# Applied EPIC v2

Prerequistes

- 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 hast 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 & Sercret

- 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

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							Create an account Reset password				
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Step 4 - Go to Apps

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



Step 5 - Click on New App

Production Access	Contact Us	dev@bridge.insure 🔻
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Step 6 - Setup New App

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

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New App								
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	Policy Module	Manage key infor	rmation related to policies an	d their lines, excluding the risks	-	E	nable	
	Policy/Plan Forms Module	Manage full detail information relate	ils for all Applied Epic Forms ed to these forms, use in con	powered policies and plans. For key header junction with the Policy Module	-	E	nable	
	UK Rating Hub Module	Perform UK vehic market	cle lookups and obtain quote	s. This module is only applicable for the UK	-	E	nable	
	Workflow Management Module	Manage activities	s for work tracking purposes		-	E	nable	
					CANCEL	O 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

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#### Step 8 - Go to TRG

- 1. TRG Admin
- 2. Enter Agency name



### Step 9 - Emulate agency

Michael Tucker (470) 207-9120 • Cal 3460 Available • Communications Contracts Sales Automation	My Profile	Agency Setup Campaign Registry Test - Prod - Gna	Agency Account  Bridge Notices  rly Agency	TRG Admin	Agency Admin assword & Ha	Order Management rdware Offerings	Bridge Downloads Hubspot Mapped	Hide Hubspot Mapp PIC Test - Prod	ed 🗌 Disabled Only	Active Only	] 2.0 Only ×
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#### 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

Redcliffe Tech			
RT (470) 467-4494 •	My Profile Agency Setup Agency Account	Agency Admin Bridge Downloads	
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Text Compliance Form Click Here	Integration Settings Auto Import Management System Data Export to I	Email Settings	
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Step 12 - Select Auto Import Management System Data

• Toggle on Scheudle Contact Sync Task

My Profile Agen Choose Setup Action Integration Settings AutoUncocct Automatic Data Syn Schedule Contact Sync Ta Note: It can take approximately 5 Syncing with EPIC(v2) will Impor	Agency Acces Integration Setup Management System Data Expo the for EPIC(V2) ask. (than every 15 minutes) to 10 minutes per 1,000 contact at the following fields.	unt Agency Admin rt to Email Settings 0 0 ts to sync your contacts. You v	Bridge Downloads will be notified once the contacts a	re imported.			
<ul> <li>First Name</li> <li>Last Name</li> <li>Organization Name</li> <li>Trite</li> </ul>	Ernall Address     Contact Type     Customer Type     Customer Id	<ul> <li>Address</li> <li>City</li> <li>State</li> <li>Zip Code</li> </ul>	Country     Mobile Phone Number     Work Phone Number     Home Phone Number	Fax Number     Oate of Birth     Policy CSR (Name)     Policy Number	Policy Type     Policy Term     Policy Premium (5)     Policy Effective Date	Policy Expiny Date     Tags     Vebsite     Sales Manager	Service Manager
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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

Michael Tucker     Cores (470) 207-9120     Cores (470) 207-9120     Available     Communications     Contacts     Sales Automation	My Profile	Agency Setup Campaign Registry Test - Prod - Gna	Agency Account Bridge Notices rly Agency	TRG Admin	Agency Admin	Order Management dware Offerings	Bridge Downloa Hubspot Mapped	ds Hide Hubspo EPIC Test - Prod	t Mapped [	Disabled Only	Active Only	2.0 Only
eSign Video Documents To Do	Map to Hubspot	r O Cancelled	arch Hubspot Companies:		Create Ag	ency as New Company						
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bridge	Settings Users	T Filter user	by name or extension									

Step 13 - Verify contacts are syncing

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