

# Applied EPIC v2

## Prerequisites

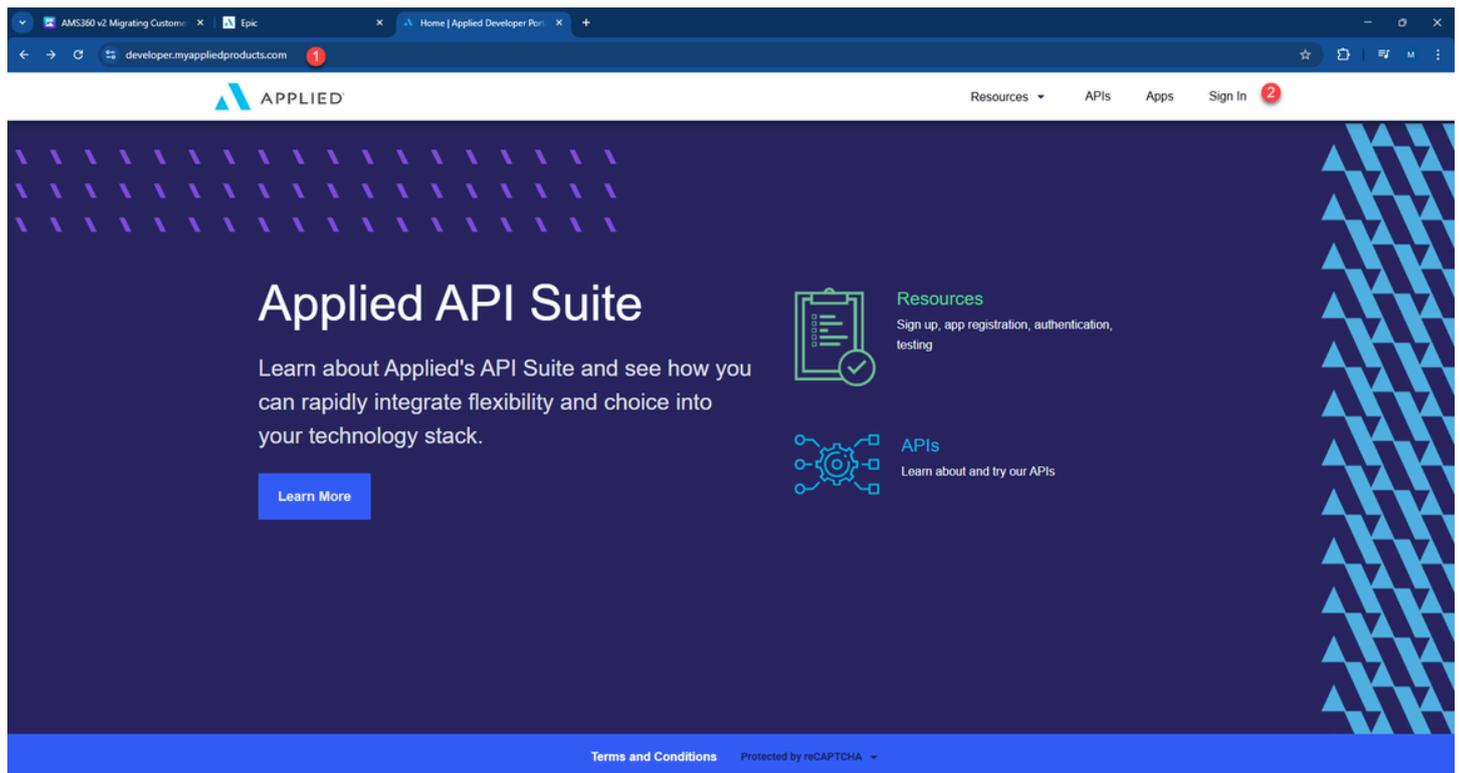
1. Customer has to have Applied EPIC SDK kit
2. Have Applied EPIC Dev account (once you have the SDK Kit, you will have a dev account)

