Agency Integrator

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Enhancements to Agency Integrator for May 18, 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**. **Any of your votes allocated to Enhancements on the list below will be given back to you as of May 20, and will be available to cast on other Enhancement Requests.**

Module	Section	Enhancement
Applications	Comments	When adding a Comment to an Application that has one or more **Related Applications**, you will now have the option to copy the Comment to some or all Related Applications.
Commission	Statements	An additional column has been added to the **Batch Detail List** for Open statements using payment types **MGA Commission** or **Agent Commission**. The new column **EST. –AC** will indicate the difference between the actual payment entered on the batch detail and the estimated amount. If the actual amount equals the estimated amount the column will display a zero. A positive value indicates that the actual amount received is less than what was estimated. A negative value indicates that the payment received is more than what was estimated.
Commissions	Quick Case Add	When adding a new case through the Quick Case Add process in the Commissions Statements module, you will now have the ability to select the Hierarchy during entry, rather than having to go and add the Hierarchy afer the quick case has been added and saved.
Commissions	Statement Import Template	An additional column has been added to the **Statement Import Template**. The new column is called **Automatically Adjust** and corresponds to the Automatically Adjust check box on the Batch Detail screen. Manipulation of this column on the template allows users to indicate that a particular line item on a statement should not be automatically adjusted. On the template, an added value of N in that column will indicate that no adjustments should occur. A blank or a value of Y in that column will assume the default in the system: that automatic adjustments should be calculated. If you have already downloaded and are using the existing template, you will not be required to download the new version of the template.
General	Imaging Vendors	For agencies who use imaging integrations with PaperClip, Exam One, and DocStar, additional icons have been added to the top right-hand side of the Contact and Application Detail screens as a shortcut to view the associated images. The existing links under the Actions menu will still be accessible as well.
Report Builder	General	The available amount of Custom Fields that can be used on a report has been increased from 4 to 10.
Administration	Hierarchy Override Sharing	For **Override Sharing** scenarios set up on Hierarchy Tiers, you can now select whether the payment will be made by the MGA or the Carrier.
Administration	System Preferences	A new System Preference has been added called **Auto update status to In Force - Commission Paid**. If turned on, this Preference will change the status of a case to **In Force - Commission Paid** when a commission statement is posted containing a payment for that case.
Administration	User Administration	The **User Administration** screen now displays more users by default, and a search field has been added to help agencies with long user lists. You can now edit the user ID by double clicking or right-clicking and selecting edit. Previously, right-clicking to edit was the only option.
Applications	Application Search	When searching for an Application by Policy Number, you now have the ability to use the asterisk character to utilize wild card search options. i.e. if you search for *123* you would see results for 123, aaa123, 123aaa, and aaa123aaa. This has been added to the Policy Number field only.
Commissions	Statements	An additional column has been added to the **Batch Detail List.** The new column **F/R** will indicate if the detail is a first year **(F)** or renewal **(R)** payment.
Commissions	Statements	When adding a new Batch Detail, the cursor will now default to the **Policy Number** field, rather than requiring a mouse click to type into the field.
Commissions	Statements and Posted Batches	Changes have been made to the layout of the screens in the commission batch process to consolidate information and streamline workflow. The **Statement Batch Header**, **Batch Detail List** and **All Adjustments** screen were previously located on separate screens, and now appear on the same screen. These changes have been added to both Open and Posted batches. Please refer to the Commissions Administration user guide for complete documentation.
Contacts	Carbon Copy	When attaching a Carbon Copy to a Contact, you will now have the option to **Select All** and **Unselect All** when deciding which Memos should be included.
Contacts	Hierarchy Tab	A spinner icon has been added to indicate that the system is working when attaching a Hierarchy to a Contact.
Contacts	Outlook Integration	Support for Outlook versions 2010 and 2013 has been added for the Outlook Integration between the Contacts module in Agency Integrator and Microsoft Outlook. Previously, only versions 2003 and 2007 were supported.
Contacts	SureLC Integration	This integration will allow Licensing and Appointment data to populate on a contact in Agency Integrator if your agency uses SureLC. See attached TechNote for further details.
General	Imaging Vendors	docSTAR has been added as an imaging vendor for Agency Integrator. If your agency uses docSTAR, contact the AMS Help Desk to turn on the integration that will allow you to view docSTAR images associated to your Applications in Agency Integrator with one click. See attached TechNote for further details.
Legacy Reports	Status group	Three new Legacy Reports have been added to the **Status** group for customers who use the John Hancock Inforce feed. The reports are called: **Inforce Term Conversion**, **Premium Overdue**, and **Lapsed / Lapsed Pending**.
Report Builder	General	**Custom Fields** will now be easily identifiable in Report Builder. An asterisk has been added after the field name, i.e. AML Training Date*
Report Builder	New Fields	New Fields have been added to Report Builder in the Commissions Data Group: **Detail commission record ID, Contact ID (of the agent), Entered by, Payee ID, Application Signed State, Batch Detail Insured Name**
Resources	Document Vault	Changes have been made in **Document Admin** to the **Document Vault Search** screen. Paging has been added to display documents more quickly, and a spinner icon will now notify you when a search is in progress.

