Enhancements to Agency Integrator for August 18, 2012

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
Administration	Auto Receipting (uservoice)	The **Signed Date** field has been added to the **Auto Receipting Profile** as a field that can be Populated, Overridden or Queued from the Carrier Status feeds. The **Carrier Status** screen on an Application has also been updated with this new field.
Administration	Document Vault	A new Document Vault Administration area has been added where you are able to search for, view, edit and delete documents from all vaults (Contacts, Applications, Global and Private). Documents can be mass-deleted. See attached documentation for further details.
Administration	Carrier/ Product Attachment	A tree view to aid in Organization selection has been added to **Carrier/Product Attachment** administration. This will make it easier to manage Carriers and Products for customers with a large number of Organizations. See attached documentation for complete details.
Applications	Auto Receipting	**Auto Receipting** now has the ability to change the status of an Application to **Issued w/Delivery Requirements** without relying on the presence of outstanding Delivery Requirements, a **Policy Date**, or **Delivery Due Date**.
Applications	Group Applications	A right-click option has been added so that you can **Attach Polices** from the **Employees** tab on the **Group Detail Maintenance** screen.
Applications	Paper Clip Integration	The following fields have been added to the PaperClip integration on an Application: **GA#, User Name**, and **Case Manager**. These fields will now pass over to PaperClip if they are populated in Agency Integrator.
Contacts	Additional Detail Tab	The field **iGO ID** has been re-named to **PipePass ID**
Contacts	Commission Roles and Schedules Tab	Paging was added to the **Commission Roles and Schedules** tab to alleviate slow loading time when it contained a large number of Roles or Schedules attached to the Agent.
General	Fields (uservoice)	These fields have been expanded from 20 characters to 30 characters: **GA Number** and **Appointment Number**.
General	Read-only Fields (uservoice)	Read-only fields are now more visually distinct from other fields, making it more obvious that the field is Read-only.
Memos	General	The email address that appears when a recipient receives a Memo will now display as **noreply@ipipeline.com**, rather than noreply@agencyworks.com.
Memos	Queued Memos	Memos that have been sitting in a **Queued** status for more than seven days will now automatically change to **Failed** status.
Memos	Triggers	Codes have been added as a criteria to Informal Memo Triggers.

Changes to Agency Integrator for August 18, 2012

Module	Section	Change
Administration	Memos	If the **Save Memo to Comment** box is checked in Memo Administration, that Comment will now be automatically set to **Confidential,** unless the NONCONFIDENTIAL System Preference is turned on. Confidential Comments are not viewable through **Broker Gear**.
Administration	Role Administration	An error will no longer occur when attempting to delete a User Role with no Users or Rights attached to it.
Applications	App Upload	Applications using the **Transamerica Application Upload** process will no longer error out to an invalid Office ID value.
Applications	Application Entry	When the System Preferences **Skip License Check** and **Skip Appointment Check** are turned on, the system was still generating Licenses and Appointments during Application Entry, as well as the Requirements on those Licenses and Appointments. This has been resolved. Licenses, Appointments, nor Requirements will be generated when those system preferences are turned on.
Applications	Application Entry	Previously , if your office had the **Applications - Base Premium Required** System Preference turned on, but the **Premium** tab did not appear on the Application Entry Wizard, you would receive a Base Premium Required error when finishing the Application. This has been corrected.