## Step 1 - Customer has to request SDK Kit from Applied EPIC

- This request can take some time to receive back from EPIC, so start early

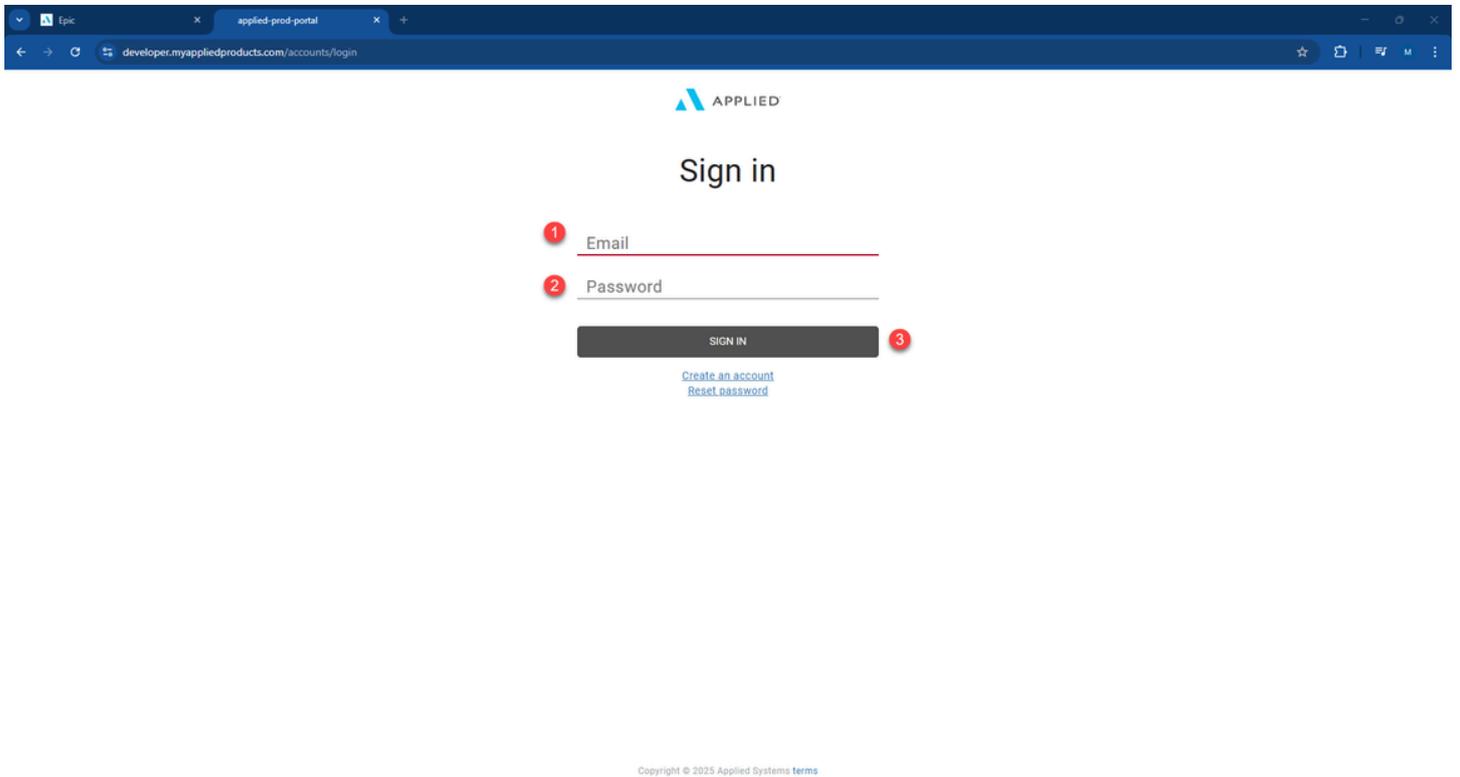
## Step 2 - Customer provides Key & Secret