Changes to Agency Integrator for May 18, 2013

Module	Section	Change
Administration	Auto Receipting Profiles	Previously, if a user made changes to the **Assign Profile** tab, but then clicked **Cancel**, changes would still be saved. This has been corrected, and changes will not be saved unless the user clicks **OK** or **Apply.**
Administration	Codes	In **Codes Administration,** users will no longer be able to change the Type of code after it has been saved, and has been assigned. (i.e. You cannot change a Code from **Application Only** to **Agent/App with Auto Assign** or **Agent/App with Manual Assign**, etc.)
Administration	Hierarchies	Previously, after removing a Hierarchy's attachment to all Contacts and Applications, you were unable to delete the Hierarchy. This has been corrected. After the hierarchy is removed from all Contacts and Applications, you can delete the Hierarchy.
Administration	Hierarchies	When selecting **Replace Contact** on the Manage Contacts screen in Hierarchy Administration, there is now a **Cancel** button available to leave the screen.
Administration	Memos	Previously when sending a memo with the **Default Signature/Reply** set to Organization, the recipient of the e-mailed memo would see the sending user's e-mail address, instead of the e-mail of the address associated with the organization. This has been corrected.
Administration	Role Administration	Previously, if a user was assigned the **Admin-Memos** User Right, they were allowed to edit a Contact record. This has been corrected and the Admin-Memos Right will no longer allow access to edit Contacts.
Administration	User Administration	Users with access to **User Maintenance** can now assign a **Default Organization** to a User ID. Previously only the iPipeline AMS Help Desk had this capability.
Applications	Application Entry	If the System Preference **App Entry - Populate Submitted Date** is turned on, a cloned Application will no longer retain the **Submitted Date** of the original Application. The current date will be displayed in the Submitted Date field. If the preference is turned off, the Submitted Date will remain blank.
Applications	FastApp	Previously, Applications created through the **FastApp** process for Aviva Life and Annuity were created without the first and last name of the insured. This has been resolved and applications will now be created with a first and last name.
Applications	Informal Application Detail	Previously, the **Paid/Closed Date** field on informal cases would update to the current date when saving a change. This has been resolved.
Applications	Application Entry	Values on the **Premium** tab of a cloned case will now accurately mirror the values from the original case. Previously, the values on the Premium tab didn’t save after clicking OK.
Applications	Application Entry	Values in **Custom Fields** on a cloned case will now accurately mirror the values from the original case. Previously, the values in Custom Fields didn’t save after clicking OK.
Applications	Application search	With some workflows, the **Application Search** didn’t return your search results. Instead, it would remove your search criteria and display your **Last Accessed** list. This has been resolved and will return your search results.
Applications	Controlled Address	When adding a **Controlled Address**, the address information will now refresh immediately, rather than having to exit the record and open it again to see the update.
Broker Gear	Contact Information	When editing contact information in **Broker Gear**, the user will no longer receive an error.
Command Center	Task List	Additional filtering has been added to the **"To"** selection on Comments. Now, only users with access to the specified application or contact will appear on the drop-down list.
Command Center	Task List	In some instances, **"Agent"** was not an available option for the **"To"** selection on Comments. This has been resolved.
Command Center	Task List	In using certain workflows, comments on the **Command Center** could appear multiple times. This has been resolved.
Commissions	Posted Batches	In some cases, Statements that had been posted could still be viewed in the open statements list, and could still be modified. This has been resolved. Posted Batches will only appear in the Posted Batches list and cannot be modified.
Commissions	Schedules	When copying a **Commission Schedule**, the **Available for Use** box will no longer be automatically checked.
Commissions	Schedules	When attaching a Commission Schedule to a Hierarchy Tier, the rates placed in the MGA Pay and Carrier Pay boxes will now work as expected.
Commissions	Statement Import	**Group** names will now display when a statement is created using the Import feature.
Commissions	Statement Import Template	The **Policy Year** column and the **Payment Type** column are no longer required on **Statement Import Template**. If you do not provide a value in the Policy Year column, the system will calculate the Policy Year based on the statement date and the policy date of the application. If you do not provide a value in the Payment Type column, **MGA Commission** will be assumed.
Commissions	Statements	**Commission Alert** is now an available option on the **Actions** menu when accessing the **Application Detail** screen from the **Statement Batch Detail** screen.
Commissions	Statements	Previously, when entering a Batch Detail, if the user added some information and went outside the Detail screen to search for a case, the previously added information was not retained. The information will now be retained.
Commissions	Statements	The **Save** and **New** buttons will now be consistently placed on the screen when adding a new batch detail.
Commissions	Statements	If a policy was deleted from a batch, the Batch Header total would display incorrectly. The totals will now update correctly when a policy is deleted from the batch.
Commissions	Statements	Users will no longer receive an error message stating that their changes to an Adjustment were not saved when clicking **Apply** then **OK.**
Commissions	Statements	In some instances, when inside a Batch Detail, clicking **Cancel** would return you to a blank Statement list. This has been corrected.
Commissions	Statements	In some instances, the **Commission Adjustment List** would display the previous adjustment you had made for another policy. This has been corrected.
Commissions	Statements	When searching for an Agent from the Batch Detail screen, if you clicked Cancel and decided not to perform the search, you were returned to a blank screen. This has been resolved, and you will be returned to the Batch Detail screen if clicking Cancel from the contact search screen.
Commissions	Statements	In rare occasions the **Notes** field on the Batch Header would not display the contents as expected. This has been resolved.
Commissions	Schedules	When editing rates on **Commission Schedules** that included bandings, users would sometimes experience an error forcing them to add a minimum or maximum value where one should not be required. This has been resolved.

