



CRM & Agency Management Software





Intruity Corporation was founded in 2010 as a premier software and technology company specializing in **business automation** and **telecommunications**. Our product and services range from a one of a kind **CRM & Agency Management System** built for Insurance agencies, to a robust **VoIP telephone system** that helps enhance business day-to-day communication.



INTRUITY
CORPORATION

Sales Line. (800) 898-7212
Sales@Intruity.com
Intruity.com

Products



Cloud-based CRM & AMS solution designed to automate your business processes.

RIPPLE

All of the features of a traditional PBX telephone system with modern VoIP technology.

Predictive Dialer

Unique automated telephone dialing that places multiple calls simultaneously.



Intruity is the one smart systems partner needed for Agency Management, CRM, and VOIP telephone technology solutions.

Control and scale your business with automation and data integrity.

OneLink - CRM & AMS product

Next-generation cloud-based software that's been designed specifically to meet the needs of Health, Life, P&C insurance agencies.



Customer Management

Truly understand your customers; **embrace and anticipate customer need** for higher retention and customer satisfaction while maximizing your ROI.



Team Management

Monitor your team's valuable information including campaign and task status, compensation, licensing, document management, push company notices, and much more.



Lead Management

Increase your sales, lead disposition oversight, and accountability using our automated call software, custom drip email campaigns, and predictive dialing technology.



Commission Processing

Simplify your complex commission payments and convert your sales into income with our automated commission reporting and processing.

Two Needs, **OneLink One Solution**

AMS

Agency Management System

- Operations data used to run a business more effectively
- Manage companies activity, sales, commissions, overall revenue
- Reports and Analytics
- Track policy status/types/amounts of coverage
- Software-as-a-service (SAAS)

CRM

Customer Relationship Management

- Customer centric system, administers interactions with customers
- Connects customer to help nurture clients and leads
- Marketing automation
- Speeds up the communication process
- Helps protect data privacy

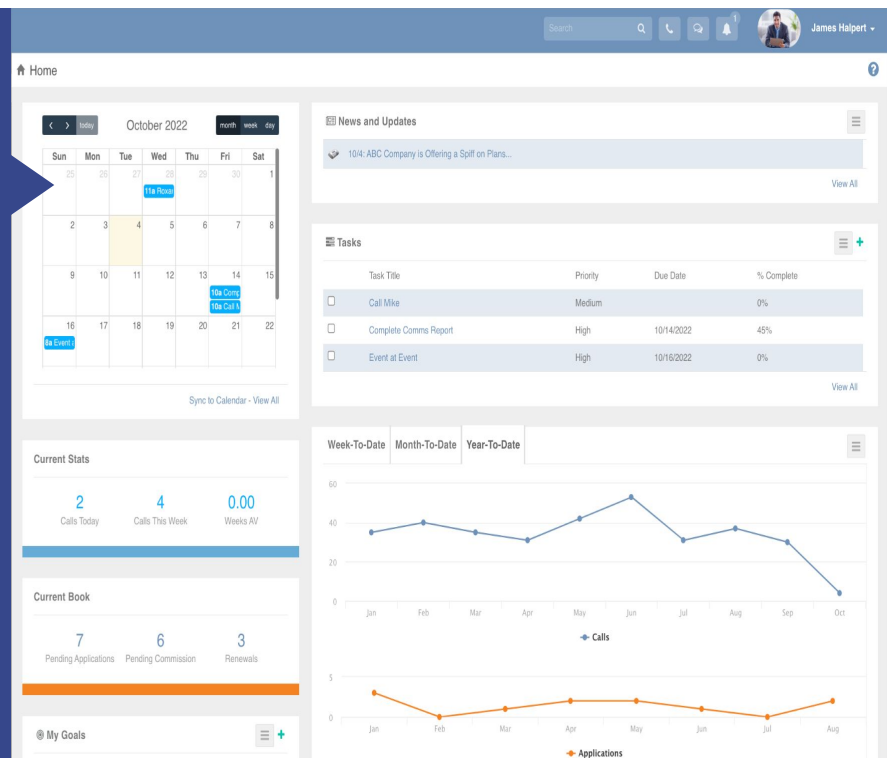
OneLink - Customized Dashboard

Personalized Activity Board

Calendar - Calendar located top left of the dashboard. Never miss a meeting.

