

Connect Islands of Disparate Data with MuleSoft



Forward Looking Statements



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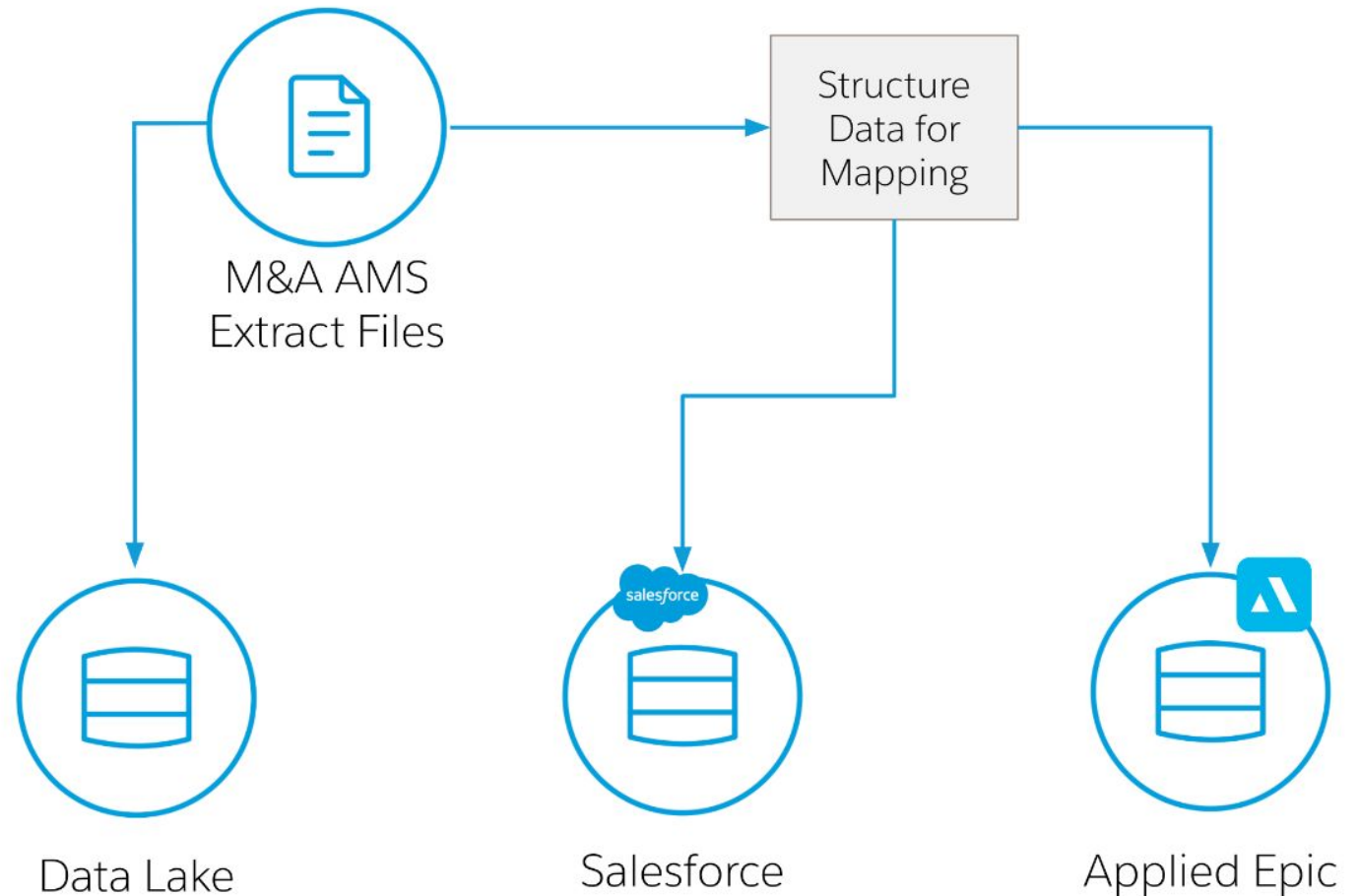
Paul Magioncalda
Senior Solutions Engineer
Salesforce

