

INTEGRATION

Powerbroker Integration

BluInsurance integrates the industry leading Zoho CRM with Powerbroker to seamlessly bring all current and past policies into one centralized database. All Powerbroker data will be synced bridging the gap between a prospect and closed policy. With this integration you will easily be able to visualize all policies, claims and clients in easy to read dashboards.

POWER BROKER



Website Integration

BluInsurance integrates with your public website so every new lead from your website is automatically added to your CRM. With each new lead, BluInsurance immediately sends a custom welcome e-mail to the client to establish a relationship of trust and great customer service. This capability is not limited to your personal website, but can also be applied to any lead site that your brokerage subscribes to.

Today's Website Leads ▾

<input type="checkbox"/>	FIRST NAME	LAST NAME
<input type="checkbox"/>	Titan	Ron
<input type="checkbox"/>	Marcus	Tory
<input type="checkbox"/>	Eric	Rowand

Email Integration

BluInsurance's email integration will sync with your existing email server to store and organize any customer communication within your CRM. With BluInsurance's email integration, your brokerage can promote a culture of collaboration and transparency with every client interaction being in a central location. BluInsurance can also track if an email is opened and which links are clicked to understand the effectiveness of your email marketing..

{ Outlook YAHOO! MAIL Gmail }



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