Agency Integrator Administration

User Association Administration

IPIPELINE®
INSURANCE ACCELERATED

Table of Contents

User Association Introduction

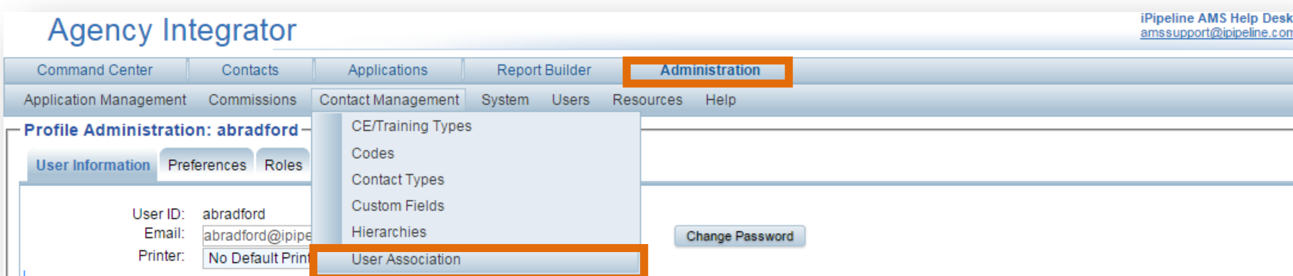
This function allows an agency to assign certain **Agency Integrator** users to specific agents, much like applications have case managers. More specifically, user associations enable Licensing and Appointment Requirements to appear in the **Command Center Task List** of specific user(s) in an agency. In addition to the reporting capabilities already made available, this function increases an agency's ability to effectively follow-up on Licensing and Appointment Requirements.

The most common use of this function is to create an association for each licensing and appointments administrator you have in your agency. You are able to assign agents to each association for follow-up purposes. Each assigned user will subsequently receive follow-up notifications in their **Command Center Task List** for the agents they are assigned to. You may also set up an association and attach multiple users to the association. This is particularly helpful when you have a team of users who handle licensing and appointment procedures in your office.

The creation, maintenance, and deletion of **User Associations** is an administrative right.

Creating a User Association

Click **Administration** on the top menu bar, then **Contact Management** sub-menus, select **User Association**.

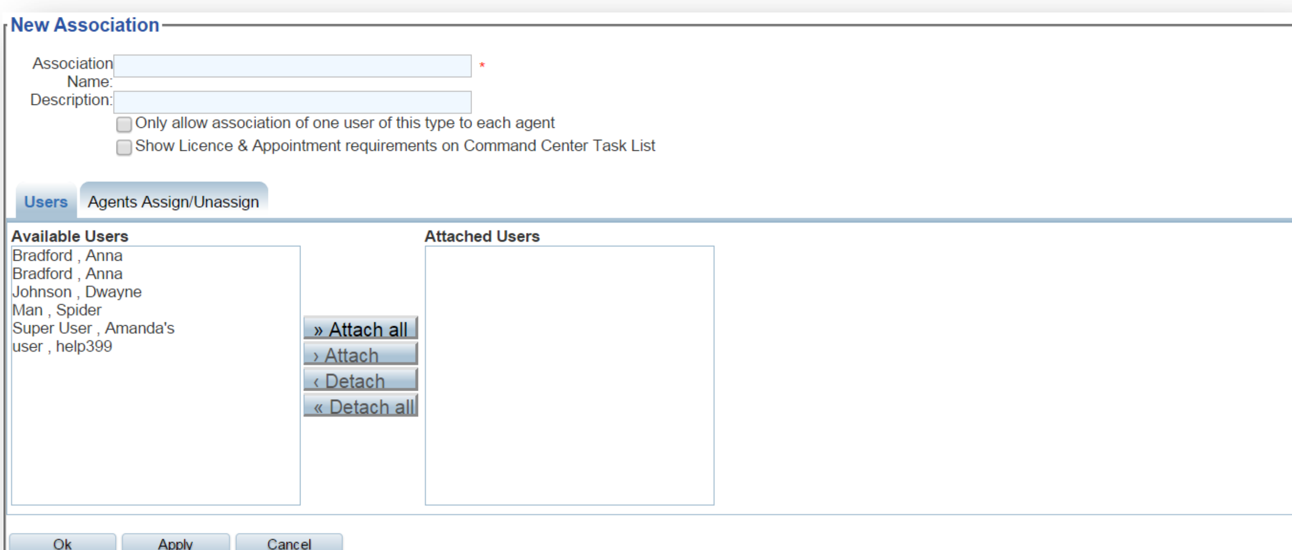


User Associations screen will appear:

Depending on how your agency functions, you will most likely want to create a new association for each licensing and appointment administrator or teams of administrators in your office. For example, User 1 may handle the licensing and appointment requirements for Agents A-M and User 2 may handle Agents N-Z. Or, you may have multiple users who handle the entire agent alphabet. Other criteria can include specific states, premium production, etc. Some agencies will want to create one Licensing and Appointment Association and then create different user and agent links using the **Agent Assign** functions.

