What's New Guide

Contact List

There are five updates to the Contact List screen:

- Stage values updated
- Reminders removed
- Primary contact method moved under Connect
- New columns for Life and Health
- Updates to the "More Options" menu

Stage Values

The Stage can still be set automatically by the platform or manually by the agent, but the Stages have been updated so they can apply to both Health and Life Contacts:

New: Default value for new Contacts added to Integrity. Helps agents find their leads quickly.
Contacted: Contacts the agent has reached out to through Integrity.

- These Contacts have one or more call recordings linked to them (either incoming or outgoing), and / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).

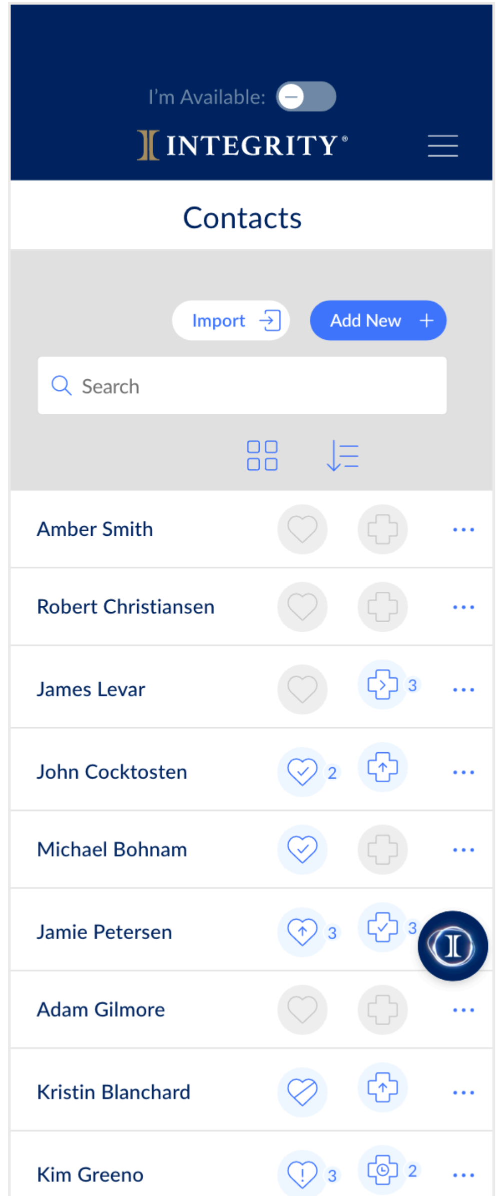
Engaged: A Contact with one of the following actions completed:

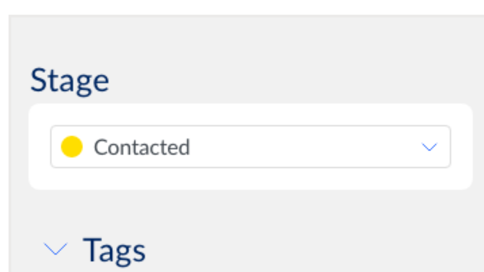
- Signed SOA (Health Contacts)
- Completed SOA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

Client: The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.
Retained:

- Health Contacts: At least one annual renewal
- Life Contacts: Two consecutive years of having a policy

Loyal: Three or more years of renewals / history plus at least one active or in progress policy
Lost: This stage can only be set by the agent. After setting the Contact's stage to Lost, the agent can choose from a list of reasons the Contact was lost.





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Reminders

Contact Reminders have been removed from the Contact List screen. They're still available on the Contact Details screen. A new reminder can be added to the Contact from the Contact List screen by clicking or tapping the three dots at the end of the row, then clicking or tapping Add New Reminder.

Primary Contact Method

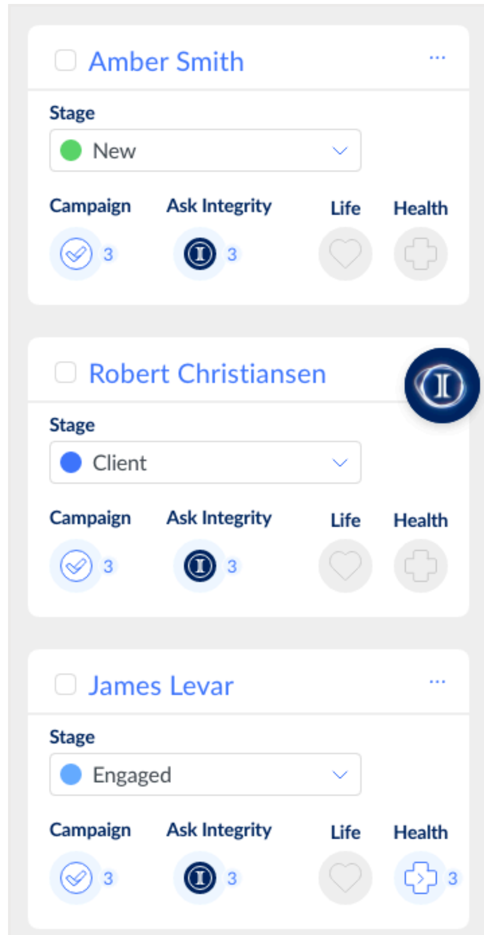
Contact Reminders have been removed from the Contact List screen. They're still available on the Contact Details screen, and the agent can still choose to call or email the Contact from the Contact List screen by clicking or tapping the three dots at the end of the row, then clicking or tapping Connect, then click or tapping either Email or Phone Number.

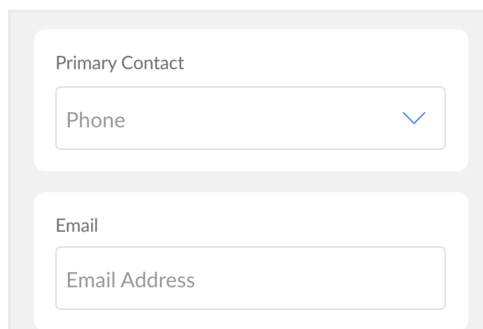
Policies: Life and Health Columns

If the agent has sold one or more Final Expense policies to the Contact through an Integrity upline, the heart icon will be blue. If not, the heart icon will be gray.

If the agent has sold one or more Medicare policies to the Contact through an Integrity upline, the cross icon will be blue. If not, the heart icon will be gray.

Policies the agent has sold to the Contact through an Integrity upline are automatically connected to the Contact record by Integrity whenever possible. Unlinked policies for both product types can be found in Policy Snapshot on the Dashboard and can be linked manually to Contact records.





Contact List

“More Options” Menu - Connect

The three dots at the end of each line (sometimes called the “meatball” menu) can be clicked to show and jump to common actions.

- View Contact – no change
- Start a Quote (formerly Find a Plan).
  - If the agent hasn’t selected which product(s) they sell on the Account page, the Start a Quote option will prompt them to choose whether to start a Health quote (Medicare) or a Life quote (Final Expense). When the agent chooses a product to quote, they can also choose “Don’t show this message again” and they won’t see the product type prompt in future. If they want to see the prompt again, they can update the products they sell on the Account page.
- Connect
  - **Call**
    - Place a recorded outgoing call to the Contact using the unique Agent Phone Number
  - **Email**
    - Open a new message addressed to the Contact in the agent’s email software (Outlook, Gmail, etc.)
  - **Call Script**
    - View disclaimer statement(s) that have to be read on calls for compliance
  - **Scopes of Appointment**
    - For Health Contacts only
      Jumps to the Scopes of Appointment screen where the agent can send a new SoA and/or view previous Scopes sent to that Contact