AgencyBuzz Integration with Insurance Website Builder Standard Forms

This document provides information about the data bridge from Insurance Website Builder standard forms to AgencyBuzz including setup, field mapping, and FAQs.

Table of Contents

Integration Requirements

Integration Setup

Field Mapping

Integration Tips + FAQ
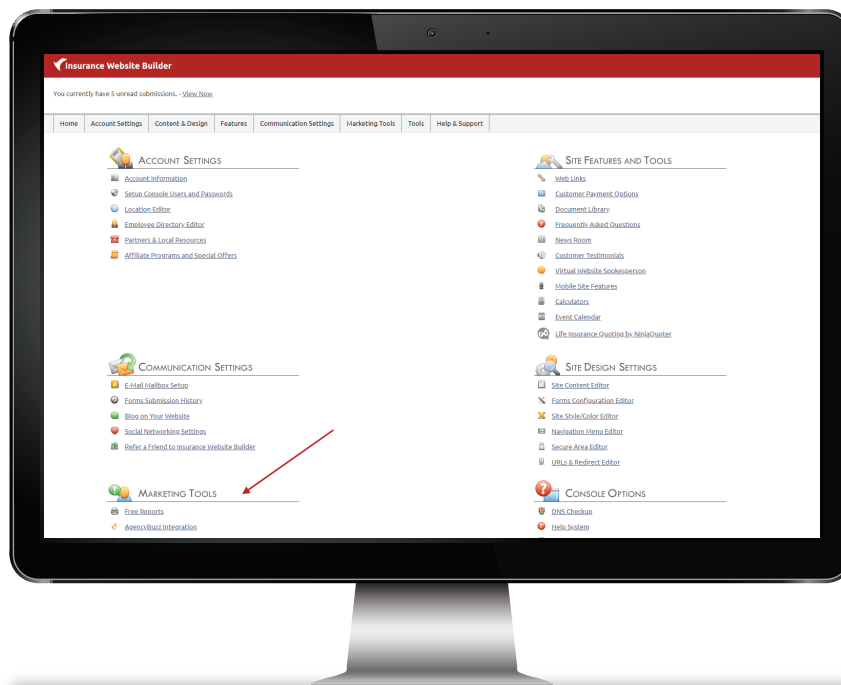
Integration Requirements

In order for the integration to be set up properly and continue to function, the following prerequisites have to be met:

1.   You have a valid account login for an AgencyBuzz user with Admin Access Level.

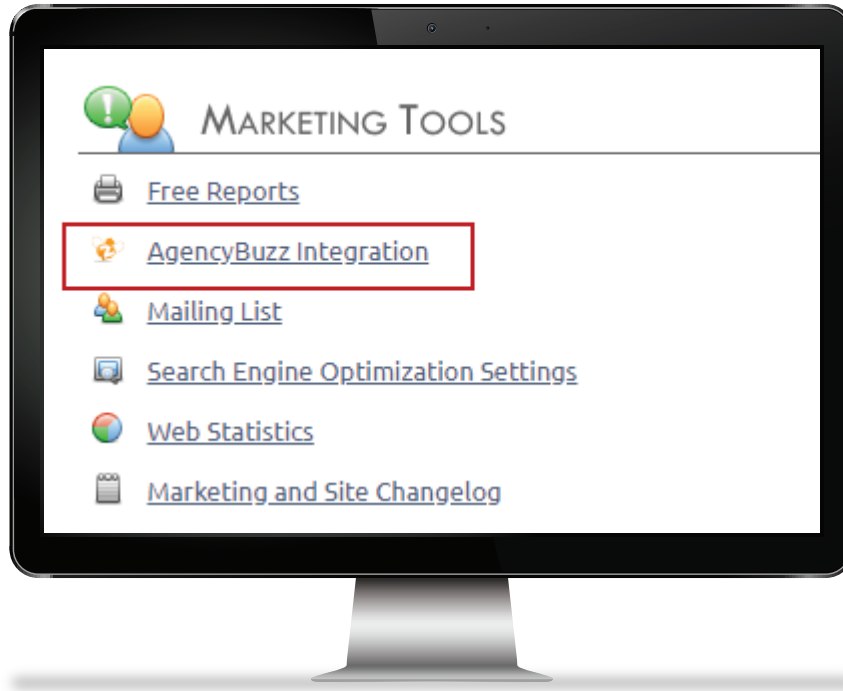2.   You have a valid account login for Insurance Website Builder.