Creating an **Association** and will not dictate whether or not an agent is assigned to a specific user or group of users. Rather, once the **Association** is created, you will need to link specific users in your agency and then specific groups of agents to the **Association** through the features discussed later in this section.

Start by clicking on the **Add Association** button. New Association screen will appear.

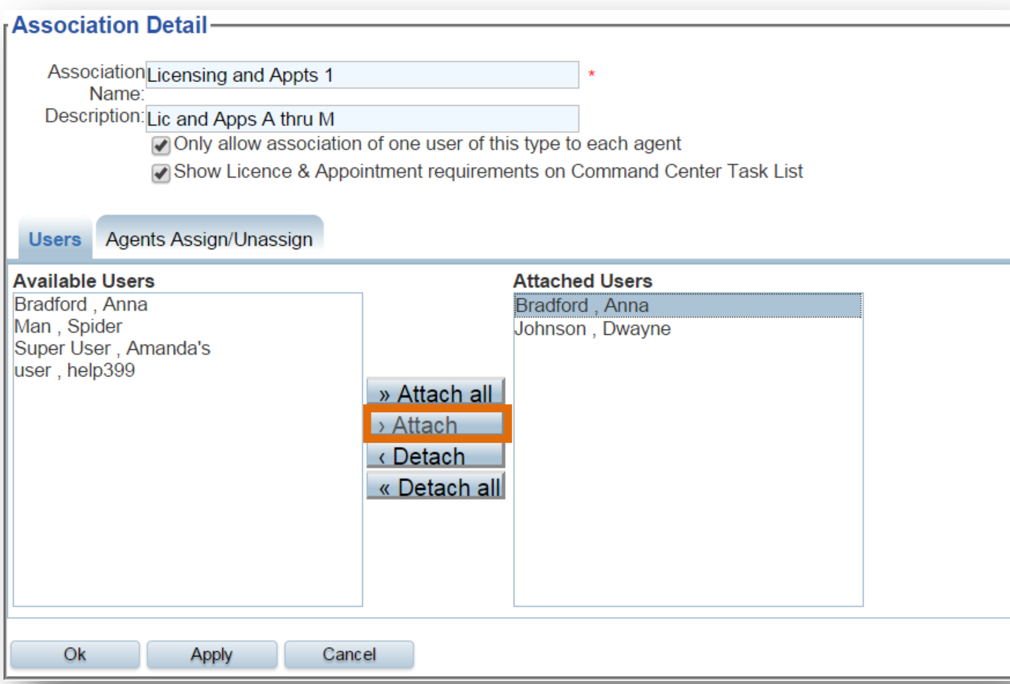


The **Association Name** will easily identify the association once you start assigning users and contacts. The **Description** also aids in easily identifying the association. There are four checkbox options:

Only allow association of one user of this type to each agent: This prevents you from linking an agent to more than one user in the association. If this is unchecked, you are able to attach multiple users from that specific association to an agent. Consequently, each user attached will receive follow-ups and tasks for each agent assigned to the users in the association. Once a task is completed, it will fall off the **Command Center Task List** for all users assigned to that agent.
License & Appointment requirements to show on Command Center Task List: This enables outstanding L & A requirements for linked agents to appear in the **Task List** of each user linked to the association. They would receive only the requirement follow-ups which correspond to agents attached to the association and linked to their user ID.

