

USER GUIDE: BOOK OF BUSINESS UPDATES

NEW FEATURES MAKE IT EASIER TO MANAGE DATA AND GAIN INSIGHTS FROM YOUR AGENCY'S BOOK OF BUSINESS

What is the IntegrityCONNECT Book of Business feature?

Book of Business is a full listing of all policies connected to your agents. It's designed to help you easily manage your downline agents' production, understand book of business trends and identify opportunities for new business and client retention. You can access it from your IntegrityCONNECT global menu by clicking the briefcase icon labeled "Book of Business."

Import a Book of Business

UPLOAD A FILE

1. Log in to IntegrityCONNECT. In the left-side navigation menu, click on the briefcase icon. This will open a Book of Business window.

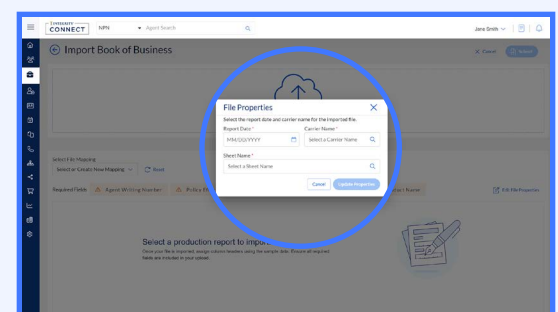
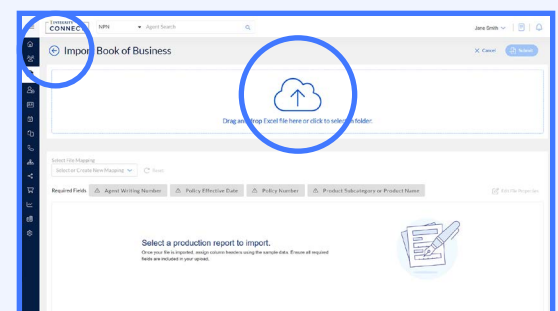
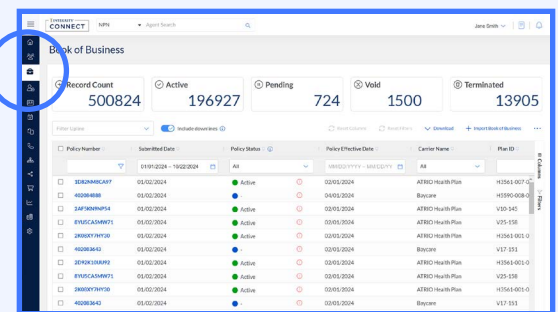
(NOTE: To toggle a view of the icon names, click on the menu icon in the upper left corner.)

2. Click on Import Book of Business to access the import screen.
3. Drag and drop a production or book of business file onto the import icon, or click on the upload icon and select the file from your computer.



4. In the File Properties popup window, designate or confirm the Report Date, then select a Carrier Name and Sheet Name. When finished, click Update Properties.

Once the upload completes, it will auto-populate as a table with each column labeled as designated in the original file.

Above the table, IntegrityCONNECT indicates missing Required Field names with .



- At the top of each column, use the dropdown menu to assign or confirm names for the remaining columns. For example, you can change a column that imported as “Policy ID” to “Policy Number,” which is one of the required field names.

When you resolve a missing or mislabeled Required Field, the  icon above the table will change to .

- Once all columns have been changed or confirmed, click Submit in the upper right corner. A Save File Mapping popup window will then appear.

CREATE & SAVE MAPPING TEMPLATES

To save your mapping preferences as a template for future imports, designate a File Mapping Name in the Save File Mapping window. When finished, click Save File Mapping. Otherwise, click Do Not Save.

Manage the Data in Your Book

GAIN INSTANT INSIGHT FROM THE DASHBOARD

Located at the top of the page, the dashboard offers a dynamically updated overview of your Book of Business. It provides insights on:

- Total Policies
- Total Active Policies
- Total Pending Policies
- Total Voided Policies
- Total Terminated Policies

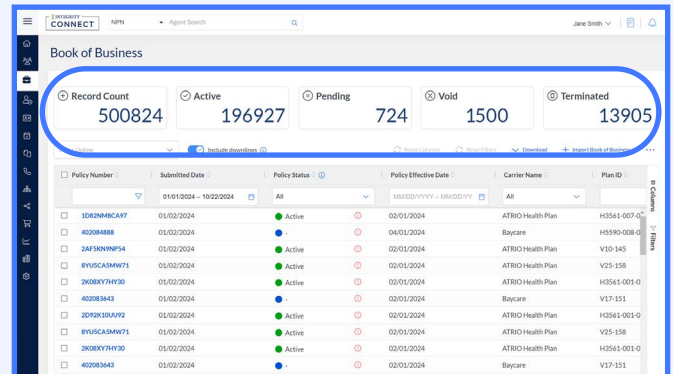
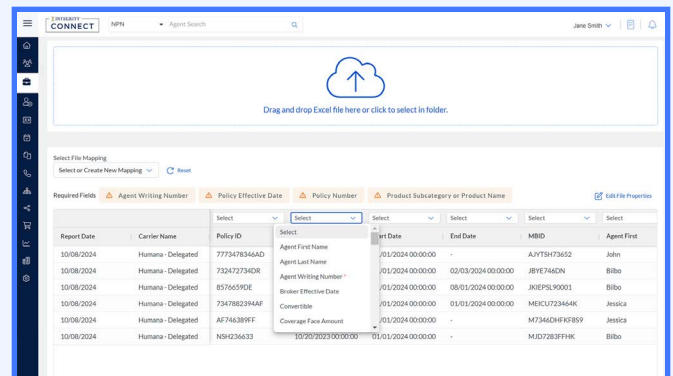
FILTER YOUR DATA

Convenient filters allow you to arrange and view data to obtain deeper insights. As you select a filter, policy totals on the dashboard will also change.

