



# AGENCY VUE

## Business Overview

Development & Implementation

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# INTRODUCTION

## OVERVIEW

The goal for this application is to integrate the many sites and tools we use on a daily basis. By streamlining the lead capturing, quoting, verification, and processing steps. It is projected that we should be able to save 22 to 28 minutes per application. Another benefit to consolidating all these processes into one system would be the added analytics we would be able to generate and monitor.

## PROPOSE

The propose of this document is to give a top level overview of each functional area. This document is subject to change during the development and implementation process. As with any new project some 'needs' and 'wants' will need to be evaluated and deemed necessary or not based on many factors that are sure to arise during the development process.

# ACCOUNT LEVELS

## OVERVIEW

This application will have multiple account levels which we will outline in this section. There will be 3 (three) main account types with different sublevel profiles. The reason for the 3 account types is to set it up as a **Master -> Agency -> Agent** flow.

## MASTER LEVEL

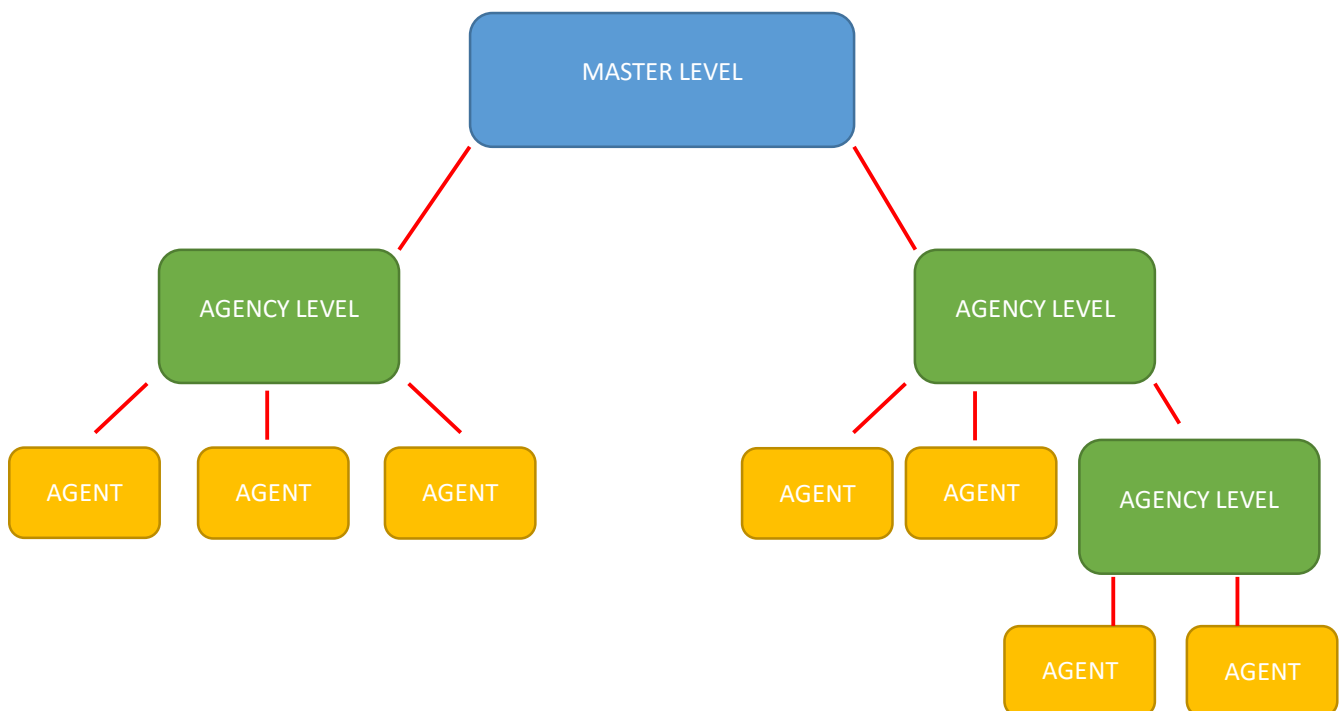
The Master level will be used by AgencyVUE only. From this account we should be able to view all levels and all data. This will be the complete admin level account.

## AGENCY LEVEL

The Agency level will be used by “downline” companies. These accounts will be business overview profiles that are admin levels accounts for only the agents and or agency level accounts that this account setup or referred.

## AGENT LEVEL

The Agent level is the lowest level which will also consist of multiple permission/profiles. From this level you can assign an agent to different roles and security levels.



# PRODUCT & SOFTWARE INTEGRATION

## OVERVIEW

Several product sites are available through API, however; there are several products that do not currently offer API integrations. Secondly, there are some products that have static pricing based on a few factors (Ex. State, Age, etc.). In order to properly build out the quoting engine in this application we will need to integrate several API's. We will also need to integrate with our current dialer, softphone, and inbound lead vendors. It will also be necessary to set this application up in a way that will be easy to add new product API's as they become available.

## PRODUCT API'S

Below is a list of products that will require an API in order to extract an accurate quote.

- Unified Health One (Product)
- Premier STM (Product)
- Merit STM (Product)
- Eagle Premier Series (Product)

## STATIC PRODUCTS PRICING

Below is a list of products that are based on a static price table (no API needed).