Integration Setup

To set up the bridge of standard form submissions from Insurance Website Builder to AgencyBuzz, you will need to configure Insurance Website Builder by following the steps below.
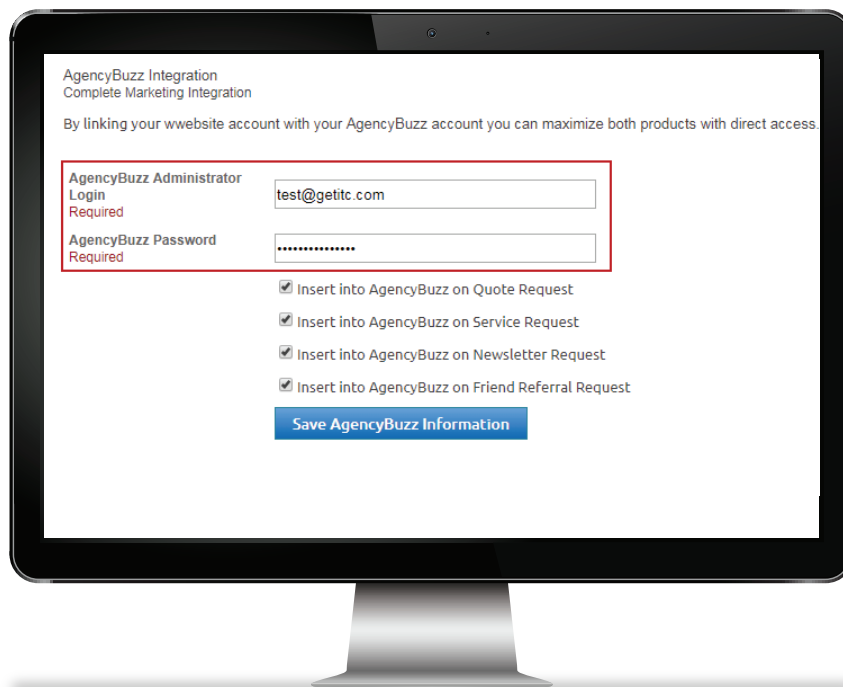
1.   Log in to your **Insurance Website Builder** administration console.

2.   Go to the **Marketing Tools** section located at the bottom left of the main screen.
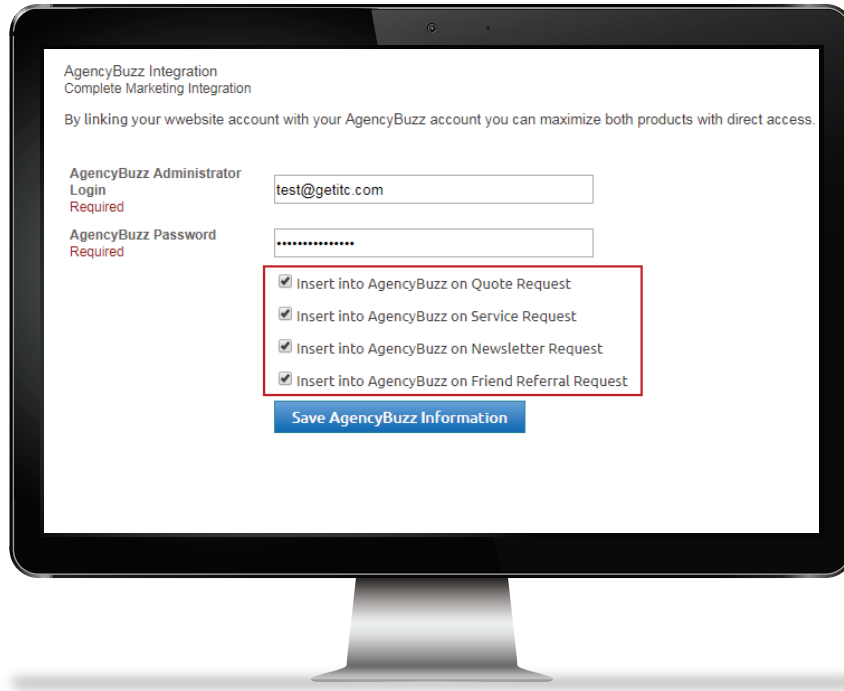
3.   Click **AgencyBuzz Integration** from the list of available marketing tools.