1. Customer will navigate to <https://developer.myappliedproducts.com>
2. Click Sign In



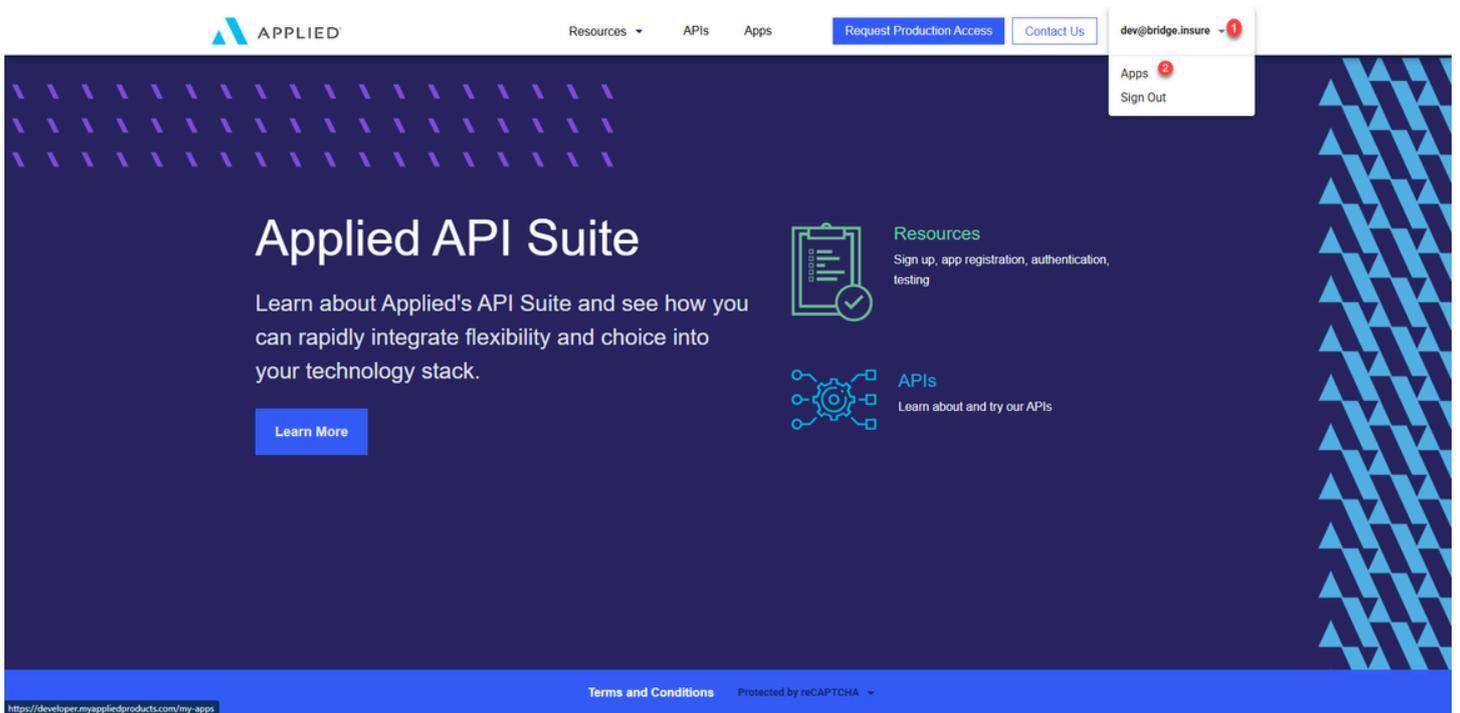
## Step 3 - Sign Into Applied EPIC Dev Account

1. Enter email associated with Applied EPIC dev account
2. Enter password associated with Applied EPIC dev account



## Step 4 - Go to Apps

1. Click on the email address associated with dev account
2. Click Apps



## Step 5 - Click on New App

+ NEW APP



4

## Step 6 - Setup New App

1. Enter App Name as Bridge
2. Enter description
3. Select Epic SDK Module & Click Enable
4. Save

New App

Overview

App Name \* 1  
 Bridge\_1

Description  
 Phone 2

APIs \*

Name	Description	Status	Actions
Applied Pay Module	Manage Lockbox settlement and return payment details into Applied Pay associated with Authorized Payments	—	Enable
Configuration Module	Manage general configuration areas of Epic	—	Enable
CRM Module	Manage accounts, contacts, and retrieve other common information used by multiple API products	—	Enable
<span style="color: red;">3</span> Epic SDK Module	Manage various domains of Applied Epic via Applied Epic SDK technology. If you cannot find the functionality you need in the other API Products, please check here	—	Enable <span style="color: red;">→</span>
Ireland Connect Module	Perform Ireland Motor and Home insurance quotations, self-service tasks, policy renewals, and look up vehicles and addresses	—	Enable
Policy Module	Manage key information related to policies and their lines, excluding the risks	—	Enable
Policy/Plan Forms Module	Manage full details for all Applied Epic Forms powered policies and plans. For key header information related to these forms, use in conjunction with the Policy Module	—	Enable
UK Rating Hub Module	Perform UK vehicle lookups and obtain quotes. This module is only applicable for the UK market	—	Enable
Workflow Management Module	Manage activities for work tracking purposes	—	Enable

