



What's New Guide

Account Settings

Availability Preferences

Lead Source now includes direct connection to LeadCENTER for Life leads. Agents can click / tap Set up or Configure to create and manage lead campaigns (lead purchases) in LeadCENTER. Data leads purchased in LeadCENTER are immediately sent to Integrity as Contact records. Real-time call leads are connected to the agent's Personal Agent's Phone Number and the recordings are created and stored in Integrity.

Selling Preferences

Choose which Product Type to quote. By default, both Product Types are selected and the agent chooses the Product Type each time they start a Quote.

Active Selling Permissions

This section now includes Active Selling Permissions for Final Expense agents.

Self-Attested Permissions

This section now includes a section for Final Expense agents to self-attest to their own permissions. Self-attested permissions will be checked according to the appropriate carrier/agency/ FMO after 33 days and will be removed if not verified.

Availability Preferences

Calls to your Agent Phone Number will be forwarded to the number below.

Forward Calls to: [Edit](#)

435-555-8989

Lead Source

Health [Set Up](#)

Life [Configure](#)

PlanEnroll

Selling Preferences

Quote Life Products
Vivamus sagittis lacus vel augue

Quote Health Products
Vivamus sagittis lacus vel augue

Active Selling Permissions

Life

Health

Carrier:
Carrier 1

Products:

FINAL EXPENSE PRODUCT 1

Producer ID:
123456789

Self-Attested Permissions

[Add New](#) +

Life

Health

Carrier:
Carrier 1

Date Added:
09-10-25

Products:

FINAL EXPENSE PRODUCT 1