Agency Integrator

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Enhancements to Agency Integrator for March 17, 2012

Enhancements with this icon were submitted and voted on by our User Community (you!) using the UserVoice tool.

Module	Section	Change
Administration	Auto Receipting	The Memos section has been removed from the Auto Receipting Profile Administration. Memos generated by Auto Receipting are controlled on the individual memo.
Administration	Commissions	When adding a Batch detail, using the Enter key instead of using the mouse to select **OK** on the detail pop up will load the case information correctly on the detail screen.
Administration	Custom Fields	Administrators now have the ability to hide some **Selections** for a Custom Field with a list of items to select from. This will allow selections which are no longer valid to be inaccessible to new Applications and Contacts but remain where they were already selected.
Administration	Memos	Administrators now have additional tools to customize Memos. These include additional **Reply To** email address options, additional Signature options, and the ability to direct copies of memos to **Memo History** on a memo-by-memo basis. Specific details describing how to use this new fuctionality are included in the attached TechNote.
Administration	Memos	**Signed State** has been added as an available filter for Triggers related to Application Memos.
Administration	Memos	**Agent Sales Manager User ID** and **Employee Assignment User ID** are now available to add to Memo Templates and/or Memo Blocks.
Applications	Application Entry	The **Issue Age** for a client will no longer calculate when the date of birth is entered. The Issue Age will now calculate when you click **Next** to move to the next tab in the entry wizard. This will allow the issue age to calculate using the age nearest or age last method for the Carrier and Product selected.
Applications	FastApp Applications	**Hierarchies** will automatically be attached to applications created by **FastApp** at the time the case is created. This will occur if the agent has one, and only one **Hierarchy** active at the time the case is created. If the agent has multiple active hierarchies, no hierarchy will be added when a case is created by the FastApp process.
Applications	Inforce Application	Users accessing Inforce cases which may have been added via the Quick Case Add process will no longer be required to enter a Date of Birth before other changes to the case can be saved.
Applications	Paid/Closed Date	When a case is re-opened, the User is asked if they want to change the **Paid/Closed Date** for the case. The wording on this notification has been adjusted make the choices more clear.
Command Center	Carrier Status	**Carrier Status** will open in a new window when accessed through the **Resources** menu.
Commissions	Schedules	An additional column called **Available** has been added to the **Commission Roles and Schedules** tab on a Contact. This will notify users when a schedule has been attached, but has not yet made been made available for use in Administration.
Contacts	Appointment	When entering a new Appointment, the automatically-generated Requirements will be visible immediately, rather than after saving and re-opening the Appointment.
Contacts	Search	Additional right-click options have been added for contacts from the **Search Results** screen.
Contacts	Search	**Appointment Number** has been added as an item that can be searched for to locate an agent.
General	Document Vault	Several updates have been made to Document Vault including the ability to add documents to Contact records, and view documents from a Document Vault tab. Specific details describing how to use this new functionality are included in the attached TechNote. **Important Note: Even if your User ID had access to the previous version of Document Vault, you will need to update your user roles with the new User Right(s) in order to have access to the new version.**
General	Multiple Sessions	To open an additional session of Agency Integrator, select **New Session** from the **Resources** menu. This change will alleviate some symptoms that users have experienced when using more than one session, such as one session freezing, or being returned to Command Center. Note - multiple sessions will use additional computer recourses and may impact performance.

General	Old User Interface Access	If you would like to disable access to the old user interface in your office, we now have the ability to do this. Note - this will disable access for all users in your office - this cannot be done on a user-by-user basis. Contact your Customer Account Manager or the AMS Help Desk to disable access to the old user interface.
Report Builder	Application Reports	**Carrier GA** has been added as an available column in the **App Info - Agent** and **App Info Requirements** data groups in report builder. This column will display the GA number assigned to the case by the Carrier for cases included in Pending Case Status feeds.
Report Builder	Application Reports uservoice	A criteria called **Include Hierarchy Downline** has been added to the **App Info - Agents** and **App Info - Agents w/Split Premium** data groups. Adding this criteria to your report will allow you to include business for any agents in the selected hierarchy reporting to the selected level/contact to be included in the results.
Report Builder	Commissions Data Group	**Paid** has been added as a criteria in the Commissions Data group. Using this criteria will allow you identify adjustments which have been marked as paid. The **Paid indicator** is also available to add as a column in a report.