Column-Only Filters

Use the pull-down menu at the top of each column to drill down into the data. Filtering options include:

- Immediate Upline
- Agent
- Plan ID
- Top of Hierarchy
- Carrier
- Product Type



You can also select a date range to view the data. Quick date selection options include:

- Last Year
- Last 365 Days
- Last 6 Months
- Year to Date
- This Month

Global Filters

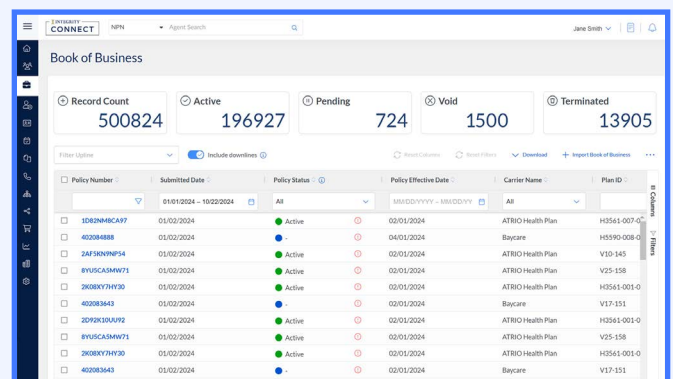
On the right side of the page, click Filters to sort data according to:

- Policy Number
- Submitted Date
- Policy Status
- Policy Effective Date
- Carrier Name
- Plan ID
- Policy Type
- Product Type
- End Date
- Writing Agent Name
- Top of Hierarchy
- Immediate Upline

ADJUST COLUMNS FOR CUSTOM VIEWS

You can create a custom view in your table by moving or adjusting columns. Your changes will be automatically saved for future use.

- To reposition a column, select it and then drag it left or right.
- To condense or expand a column's size, click the boundary at the top of the column and drag it to the desired width.
- To hide columns, click the Columns tab on the right side of the screen and uncheck the columns you want hidden.



VIEW MULTIPLE LAYERS OF HIERARCHY (DOWNLINES)

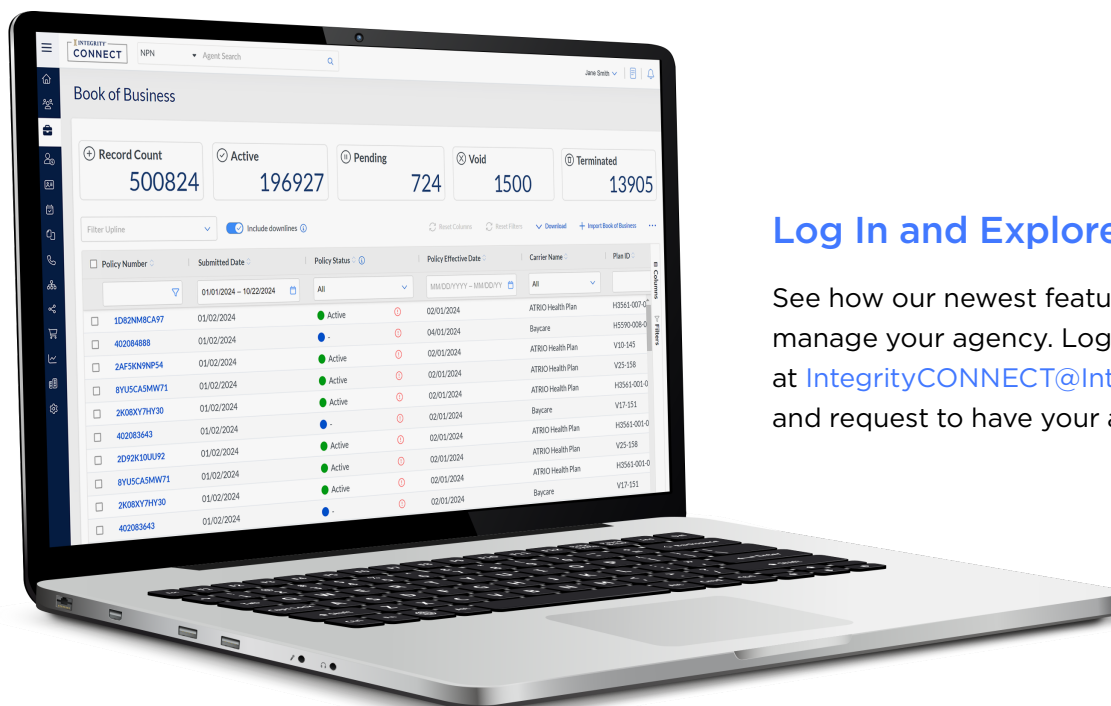
To view an agent's downline:

1. Type the agent's name in the Search Bar.
2. Click Include Downline.
 - All contractual downlines associated with the agent will appear.
 - From here, you can select or unselect agencies to include in the table display.
3. To continue down the branches of the hierarchy, click on the filter pull-down menus at the top of the column labeled:
 - Agent Name
 - Immediate Upline
 - Top of Hierarchy

ACCESS AN INDIVIDUAL AGENT'S BOOK OF BUSINESS

Users can also access an individual agent's book of business to gain insight into their work and identify opportunities. To view an agent's data:

1. Search for the agent using the search bar in IntegrityCONNECT. Their name should appear as a result in a dropdown menu.
2. Select the agent's name in the menu to visit the Agent Profile.
3. In the Agent Profile, click on the Book of Business tab.



Log In and Explore Today

See how our newest features can help you manage your agency. Log in today or email us at IntegrityCONNECT@IntegrityMarketing.com and request to have your agency onboarded.