

### Enhancements to Agency Integrator for August 22, 2015

Module	Section	Enhancement
Report Builder	Report Designer (Beta)	A new and more intuitive way to create reports called <b>Report Designer</b> has been added to the Report Builder module. Use Report Designer to edit your existing reports, or create brand new reports. Once created, you can run and schedule them in Report Builder, as you do today. Though Report Designer is in a Beta phase currently, you can take advantage of an easier way to find the data groups and fields you're looking for, and a preview feature that allows you to view your own agents and cases in a sample report on-screen before you run it. <b>See attached TechNote for complete details.</b>
Report Builder	User Rights	A new User Right called <b>Report Builder Email</b> has been added. Only users who have this right will be able to send or schedule reports to be delivered by email. Note: All existing User Roles in your system that included the <b>Report Builder Admin</b> User Right will automatically contain this new Right as well. If you wish to restrict any users' ability to email reports, you will need to take action to remove the Report Builder Email Right from the appropriate Role(s).
Applications	App Entry	If an agent has multiple Licenses and/or Appointments to choose from when being attached to an Application, the modal window that appears will now display the License Line of Business and the Appointment State to better assist you in attaching the correct Licenses and Appointments.
Contacts	User Association	All functionality related to <b>User Association</b> has been updated to be consistent with the look and feel of the rest of AI. If your agency already uses User Association, your previous associations will function as usual, you will just want to familiarize your users with the new screens. If your agency doesn't use this functionality today, and would like to know more, <b>see attached documentation for complete details.</b>

### Changes to Agency Integrator for August 22, 2015

Module	Section	Change
Applications	Application Detail	The extension on the Agent's phone number (if applicable) will now appear correctly on the top of the Application Detail screen.
Applications	Case Manager	Previously, if a Case Manager's User ID was inactivated, and an Application belonging to that Case Manager was changed, the Case Manager selection was lost and reset to "Select". Now, the Case Manager will be retained unless manually changed by the user.
Applications	iGO / AI Integration	Assurity applications created by the iGO / AI Integration will now correctly populate the primary agent when available, rather than using the iGO Default Agent.
Applications	iGO / AI Integration	In some situations, the Case Manager selected on an Application was removed when selecting Go or No Go to decision the case. This has been resolved and the Case Manager will now be retained as expected.
Applications	Super Users	Previously, when logging in as a Super User, the list of Case Managers to select from would be incorrect. This has been resolved and Super Users will see the correct Case Manager list for the environment they have selected.
Command Center	Task List	Previously, if an application was created by FastApp without a Signed State, and the Signed State was manually populated later, Requirement follow-ups on Command Center were appearing multiple times, rather than being grouped together for the same Application. Now, the Requirements will group together as expected, and you will see a numeric indicator, showing you if the same Application has multiple Requirement follow-ups.
Commissions	Commission Statement Import	Previously, when importing a Commission Statement with a value in the Payment Amount column, the Payment Amount would disappear from the Batch Detail screen if you chose to enter the associated Application as a Quick Case. This has been resolved and the Payment Amount from the import will be retained after adding a Quick Case.
Commissions	ECP Adjustments	When adding a manual ECP (Employee Compensation) Adjustment to a Statement, you can now successfully search for the Payee and choose from ECP users attached to that Application. Previously, the attached users did not appear in your search.
Commissions	Statements	Previously, when adding a Batch Detail, the Payment Amount would disappear if you chose to enter the associated Application as a Quick Case. This has been resolved and the Payment Amount previously entered will be retained after adding a Quick Case.
Contacts	Appointments	When adding a new Appointment, the Appointment's State is a required field. If you attempt to save the Appointment without a State, you will receive an error message.
Contacts	Cases Tab	On the Agent Detail screen, you can now successfully sort entries on the Cases tab by date.
Contacts	Email Address	You will no longer receive an error message stating that the domain is invalid when attempting to save an email address with a domain that is more than three characters (i.e. bob@abcinsurance.agency).
General	Google Chrome Browser	Previously, when using Google Chrome to access AI, blank <b>Web UserID</b> and <b>Password</b> fields on the Additional Detail tab of a Contact could be automatically populated with the user's AI username and password. This will no longer occur.
iPipeline CRM Integration	Contacts	If your agency uses iPipeline CRM, Contacts designated with a Manager or Coordinator status in AI that have been synced to CRM will now retain that status as expected. If the contact is changed in CRM and re-synced back to AI, the AI status will not change.
iPipeline CRM Integration	CRM Activities	If your agency uses iPipeline CRM, CRM Activities will now appear as expected in Agency Integrator. Previously, the Activities appeared as HTML rather than traditional text.
Memos	Attachments	When generating a new Memo and adding attachments, you can now successfully delete attachments as desired, prior to sending the Memo.
Memos	Carbon Copies	You can now successfully delete a Carbon Copy recipient from the Memo Queue screen, prior to sending the memo.

Report Builder	Administration	When copying a Report Builder report, you will now receive an error message if the title exceeds the maximum character limit, rather than an unexpected error.
Report Builder	Sorting	If you choose to sort your report by a column with numeric values, those values will now be correctly sorted in ascending order.
System Administration	Carrier / Product Attachment	You will now receive an obvious warning message when attempting to attach all Carriers in your environment. Previously, the warning message did not appear and some users inadvertently attached all Carriers.