CANCEL CLEAR SAVE 4

Step 7 - Copy the Key & the Secret

- Click on the square to copy the key or the secret one at a time

Bridge\_1

Overview

App Name \*  
 Bridge\_1

Description  
 Phone

App ID  
 ca6ee7a6-039b-4341-ab01-29acd9392110

API Keys

Key	Secret	Status	Created	Expires	Actions
		Active	Apr 18, 2025, 11:33 AM	never	Redact Secret Revoke View Scopes

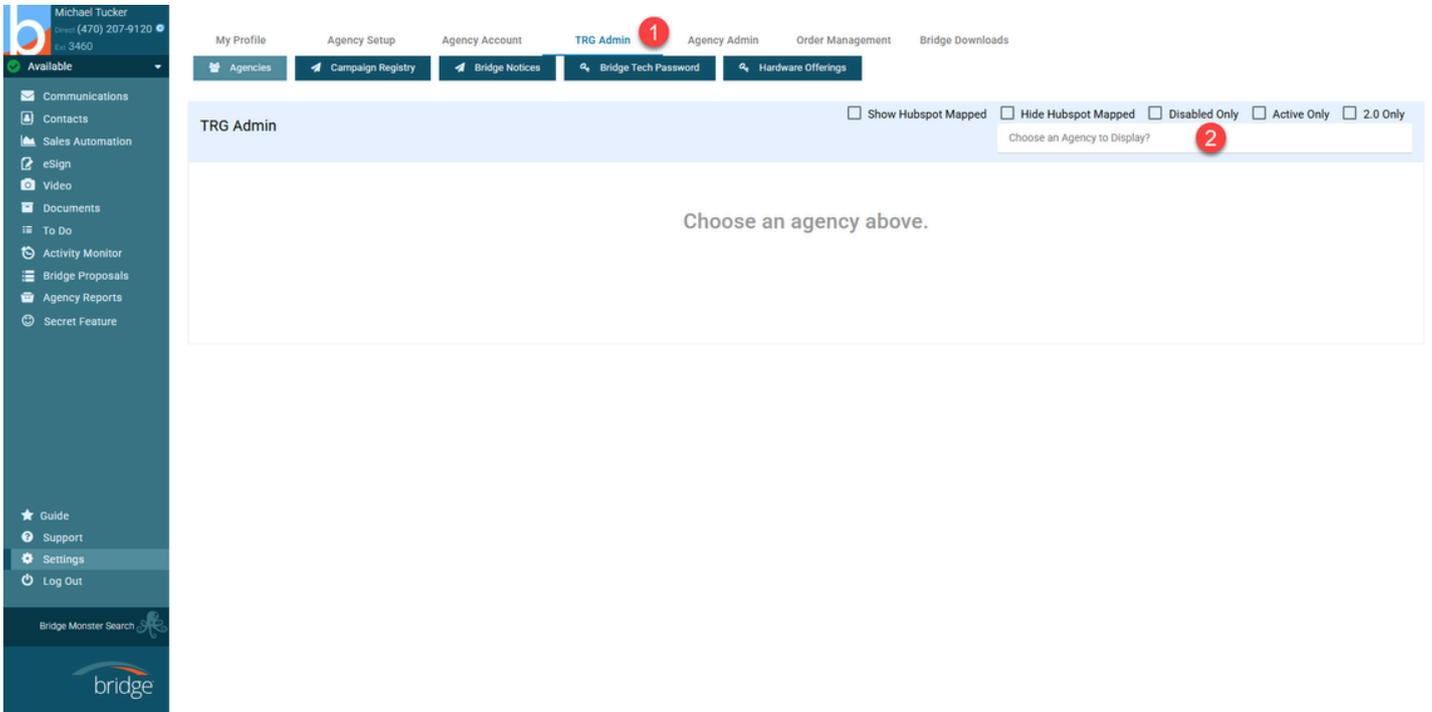
APIs \*

Name	Description	Status	Actions
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Configuration Module	Manage general configuration areas of Epic	—	Enable
CRM Module	Manage accounts, contacts, and retrieve other common information used by multiple API products	—	Enable
Epic SDK Module	Manage various domains of Applied Epic via Applied Epic SDK technology. If you cannot	Enabled	Disable