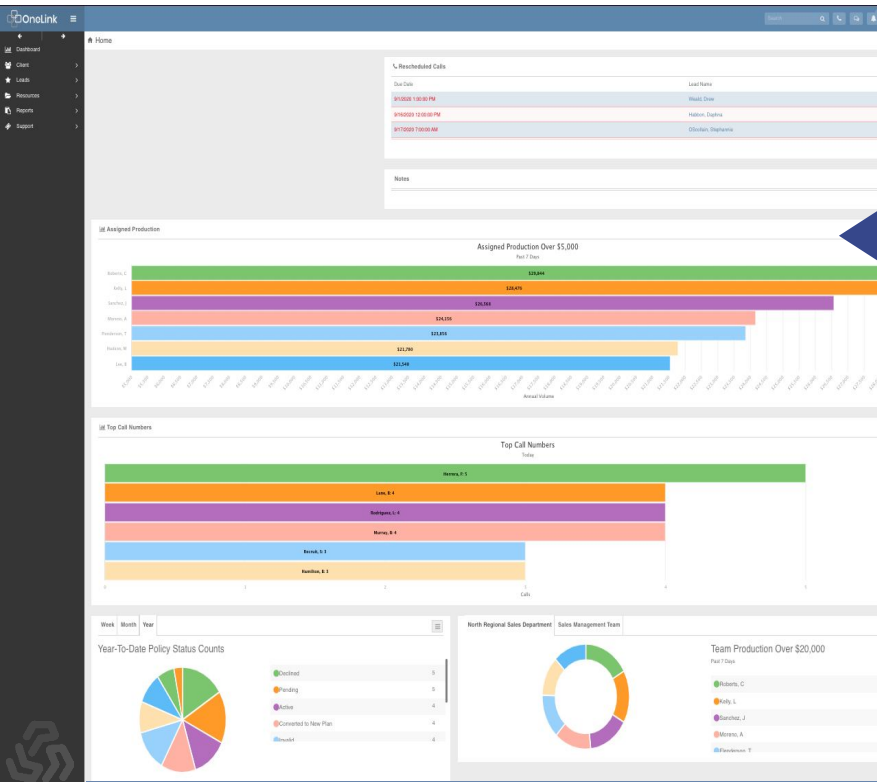
Tasks - Monitor client and lead upcoming task actions. No task falls through the cracks.

News & Updates - Individual or company-wide news items and reminders can be placed on the dashboard.



OneLink - Customized Dashboard

Personalized Progress Board




Reports - Easy to find and navigate reporting. Top down agency view to individual producers/employees.

Leaderboard - Up to date sales metrics. Show individual & team overall production

Sales to date - View policy counts and types for specific periods of time.

OneLink - Client Profile

 **Client**

Personal InformationPolicy DetailsCommissions EarnedPaymentsAssetsAttachmentsTasksNotes


Contact Information


First Name: *

Middle Name:


Last Name:

Nickname:

Home Phone: *
 

Mobile Phone: *
 

Business Phone:

Email: *
 


Date of Birth:

(50 years old)

Unsubscribe Email:

Client Status

Client ID:

Associate:
 

Original Associate:

Status:

Lead Source: *

Home Address

Address:

Address 2:

City:

State:

Zip:

County:

Business Address

Business Name:

Address:

Address 2:

City:

State:

Zip:

County:

Mailing Address ☒ Same as Home Address

Fax:

Profile Contains

- Customer identity
- Pertinent customer notes
- Assets
- File upload section - accepts most file types

Integration Features

- Email
- Calendar
- Websites
- Phone
- And More

OneLink - Client Policy Details

Keep **Carrier/Policy/Plan** details front and center

Editable Fields

- Vendor/Carrier/Company names
- Policy/Plan - Type
- Policy/Plan - Numbers
- Policy/Plan - Dates
- Policy/Plan - Status

Client

[Client Information](#) [Additional Information](#) [Policy Details](#) [Commissions Earned](#) [Payments](#) [Assets](#) [Attachments](#) [Tasks](#) [Notes](#)

\$572.00
Active

\$516.00
Expired










\$45.00
Pending

Show

All

 entries

Search:

Policy ID	Policy Number	Product Type	Effective Date	Vendor	Plan	Quoted Premium	Status	Last Commission Entry	
1969	848062876	Life Insurance	10/1/2022	Pacific Life	Promise GUL	572	Active		  
3014	45666545H	Dental Insurance	10/1/2022	Delta Dental	Premier	45	Pending		  
3015	9888997798	Health Insurance	3/1/2021	ABC Insurance	Silver Plan	516	Expired		  

Showing 1 to 3 of 3 entries

Previous 1 Next

Please do not change a Policy from one Vendor to another. If you write a new Policy please "Add Policy"

Update

100% customizable

OneLink - Client Asset Tab

Asset Type - Use

- Additional services offered
- Tangible/intangible products sold
- Insured item types
- Inventory of any sort

Client

Client Information Additional Information Policy Details Commissions Earned Payments **Assets** Attachments Tasks Notes

Assets

Select the asset you wish to add for this Client

> Vehicle (0) Add +

> Driver (0) Add +

> Boat (0) Add +

> Building (0) Add +

> Motorcycle (0) Add +

> Tax_Services (0) Add +

100% customizable

Update

OneLink - Client Asset Tab

Asset Type - Examples

- Vehicles
- Art
- Machinery
- Household Drivers
- Home
- Livestock
- Insurance products

