Agency Integrator

Powered by iPipeline

## Enhancements to Agency Integrator for February 23, 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 |
|---|---|---|
| Commissions | Agent Schedules | The system can now produce a PDF of an Agent's Commission Schedules. See forthcoming TechNote for full details. |
| Commissions | Statements | Added the ability for users to import Commission Statements into Agency Integrator using a template. See forthcoming TechNote for full details. |
| Application Administration | Exception Queue | Paging has been added to the **Exception Queue** to alleviate slow loading time when it contains a large number of entries. |
| Applications | Inforce Tab and Inforce Feeds | New fields have been added to the Inforce tab on Applications. Additional functionality has been added to Auto Receipting to allow alerts to appear on Command Center for Inforce-related events. See forthcoming TechNote for full details. |
| Applications | Application Detail | Guam has been added as an available Signed State. |
| Applications | Carrier Status | On Inforce cases with John Hancock, when selecting Actions, **Carrier Status**, you will be taken to an updated Carrier Status window with a new appearance. |
| Commissions | Statements | All agents on a case will now appear in the agent list when entering a batch. Also, an identifier has been added to the Batch Detail list to indicate when there are multiple agents on a case. |
| Commissions | Statements | A new column has been added to the batch detail list to indicate whether the case on the statement is matched to one in AI. |
| Contacts | Appointment Feeds | When viewing Carrier Appointment Status, only the selected state will be displayed. |
| Legacy Reports | Status Report Group | There are new Legacy Reports available in the Status report group. **JH Inforce - Term Conversion** and **JH Inforce - Lapsed/ Lapse Pending/ Overdue** . These are specific for John Hancock cases. |
| Report Builder | Agent info-Codes Data Group | A new Criteria called **Code Start / End Date** has been added to **Agent Info - Codes** data group, to help run Code reports by date . This will functionally work the same way as **Hierarchy Start / End Dates** and **Organization Agent Start / End Dates** already in Report Builder. |
| Report Builder | Agent Data Groups | **CRM Owner** has been added as an available column and criteria for all Agent data groups. |
| System Administration | System Preferences | A new System Preference called **Requirements - L&A default follow up days** has been added, which allows you to define the default number of follow-up days for License and Appointment requirements. If left blank, it defaults to 7 days. |
| User Administration | Memo CCs | A Select All/Unselect All option has been added to the **Memo CC** tab of the User Administration area. |

## Changes to Agency Integrator for February 23, 2013

| Module | Section | Change |
|---|---|---|
| Administration | Logos | Logo Administration has been moved from inside the Memos Administration area. To administer Logos, go to **Administration, System,** and **Logos.** |
| Administration | Custom Fields | After initially creating a Custom Field and going back in to edit it, you were unable to change selected Carriers. This has been resolved. |
| Administration | Custom Fields | After initially creating a Custom Field and going back in to edit it, changes to Organization selections were not being saved. This has been resolved. |
| Applications | Agents Tab | In some cases, deleting an Agent or Agents from An Application did not work as expected, resulting in cases totalling more than a 100% agent split. This has been resolved. |
| Applications | Application Detail | After successfully relating cases, you will be returned to the **Related Cases** tab. Previously, you stayed on the **Application Search** screen. |
| Applications | Application Detail | The **Purpose** field on the Additional Detail tab will no longer default to **Business.** This field will remain blank unless populated. |
| Applications | Application Entry | Previously, users were unable to complete applications in an Unfinished status if the System Preference **App Entry - Agent Selection First** was turned on. This has been resolved. |
| Applications | Application Entry | When changing agent percentages on a case, then deleting one or more agents during application entry, agents were not being removed as expected. This has been resolved. |
| Applications | Application Entry | Requirements will no longer be removed when clicking Cancel on the Requirement Detail screen during application entry. |
| Applications | FastApp | It is now easier to update required fields on Applications created through the FastApp process that may be missing information such as the Signed Date, without errors. |
| Applications | Search Results | When right-clicking from the Search Results screen and selecting **Illustrations,** the system will navigate to the Illustrations tab on the selected Contact. |
| Commissions | Commission Estimated Payout Tab | The **Commission Estimated Payout** tab on an Application will now correctly reflect the **Assigned To** for both Hierarchy Override Payments and Agent Schedule Payments. |
| Commissions | Schedules | You are now able to select the **All other states** banding option in a Commission Schedule. Previously, when selecting that banding, the schedule wasn't available for assignment to applications. |
| Commissions | Statements | When entering a Batch Detail for a case that exists in the system, followed by a case that does not exist in the system, the Commission Estimated Payout tab will no longer display information from the previous case. |

| | | |
|---|---|---|
| Contacts | Contact Detail | Email addresses with apostrophes are now allowed in Agency Integrator. |
| Contacts | ECP Tab | The **Entered By** field will now correctly display the User that assigned the employee, not the employee that was assigned. |
| Contacts | ECP Tab | Inactivated ECP Users will no longer be removed from the Sales Manager fields that they were assigned to, they will simply be inactivated as ECP users. |
| Contacts | Illustrations Tab | The **Sales Vault** column will now correctly reflect if there is a document attached to the Illustration Request. |
| Contacts and Applications | Dymo Labels | If using Firefox as your browser and your Dymo label printer is not set up correctly, you will now receive an error message letting you know. Previously, no error message was generated. |
| Informal Applications | Application Entry | An error will no longer occur when adding an agent to an informal application if the contact's SSN/Tax ID is typed in, rather than searched for. |
| Legacy Reports | ECP Paid Premium Report | App ID will no longer visually overlap the insured's name on the output of **ECP Paid Premium Report**. |
| Report Builder | Predefined Date Criteria | In the Agent data groups, the **Predefined** options for date range Criteria will now work correctly when selecting Organization Start/End dates, Hierarchy Start/End dates, and Code Start/End dates as Criteria. |
| System Administration | Memo Triggers | You will no longer be able to change the trigger Type after you have added Criteria to a Memo Trigger. Previously, this change was allowed, and could cause issues with available trigger criteria. |
| System Administration | Org Maintenance Tool | The Organization list is now sorted by Organization Name rather than description. |