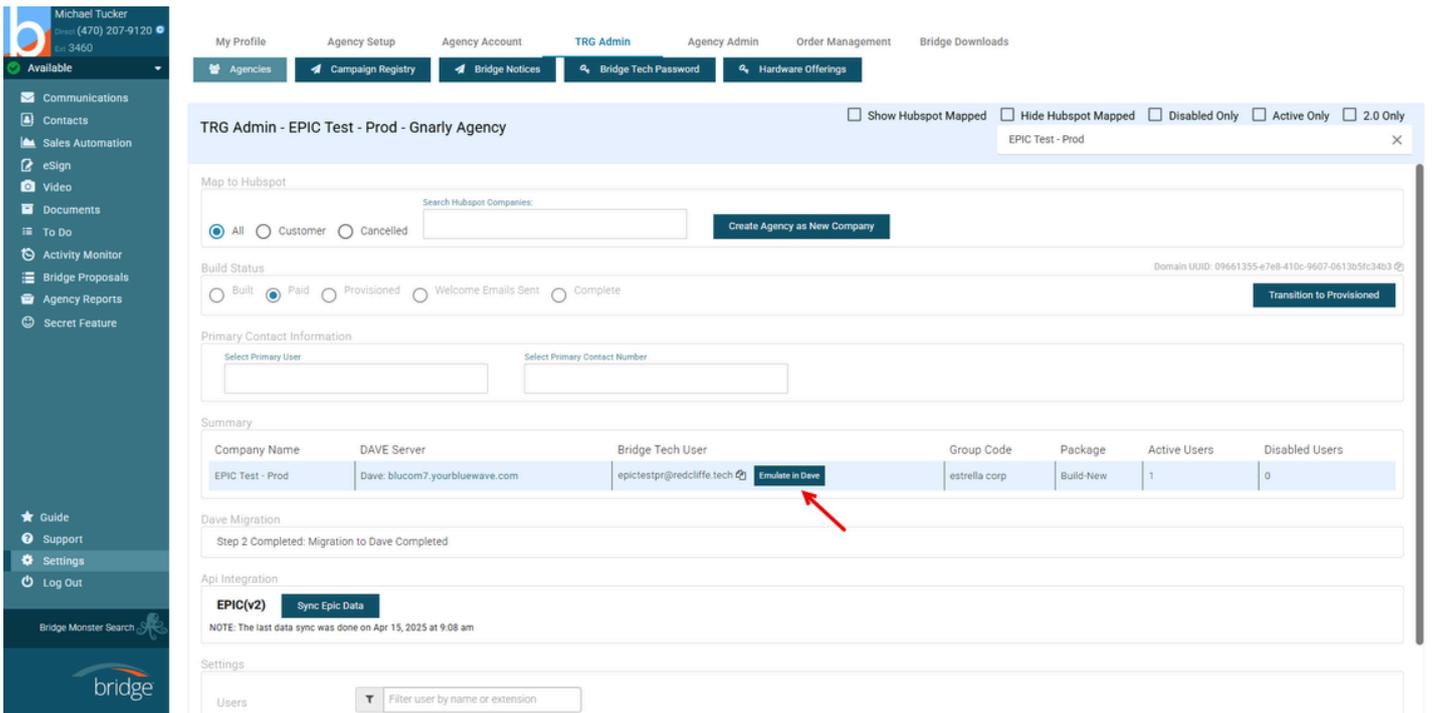
DELETE RESET SAVE

Step 8 - Go to TRG

- TRG Admin
- Enter Agency name

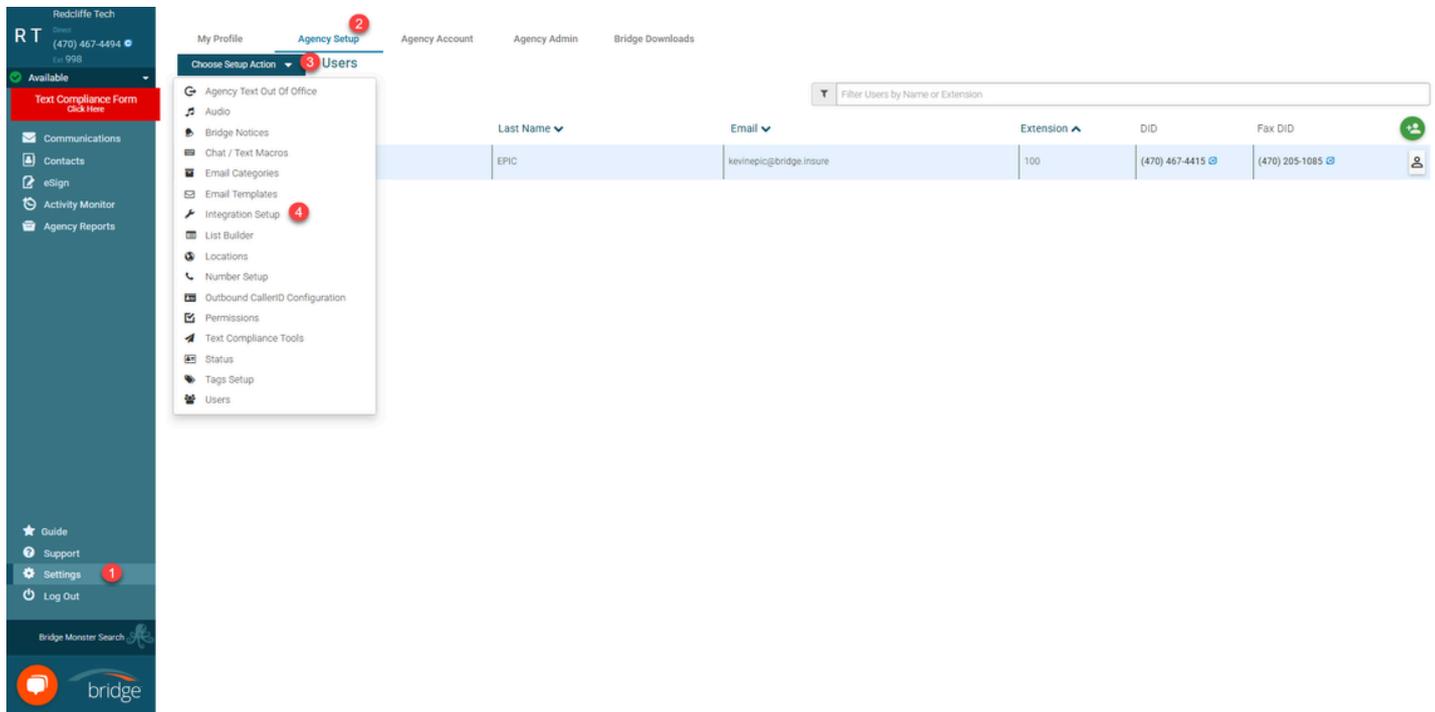


## Step 9 - Emulate agency



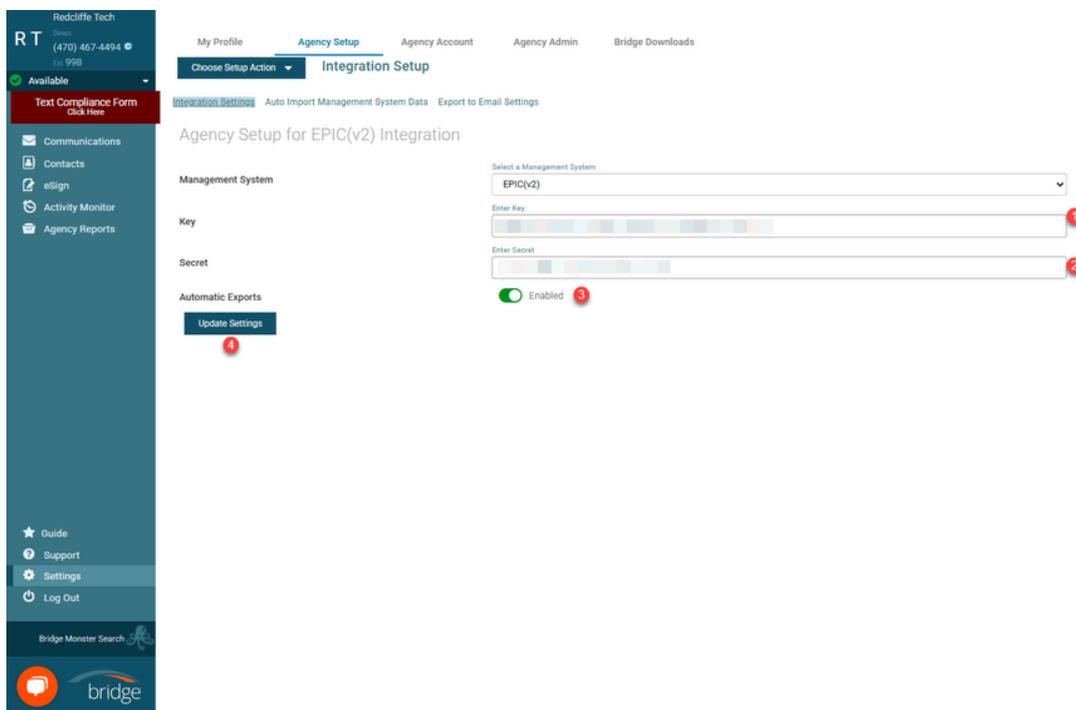
