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Agency Integrator

UserVoice Enhancements to Agency Integrator for August 23, 2014

Items in this section were submitted and voted on by our User Community (you!) using the UserVoice tool. UserVoice can be accessed by clicking the **Resources** menu and selecting **Enhancement Request**.

Module	Section	Enhancement
Applications	Annuity Detail	**Annuity Type** is no longer a required field on Annuity applications. Now, the Annuity Type will be pre-populated, based on the **Product Type** of the selected Product.
Applications	Application Search	Users can now mass-assign and re-assign Case Managers on Applications. This ability requires the User Right **Applications - Mass Assign Case Manager. See forthcoming TechNote for complete details.**
Contacts	Appointments	**Appointments** can now be associated to a **Hierarchy**, allowing you to further distinguish between (and report on) appointment records for the same Contact and Carrier. **See forthcoming TechNote for further details.**
Report Builder	Categories	Users can now add a **Category** to any Report Builder report that they have access to. Once a Category has been added, users can Group and/or Sort by that Category to more quickly and easily locate frequently-used reports. **See forthcoming TechNote for complete details.**
Data Replicator	Requirements	The RQVREQ table has been added to Data Replicator. This table includes fields to tie the Requirement to the Vendor and the Vendor Order ID. Included fields: REQREQID, VENDORID, and REQMSTID. If you would like any of the fields in these tables to appear in your file, you must select those fields in **Data Replicator Administration**.

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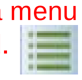
Module	Section	Enhancement
Administration	GA Number Maintenance	You can now add, edit, and delete the GA Numbers your agency can use on Applications and Memos through the new **GA Number Maintenance** module. Previously, the iPipeline AMS Help Desk maintained this list. Note that if you would like Pending Case Status, Appointment, Commission, or Inforce feeds on GA Numbers, the process has not changed. You will still need to request carrier feeds on any GA Numbers through the Help Desk. **See forthcoming Tech Note for complete details.**
Agency Gear	Forms	Because Forms are accessed through **Forms** link, the redundant **Forms Now** link has been removed from Agency Gear.
Applications	Requirements	When clicking the **Place Order** link on the Requirements tab of an Application, you will now see the full list of Vendors displayed without needing to scroll.
Commissions	Commission Statement PDF	A new option to **Include Posted Date Range** has been added to the Commission Statement PDF output. If checked, the date range you selected as criteria will display below the Title on the PDF. Also, a date and timestamp has been added to the bottom left of the PDF output, displaying the date and time the Statement PDF was generated in Agency Integrator.
Commissions	Special Deals	Special Deals can now be paid by Carrier/Other, in addition to being payable by the MGA.
Data Replicator	Comments	If you include Comments in your Data Replicator file, you now have an additional option to include Agent, Application, and/or User Comments separately, rather than having all three types of comments included in the general Comment table. The additional tables are titled AGENT_COMMENT, AGENT_COMMENT_DETAIL, AGENT_COMMENT_USER, APPLICATION_COMMENT, APPLICATION_COMMENT_DETAIL, APPLICATION_COMMENT_USER, USER_COMMENT, USER_COMMENT_DETAIL, and USER_COMMENT_USER. If you would like any of the fields in these tables to appear in your file, you must select those fields in **Data Replicator Administration**.

Changes to Agency Integrator for August 23, 2014

Module	Section	Change
Applications	App Entry Wizard	When entering an application, if the Agent you've selected has more than one applicable Hierarchy AND more than one applicable Appointment, you will be now be prompted to make your Hierarchy selection first, and your Appointment selection second. Previously, the Appointment selection came first on the screen. Note: If the selected Agent does NOT have multiple Hierarchies and Appointments to choose from, there will be no change in your app entry process.
General	Right-click Options	You will notice a new icon on some right-click menus in the system. If this icon is present next to a menu option, it means that the action can be taken on more than one row, or on all the rows that you have multi-selected. 
Legacy Reports	Commissions	In the Commissions report group, the **Agency Name on Statement** report is no longer available. A new and improved version of this report can be run through **Administration, Commissions, Commission Statement PDF**.
Administration	Codes	When editing a code and clicking **Edit Rules**, the Code Rules Administration screen will now display the rules for the Code you are currently editing, rather than displaying the rules from the Code you previously edited.
Administration	Organization Maintenance	The **Address** field on an Organization can now accept up to 25 characters on-screen (increased from 20 characters).