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Administration	Auto Receipting	When working in the **Assign Profile** tab, any change to the Carrier, or the Profile selection will now cause the list of organizations to refresh so that correct information is displayed.
Administration	Auto Receipting	Copying an Auto Receipting Profile will now work as expected.
Administration	Carrier/Product Attachment	In some instances, removing a single carrier or product from an organization resulted in an error. This has been corrected.
Administration	Command Center	Filters with multiple Hierarchy rules were not filtering correctly, this has been corrected.
Administration	Custom Fields	**Selections** can now be deleted from Custom Fields.
Administration	Hierarchies	If a User has restricted Organization access and attempts to access a contact from the **Manage Contacts** screen, they will receive a notification that they do not have permission to view this contact, rather than an error returning them to Command Center.
Administration	Hierarchies	If a contact has been end-dated in a Hierarchy, and its **Parent** is replaced - it will no longer move to a new hierarchy branch.
Administration	Hierarchies	End-dated Hierarchies will now be visible in the **Hierarchy Administration** screen.
Administration	Memos	New Organizations will be automatically selected for memo templates assigned with the **All Organizations** box selected.
Administration	Memos	Filters added to Memo Blocks will be saved when the user hits **OK** or **Apply.**
Administration	Plan Replacement	Using Plan Replacement will no longer result in an error notification.
Applications	AR Error Queue	The full date is now visible on the **AR Error Queues** tab.
Applications	Cash With App	If the amount of **Cash with Application** ends with a zero in the cents portion (i.e. $200.00), the zero will no longer be dropped off in the field.
Applications	Cloned and Copied Cases	Any Vendor Order IDs on the original Application will not be added to the new Application when it is cloned or copied.
Applications	Cloned Cases	When cloning a case, if the user selects a different GA number, the currently selected number will be assigned to the newly created application.
Applications	Codes Tab	Filtering of Active and Inactive Codes has been improved.
Applications	Copied Cases	The **Issue Age** for a client will now be updated when you copy a case.
Applications	Disability Detail Tab	Entering more than 15 characters in the **Paid By** field will no longer cause an error to occur.
Applications	Health Detail Tab	**In Network Deductible** is now an available field on the Health Detail tab.
Applications	Hierarchy	A Hierarchy that has been end-dated can now be removed from an Application on the **Agents** tab.
Applications	Informals	**Informal** Type Memos will now be immediately available after creating a new Informal case. Users will no longer need to save then case, and then come re-open it to send Memos.
Applications	Informals	**Follow-up dates** can now be changed for Quote-specific **Subject To Requirements**.
Applications	Informals	**Subject To Requirements** added to Quotes will no longer appear on the general Informal **Requirements** tab.
Applications	Informals	**Vendor Orders** can now be made on Quote-specific **Subject To Requirements**.
Applications	Informals	When rolling a previously closed Informal case to a Formal case, the original **Paid/Closed Date** will no longer be carried over to the new case.
Applications	Pre-Application	If a **Signed State** is added to a Pre-Application, only products available in that state will be selectable.