Attaching Users to an Association

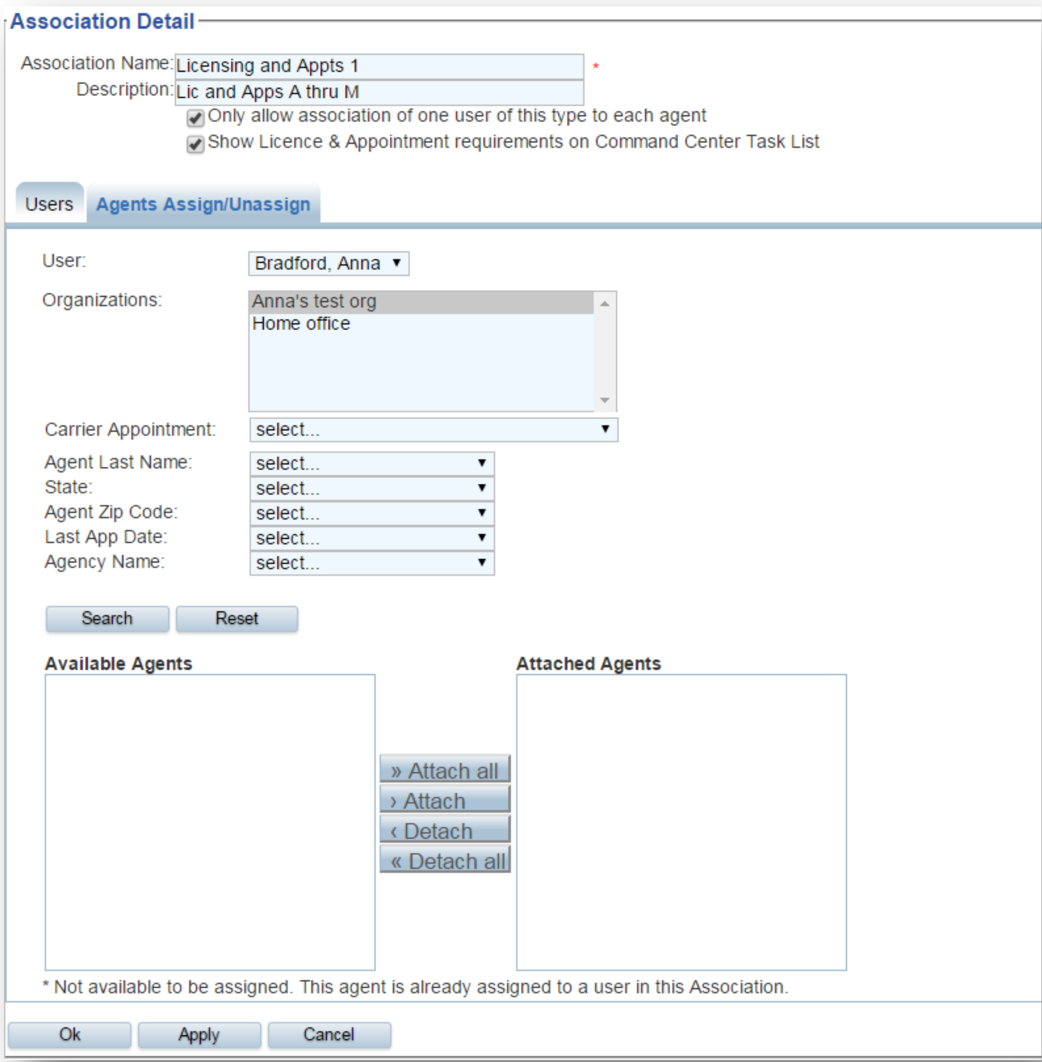
Now that you have created your **Association Detail**, you are ready to attach users in your agency to the **Association**. Click on the available users you wish to link with this association and click **Attach**.



Click on the **OK** once your selections are complete. This screen is where you will add multiple users to the same **Association**.

Agent Assign/Unassign

Now that you have selected your user(s) to the **Association**, you are ready to link agents to the **Association**. Click the **Agents Assign/Unassign** tab.

