



This TechNote discusses integration between SureLC and Agency Integrator. For agencies that use SureLC, this integration will allow Licensing and Appointment data to populate on a contact in Agency Integrator.

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Setting up the Integration

Please contact the AMS Help Desk at amssupport@ipipeline.com or your Customer Account manager to have the Integration turned on.

Contact Integration Details

The Contact integration uses an existing contact’s **Social Security Number or Tax ID** in Agency Integrator to match to one being sent from SureLC. If a match cannot be found, a new contact record is created in a default Organization of your choosing.

The new Contact will be created with the fields below:

- SSN/Tax ID
- Name (Prefix, First, Middle Initial, Last)
- Designation
- Title
- Date of Birth
- Gender

- Status
- Resident State

A sample of a Contact created by the Integration is below:

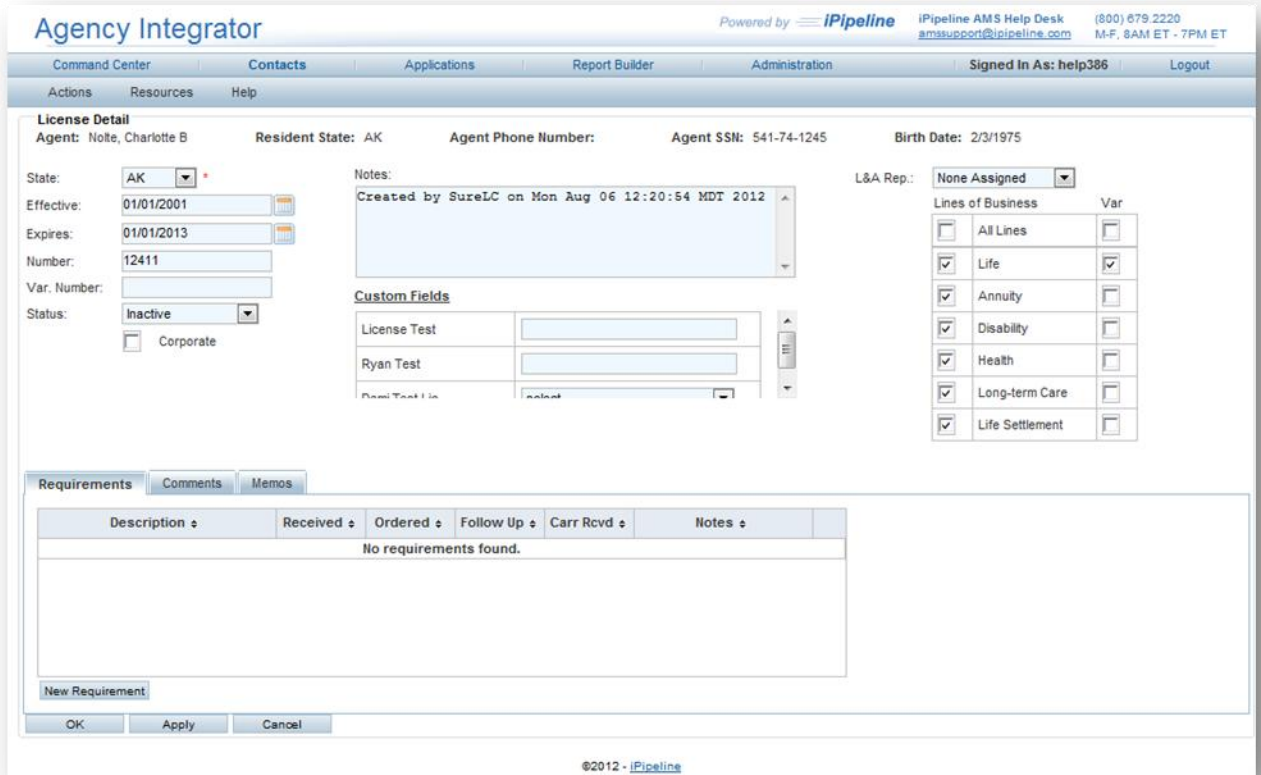
License Integration Details

The License integration uses an existing License record's **State** and **License Number** or existing **SureLC license record** in Agency Integrator to match to one being sent from SureLC. If a match cannot be found, a new License record is created . You will be able to identify a License created by the integration, because the text "**Created by SureLC**" will display in the **Notes** box on the **License Detail screen** in Agency Integrator.

The new License will be created with the fields below:

- State
- License Number
- Effective Date
- Expiration Date
- Line of Business
- Notes
- Status

A sample of a License created by the integration is below:



Appointment Integration Details

The Appointment integration uses an existing Appointment record’s **Carrier, State** and **Appointment Number** or existing **SureLC appointment record** in Agency Integrator to match to one being sent from SureLC. If a match cannot be found, a new Appointment record is created . You will be able to identify an Appointment created by the integration, because the text “**Created by SureLC**” will display in the **Notes** box on the **Appointment Detail screen** in Agency Integrator.

Appointment types of **Contracts, Add State** and **Transfers** from SureLC will be populated in Agency Integrator.

The new Appointment will be created with the fields below:

- State
- Appointment Number (if present)
- Carrier
- Effective Date
- Expiration Date

- Line of Business
- Status (only populated on creation, not updated by SureLC)

A sample of an Appointment created by the integration is below:

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Command Center | Contacts | Applications | Report Builder | Administration | Signed In As: help386 | Logout

Actions | Resources | Help

Appointment Detail
 Agent: Nolte, Charlotte B | Resident State: AK | Agent Phone Number: | Agent SSN: 541-74-1245 | Birth Date: 2/3/1975

Carrier: John Hancock | Number: 5234 | Effective: 01/01/2000 | Expires: 01/01/2013 | Status: Pending With Carrier

Notes: Created by SureLC on Mon Aug 06 12:20:53 MDT 2012

Custom Fields:
 Dami Test Appt: select...
 Appointment Test:
 Ryan Test:
 Another Appt Test:

Requirements Table:

| Description | Received | Ordered | Follow Up | Carr Rcvd | Notes |
|---------------------------|----------|------------|------------|-----------|-------|
| Carrier Contracting Forms | | 08/06/2012 | 08/13/2012 | | |

Buttons: OK | Apply | Cancel

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