Client



Client Information Additional Information Policy Details Commissions Earned Payments **Assets** Attachments Tasks Notes

Assets

Select the asset you wish to add for this Client

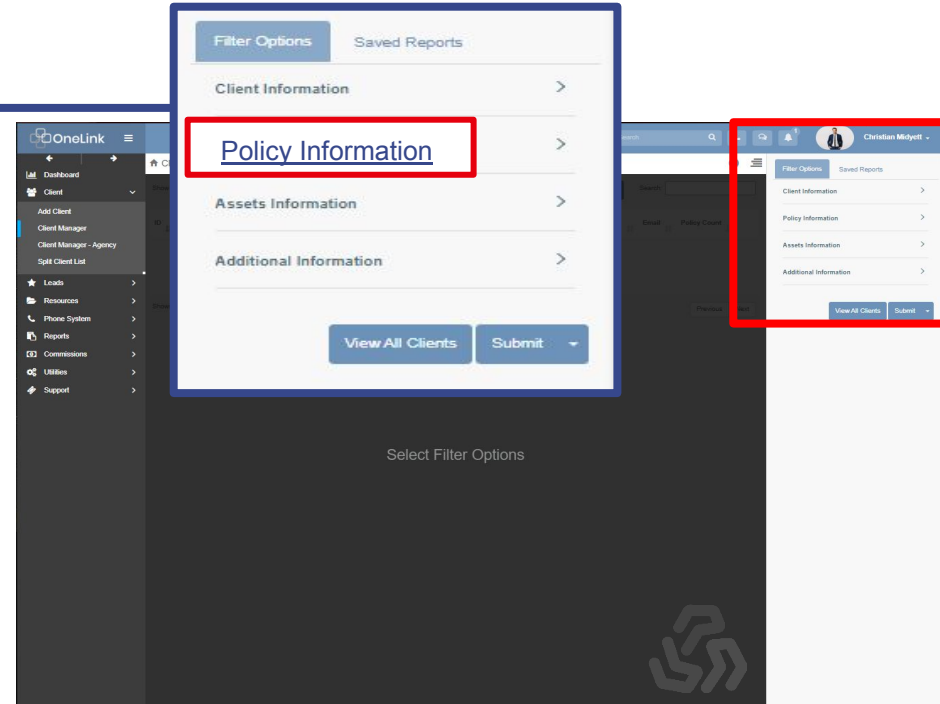
> Vehicle (0)	Add +	> Driver (0)	Add +	> Boat (0)	Add +	> Building (0)	Add +	> Motorcycle (0)	Add +
> Tax_Services (0)	Add +								

Update

OneLink - Policy Manager

Manage policy data

- Company type
- Vendor type
- Product type
- Policy number
- Lead source
- Referral source

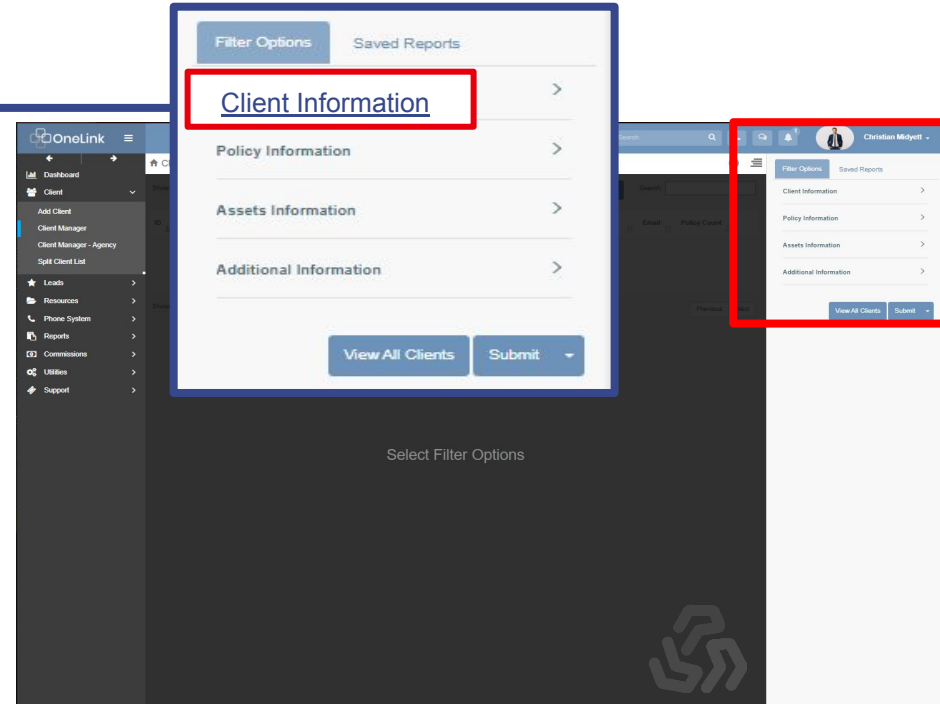


Track and find needed information
within the detailed **Policy Manager**

OneLink - Client Manager

Manage client data

- Application date
- Address
- City - State
- Policy info
- Birthday
- Lead source
- Referral source
- Assets
- And more



