



UserVoice Enhancements to Agency Integrator for October 24, 2015

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
General	Requirements	Applicant has been added as an option to select as Required Of on a Requirement
General	Requirements	You can now multi-select Requirements, right-click and change the Required Of on all selected Requirements.
Memos	Memo Queue	A Select All/Remove All checkbox has been added to the Memo Queue Screen.

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Module	Section	Enhancement
Reports	Report Designer	<p>Lots of great changes have been made in Report Designer. Note that you will now be launched directly into Report Designer instead of Report Builder when creating a new report and edit an existing report. Until our January 2016 release, you will still be able to create and edit reports in Report Builder with right-click menu options. See attached TechNote for complete details and new features, including:</p> <ul style="list-style-type: none"> * Quick Find has been added for easier column searching * "Parent" Criteria (like Organization) will now be automatically selected when "child" Criteria (like Carrier) are added * Common fields have been relocated from the "Other Criteria" folder to the "Basic Info" folder for easier location * Default Criteria have been added to each Data Group to help make new report creation easier * An Apply button has been added to allow you to save your changes and continue designing your report
Administration	Codes	Because the functionality did not exist, Assign to Prior Apps has been removed as a checkbox when creating or editing a Code that is type: Agent/App Manual Assign .
Administration	Data Replicator	You can now set a Text Qualifier (a character that encloses values in the text file) for your Data Replicator file through Administration, System, Data Replicator. Options are: none, single quote, and double quote.
Administration	Data Replicator	<p>If your agency uses Data Replicator, visit the Administration screen under System, Data Replicator to make sure you have a Notification Email set. This field is now required because automated notifications will be sent to that address in the following situations: monthly emails containing a list of all fields that will be deprecated, an additional reminder email one week prior to the field deprecation date. Note that these notifications will be sent only if the deprecated field(s) are one(s) that you have selected to be included in your file.</p> <p>A Notify When Generated checkbox has also been added. When checked, the email address specified will receive a notification each time the Data Replicator file is generated.</p>
Comments	Illustration Comments	New fields have been added to Application and Contact Comments to capture Illustration Request information. Because the existing Illustration Request tab will be retired with the January 2016 release, these fields should be used to log requests and can be sent as Tasks to Users' Command Center. See attached TechNote for further details.
General	Faxing	Because faxing functionality has been removed, Fax has been removed as an option for a Contact's Preferred Memo and Preferred Marketing, and from all Memo Templates.
Reports	App Info Data Groups	Days Since Last Commission Posted has been added as a Column and Criteria in applicable App Info Data Groups. This value displays the number of days elapsed since a Batch Detail has been posted for a particular Application.
Reports	App Info Data Groups	Last Commission Posted Date has been added as a Column and Criteria in applicable App Info Data Groups. This captures the most recent date that a Batch Detail has been posted for a particular Application.
Reports	Commissions Data Group	Agent/Payee Hierarchy has been added as a Criteria in the Commissions Data Group. When a single Hierarchy is selected as criteria, Payments for Payees belonging to the selected Hierarchy will be returned.
Reports	Commissions Data Group	Application Custom Fields have been added as Columns and Criteria to the Commissions Data Group.
Reports	PDF formatting	When using the PDF output in Report Builder, phone numbers will now appear with formatting i.e. (801) 333-7777. Government IDs (both SSN and Tax ID) will appear with formatting (i.e. 222-55-9999). Currency values will appear with formatting (i.e. \$5,000.00).
Reports	Single Premium and Annualized Premium	Single/Annuity Premium and Annualized Premium can now be subtotaled in Report Builder. These same fields can also be included on Summaries, and will split correctly when there is more than one Agent on the Application.

Changes to Agency Integrator for October 24, 2015

Module	Section	Change
Administration	Riders	An unexpected error will no longer occur when clicking Apply rather than OK to create a new Rider.
Applications	Additional Detail Tab	Previously, Owner Zip Code could not be entered on the Additional Detail tab if the field was clicked on first (tabbing into the field did not cause the issue). This issue has been resolved and a value can be entered whether the user clicks or tabs into the field.
Applications	ECP Tab	Previously, if an Employee was added to a case during the Application Wizard (as opposed to manually on the ECP tab after entry), the Grid Name was not attaching to the case correctly. This has been resolved.
Applications	Group Applications	Group Name will now appear on the Group Application Detail screen as expected.
Applications	Requirements	An unexpected error will no longer occur when attempting to place a vendor order on a Requirement for a Pre-app without a Product.
Applications	Rolling to Formal	Previously, when rolling a Preapp or Informal to a Formal Application, the Agent was duplicated in some instances. This will no longer occur.
Contacts	Carbon Copy Tab	When adding a new Carbon Copy to a Contact, phone numbers, fax numbers and email addresses will now be validated for correct formatting when saving.

Contacts	Commission Roles and Schedules Tab	View/Edit Attachment on the Commissions Roles and Schedules tab has been removed as a right-click menu option because the functionality did not exist.
Memos	Forms Attachments	The Preview button for Forms Attachments on Memos will no longer appear as the functionality was not supported. The Preview button for non-forms attachments continues to work as expected.
Memos	Triggers	The Memo Trigger criteria previously named Placed Date has been changed to Closed / Placed Date to match the field's name in other system areas.
Reports	Comment Data Groups	In some instances, report data was returned incorrectly when using Comment Category as Criteria. This has been resolved.
Reports	Commissions Data Group	Reports in the Commissions Data Group using the Posted Date as Criteria will now return results as expected.
Reports	Custom Fields	If a Report was sorted, grouped or summarized by a Custom Field that had been deleted from Administration, an unexpected error would occur when running the report. This will no longer occur.
Reports	ECP Data Group	Because Custom Fields are not yet available in the ECP Data Group, they have been removed from the Columns lists in both Report Builder and Report Designer.
Reports	Saved Criteria	In some instances, certain Criteria options were missing when creating a Saved Criteria set. This has been resolved.