



# Just in Time Integration Overview

## Overview

AgentSync is built on the Salesforce platform and allows for a variety of integration patterns. Outlined below are a few approaches - we're happy to work with you to discuss in detail how best to support your use case and preferred approach!

### REST API

Salesforce has a robust REST API with extensive documentation that can be found [here](#). The standard endpoints allow for extraction of all AgentSync data objects and/or creation of Agent and Agency records. We will configure a [connected app](#) within the AgentSync application to allow access and configure a service user within your account to ensure the correct access is granted. The integration with the REST API can be scripted in the preferred language of your organization.

### Middleware

Many middleware providers provide out-of-the-box Salesforce connectors. If you are currently using a middleware system, there is a good chance it has this capability. Going the middleware route can be a faster route than scripting if you have already onboarded a provider. Middleware systems can also be a solid option if you don't have a team in-house to build the integration from scratch as most providers have an intuitive point-and-click interface. A few common providers are listed below.

- [Mulesoft](#)
- [Boomi](#)
- [Informatica](#)
- [Tray.io](#)

### Other

The ecosystem around Salesforce integrations is constantly evolving. For example Amazon recently released [AppFlow](#), a fully managed integration service between SaaS

providers such as Salesforce and AWS services. Depending on your backend systems, there may be a specific solution available to you outside of building the REST integration or one of the larger middleware providers.

## Filtering/Matching Criteria

To match the producer's Policy with the pending JIT appointment in AgentSync, you would query on the following data points in Manage:

1. NPN - in order to locate related producer's NIPR Transaction
2. NIPR Transaction
  - a. Status = 'Ready to Submit'
  - b. Transaction Type = Appointment
  - c. State - based on state application was signed in. Most Policy Admin Systems label 'State Signed'
  - d. Company Co-Code - if customer appoints for more than one CoCode

Note, Gateway Business Rule will need to be active for JIT appointments for the State and Line of Authority in order for JIT transaction to be created.