Execute actions based off real time data


OneLink - Client Campaigns

Assign clients to actionable campaigns

- Appointments/calls
- Calendar reminders
- Action based email campaigns
- Retention tasks
- Referral tasks
- Cross promotion tasks
- Holiday/Birthday tasks
- Client call campaigns
- And more



OneLink - Leads Profile

 **Lead**

Linking RecordsHistoryHealth / LifeGroupAutoBuildingBusinessScriptsAssetsAttachmentsTasksNotes

Lead Information

ID:
19501

Category:
Opened Lead


Type:
Health

Status:
New

Source:
Google Ads - Google Ads

Date Received:
9/20/2022 2:11:54 PM

Current Leadtime:
1:14:07 PM Central

Assigned To:


Contact Information

First Name:
John

Nickname:

Address:
8543 Washington Center

City:
Dallas

Last Name:
Smith


Date of Birth:
4/25/1972
(50 years old)


Address 2:

State:
TX


Zipcode:
75205

County:
Dallas

Day Phone:
(972) 443-3071


Evening Phone:
(850) 839-6729


Fax:

Email:
j.smith72@gmail.com


Unsubscribe Email:
Yes No

Unsubscribe Text:
Yes No

Personal Information

Currently Insured:
Yes No

Currently Insured By:

Lead Transferred:
Yes No

Spanish Speaking:
Yes No

Household Income:

Rewrite:
Yes No

Referred By:

Services To Quote:

Upsell From:

Notes:

Update Lead

Fully nurture prospects and leads within OneLink

OneLink - Lead Save Script Function



Customize and Save

- Call scripts
- Sales rebuttals
- Common objections

Ensure leads are taken care of in a consistent manner.

Change script function based on lead type.

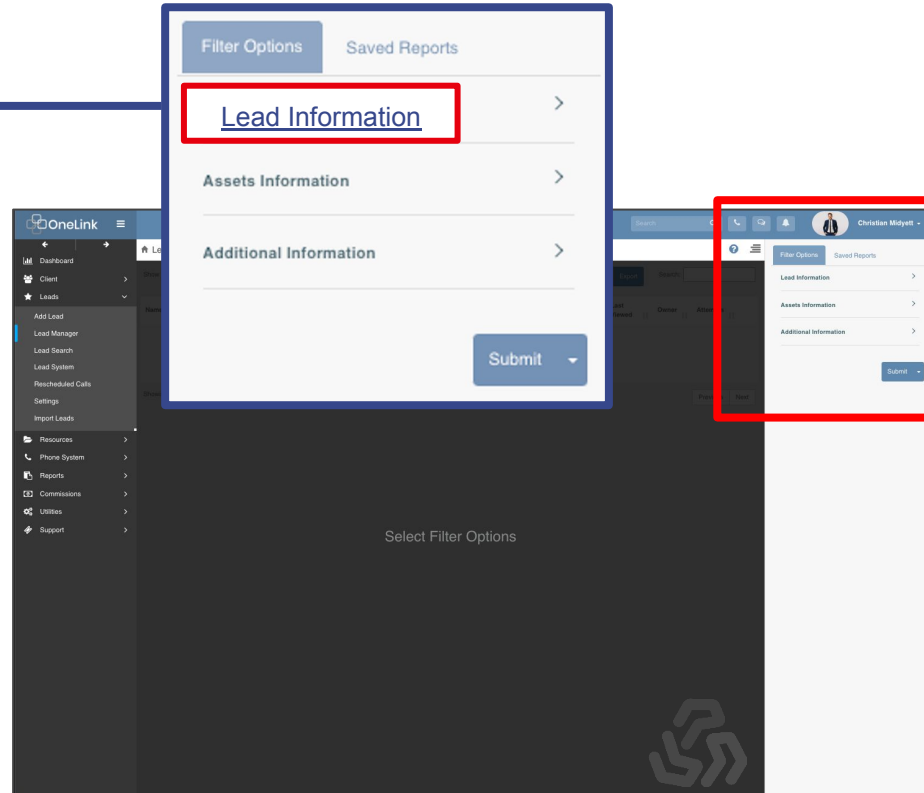
OneLink - Leads Manager

Manage Leads

- Lead type
- Lead origin source
- Who lead was assigned to
- Lead disposition type
- Lead identity data