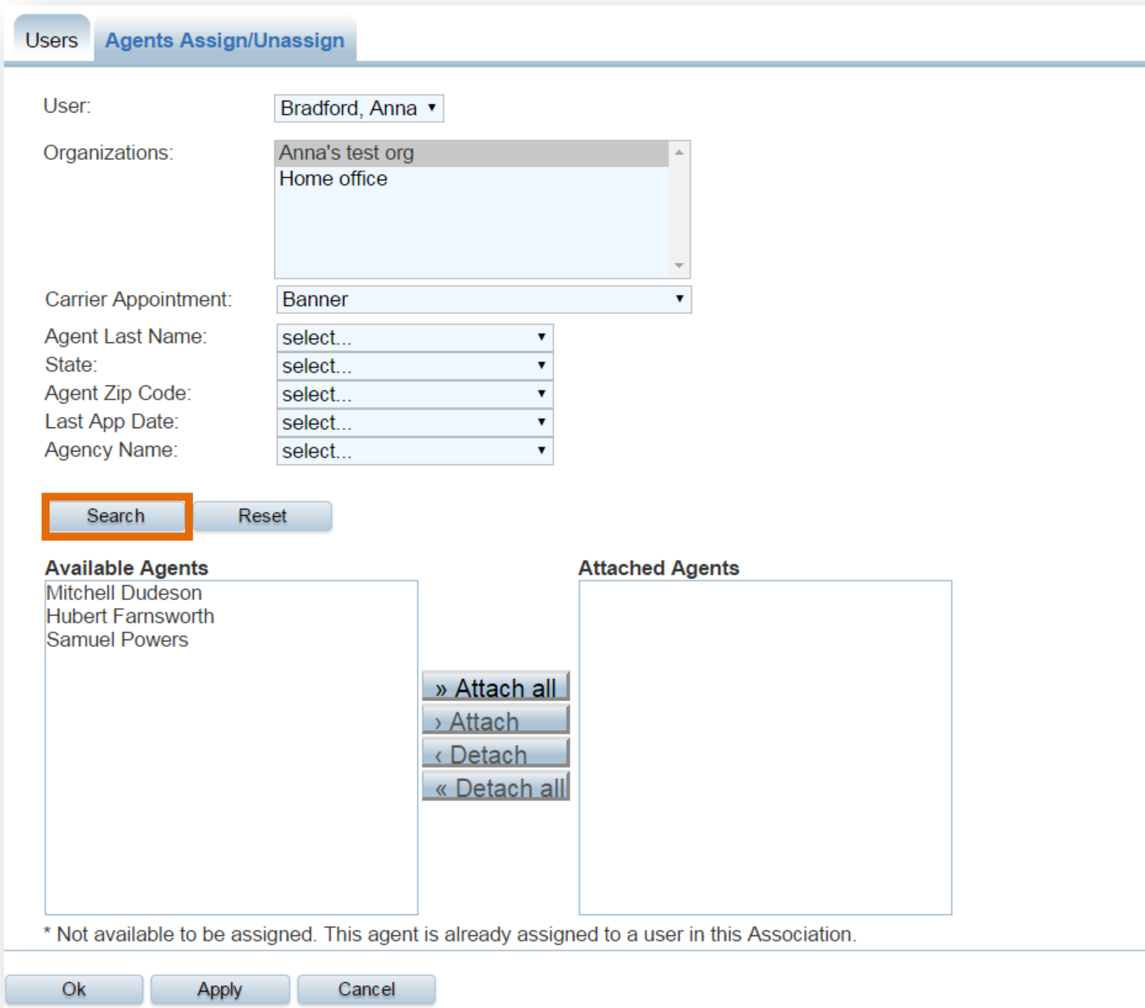


The screen consists of the following fields:

User: Choose the User from the Association you wish to work with.
Organizations: Will select agents who are assigned to one or multiple Organizations.
Carrier Appointed: Will select only agents who are appointed with the carrier you select.
Agent Last Name: Allows you to bring back results based on alpha searches.

Agent State: Allows you to bring back results based on the resident state of an agent.
Agent Zip Code: Allows you to search based off of zip code.
Last App Date: Searches based on the date of the last application submitted.
Agency Name: Allows you to search by Agency name.

Enter in your desired criteria for assigning agents. You can use one or multiple criteria. Click on the **Search** button and a list of matching agents will appear in the bottom portion of the screen:

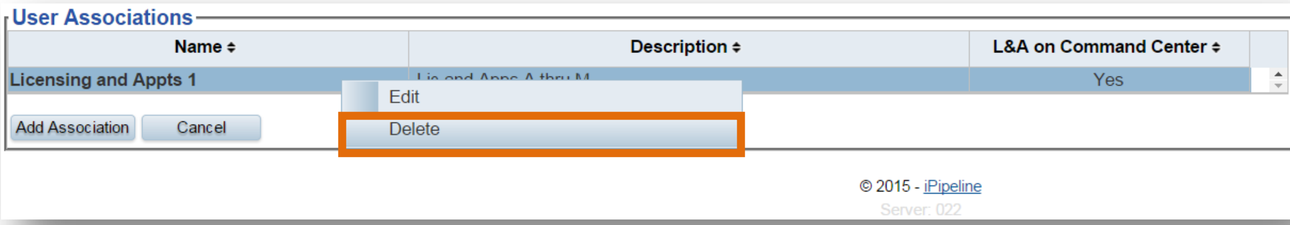


In order to assign agents to this **Association**, there must not be an asterisk * next to their name. You can choose the **Attach All** or **Detach All**.