Insurance Broker Connected Experience

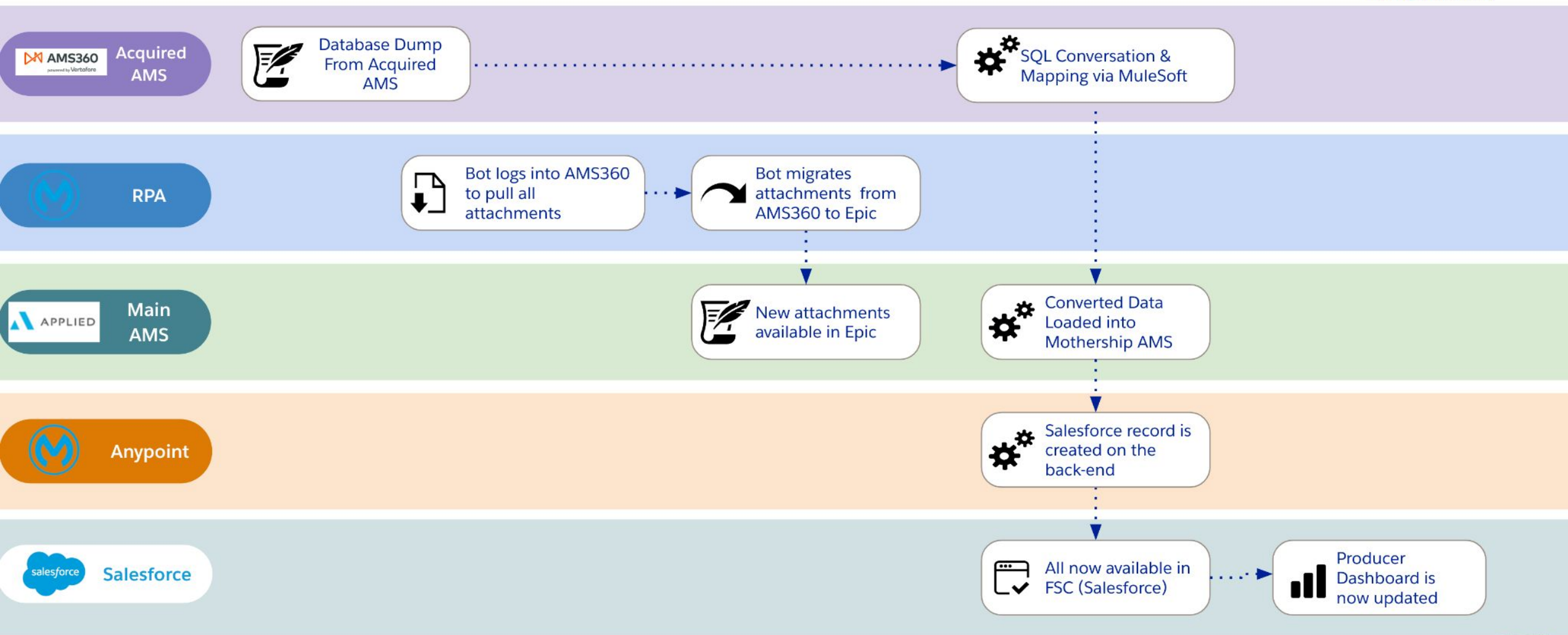
Applied Epic to Salesforce Integration via RPA



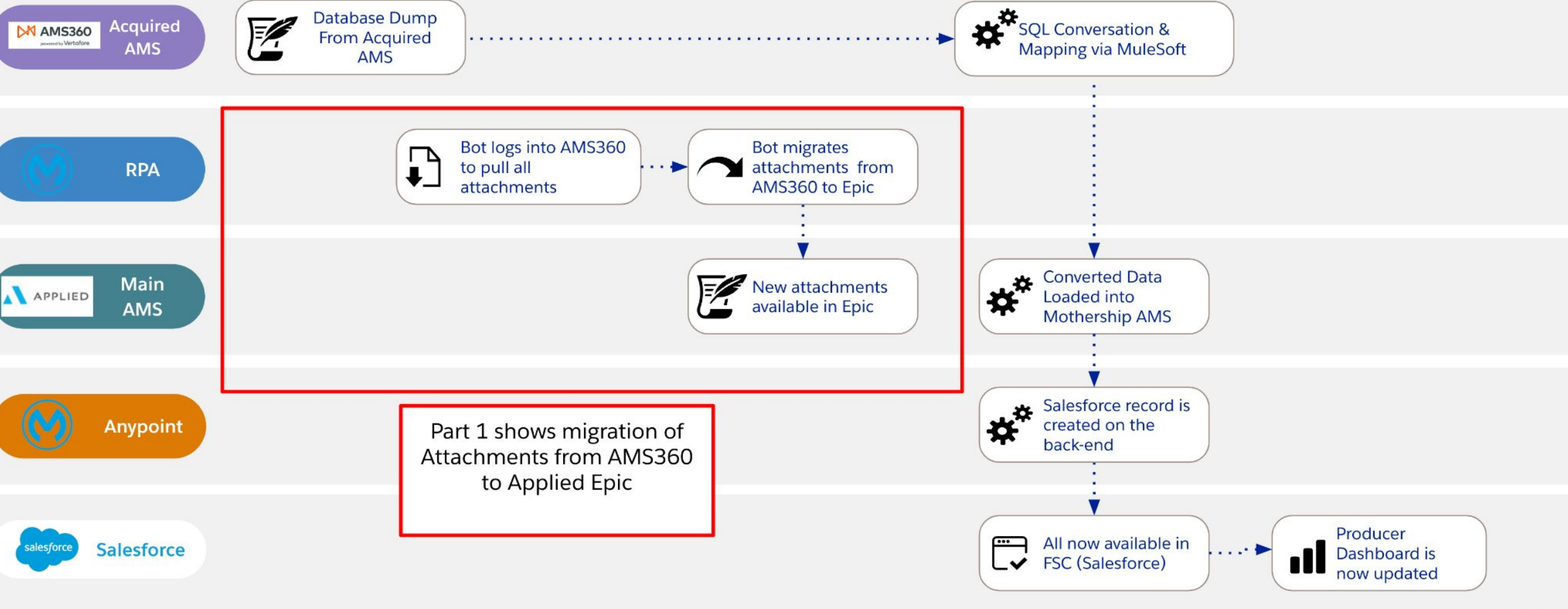
- Build templated process for mergers and acquisitions
- Introduce process for ingesting acquired entities
- Utilize data loader, FSC model, Epic <> Salesforce integration for testing
- Reduce M&A processing time from months to days