Execute Lead Actions

- Call campaigns
- Email automation



OneLink - Lead Campaigns

Assign leads to actionable campaigns

- Assign prospect data to specific employee/agents/groups
- Create calendar reminders
- Schedule - reschedule appointments/calls
- Record disposition outcomes
- **RIPPLE** VOIP phone system, assign call campaigns to specific phone lines
- And more



OneLink - Lead CRM Benefits

Lead

Linking Records History Health / Life Group Auto Building Business Scripts Assets Attachments Tasks Notes

Lead Information

ID:	Category:	Type:	Status:
19501	Opened Lead	Health	New
Source:	Date Received:	Current Leadtime:	Assigned To:
Google Ads - Google Ads	9/20/2022 2:11:54 PM	1:14:07 PM Central	

Contact Information

First Name:	Last Name:	Day Phone:
John	Smith	(972) 443-3071
Nickname:	Date of Birth:	Evening Phone:
	4/25/1972 (50 years old)	(850) 839-6729
Address:	Address 2:	Fax:
8543 Washington Center		
City:	State:	Zipcode:
Dallas	TX	75205
County:	Email:	Unsubscribe Email:
Dallas	j.smith72@gmail.com	Yes No

Personal Information

Currently Insured:	Spanish Speaking:	Referred By:	Notes:
Yes No	Yes No		
Currently Insured By:	Household Income:	Services To Quote:	
Lead Transferred:	Rewrite:	Lead Complete:	Upsell From:
Yes No	Yes No	Yes No	

Improve lead data and closing rates

- Grade and monitor closing techniques
- Generate performance data
- Import and Export to Excel/CSV files

OneLink - Data Search Navigation

The screenshot displays the OneLink application interface. At the top, a blue header bar contains the OneLink logo on the left, a search bar with the word "SEARCH" in blue text, and a user profile icon for "Christian Midyett" on the right. Below the header, the main content area is divided into three sections: "Lead", "Client", and "Policy". Each section has a search bar and a table of results. The "Lead" section shows one entry for John Smith. The "Client" section also shows one entry for John Smith. The "Policy" section shows three entries for John Smith, with the first one highlighted. The left sidebar contains a navigation menu with icons for Dashboard, Client, Leads, Resources, Phone System, Reports, Commissions, Utilities, and Support.

SEARCH

Quick Search

John Smith

Lead 1

Show 10 entries

Name	Address	City	State	Zip Code	Day Phone	Evening Phone	Email
John Smith	8543 Washington Center	Dallas	TX	75205	9724433071	8508396729	j.smith72@gmail.com

Showing 1 to 1 of 1 entries

Previous 1 Next

Client 1

Show 10 entries

Name	Address	City	State	Zip Code	Home Phone	Mobile Phone	Email
John Smith	8543 Washington Center	Dallas	TX	75205	(972) 443-3071	8508396729	j.smith72@gmail.com

Showing 1 to 1 of 1 entries

Previous 1 Next

Policy 3

Show 10 entries

Policy NO	Client ID	Name	Address	City	State	Zip Code	Home Phone	Mobile Phone	Email
45666545H	86	John Smith	8543 Washington Center	Dallas	TX	75205	(972) 443-3071	8508396729	j.smith72@gmail.com
848062876	86	John Smith	8543 Washington Center	Dallas	TX	75205	(972) 443-3071	8508396729	j.smith72@gmail.com
9888997798	86	John Smith	8543 Washington Center	Dallas	TX	75205	(972) 443-3071	8508396729	j.smith72@gmail.com

Showing 1 to 3 of 3 entries

Previous 1 Next

Easily search OneLink data

- Name
- Email
- Phone number
- Policy number

OneLink - Reporting Capabilities

🏠 Reports > Call Activity (Agency)

Total Calls

941

Total Reschedules

54

Show 10 entries

Search:

Associate	Total Calls	Total Production	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm
Ruslan Belyy	18	0	0	2	1	0	0	1	1	1	1	1	2	0	0	0	0	0	0
Jerry Gardner	17	5388	1	0	1	2	0	1	1	0	1	1	2	1	0	0	0	0	0
April Long	15	0	1	1	0	0	1	0	1	0	1	0	2	2	0	0	0	0	0
Claudia Roberts	15	29844	1	0	0	1	1	1	1	1	1	0	1	1	0	0	0	0	0
Janice Hicks	15	0	1	0	1	1	1	1	1	1	0	1	1	0	0	0	0	0	0
James Halpert	14	0	0	1	2	0	1	1	1	1	0	1	1	1	0	0	0	0	0
Wyatt Dixon	14	11748	1	1	1	1	1	1	1	1	1	0	0	1	0	0	0	0	0
June Price	14	10704	1	1	0	1	0	1	1	1	1	0	1	1	0	0	0	0	0
Barry Murray	14	0	1	1	1	1	1	1	1	1	1	0	1	0	0	0	0	0	0
Frances Richardson	14	0	1	1	1	0	2	1	1	1	1	1	0	1	0	0	0	0	0
Totals:	941	537164.65	58	60	59	52	54	68	54	49	66	49	59	65	0	0	0	0	0

