Agency Integrator

Powered by iPipeline

Enhancements to Agency Integrator for August 17, 2013

Items with this icon 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	Comm. Est. Payout Tab	The **Recalculate Commissions** button has been added to **Comm Est Payout** tab on an Application. **The button has also been removed from its previous location on the Agents tab.**
Administration	Application Status	A new Administration module called **Application Status** has been added, allowing administrators to hide and re-order Statuses that appear as selection options on Applications. This enhancement is the first step in allowing Customizable Application Statuses to be created and maintained in Agency Integrator, which is an upcoming enhancement. See forthcoming TechNote for further information.
Applications	Annuity Payments Tab	A new tab called **Annuity Payments** has been added to annuity applications to track annuity payments made by the annuitant. The tab is accessible through the **Actions** menu from the Application Detail screen. If using the Commissions module, certain types of posted Commissions will automatically populate on this tab. See forthcoming TechNote for complete details.
Applications	Application Detail	Primary Agent's **email address** will now display in the header as a hyperlink on the **Application Detail** screen. Clicking on the email address will launch a new email directed to that address in your default email program. **Note that this hyperlink generates an email message in your email program, it does not generate an AI Memo. Emails from outside email programs are not automatically stored in Agency Integrator.**
Applications	Application Search	**Plan** (Product) has been added as a column on the Application Search Results screen.
Command Center	Task List	Additional columns have been added to the **Command Center Task List**. You will now be able to view Policy #, Agent Name, and Status on the grid view.
Commissions	Schedules	When adding a new **Rate** to a Subschedule, the cursor will initially be in the **Carrier Rate** field, making quick Schedule entry easier.
Commissions	Statements	**Organization Name** has been added to the Statement Batch Detail screen.
Commissions	Statements	**Agent Responsible** and **Commissionable Premium** fields were added to the Open and Posted Batch Detail grids. The columns are now selectable and resizable.
Commissions	Quick Case Add	When entering information on a **Quick Case**, the fields (including insured's name) will now retain when returning to the Batch Detail Screen after entry of the Quick Case is complete. Fields populated manually, imported from the Statement Import tool, or from the Carrier Statement feed will now be automatically populated on the Quick Case.
Commissions	Statements	The **Modal Comm. Amount** field on the Batch Detail Screen will now allow $0.00 as a valid amount. Previously, you had to add a minimum of $0.01 for the Detail to save correctly.
Commissions	Statements and Posted Batches	A new column called **Paid** has been added to the **Adjustment List Screen** in **Commission Statements** and **Posted Batches**. Adjustments with the **Paid** box checked on the Adjustment Maintenance screen will appear with a Y in the new Paid column on these tables.
Contacts and Applications	Codes Tab	You can now sort data on the **Codes** tab by available column headers.
Contacts and Applications	Comments	A new field called **Carrier** has been added as a possible selection on Agent and Application Comments. The new Carrier field is not required; however, if selected, will allow the comment to be associated with a specific carrier. The Comment list can then be filtered by Carrier as well.
CRM Integration	AI Comments	**AI Comments** created in CRM will now display the CRM user's Username on the Comment in Agency Integrator.
CRM Integration	CRM Owner	If your agency uses **iPipeline CRM**, you can now turn on a **System Preference** to require the **CRM Owner** field on the **Contact Detail** screen. If the Preference is turned on, Contacts will not be able to be saved without selecting a value in the CRM Owner field.
CRM Integration	CRM Owner Field	The **CRM Owner** field has been added as a column on the **Application Search Results** and **Contact Search Results** tables. You can remove this new column from your tables if desired. A read-only **CRM Owner** field has also been added to the header of the **Appointment Detail**, **Application Detail**, and **Statement Batch Detail** screens.
General	Customizable Tables	Several table views in the system are now customizable. Columns can be permanently added or removed, column widths can be permanently adjusted, and grouping and sorting by column can be saved per session. See forthcoming TechNote for complete details.
General	Notes Fields	**Notes** fields throughout the system have been increased to 5,000 characters. This applies to **Requirement Notes** (on Applications only), **License Notes**, **Appointment Notes**, **Premium Notes**, **Product Specific Notes**, and **Contact Notes**. Important Note: If your agency uses **Data Replicator**, be aware that the **Notes** fields sent to Data Replicator will be truncated from 5,000 characters down to their previous character limits. To receive the full content of Notes fields, you should implement the **New Data Replicator**, which contains the full field values. Talk to your Customer Account Manager to switch to the New Data Replicator.
General	User Comments	Paging has been added to the **User Comments** list to display Comments more quickly.
New Data Replicator	Additional Fields Added	Carrier Contact Information fields are now available in the **New Data Replicator** and can be selected to be included in your Data Replicator file. Talk to your Customer Account Manager to switch to the New Data Replicator.
New Data Replicator	Data Replicator Administration	**Descriptions** have been added to the **New Data Replicator** Administration tables, making it easier to know which fields should be included in your file. Talk to your Customer Account Manager to switch to the New Data Replicator.

