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SUPERMARKET INC.

Welcome to iAgent, the app for Instant Appointments!

- iAgent allows ISI appointment setters to deliver what we are calling Instant Appointments to brokers using the app
- Instant Appointments are offered to leads who would like to meet with a broker ASAP, even within the hour – so using the app and being signed in is important – if we don't have brokers signed in, our setters cannot offer Instant Appointments to the leads we contact
- Through Beta testing we noticeably reduced No Show appointments and improved sales by reducing the amount of time between the customer booking the appointment and the agent meeting with them



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Who Can Use the iAgent App?

- All Android and iPhone users
- iAgent is available to brokers working with ISI in good standing. The app cannot be downloaded to brokers who are not currently receiving leads either due to a low EAP performance or due to a debit balance. If you are unsure, speak with your BSM
- Once any of these issues is resolved, we will of course make the app available



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What Do You Have to Do?

(For this stage you must be using your mobile device)

- Go to: <http://insurance-supermarket.ca/iAgentAccess.htm>
- Don't ignore the notes next to the links!

› iAgent Access

If you are iPhone, iPad user

Open [this link](#) on your phone and tap on Install Application.

If your iPhone after the installation shows you a security popup, about the untrusted provider, then go to Settings -> General -> Profile -> Insurance Supermarket -> Tap on Trust.

If you are Android Phone user

Open [this link](#) on your phone and tap on Become a Beta Tester then tap on Download the iAgent Beta (In House).

In Google Play tap on Install and follow the installation steps from it.

› Quick Links

[Getting Started With Us](#)

[iAmInsured](#)

[What's New](#)

[Training Events](#)

[Upcoming Conferences](#)

[WinQuote\(tm\)](#)

[iAgent Access](#)

[CRM](#)

[Virtgate](#)

[ISI Toolbox](#)



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What Do You Have to Do?

(For this stage you can use a computer if it is easier to see)

- Once you have downloaded the application for your device, you will need to enter your email address that you receive our appointments OR your cell phone number here on that same page:

In Google Play tap on Install and follow the installation steps from it.

Access Management

To get the Access to your iAgent App please enter your email address, phone number and click on Submit.

SUBMIT



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What next?

- Your screen should then look like this:

In Google Play tap on Install and follow the installation steps from it.

Access Management

We have verified your account. Please enter the password you would like to have, from 5 to 8 characters and click Set Password.

After that you would get an email message with your access information.

SET PASSWORD



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What next?

- You will then receive an email with a 4 digit pass phrase (i.e. 9662)

In Google Play tap on Install and follow the installation steps from it.

Access Management
We have verified your account. Please enter the password you would like to have, from 5 to 8 characters and click Set Password.

After that you would get an email message with your access information.

Enter your password here

Enter Pass Phrase here

SET PASSWORD

Enter a password of your choosing in the first box (i.e. Broker123) and then the 4 digit code in the second box



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What next?

- You are all set to log into Instant Appointments using your email as a login name and the password you chose a few slides back!



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What's Important?

- It's a little bit chicken and egg....if you aren't showing as available, we won't know if we can offer the option to the lead.....so the more brokers using it, the better!
- We hope it helps you with downtime between appointments and keeps you busy.... it uses your actual location instead of the address you have in the CRM – which opens your territory!
- It takes into account traffic conditions etc., so you don't have to worry about being somewhere in 15 minutes when it will take you 30minutes with traffic!
- We send you a map and route the best way for you to get there – just open NAVIGATION and go!



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What Else is Important?

- Open app and indicate you are available!
- Our setters will then try and book the Instant Appointment
- The app will indicate if a setter is trying to book the appointment this way – if they succeed they will send you the details.....obviously in area with a larger populations we will have more than one broker and the appointment will go to the broker closest to the lead and with the best EAP
- This system DOES NOT replace our existing method of booking appointments for you 2-3 days out – you will still receive these



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Thank you!

- Email us if you encounter any problems!
- iagent@isi.ca