Showing 1 to 10 of 109 entries

Previous 1 2 3 4 5 ... 11 Next

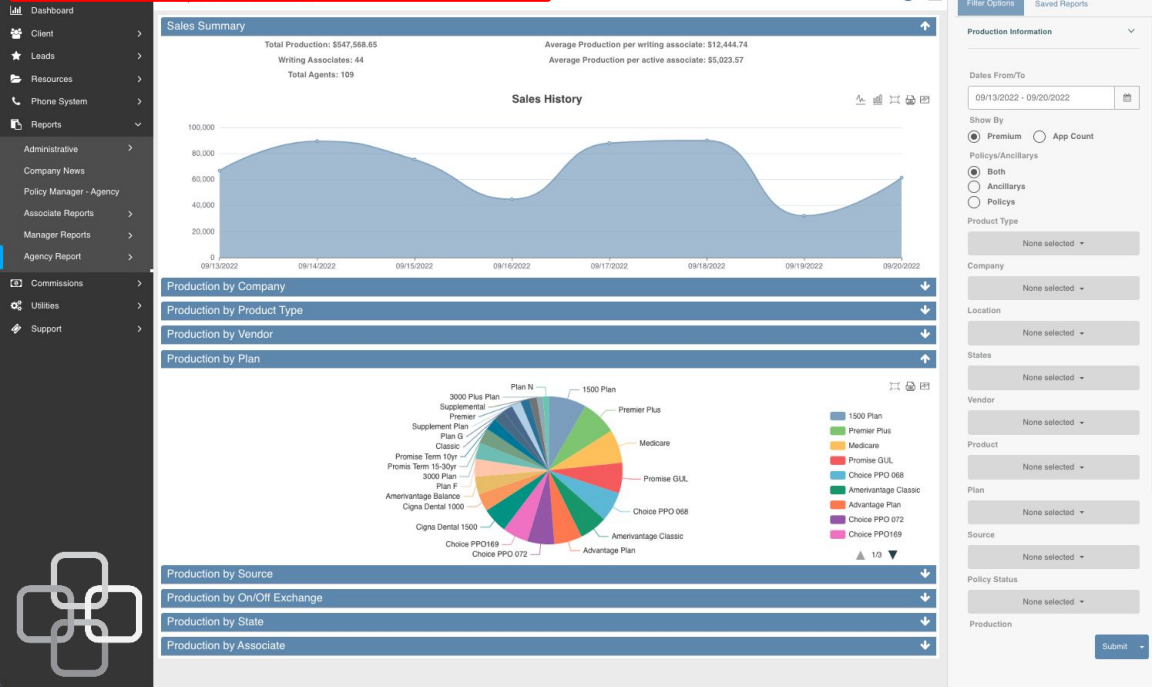
Reports Available for

- Call Activity
- Production
- Lead History
- Commission

Run agency reports that show data in an easy to understand, functional format.

OneLink - Reporting Capabilities

🏠 Reports > Production (Agency)