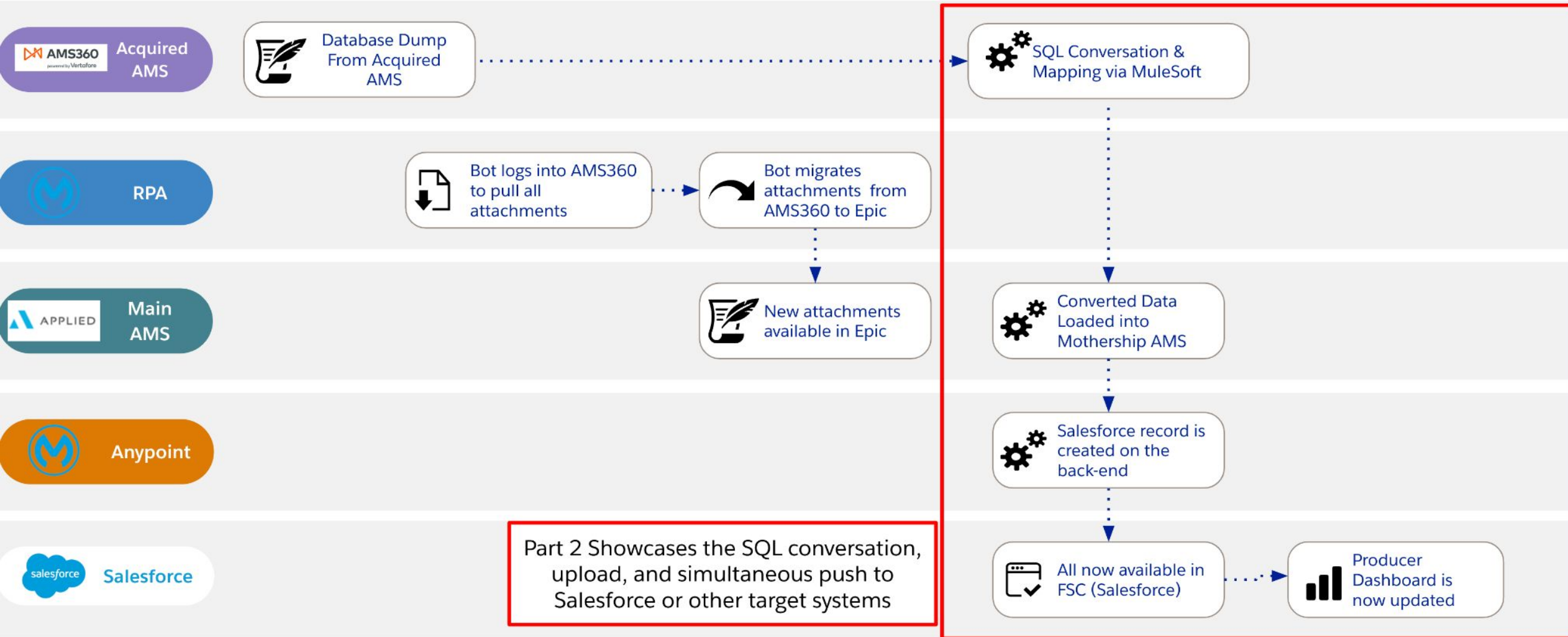
MuleSoft Automation Demo Flow



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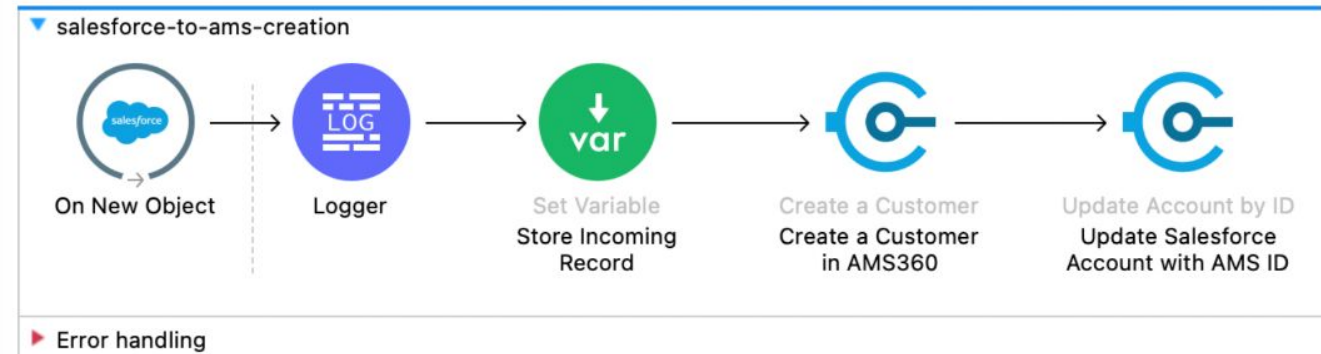


New Record Created in Salesforce

Producer creates new record in Salesforce -> Reflect update in AMS

Initiating the Account Creating in AMS360 via Salesforce

- When working with a net new business, a producer will create an Account, Contact, and Opportunity within Salesforce while working through the sales process. Once an Account and Opportunity is created, the system (Salesforce) generates an account within AMS360 as a prospect so the service staff can begin documenting and quoting business for the producer. Prove ability to enable flow of data between AMS360 & Salesforce for any data field the team needs



AMS updates reflected in Salesforce

Account manager updates AMS → see those updates reflected back in Salesforce

Dirty Data & Carrier Codes

