AgentSync for Agencies

agentsync

The Problem

5,546
Regulatory actions taken against producers last year

$30,441,868
Total regulatory fine amounts in U.S. dollars last year

25%
Increase in total fines vs. previous year

The Solution

☑ Carrier must **file state appointments** in most states for the producers that are appointed to sell their products. *Requirements vary by state*

☑ Producer must hold both **an active license** in the customer's operating state(s) and the producer's resident state.

☑ Producer must be **authorized to transact** the appropriate line(s) of authority - ex: property, casualty, health, life, etc.

Features

System Implementation
Basic setup can be completed in days, not months, and can be deployed within an existing Salesforce environment or as a standalone if you aren't currently on Salesforce.

Apply For & Renew Licenses Directly From Salesforce
Take license management one step further by automatically applying for or renewing licenses and lines of authority.

The Agent Record Imported with NIPR
Simply enter the producer's NPN (National Producer Number) to import the agent record from the NIPR Producer Database in real-time.

Automated Agent Contracting
In one click, or as part of an automated workflow, generate producer agreements auto-populated with agent and agency info, w9, and E&O policy collected during onboarding.

The Producer Sync
AgentSync is powered by a direct integration to NIPR that makes a copy of all your producers' contact info, licenses, appointments, and even regulatory actions.

The Agent Portal
All producers can view their licenses, carrier appointments, update their bio info, answer background questions, upload documents, etc.

Automatically-Generated Compliance Analysis Through Scorecards
As soon as a producer is assigned to a producer assignment, a scorecard is generated and identifies any gaps in compliance.

Dashboards & Reports
Self serve, drag and drop customization, and one-click exports.

Data Security & Privacy
Built on the Salesforce platform and fully reviewed and approved by their security team, your data is as safe as it gets.

5.0 Average Rating ★★★★★ Read all our reviews on the Salesforce Appexchange

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