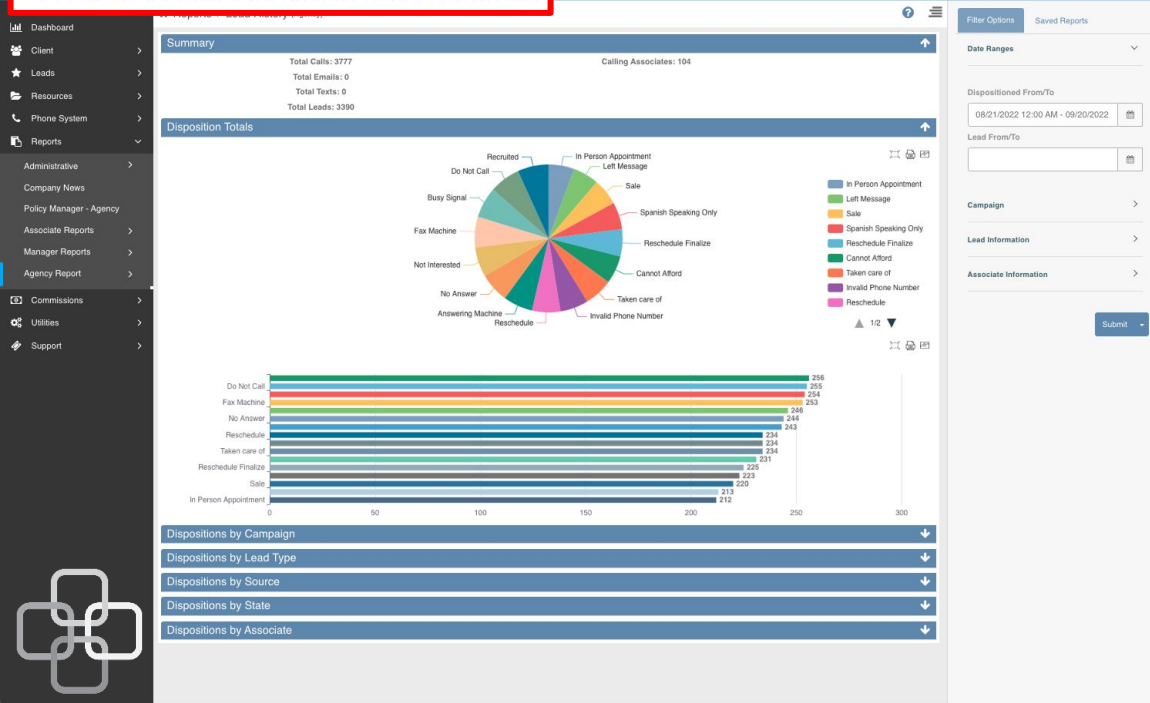
Reports Available for

- Call Activity
- **Production**
- Lead History
- Commission

Run agency reports that show data in an easy to understand, functional format.

OneLink - Reporting Capabilities

🏠 Reports > Lead History(Agency)



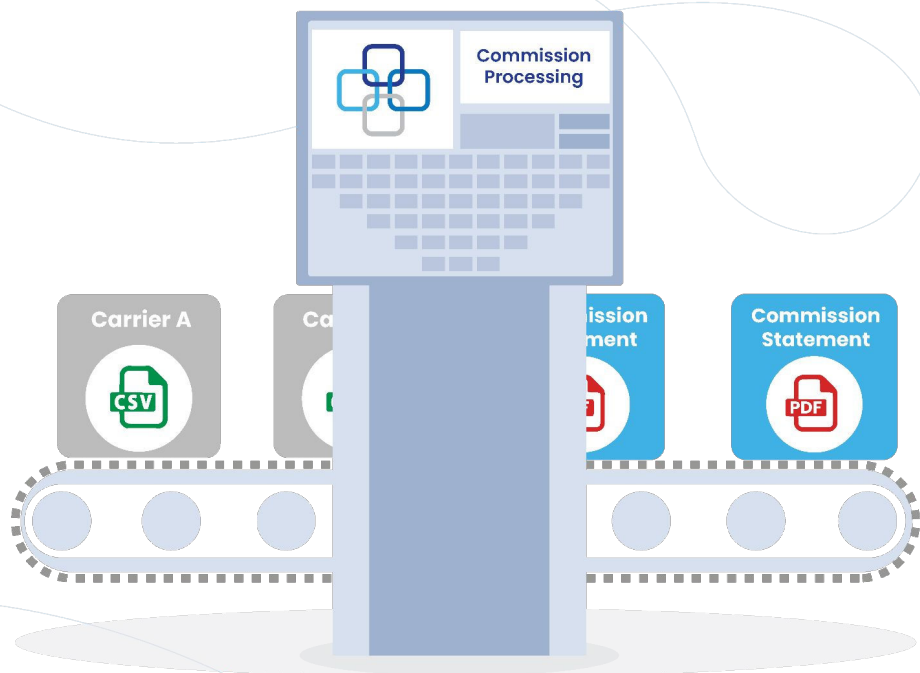
Reports Available for

- Call Activity
- Production
- **Lead History**
- Commission

Run agency reports that show data in an easy to understand, functional format.

OneLink - Reporting Capabilities

🏠 Reports > Commission (Agency)



Reports Available for

- Call Activity
- Production
- Lead History
- **Commission**

Run agency reports that show data in an easy to understand, functional format.

OneLink - Calendar Function

Put the Onelink calendar to work

- Device integration
- Meeting invites
- Meeting reminders
- Email follow up
- Rescheduled obligations
- Tasks
- And more



OneLink - Task Function



Stay on track with OneLink

Create and assign system tasks

- Phone call
- Appointment
- Pending items
- Email communication
- Important policy dates
- Important personal dates
- Any type of action based outreach

OneLink - Email Function

Use and Automate email with ease

- Primary email provider integration
- No new email address required
- Send emails directly from client/lead profile
- Send Intruity meeting invites
- Store and save email communications
- Automate action based email chains



OneLink - Intruity Meetings Function



Conduct meetings with One click

- Calendar integration
- Video meetings
- Audio meetings
- Live Stream events

OneLink - Voice Recordings Function

Create and save pre-recorded audio files

- Voicemail drops
- Compliance scripts



OneLink - Commission Function



- Individual and hierarchy rule compatible
- Pay custom commissions rules based on carrier, product, and plan types
- Set rules on first year and renewals rates
- Define by flat dollar amounts or percentage points
- Build Hierarchies
- Track-separate employee type (10-99 or w-2)
- Monitor and showcase chargebacks
- Organize your commission and payout cycles
- Build easy to view commission statements