Report Builder	App Info - Agents Data Group	Additional criteria options have been added to the Estimated and Actual Commission values on an application. These values can now be reported on using "is blank" or "is not blank" on the **Criteria** tab on a report, allowing you to pull lists of cases with blank or non-blank commission values.
Report Builder	Commissions Data Group	**Case Status** and **Case Status Category** were added to Report Builder as Columns and Criteria in the Commissions data group.
User Administration	Role Administration	Additional **User Rights** have been added to control access to the **Appointments** tab on a Contact. The new rights are: **Read Only**, **Write** and **Delete.** Visit Role Administration to adjust your Users' access to this tab if desired.
User Administration	Role Administration	Additional **User Rights** have been added to control access to the **Licenses** tab on a Contact. The new rights are: **Read Only**, **Write** and **Delete.**
User Administration	Role Administration	An additional **User Right** has been added to control access to **Logo Administration.** The new right is **Admin – Logo**.

Changes to Agency Integrator for August 17, 2013

Module	Section	Change
Administration	Custom Fields	Custom Fields assigned to specific **Carriers** in Administration will now only appear on applications for that Carrier.
Applications	Additional Insured Tab	Previously, Additional Insured changes would save when Canceled was click. Now, changes will only be saved if **Apply** or **OK** is clicked.
Applications	Agent Tab	Decimal places on values in the agent % field will now save and display correctly.
Applications	Application Detail	Entering a duplicate policy number on an Application and clicking OK will now display an error, allowing you to resolve the duplicate before saving.
Applications	Application Detail	When accessing an Application with **Related Applications** in different organizations, the user will now only see the Related Application if they have access to the Organization the case resides in.
Applications	Application Entry	If your agency uses the System Preference **Workflow App Entry - Agent Selection First**, you will no longer experience an unexpected error if information is missing during the application entry process.
Applications	Application Entry	Adding multiple Agents to an application during entry now retains the first contact's correct split percentage.
Applications	Application Entry	During application entry, the SSN number will no longer blank out when using the Product **Search** option.
Applications	APS Requirements	When creating multiple APS requirements and attaching Doctor Contacts to the APSs, the Doctor attachment will now save correctly on each requirement.
Applications	Auto Receipting	When receiving off a status change from the Auto Receipting Queue (**AR/Error Queues** tab), the change will be correctly assigned to the User who receipted the change. Any Memos triggered on that same change are also tied correctly to the User who receipted the change.
Applications	Auto Receipting	Auto-receipted applications containing multiple agents were not always displaying the correct Agents' split percentages. This has been corrected.
Applications	Commission Estimated Payout Tab	**Flat Dollar Amounts** greater than $1,000 can now be entered on the **Commissions Estimated Payout** (CEP) tab.
Applications	Group Cases	Previously, if entering an invalid SSN on a **Group Employee**, an unexpected error would occur. This has been resolved and the standard error message will be displayed if an invalid SSN is entered.
Applications	Group Cases	If a Group Case is deleted, any **Special Deals** associated to it will also be deleted.
Applications	Paid / Closed Applications	Fields on a Paid/Closed application will no longer gray out when clicking **Apply.** You can now click Apply and continue to make edits.
Applications	Premium Detail	If your agency has the term **Premium Calculator System Preference** turned on, you will no longer receive an unexpected error when trying to change the **Modal Factor** on an Application.
Applications	Related Applications	When adding a **Related Application**, you will now be returned to the original application once the related application has been selected.
Applications	Required Custom Fields	You will now be able to successfully finish an application in Unfinished status and roll PreApp to a Formal when the application has one or more required Custom Fields.
Applications	Requirements	When using the **Previous** and **Next** buttons to scroll through Requirements on an application, certain changes would cause the requirement order to reset. This has been resolved and Requirement order will remain static when clicking through requirements.
Applications	Application Detail	Previously, they system would not allow a zero in the **Issue Age** field. This has been corrected to display a zero if the applicant is less than one year old.
Applications and Contacts	Comments	Double clicking **Apply** or **OK** on a comment now only saves the Comment one time. Previously, multiple clicks resulted in duplication.
Broker Gear	Comments	In certain scenarios, Comments appeared in **Broker Gear** twice; this has been resolved.
Broker Gear	Group Cases	Group Polices are now visible in **Broker Gear** if your agency subscribes to this service.
Command Center	Filters	Command Center filters that use **Face Amount** as a criteria will now work as expected.
Command Center	Task List	LTC Illustration Requests will now be directly accessible by double clicking on the task from **Command Center**.
Commissions	Posted Batches	You will now be able to search **Posted Batches** to find payments for policies that don't have an Application record in Agency Integrator.
Commissions	Schedules	When searching for a Schedule, the Product list will now automatically update when selecting a new Carrier from the drop-down list.
Commissions	Schedules	A zero value is no longer allowed in the **From Year** field on a commission Rate. Similarly, the **To Year** can no longer be less than the **From Year**.
Commissions	Statement Import	When adding a Quick Case from a Batch Detail imported through the Statement Import Tool, the system was resetting the previously defined **Modal Premium** and **Commissionable Premium** fields, setting them at $0.00. The data in these fields will now retain after going through the Quick Case Add process.