Applications	APS Requirement	You can now add a new Doctor Contact from an APS requirement as you could in the Legacy system.
Applications	AR/Error Queues	When visiting the **AR/Error Queues** tab on a case and right-clicking to **Add/Match Requirement** in the Error Queue, you will no longer receive an unexpected error.
Applications	Carrier Status	Accessing Carrier Status from the **Related Cases** tab would show status for the original case rather than the Related Case. This has been resolved.
Applications	Carrier Status	**Premium Mode** will now display correctly on the **Carrier Status** screen.
Applications	Cloned Application	When **Cloning** an Application, the Application Alerts on the original Application will now also appear on the Cloned Application.
Applications	Cloned Application	When closing a Cloned Application, the correct date will appear in the **Paid Closed Date** field, rather than the originating Application's Paid Closed Date.
Applications	Delete Application	In some instances, when right-clicking to delete an Application from the Search Results screen, the delete confirmation message would display the previously accessed application's Insured name. The message will now display the correct name.
Applications	Group Applications	When accessing a Group Application that was entered in the Legacy User Interface, you will no longer receive a "Record not found" error.
Applications	Informal Quotes	In some instances, when a new Informal Application was created, the **Quotes** tab would display the Quotes from the Informal app previously accessed. This has been resolved.
Applications	Informal Quotes	When using the **New Requirement** button on the Requirement Detail screen to add new Requirements to an Informal **Quote,** the requirements will now be added to the **Subject To Requirements** tab on the Quote, not to the general Requirements tab on the Application.
Applications	Informal Quotes	The **Tentative Offer** field will no longer allow you to enter more characters than are displayed in the field.
Applications	Informal Quotes	The **Face Amount** field will now be formatted as currency on **Informal Quote** type memos.
Applications	Memo Queue	When sending a memo with a **Carbon Copy**, the email field in the Memo Queue will now correctly display the primary recipient's email address, not the Carbon Copy's email address.
Applications	Memos	There were some instances where generating a new Requirement would not trigger a New Requirement Memo as expected. This has been corrected.
Applications	Memos	When a Memo's **Reply To** was set to Case Manager, rather than User, any Carbon Copy recipients of the Memo would receive it from the User. This has been corrected, and all recipients of the Memo will receive it from the Case Manager as expected.
Applications	Memos	When creating a new Application, the system will no longer generate Memos associated with both the **New Requirement** and **Requirement Received** Memo Triggers.
Applications	Premium Tab	Changing the **Planned Modal Premium** on an Inforce policy will no longer result in an error.
Applications	Related Applications Tab	The Group Name will now display correctly on the **Related Applications** tab.
Applications	Requirement Events	When adding a Comment to a Requirement Event, an error would occur. This has been corrected and the error message will no longer appear.
Applications	Requirement Events	When a **Requirement Event** has been added to a Requirement, the Event indicator on the Requirements tab will now instantly appear, rather than having to exit the case and re-open it in order to see the Event indicator.
Applications	Requirements	On the **Requirement Detail** screen, when tabbing between fields, the entire Requirement **Description** field will be highlighted, rather than placing the cursor at the beginning of the field. This will make it easier to change the Description while tabbing through fields.
Applications	Requirements	When adding a new Requirement from within the Requirement Detail Screen, or using the **Generate Requirements** button, the **Requirement For** field was not correctly populating the Primary Insured's name. This has been resolved.
Applications	Requirements	The status of a Requirement will now automatically change to Received when a date is manually entered into the **Agency Received** field.
Applications	Requirements	When adding a **Doctor** to a Requirement, the **Requirement Description** field will no longer allow you to enter more characters than the field displays.