Contacts	Agent Commission Schedule PDF	When using certain criteria to generate an **Agent Commission Schedule PDF**, an error would result. This has been resolved.
Contacts	Contact Detail	The Exclude option has been removed from the preferred memo distribution drop down list on a contact record.
Contacts	Contact Search	The drop-down list of available Carriers in the **Appointment Carrier** search field will now display, even if a large number of carriers are attached.
Contacts	Contact Search	In rare instances, the contact you previously accessed would open, rather than the contact you searched for. This has been corrected.
Contacts	FastApp	Previously, Agents created through the **FastApp** process for North American were created with a last name only. This has been resolved and agents will now be created with first and last name.
Contacts	Hierarchy	If an end date was added to a contact's **Hierarchy**, the hierarchy wasn't available to add to application, even if the **Signed Date** was before the hierarchy end date. This has been corrected, an application can now be added to a hierarchy which has been end dated, provided the **Signed Date** is before the end date.
General	Browser	If using an older version of Internet Explorer, Firefox, Chrome, or Safari, you will now be prompted to upgrade your browser for optimum system performance.
General	Password Resets	For enhanced security, when clicking on the **Forgot Password** link from the login screen, you will now be asked to enter your Username and Email address before your password will be reset. If either field is populated incorrectly, you will receive a message that your Username and/or Email address could not be recognized. Previously, only your Username was required to reset your password.
Group Applications	Application Search	Previously, search results run on the **Group Name** field were based on the status of the Group rather than the status of the Application. This has been corrected.
Legacy Reports	AR Audit Log	In the **Status** group, the **A/R Audit Log** report was displaying an incorrect date format. This has been resolved, dates are now being displayed in the correct format.
Report Builder	Agent Info - Codes Data Group	In the **Agent Info-Codes** data group, **Agent Code Active** was renamed as **Code Active Date**. **Agent Code Inactive** was renamed as **Code Inactive Date**.
Report Builder	Agent Info Data Groups	In some instances, Report Builder results were not displaying a Contact's Default Organization. This has been resolved.
Report Builder	Commissions Data Group	Agent has been added as a **Criteria** in the Commissions Data Group. Available options to select on the Criteria tab are: **Tax ID** or **Contact ID**.
Report Builder	General	When deleting a report in Report Builder, a pop-up message will now display to confirm that the report has been deleted.
Report Builder	General	Reports using the **Between** option as a **Criteria** (i.e. Face amount between $100,000 and $200,000) will now return results as expected.
Report Builder	General	Reports using date-based Custom Fields as criteria will now display results as expected. No records outside of the established criteria will be included in the report results.
Report Builder	General	In certain instances, the **Preferred Marketing** column on reports was blank. This has been resolved, values will now display as expected.
Report Builder	Scheduler	When trying to change the **Saved Criteria** on a report already scheduled, to a newly created saved criteria, the newly saved criteria did not appear in the list to select from. This has been resolved.
Report Builder	Scheduler	An inaccurate report name could be displayed if a user without access to a report attempted to edit the Schedule for that report. This has been resolved.