4.   Enter your AgencyBuzz email username in the **AgencyBuzz Administrator Login** field and your AgencyBuzz password in the **AgencyBuzz Password** field.

5.   Check the **boxes** for the Insurance Website Builder default form submissions you wish you push over into AgencyBuzz.

AgencyBuzz Integration
Complete Marketing Integration

By linking your wwebsite account with your AgencyBuzz account you can maximize both products with direct access.

AgencyBuzz Administrator
Login
Required   test@getitc.com

AgencyBuzz Password
Required   ●●●●●●●●●●●●●●

☑ Insert into AgencyBuzz on Quote Request
☑ Insert into AgencyBuzz on Service Request
☑ Insert into AgencyBuzz on Newsletter Request
☑ Insert into AgencyBuzz on Friend Referral Request

Save AgencyBuzz Information

6.   Click **Save AgencyBuzz Information** to connect the bridge.

7.   Your **AgencyBuzz Password** will erase and your email address will remain in the **Administrator Login** field if the integration was saved correctly.

Field Mapping

Since AgencyBuzz and Insurance Website Builder use different types of data, not all fields from the form submissions will come into AgencyBuzz. Below is a chart of what information is pulled from Insurance Website Builder form submissions and what field it goes into in AgencyBuzz.

Contact Record	
Form Submission Field	**AgencyBuzz Field**
First Name	First Name
Last Name	Last Name
Company Name	Company
Occupation	Job Title
E-Mail Address	Email Address
Primary Phone Number*	Home Phone
Street Address	Street 1
City	City
State	State
ZIP/Postal Code	Zip Code
Date of Birth	Birthdate
Your Anniversary	Anniversary
Quote Request Form: Line of Business	Prospect Status for Each Line(s) of Business
Newsletter Form: Interested Products & Services	

AgencyBuzz will not pull extensions.

Integration Tips + FAQ

This section answers frequently asked questions about the integration between AgencyBuzz and Insurance Website Builder.

How do I know if my Insurance Website Builder website is currently integrated with my AgencyBuzz account?

1.   Log in to your **Insurance Website Builder Admin Console**.
2.   Click on **Marketing Tools** > **AgencyBuzz Integration**.
3.   If there is an email address in the **AgencyBuzz Administrator** field, this typically means the integration is currently built.
4.   You can also verify the bridge is in place by looking at the **Newsletter** signup form on your website. If there is an "**I am Interested in…**" box with a list of lines of business, the integration is currently built.

Why do my custom online form submissions not bridge into AgencyBuzz?

The Insurance Website Builder/AgencyBuzz integration supports standard default forms only. Any customized online forms created with the form builder will not connect to AgencyBuzz.