OneLink - Open API

Technology Integration

- Email
- Website
- TPA vendors
- Calendar



OneLink - Security

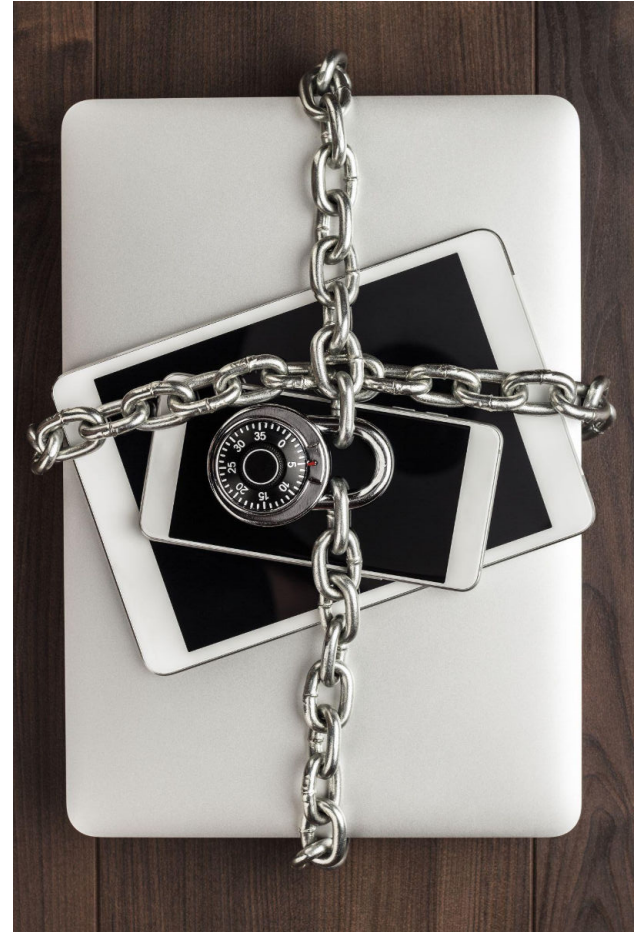
2 Step verification process (2FA)

- Optional or required
- Email
- Text

Data encryption

- No data cross contamination

SOC2 Compliant



OneLink - Packages & Pricing

We Offer
Bronze,
Silver,
Gold, &
Platinum
plan product
packages

Read only access


OneLink

Administrative access

	BRONZE	SILVER	GOLD	PLATINUM
	\$9.95/ User / Month	\$49.95/ User / Month	\$69.95/ User / Month	\$99.95/ User / Month
View Assigned Task	✓	✓	✓	✓
View Commission Statements	✓	✓	✓	✓
View Sales Detail	✓	✓	✓	✓
Task Management & Assignment	○	✓	✓	✓
Customer Management	○	✓	✓	✓
Advance Phone System Integration	○	✓	✓	✓
NIPR Database Integration	○	✓	✓	✓
Unlimited Contacts	○	✓	✓	✓

OneLink - Pricing and Agreement

Product packages for all budget, and employee/agent types

One **Platinum seat required** as an administrator per account

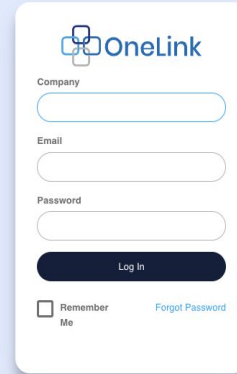
One year contract minimum, pricing is based off of the amount and types of users associated with the Platinum account

Only pay for active users, an Administrative user can manipulate the terms of the contract at any point based on the active user amounts and user types.

1st payment billed typically 30 days after initial setup, monthly invoices will be attached to the Administrative users profile

What **OneLink** Can Do

- All system needs in one place at one time
- Access to information anytime/anywhere
- Automates business actions and flow
- Real time, calculable data metrics
- Creates uniformity and consistency
- 2 CRM systems in One
- Creates scalable solutions
- Control system costs



The image shows a login form for OneLink. At the top is the OneLink logo, which consists of a blue square icon with a white cross-like shape inside, followed by the text "OneLink" in a blue sans-serif font. Below the logo are three input fields: "Company", "Email", and "Password". Each field has a light blue border and a small blue icon on the left. Below the "Password" field is a dark blue "Log In" button with white text. Below the button is a checkbox labeled "Remember Me" and a link "Forgot Password" in blue text.

[Not a customer?](#)

[Visit Our Website](#)



Welcome to OneLink





INTRUITY

CORPORATION

For over a decade we have been considered a trusted Tech partner to thousands of partner agencies and firms.

At Intruity customers come first - we look forward to earning your business!

For more information contact us at (800) 898-7212 or visit our website at intruity.com.