## Step 10 - Go to Intgration Setup

1. Click settings
2. Click Agency Setup
3. Click choose setup action
4. Select Integration setup



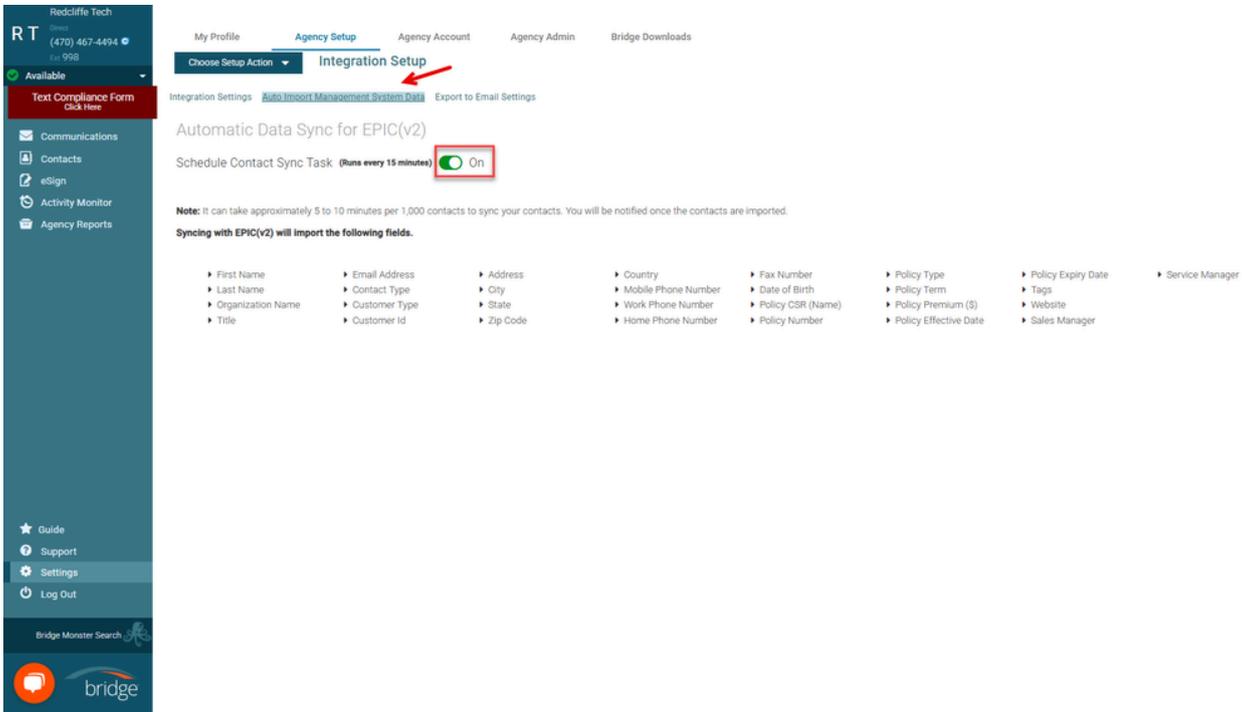
## Step 11 - Paste the Key & the Secret

1. Paste the key from Epic
2. Paste Secret
3. Toggle on Auto Exports