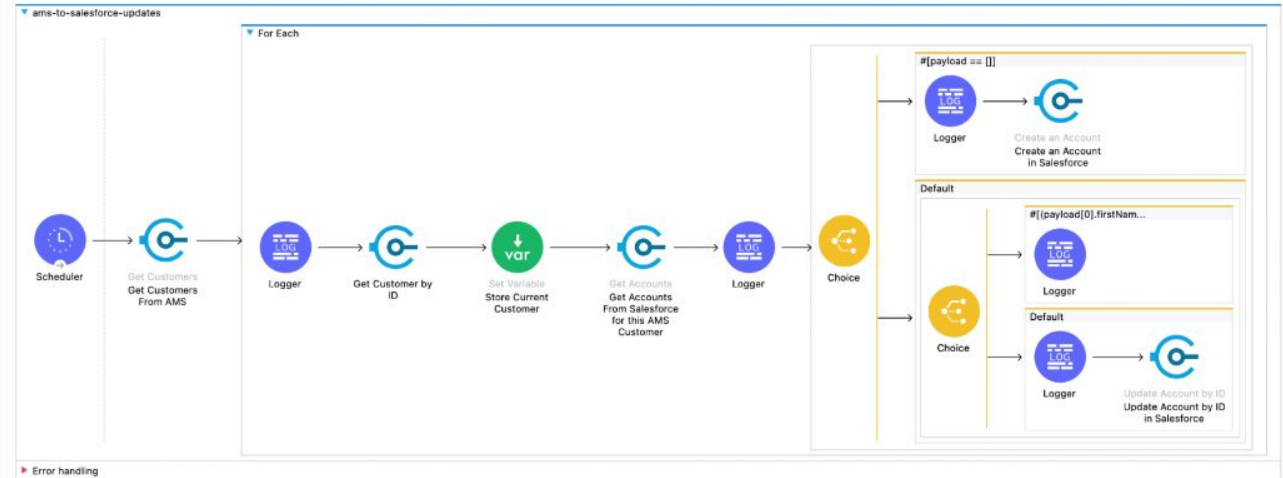
- E.g: We want all records with the same NAIC codes to match within the carrier record in Salesforce regardless of the naming convention being different within the management system

Object Creation and Mapping

- We would like the ability to segment the data coming into Salesforce by record type Personal, Commercial, and Benefits.

Updating AMS360

- When changes are made to the account within AMS360, we want those changes to be reflected within Salesforce.



File transfers between AMS/Salesforce

Producer sends attachment from Salesforce to AMS

Attaching, Sending, Receiving Files

- When a producer attaches correspondences or documents to the account those documents directly flow to AMS 360 to the Account to store
- Could also be done via forwarded email
- Goal: empower the producer with all the information they need right at their fingertips

file-transfer-fsc-to-ams