Administration	User Administration	When trying to edit a User's phone number **Extension**, clicking **Apply** multiple times caused a Invalid Phone error message. This has been resolved.
Applications	AI / iGO Integration	If an Application is created in Agency Integrator through the AI / iGO Integration, you will no longer see the **Application Upload** prompt appear to send the case to the Carrier. This will prevent duplicates of the application being sent to the carrier (one from iGO and one from App Upload).
Applications	AI / iGO Integration	On an application created by the AI/iGO integration, after selecting either **Go** or **NoGo** from the **eApp** drop-down and saving the application, that option will be grayed out. Previously, the option was not grayed out, allowing you to select Go or NoGo a second time, which would result in a failed transmission to the Carrier.
Applications	AI / iGO Integration	In some rare instances, Document Vault documents were unavailable for viewing if the case was created by the AI/ iGO integration. This has been resolved.
Applications	Carrier Status	When clicking **Actions, Carrier Status** from an Application with no Policy Number, the correct application will now appear in the Carrier Status window.
Applications	Commission - Estimated	Previously, if an application had a Manual Agent Commission rate, and that agent was then removed from the application, the associated manual rate was removed from the screen, but not from the database or the Data Replicator file. Now, the associated rates will be completely removed when the agent is removed from the application.
Contacts	CRM Owner	The selections in the **CRM Owner** drop-down list on the **Additional Detail** tab are now correctly sorted.
Applications	ECP	When selecting a user from the Employee drop-down list to associate with an Application on the **ECP** tab, you will now see the ECP Grid Name along with the Employee's name to help you distinguish between multiple grids for the same employee.
Applications	General	If entering a '$' in a dollar amount field (like **Face Amount**) will now strip out the special character and save correctly, rather than giving an error message.
Applications	Group Applications	Within a Group, you can now create a new Application directly from an Employee's record by clicking the **New Policy** button.
Applications	Pre-Applications	When adding a new Pre-Application, the list of available Products will now be filtered according to the Organizations that you have access to.
Applications	Transamerica App Upload	When using the **Transamerica Application Upload** process, the KindCode and Producer lookup functionality will now work as expected.
Command Center	Two - Way Communication	When using **Two-Way Communication**, the Comment Reply from the Carrier will now be directed to the Case Manager of the Application's Task List.
Commissions	Commission Statement Import	The Commission Statement Import will now allow numbers formatted as text in Excel to be successfully imported.
Commissions	Commission Statement Import	The **Import Statement Details** button and **Download Template File** link were available on the Statement Batch Header, even when there were existing Details already in the Batch. The button and link will not appear unless there aren't existing Details already in the Batch.
Commissions	Schedules	When copying a Rate within a Subschedule, the **Payment Type** from the master record will now copy correctly. Other improvements have been made to the Rate copy process to fix various, occasional errors in copying.
Commissions	Statements	The value appearing in the **Est. - Act.** (Estimated minus Actual) column on the Batch Detail List was incorrect when the Application used an Override Schedule. This has been corrected.
Contacts	Commission Roles and Schedules	To prevent confusion, the **Type** column on the Commission Roles and Schedules tab has been re-labeled to **Attached By**. The column displays the method by which the schedule was attached to the Agent, either by Organization, Role or Agent.
Contacts	Contact Search	For customers using iPipeline CRM, contacts that were created in CRM and synced to AI will now properly display a **Status** on the Contact Search Results screen.
Contacts	Super Users	Super Users can now successfully search through Contacts without having to switch environments first.
Contacts	SureLC Integration	In some instances, some customers were seeing a delay in the creation of Licenses or Appointments from the SureLC integration. This has been resolved.
Contacts and Applications	Comments	When inside a Comment, clicking **Comment, Print** will now open a new window with a PDF of the Comment, rather than opening a new duplicate window.
Group Applications	App Entry Wizard	You can now enter a Group application as expected when clicking on **New Policy** from the **Group Detail Maintenance** screen.
Legacy Reports	AR Audit Log	The **AR Audit Log** report (in the Status group) will now correctly reference the Application Organization.
Legacy Reports	Contact Task List	The previously named **Agent Task List** report is now called **Contact Task List**. It can now be run by Contact Type, so you can choose to view results for Agents only, Prospects only, etc. Correspondingly, the **Contact Task List** report has been removed from the Contact report group, and can now be run from the Agent group.
Report Builder	Application Type	If you have the column **Application Type** included on a Report Builder report, it will now display "Formal" "Informal" or "Pre-App" rather than displaying "F" or "I".
Report Builder	Scheduled Reports	In some instances when using Hierarchy criteria, there was a discrepancy between the data returned on manually run reports and scheduled reports. This has been resolved.