Once you have checked all the agents you wish to add, click on the **OK** icon.

Deleting a User Association

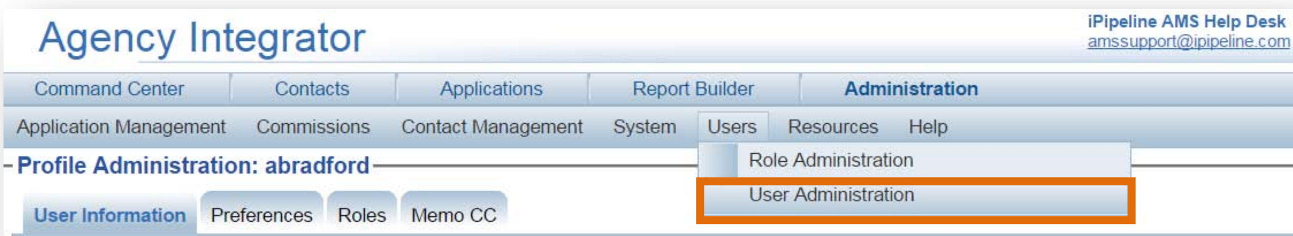
To delete an existing User Association, right click on the Association and select Delete.



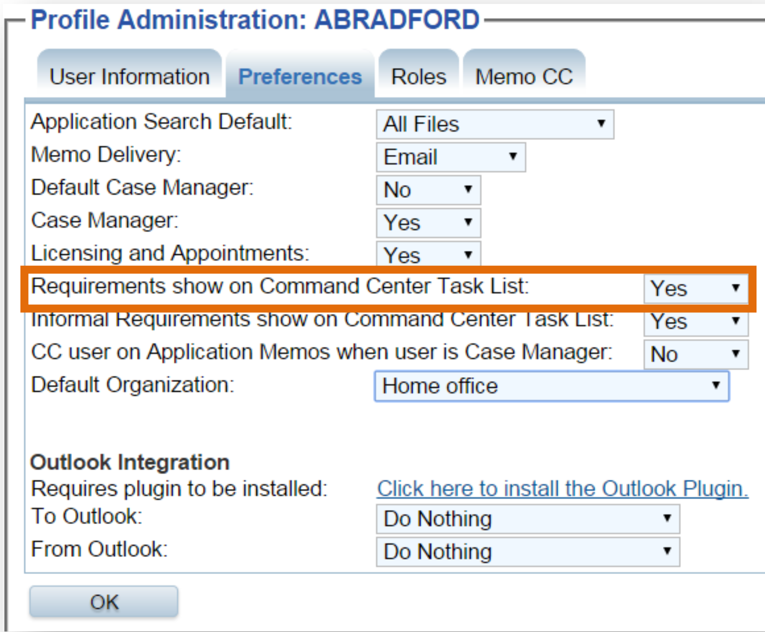
Editing User Preferences to Enable Associations

Once the **Association** has been created, the user(s) attached, and agents linked, you will want to ensure that the corresponding **Agency Integrator** user preferences are activated accordingly.

Access **Administration, Users, User Administration**.



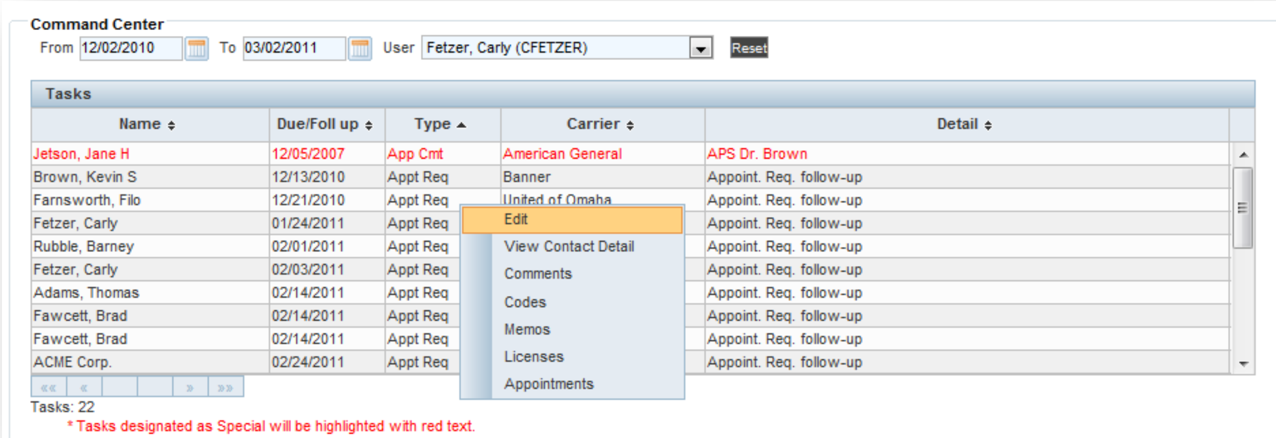
Choose one of the User IDs which is affiliated with an **Association** and click Edit to view the User's preferences. Click the **Preferences** tab.



