

# SureLC

Ebix integration

# Synchronizing producer's data between SureLC and Ebix



## Synchronization features:

- SureLC synchronizes producer's data with Ebix transparently for user.
- SureLC producer registration speed up by taking initial data from Ebix
- automatically selects synchronization direction (no user intervention required)
- provides attributes access level configuration
- special UI for conflicts resolution
- ability to ignore conflict changes and user choice remembering

# Adding producer to SureLC from Ebix

SureLC can speed up registration process by importing producer's initial data from Ebix.

Licensing & Contracting + Add Me ↩ Cancel

Agency: demo agency

Affiliation:

NIPR Name: SEAN MORTON

NPN  License/State  SSN

SSN: 191-64-5879 \*

Last Name: MORTON \*

Phone: 45123456

Fax: 23456123

Cell: 56123456

eMail: sean.morton@surancebay.c \*

Password:  ⚠ This field is required.

\* - required fields

[PDB Report](#)

+ Add Me ↩ Cancel

# Adding producer to SureLC from Ebix

Ebix producer details where data is taken from.

SmartOffice by Ebix CRM  
Home | Settings | Sign out | Help/Training

Search: Advisor Morton Search New: Select type...

Advisor - SEAN MORTON

Menu

**Advisor** | Pending Cases | Policies | Investment Accounts | Investment Positions | Presale Activity/Proposals | Activity Log

List | **Personal** | Add'l Detail (N) | Key Relations | License/Compliance (X) | Cont./Appt. | Production (Z) | Commission | Smart Checks (J) | Letters/Documents | Request/Requirement | Custom |

**Personal Information**

Last Name	MORTON	Suffix	
First Name	SEAN	Middle Name	
Greeting		Title	
Type		Sub-Type	
Agency			
Job Title		Office Code	
Case Manager			
Supervisor			
Broker/Dealer			
Marketing Mgr			
C/U Bank		Status	Active
Source		Sub-Source	
Referred By			
Birth Date	02/02/1981	Age	31
SS #	191-64-5879	Gender	Male

**Detail Information**

Code		Hire Date	
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**Remarks**

**Phone Numbers**

Phone Type	Full Phone	Remarks
<input type="checkbox"/> Business	(25) 5647895	
<input type="checkbox"/> Business Fax	(56) 784512	
<input type="checkbox"/> Residence	(45) 123456	
<input type="checkbox"/> Residence Fax	(23) 456123	

**Addresses**

Address Type	Complete Address	Remarks
<input type="checkbox"/> Business	6746 W. COAL MINE AVE LITTLETON, CO 80123	
<input type="checkbox"/> Billing	6746 W. COAL MINE AVE LITTLETON, CO 80123	

**E-mail/Web Addresses**

Type	Address	Preferred	Mo
<input type="checkbox"/> E-mail	sean.morton@suranceb	Yes	11/2

Photo

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# First synchronization after producer registration.

Home SEAN MORTON's INFO Next Request Appointment

**Synchronize**

AMS		SuranceBay
Middle Name : John		Middle Name
Marital : S		Marital Status
Business Entity Phone : 255647895		Business Entity Phone
Business Entity Fax : 56784512		Business Entity Fax

Business Entity Fax : 56784512

Business Entity Fax

OK Cancel

NIPR DBA QUESTIONS LICENSES CONTRACTS HISTORY PRINT SCAN SCREENINGS

# Conflict resolution UI

Middle name was changed at the same time in both SureLC and Ebix.

The screenshot displays a web application interface for "SEAN MORTON's INFO". A "Synchronize" dialog box is open, comparing two records:

AMS		SuranceBay
Middle Name : Gregory		Middle Name : Walter

Below the table, the conflict resolution options are shown:

- Middle Name : Gregory
- Middle Name : Walter

The "Middle Name : Walter" option is selected. At the bottom right of the dialog, there are "OK" and "Cancel" buttons. The main application interface includes a sidebar with "IDENTIFICATIONS (NIPR)", "NAME", "RESIDENTIAL ADDRESS", and "NIPR ADDRESSES". The bottom navigation bar contains: NIPR, DBA, QUESTIONS, LICENSES, CONTRACTS, HISTORY, PRINT, SCAN, and SCREENINGS.