4. Update settings



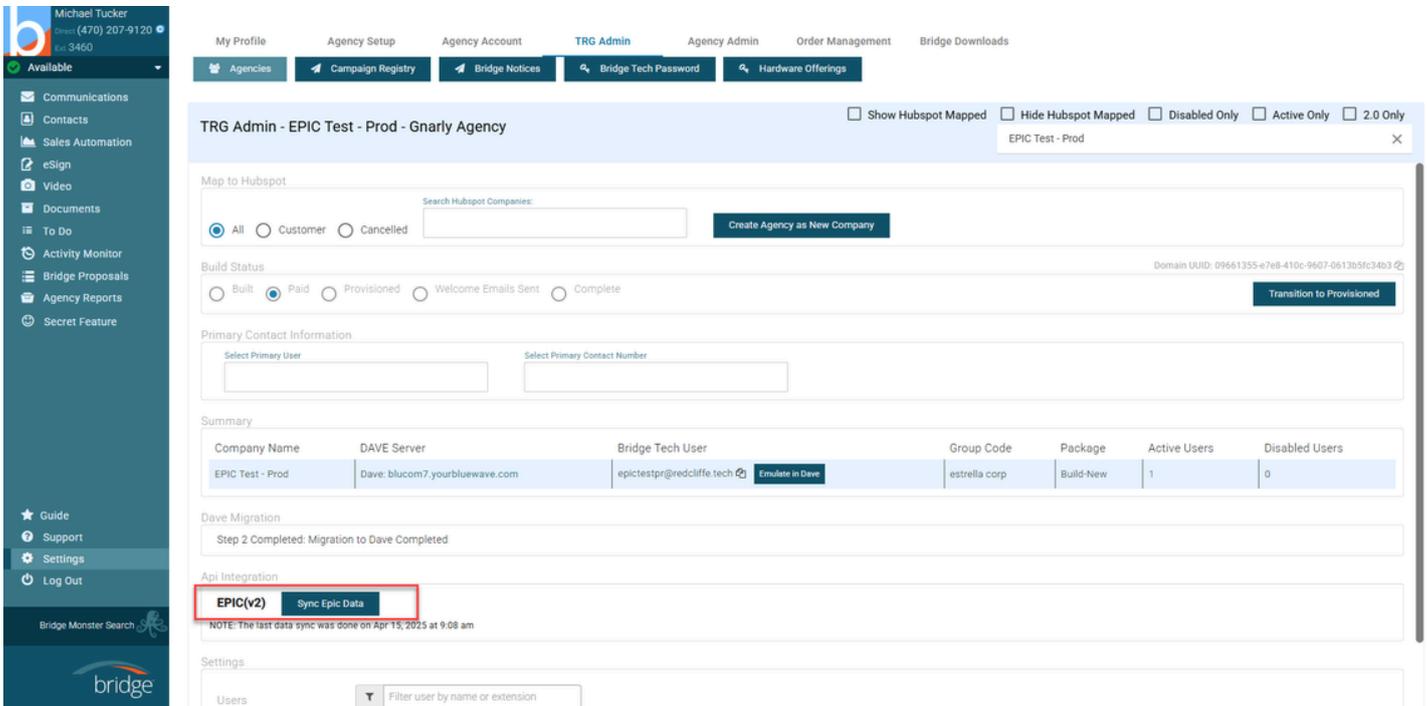
## Step 12 - Select Auto Import Management System Data

- Toggle on Scheudle Contact Sync Task



## Step 12 - Sync contacts com TRG

1. The integration must state that it is EPIC v2 If it is not, you will need to change it to v2 from the agency integration page on the customer side
2. Click Sync Epic Data



## Step 13 - Verify contacts are syncing

- If not, you will need to revisit your steps to see where you went wrong.