If you chose the **Carbon copy on memos to agent** option when creating the Association, the memos will be generated based on the Memo Delivery preference of the user. Additionally, you will want to select YES for the **Licensing and Appointments** option.

Command Center Functions

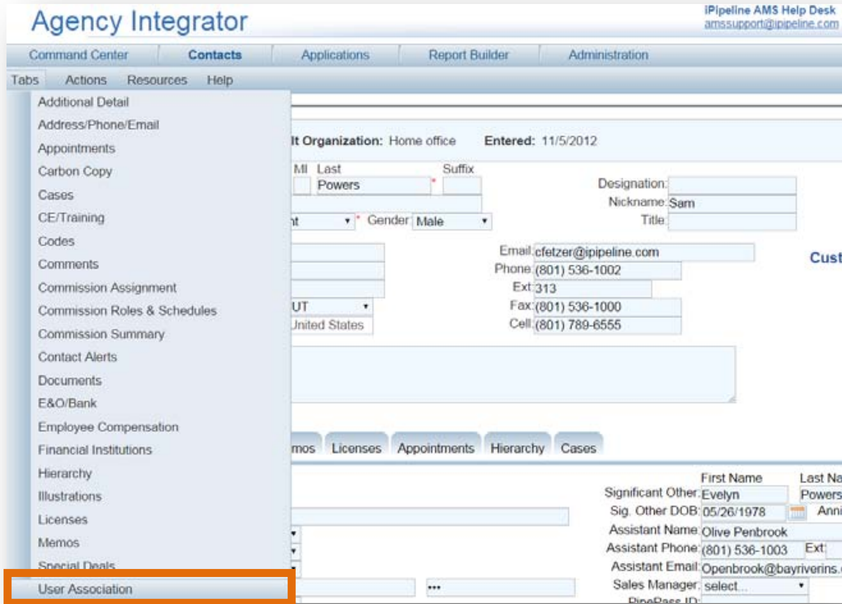
A new type of line-item will appear in the **Command Center Task List** for those users who are linked to an **Association** and have selected the **License & Appointment requirements to show on Command Center Task List** option. The **Lic Req** or **Appt Req** types will appear when a licensing or appointment requirement is due for follow up based on the follow-up date on the requirement detail. To quickly get to the specified Requirement, right-click on the **Appt Req** and select **Edit** from the pop-up menu:



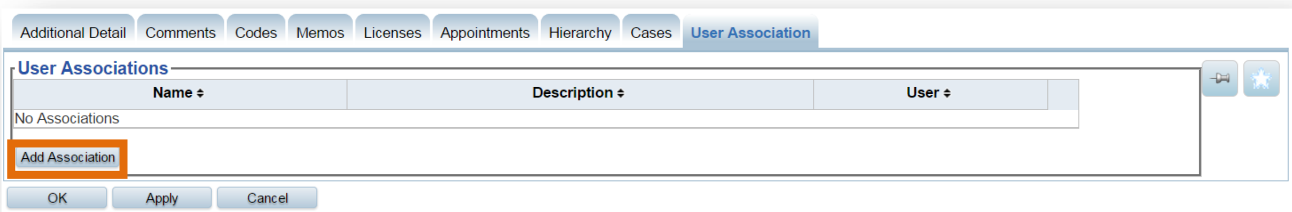
Users can subsequently work these requirements out of their queue by changing the **follow up date** in the requirement detail or by receiving the requirement.

Adding Agents to an Association from the Agent Record

Once agents have been mass-assigned to an **Association** and a corresponding user within the **Association**, you may need to add newly contracted or recruited agents on a one-by-one basis. A new screen from the Contact Record Actions menu will enable you to make these changes. From the contact record, click **Contacts** on the top menu bar then click **Actions** and select **User Association**.



The following tab appears:



Click Add Association then select the **Association Name** you wish to affiliate this agent with. Then, select the **User** you wish you attach to this agent. Finally, click on the **OK**.