Applications	Requirements	Hitting the **Back** button on the browser when entering a new requirement will no longer result in a requirement with no **Code** or **Description** being added to a case.
Applications	Requirements	Selecting the **Previous** or **Next** buttons on the **Requirement Detail** screen will now move to the expected requirement.
Applications	Requirements	It will no longer be possible to have a Requirement with a date in the **Agency Received** field and the status of **Outstanding,** or vice versa. If the user attempts one of these combinations, they will receive an error notification.
Applications	Requirements	When adding a new Requirement, hitting the **Enter** key on your keyboard will save the new requirement and return you to the **Requirements** tab.
Applications	Requirements	Clicking on a requirement, but making no changes, will no longer update the **Review Date** field on a case. Note - this only applies if you have one of the **Preferences** to automatically update the review date turned on in your environment.
Applications	Transamerica Application Upload	Tabbing has been adjusted in the Upload screens.
Applications	Transamerica Application Upload	The **Face Amount** entered in the application entry wizard will display on the Transamerica Upload screen and will no longer need to be re-entered.
Applications	Transamerica Application Upload	**Office ID** is now a required field when uploading an application to Transamerica. The office ID is the agency's GA number with Transamerica and available GA Numbers for your agency will appear in a drop-down list to be selected from.
Applications	Vendor and Carrier Status	Some users saw the Application Detail screen appear in the pop-up window when accessing a **Vendor Order** or **Carrier Status** screen, this has been resolved. The correct screen will now appear in the pop-up window.
Applications	Void	Required fields will not been needed when changing the status on an application to **Void.**
Command Center	Group Applications	**Group** names will now display in Command Center.
Commissions	Adjustments	When selecting **View Adjustments** for a specific line item, only adjustments for that line item will be displayed instead of all adjustments for the batch.
Commissions	Estimated Commission Payout	The total of Actual payments displayed in the **First Year** column will no longer include renewal payments.
Commissions	Hierarchy	When adding a manual Hierarchy Payment in the Estimated Commission Payout screen on a case, any contact can be assigned as the **Payee.**
Commissions	Schedules	If a Schedule has been end-dated, the end date will also appear on any contact records that it has been assigned to, on the **Commission Roles and Schedules** tab.
Commissions	Split Cases	The COMMSPLITOVER System Preference will now apply to hierarchies that have Schedules attached for commission payouts. The COMMSPLITOVER preference applies that agent split % to the hierarchy payment.
Commissions	Statements	When searching for a Group Application from the **Commission Statement Detail** screen, the group can now be attached to the statement.
Contacts	Contact Detail	When a duplicate **SSN/TAX ID** is entered on a contact, the error notification box will let you know that the number you entered is a duplicate, rather than sending you back to the Command Center.
Contacts	Deleting a Contact	To delete a Contact, a user must right-click from the search result screen and select delete. You will no longer be able to delete a contact while you are currently viewing the contact detail information (from the Actions menu).
Contacts	Detail	A **SSN/Tax ID** will no longer be required for Contact records that have only Informal cases assigned to them.
Contacts	Hierarchy	When attempting to delete a Hierarchy from a contact where there are other contacts attached in the downline reporting to the agent, the user will be notified that all downline contacts must be removed before the Hierarchy can be deleted.
Contacts	Production	**Carrier names** will display on the **Cases** tab in an Agent record when the carrier was subsequently removed from Carrier/Product Attachment Administration.
General	Codes	There were some date discrepancies that could occur on the Codes tab if the agent had two instances of the same code with different start/end dates - this has been rectified.
General	Dymo Label Printers	Names using special characters will now print correctly when using a Dymo Label printer.
General	Multiple Sessions	Sometimes when working with more than one session open, one of the screens would freeze and quit responding. We have made changes to several areas to prevent this issue, and are continuing to identify and make changes to other areas.
Memos	Informals	The agent name will display properly on Informal Quote memo templates.

Memos	Memo History	CC recipients will be designated with a CC for both manually requested memos and triggered memos.
Memos	Memo Queue	When changing a memo to the Print delivery method from the Memo Queue, the user's default printer will be automatically selected.
Memos	Memo Queue	When de-selecting one memo, and editing another memo, the de-selected memo will not be reselected when hitting **OK** from the edited memo.
Memos	Memo Queue	In some instances, after editing a memo from the Memo Queue, the **OK** button was not allowing the user to proceed to the next screen. This issue has been resolved.
Memos	Memo Queue	Editing a memo with CC recipients will no longer cause the recipients' names to be removed.
Memos	Memo Queue	Changes to the **Delivery Method** can not be successfully requested from the Memo Queue.
Memos	Recipient Information	A contact's **Company Name** will be added to a memo when the Recipient's Company Name field is included in the memo template.
Memos	Secure Memos	**Secure** Memos can now be edited from the Memo Queue.
Memos	User CC	Emailed memos for user CC's will now go to the email address on their user profile, rather than the email address used for password resets and user validation.
Report Builder	Application Reports	Reports with **Case Manager** as a criteria will include the user ID for the user running the report in the drop-down (if the user has the Case Manager flag on.)
Report Builder	Comment Due Date Criteria	Reports which include a criteria for **Comment Due Date** will now return the correct results.
Report Builder	Custom Field Criteria	In some instances, reports created in Report Builder which included a **Custom Field Criteria** could not be emailed. This has been resolved.
Super Users	Application Detail	Super Users will be able to see all available case managers, they will no longer be limited to other super user case managers only.
Super Users	Contacts	Super Users will no longer see multiple listings of the same contact on Search Results screens.
Super Users	Contacts	Super Users will now be able to see the **Contact Type** and assigned **Organizations** for a contact.
Super Users	Contacts	The **Agency** indicator near the top of the Contact Detail screen will now update to show the Super User which Agency the contact belongs to.
Super Users	Report Builder	Super users will be able to run reports utilizing the **Agent Info-Codes** data group without error.
Super Users	Search	The **Agency Short Name** has been added to the search results for both Contacts and Agents. This will help identify which office a case or contact belongs to.