

# Agency Integrator

Instead of Your Cases Managing You, You Can Better Manage Your Cases.

Keep track of what's most important with Agency Integrator, a comprehensive Web-based Agency Management System (AMS). Improve new business workflow in any size organization.

## Keeping you in touch

Agency Integrator provides a full range of tools necessary to streamline and grow your business. It allows your staff to track and process cases more effectively and efficiently. Agency Integrator helps keep you in contact with carriers and vendors, communicate with your agents, and assist with licensing, appointments and commission accounting functions. Carrier feeds send pending case info into Agency Integrator. Currently, 50 carriers provide data—that's more than anyone else offers. It also integrates with medical vendors that keep track of parameds. Agency Integrator even works with iPipeline's iGO e-App®.

## The devil's in the details

Your case updates are arriving at different times and in different ways. Sometimes it's from agents, and sometimes it's from carriers. Guess who's in the middle? You are. With Agency Integrator, you spend more time working cases and less time worrying about specific details. Agency Integrator provides a centralized place where all that data can all be stored. Plus, everyone in the office has access to that single repository. Whether you're monitoring high-dollar cases or your top-producing agents, Agency Integrator allows everyone to provide top-level service thanks to readily available information.

## Move cases quicker

You want to know what's going on with your cases so you can make the right calls and right decisions. Create insurance-specific, user-based, customized workflows with Agency Integrator. Instead of being in reactive mode, you're able to get information before agents ask for it. Want automated reminders? Enter the case, and then configure Agency Integrator to let it know the things that matter most to you. Search for an individual or list of cases that meet certain criteria. You'll also discover auto-generated messages with follow-up dates that automatically notify case managers.



## Now You Can...

- Maintain complete case history
- Auto-populate requirements
- Check licensing and appointments
- Track formal and informal cases
- Organize users with automatic tasks, to dos and follow-ups
- Producer demographic, illustration and book of business information
- Manage schedules and run reports

## Here's What You Get

- Application entry and tracking
- Task dashboard
- Carrier updates
- Illustration request tracking
- Commission module
- E-mail and mobile integration
- Standard and on-demand reports

Contact [sales@ipipeline.com](mailto:sales@ipipeline.com)  
or call (800) 758-0824 for more information.