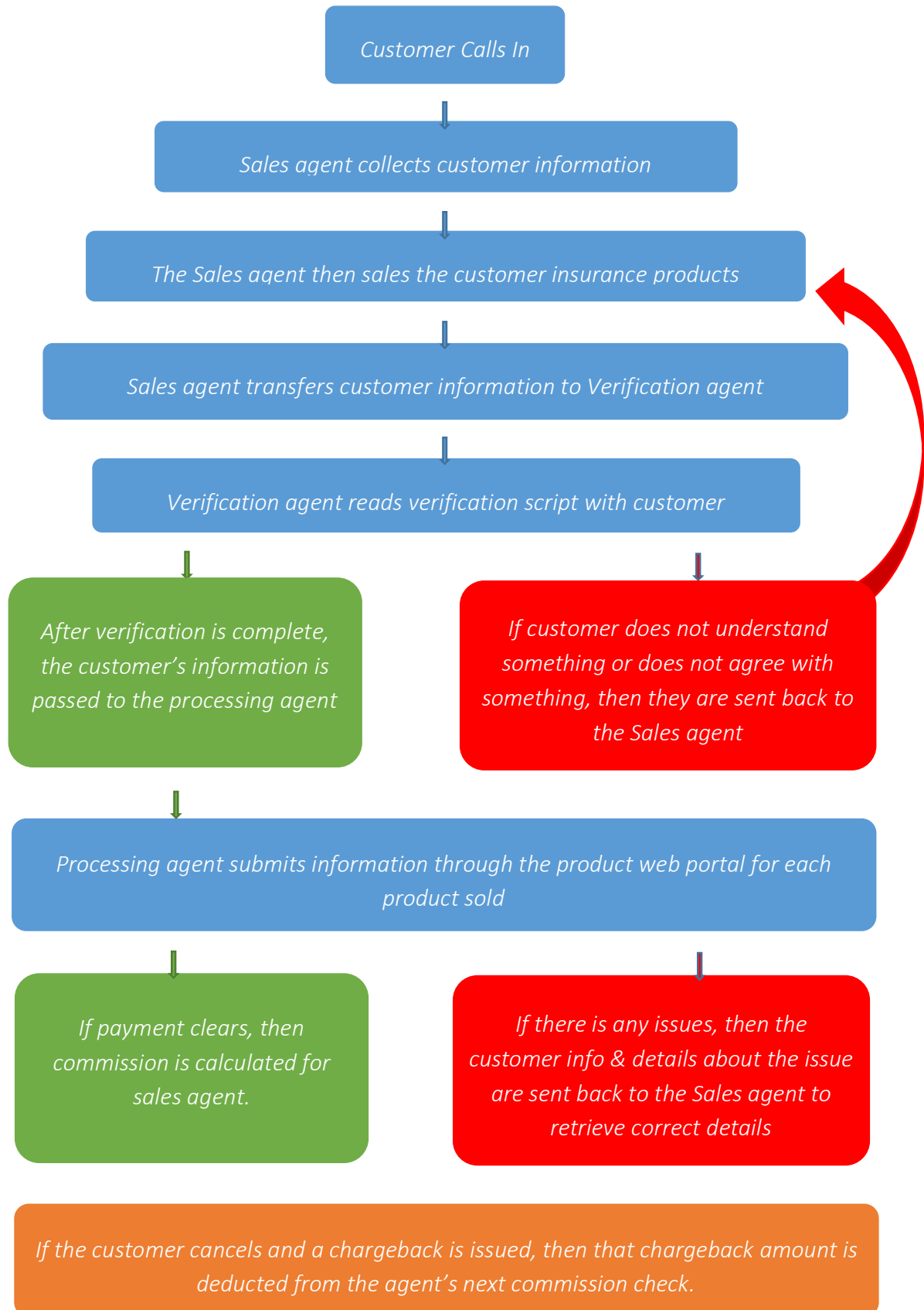
- HMS plus ADB (Product)

## ADDITIONAL AIP'S

Below is a list of current software we are utilizing to run our everyday operations. We would like to integrate these different software's or embed/build a custom application.

- Dialer
  - [www.vicidial.com](http://www.vicidial.com)
- Softphone
  - [www.counterpath.com/x-lite/](http://www.counterpath.com/x-lite/)
- Inbound Lead Companies
  - [www.datalot.com](http://www.datalot.com)
  - [www.katch.com](http://www.katch.com)
  - [www.brokeroffice.com](http://www.brokeroffice.com)
  - [www.nextgenleads.com](http://www.nextgenleads.com)

# WORK FLOW



# APPLICATION LIFE CYCLE

## STEP 1: SUBMITTED

- When the Sales agent collects the customers information and submits the form to verification this step is marked as "Submitted"
- Upon submission of the form the Verification agent will receive a notification that a new application is ready for verification.

## STEP 2: VERIFY

- If verification is completed without issues then this step is marked as "Verified".
- Upon marking this step as complete, the Processing agent will receive a notification that a new application is ready for processing.
- If verification has issues:
  - o The Sales agent who submitted the application will receive a notification that states the issue in details.
  - o The verification agent will be able to include detailed notes about the issue.

## STEP 3: PAYMENT

- If the payment clears and the application processes completely, then this step is marked as "Processed".
- Upon marking this step as complete, the Processing agent will receive a notification that an application is ready for commission payout.
- If there is an issue:
  - o Incorrect information: Processing agent can make a note on what information is needed. The Sales agent will receive a notification with details about what information is needed.
  - o Payment Issue: If the payment does not clear, the Sales agent and Processing agent will receive a notification that the payment did not clear & the reason why.
- If the customer requests that the payment be deducted on any other day then todays dates, then this step will be marked as "Post Dated". The postdated date should also be displayed somewhere.
  - o When the date the application is ready for processing the Processing agent will receive a notification to process the postdated application.

## STEP 4: COMMISSION

- Paid: If all steps are completed without issues, then this step will be marked as "Paid" and the commission amounts will be added to the Sales agent's weekly commission total.
- Chargeback: If a chargeback occurs then the processing agent will mark this step as "Chargeback" and will enter the amount that will be deducted from the Sales agent's commission total for that week.