Commissions	Statement Import	In certain situations, Excel formatting caused an unexpected error during the Statement Import process. A more descriptive error message will now display, allowing changes to be made to the Excel file.
Commissions	Statements	Custom sorting on the Batch Detail List is now persistent; previously, the sorting was not retained.
Commissions	Statements	Users will no longer experience an unexpected error when searching for a **Payee** from the Adjustment Maintenance screen.
Commissions	Adjustments	On the **Adjustment Maintenance screen**, the insured’s name will now appear in the header at the top of the screen.
Commissions	Quick Case Add	In Force cases added through the **Quick Case Add** process will no longer require **Signed State**, **Signed Date**, or **Product** in order to be saved correctly.
Commissions	Quick Case Add	When using **Quick Case Add** to input a case, if you select **Organization** first and then search for the agent, the **Contact Type** will now default to Agent when performing your Agent search.
Commissions	Quick Case Add	When a name is entered for the insured on the Commission Batch Detail page, it will be now be parsed correctly on the resulting Application.
Commissions	Statements	Previously, when viewing the **All Adjustments** tab on the Statement Batch Header screen and using custom column sorting, the sort wasn't being maintained after accessing a record and returning to the list. This has been resolved and the sort will now be maintained.
Commissions	Statements	**Protective Life Insurance** and **Protective Life and Annuity** Commission Statements populated by the feed will no longer show as blank due to negative payments not populating when the statement was created.
Contacts	Address/phone/email Tab	When accessing the **Address/phone/email** menu option from the **Actions** menu on a Contact who had no address, the tab will now load correctly, rather than resulting in an unexpected error.
Contacts	Carbon Copy	A Contact's active Carbon Copy’s Name is now editable. Previously, an active carbon copy name could not be changed.
Contacts	Comments	Comments for a Contact will now default to **All Organizations**, rather than the Contact's default Organization.
Contacts	Contact Detail	Users were unable to remove the **Date of Birth** from a Company contact record. This is now resolved and working as expected.
General	(IX) Integrated Experience	IX users can now view Licensing and Appointment information, populated with data from Agency Integrator.
General	Firefox Browser	If you use Firefox to access Agency Integrator, hitting **Enter** on your keyboard will now function the same as clicking the **OK** button.
General	Internet Explorer Browser	Forced **Compatibility Mode** has been removed in Internet Explorer when accessing Agency Integrator. By default, you will no longer be accessing AI in Compatibility Mode.
General	Requirements	Right-click options on Requirements have been disabled for Users with **Read Only** rights.
Memos	Attachments	Memo attachment names can now be up to 250 characters without causing an error. Previously, the limit was 100 characters and the document would not attach correctly if the name exceeded the limit.
Memos	Memo Triggers	When making a change to Memo Triggers and then clicking **Cancel**, your changes will no longer be saved. Changes are only retained if **OK** or **Apply** is clicked.
Memos	Memo Triggers	When assigning Case Manager Criteria to an **Application Memo Trigger** , all Case Manager names will now be available to assign, rather than displaying NULL.
Memos	Memo Triggers	Previously, when the **Auto Receipting Queue** would trigger a Memo, it wasn’t working as expected. Now, if a user accepts an Auto Receipting change that would generate a memo, it will trigger and send as expected.
User Administration	Role Administration	Inactive Users will no longer appear in the **Role Administration** area.
User Administration	Role Administration	When accessing the **Rights** tab in **User Administration**, if you clicked on **View Roles/Users** and then clicked to another tab, the tab wasn’t changing, this has been corrected.