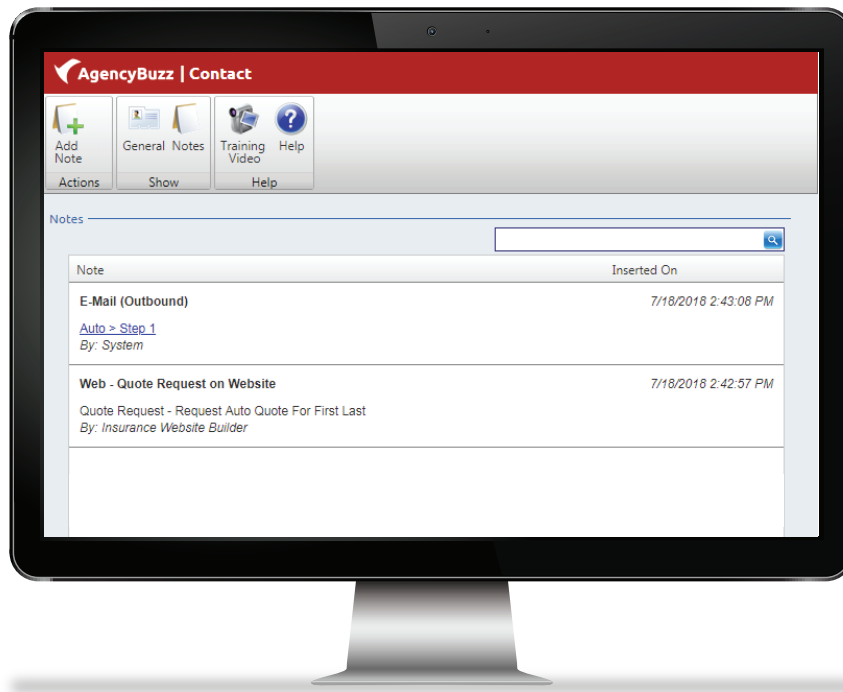### Why do Contact Us form submissions not come into AgencyBuzz?

Contact requests from your website are not considered explicit opt-ins for email marketing communication and therefore are not bridged.

I have another system integrated with my AgencyBuzz account. Will they conflict with each other?

No. If the third-party integration attempts to add/update a record into AgencyBuzz with the same email address as a record added by an Insurance Website Builder form submission, the records will combine and update accordingly.

How do I know if an AgencyBuzz prospect came from an Insurance Website Builder form submission?

Log into AgencyBuzz and open a contact record. Click the notes icon located in the top menu bar to review the history of the contact. You will see "Web – Quote Request on Website" indicating the contact came from your Insurance Website Builder form.

Additionally, the contact record's referral source will say "Agency Website."

How quickly will form submissions be added to AgencyBuzz?

Form submissions will automatically push to AgencyBuzz in real-time when the form is submitted.

My form submissions seem to have stopped coming into AgencyBuzz from Insurance Website Builder. What happened?

Invalid login credentials are the most common reason for the integration to stop working. Follow the steps below to check the integration configuration.

1.	Verify your **AgencyBuzz admin user** login credentials.

2.	Log in to the **Insurance Website Builder Admin Console**.

3.	Click on **Marketing Tools** > **AgencyBuzz Integration**.

4.	Put your AgencyBuzz email address username in the **AgencyBuzz Administrator Login** field.

5.	Put your AgencyBuzz password in the **AgencyBuzz Password** field.

6.	Click **Save AgencyBuzz Information** to update the configuration.

7.	Your AgencyBuzz Password will erase and your email address will remain in the Administrator Login field if the integration was saved correctly.

If you have verified your integration configuration in Insurance Website Builder and submissions continue to not come into AgencyBuzz, contact our support department at **800-383-3482, Option 4**.

Why did a specific form submission not come into AgencyBuzz?

There are several reasons a specific contact may not come into AgencyBuzz from Insurance Website Builder forms. Follow the steps below to research further.

1. Verify the form submission meets the **requirements for integration**:

    •   The submission has an email address.

    •   The form is a standard form and not a custom form.

2. If the **email address on the form submission already existed** in an AgencyBuzz contact record, the AgencyBuzz record will update to prospect status for the quote request line of business. If the existing AgencyBuzz record was already marked as a prospect for the line of business, no changes will be made to the AgencyBuzz record.

3. Send a screen shot of the **Submission History** to your AgencyBuzz coordinator for further research.

Can I set the integration to only pull specific types of form submissions?

You can customize the AgencyBuzz integration configuration in your Insurance Website Builder admin console by **unchecking the boxes** next to the form types (Quote Request, Service Request, Newsletter Sign Up, Referral Request) you do not want to push into AgencyBuzz.