Old baldy	592-92-3423	(801) 519-7944	RI	Agent			Yes	Manager	Innes, Carla	_National Account
484728	Sapon, Ken A.		Champion					Agent			Yes	Current	Innes, Carla	_National Account
543918	SMITH AND COMI		SMITH AND C		11-1111111	(555) 666-7676	UT	Agent			Yes	Current	Innes, Carla	New York
4823620	Smith, Erin		AgencyWorks		123-98-7654		UT	Agent			Yes	Current	Eric, Demo	AgencyWorks De
1567887	Smith, Mary A.		First Global	Peaches	987-65-4122	(213) 995-9652	RI	agent1			Yes	Current	Innes, Carla	
8033280	Staynerson, Sale		Staynerson Ag		998-77-4465	(800) 482-9924	OK	Agent	Brown, Ke	Yes	Current	Innes, Carla	Test Org	
11515080	Steffy, Jim		Acme		509-70-7798			Agent			Yes	Current	Eric, Demo	_National Account
384797	Wilson, Ann R.				123-45-0000	(213) 742-4107	AZ	Agency			Yes	Current	Demo, Angela	_National Account
6050285	Wilson, Jim		Report to Ann		845-55-9888	(770) 987-8543	GA	Agent			Yes	Current	Innes, Carla	_National Account

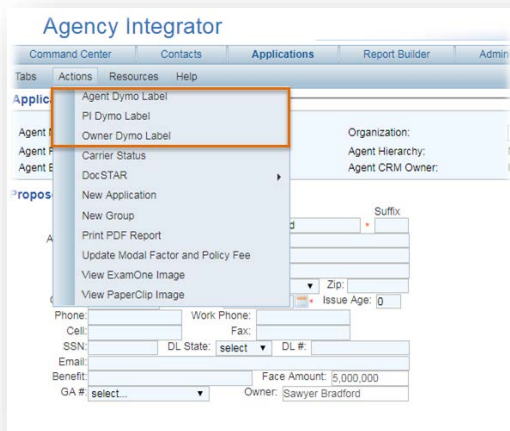
Case Manager

Using the **Application Search** results in **Agency Integrator**, to mass-assign case managers to **Applications**. For a complete walk through of this process please reference iPipeline Customer Portal. <https://www.customerportal.ipipeline.com/knowledgebase/agency-integrator-application-module/#Mass AssignUnassign Case Manager>



Dymo Label

When you select **Agent Dymo Label** from the **Actions** menu, an address label from the primary writing agent on the Application will be printed on the Dymo label printer installed on your computer. Print for **Agent, PI, and Owner**.



Preferences

Once the proper **User Rights** have been assigned, Click on **Administration** on the navigation bar. Then, Click **System** on the sub- menu bar and select **Preferences**. Popular preferences:

- Change the default Number of Follow-up Days for Requirements
- Turn Premium Calculator on and off
- Make Base Premium a required field on all applications
- Send Memos to all Agents

Preference	Code	Value
App Entry - Include Additional Detail	ADDAPPWIZ	<input checked="" type="checkbox"/>
App Entry - Check LOB on Appointments	APPTLOBCHECK	<input type="checkbox"/>
Requirements - Receive Appointment Requirements	AUTO REC REQ	<input checked="" type="checkbox"/>
App Entry - Populate Submitted Date	AUTOSUBMITDATE	<input checked="" type="checkbox"/>
App Entry - Include ECP Tab	CASOWNWIZ	<input type="checkbox"/>
Appointment Requirements and Agent Status	CHGENTUPDATELA	<input checked="" type="checkbox"/>
Requirements - Inforce cases on Command Center	CMDCNTRPAIDREQS	<input type="checkbox"/>
Commissions - Adjust override by agent split	COMSPLITOVR	<input checked="" type="checkbox"/>
CRM Owner Required	CRMOWNERREQUIRED	<input type="checkbox"/>
ECP Contacts on Cases	ECPCONTACTONCASE	select...
Bypass Validation for ECP %	ECPNOVALIDATION	<input type="checkbox"/>
Display Issue Type on Premium Detail tab	ISSUETYPE	<input type="checkbox"/>
Perform L&A check on App Save	LACHKONAPPDETAIL	<input type="checkbox"/>
Requirements - L&A default follow up days	LICAPPREQFOLUPDAYS	4
App Entry - Check LOB on Licenses	LICLOBCHECK	<input type="checkbox"/>
General - Mask Social Security #	MASKSSN	<input type="checkbox"/>
Memo Reply	MEMOREPLY	CCNOTIFICATION
Memo Reply User	MEMOREPLYUSER	select...
App Memos - Send to all agents (not just primary)	MEMOSALLAGENTS	<input type="checkbox"/>
Applications - Premium Calculator	NEWAUTOPREMCALC	BOTH
Skip Appointment Check	NOAPTCHECK	<input type="checkbox"/>
Skip L&A Check on Paid/Closed Cases	NOLACHKCLOSED	<input type="checkbox"/>
Skip License Check	NOLICHECK	<input type="checkbox"/>
confidential	NONCONFIDENTIAL	<input type="checkbox"/>
Commissions - Use Payment Amount as Override	PAYMENTOVERRIDE	<input type="checkbox"/>
App Entry - Include Premium Tab	PREMWIZ	<input checked="" type="checkbox"/>
Applications - Base Premium required	REQBASPREM	<input type="checkbox"/>
Requirements - Default follow up days	REQFOLUPDAYS	4
App Entry - Include Riders Tab	RIDRWIZ	<input type="checkbox"/>
App Entry - Skip Forms Selection	SKIPFORMSGEN	<input type="checkbox"/>
Contacts - Display Tracking ID	TRACKINGID	<input type="checkbox"/>
Applications - Update Review Date	UPDATEREVIEWDT	ANY
auto-update status to In Force-Commission Paid	UPDSTATUSAFTERPOST	<input type="checkbox"/>
App Entry - Include Codes Tab	WIZAPPCODES	<input checked="" type="checkbox"/>

MODAL= Calculates Modal Premium if Annual Premium is Entered; PERM = Calculates Base and Excess Premium using Target, 1035 Exchange, Mode and Modal Premium fields; TERM= Calculates Annual and Base Premium from Mode and Modal Premium fields; BOTH= Turns on PERM and TERM methods above, but not MODAL

Additional Training

- Onsite Training/Re-Train
- Live Bootcamps
- Recorded Bootcamps
- iPipeline Customer Portal
- Workflow Analysis