Applications	Search Results	You can now sort by all columns on the Search Results list.
Applications	Vendor Orders	In some instances, clicking **Vendor Order Status** on an Informal Application resulted in an error. This has been corrected.
Applications	Application Detail	You will now be able to see the correct Carrier List for the Organizations attached to an Agent.
Commissions	Commission Adjustments	Tabbing order has been corrected on the Commission Adjustment Maintenance screen. You can now tab through all fields in order.
Commissions	Commission Estimated Payout Tab	The Paid To column on the **Commission Estimated Payout** tab on an Application will now correctly display the Assignee, Employee, or Agent that will receive the payment.
Commissions	Posted Batches	When performing a search by Policy Number or other criteria on the Posted Batches List, and then opening a particular batch clicking OK would return you to the Posted Batches list without your previous search results displaying. This has been corrected, and you will now be returned to your search results.
Commissions	Schedules	Copying a Rate on a Subschedule will no longer result in an unexpected error
Commissions	Schedules	The **Replaces Schedule** drop-down option is now populated with the full list of active and inactive Schedules.
Commissions	Statements	When performing a search by Policy Number or other criteria on the Batch Detail List, and then opening a particular Detail, clicking OK would return you to the Batch Detail List without your previous search results displaying. This has been corrected, and you will now be returned to your search results.
Commissions	Statements	Calculations for the **Modal Commission Amount** on the Batch Detail Screen will now be correct when there is an ECP Payment.
Commissions	Statements	Calculations for the Modal Commission Amount on the Batch Detail Screen will now be correct when there is a Hierarchy payment based on a schedule assigned to the hierarchy where the rate is in the **Carrier** field.
Commissions	Statements	There were some instances where entering a Policy Number to add a Batch Detail to a Statement would result in an unexpected error. This has been resolved.
Commissions	Statements	When editing an **Adjustment,** the change wasn't immediately viewable on the **Batch Header**. This has been corrected.
Commissions	Statements	When adding or viewing a Batch Detail with a selected **Rate Base** (Base Premium, Excess Premium, etc.), the Schedules area on the Detail was displaying items for all Rate Bases, rather than the one selected on that Detail. This has been corrected.
Commissions	Statements	After entering a new Statement, adding a Detail and clicking OK on the Batch Detail List, you will now be returned to the **Statement Batch List**, rather than being taken to the **Statement Batch Header**.
Commissions	Statements	**Agent** type Payments are now correctly picking up **Commission Assignments**.
Contacts	Carbon Copy	The **Email** field on the **Carbon Copy** tab will now accept up to 70 characters, rather than cutting off at 40 characters.
Contacts	Carbon Copy	When a new **Carbon Copy** is added to a contact, the **All Memos** box will now be checked by default.
Contacts	Commission Roles and Schedules Tab	If a Commission Schedule has multiple associated End Dates for an Agent (the End Date of the Schedule, the End Date of the Organization's attachment to the Schedule, and the End Date of the Agent's attachment to the Organization), the **Commission Roles and Schedules** tab on the Agent will now display the earliest End Date associated with the Schedule.
Contacts	Contact Detail	The **Assistant Name** field will now correctly save data as entered.
Contacts	Hierarchy Tab	The correct **Parent Level** will now display on the Hierarchy tab after using The Hierarchy Replacement feature in Administration.
CRM	CRM / AI Integration	When creating a **Contact** with an **Agent** type in CRM, the Home Office Organization will no longer be added as a default if the agent already has a default organization selected.
Document Vault	Memos	Attachments sent out on Memos will no longer be added to the space calculation for Document Vault subscribers.
Legacy Reports	Agent	The **Agent Appointment - Agent Appointment Information by Status and Date** report will now use the appointment's **Entry Date** as criteria instead of the appointment's Effective Date.
Legacy Reports	Codes	The **Status Date** column on the **Codes Submitted Prem -- Submitted Premium by Code** report was incorrectly displaying the Create Date. This column will now correctly display the Status Date.

Legacy Reports	Appointment Requirements Report	The **Appointment Requirements** Report will now only display Requirements that exist on the contact.
Legacy Reports	Paid Premium Report	When running the **Paid Premium Report**, the **Only Include Primary Agent on Case** check box will now work as expected.
Memos	Carbon Copy	Previously, if a new Memo was created in Memo Administration, it wasn't automatically added to the list of Memos that a **Carbon Copy** on a Contact would receive if the **Select All** box was checked. Now, new Memos will automatically be checked so that the Carbon Copy will receive it.
Memos	Carbon Copy	Memos generated by automatic **Triggers** will now send to all Carbon Copy recipients added to the Contact.
Memos	Carbon Copy	When more than one **Carbon Copy** is added to a Contact, Memos will now be delivered to all Carbon Copy recipients as expected.
Memos	Failed Memos	Previously, if a Memo failed to send, the **Status** column in Memo History would simply indicate "Failed." Now, there will be a more descriptive reason for the failure. One of the following will appear in the Status column: **Missing From Email**, **Missing Subject**, **Missing To Email**, **Missing Email Info**, **Missing Fax Number**, **Missing Printer**, or **Fax Failed**
Memos	General	Incorrect characters were appearing in Memos, specifically **tr>**. The characters no longer appear.
Memos	Signatures	Memos set up to be from the Case Manager in Memo Administration will now show the Case Manager's correct information in the Signature.
Memos	Triggers	Memos using the **Appointment Approval** Trigger will now trigger correctly when an appointment is moved to Approved status.
Report Builder	Appointment Custom Fields	Appointment Custom Fields of the "date" type were not working correctly as Columns or Criteria. These issues have been resolved.
Report Builder	Saved Criteria	Previously, if a report that used a date-type Custom Field as Criteria, the date range for that field could not be saved in **Saved Criteria Sets**. This has been resolved.