Agency Integrator

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Enhancements to Agency Integrator for May 19, 2012

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

Module	Section	Change
Administration	Codes	**Agent/App Auto Assign** Codes can now be added to Applications based on **Plan Category**, **Plan Sub Category** and **Product Type**
Administration	Commission Schedules	Changes have been made to searching when replacing a Schedule.
Administration	Commission Schedules	**Previous** and **Next** buttons have been added to Sub Schedules.
Administration	Document Vault	Document Vault categories can now be added/edited in the New User Interface. In addition - two user rights have been added to allow users to access this new functionality. The new rights are called: **Category Doc Vault Access** and **Category Doc Vault Delete.**
Administration	Commissions	**ECP Administration** is now available in the New User Interface. Administration users will no longer be linked to the legacy administration screens.
Administration	FastApp	Cases which are already Paid or Closed in Carrier Status will now be created in an App Submitted status by default. Auto Receipting can be turned on to allow those cases to be changed immediately to Paid or Closed, if desired.
Administration	Preferences	Preferences have been added to bypass Licensing and/or Appointment checks. These can be maintained in **Preferences** found in **System Administration**. These new preferences are called **NOAPTCHECK** and **NOLICCHECK.**
Administration	User Administration	User IDs are listed in alphabetical order by User ID, and all columns are sortable. In addition, to access a user ID to edit, you can now right-click on the User ID.
Administration	User Roles	Changes to User Rights/Roles will no longer require the user to log out and back in to take effect.
Applications	Application Entry	The **Policy Fee** field will now display during application entry if the Term Automatic Premium Calculator has been turned on in System Preferences.
Applications	L&A Check	Due to customer feedback that we have received over the past few weeks, the iPipeline AMS team has rolled back the license and appointment validation changes that were introduced into Agency Integrator in our March 17 release. We were working through a number of workflow solutions, but felt that the best course of action based upon customer feedback was to make this change at this time. The additional license and appointment checks on the application detail will now act as they did prior to the March 17 release.
Applications	Requirements	An additional option has been added to Requirements which will allow users to associate a requirement with **General**, rather than one specific insured. This is for use in instances where there are multiple insureds on a case, but the requirement is not specific to either one.
Commissions	Commission Estimated Payout Tab	Formatting changes have been added to make this tab easier to read, and MGA Paid, Agent Commissions and Carrier Paid Agent Commissions have been split out to make it easier to see detail for each type.
Commissions	Role Defaults	Enhanced sorting, adjustments to column width and other changes have been made to make this section easier to read and work with.
Commissions	Schedules	The full Sub Schedule name will display on the Commission Schedule screen.
Commissions	Schedules	The size of the box that displays plans available and assigned to Schedules has been increased.
Commissions	Schedules	The process to enter Rates has been updated and will now occur in a pop-up window. In addition, the **From** year must be greater than or equal to 1. 0 will no longer be allowed as a From year. Any schedules already entered with a 0 in the **From** year and 1 in the **To** year have been changed to 1.
Commissions	Statements	When sorting the list of Statements, and then going into an individual Statement, upon exit, the list will retain any searching and sorting that had been used to generate the list.
General	Resources	**Document Admin** and **Global Documents** have been added as options under the **Resources** menu.
General	Search Results	Search results have been limited to a maximum of 500 records.

iPad Accessibility	General	When viewing Agency Integrator on an iPad, a single click will activate the right-click menu options.
Memos	Logos	Updates have been made to Memo Logo Administration. Logos can now be deleted, and Organization assignments changed.
Report Builder	Appointment and License Custom Fields	Appointment and License Custom Fields are now available in Report Builder.
Report Builder	Informal Quote Data Group	**Case Manager** has been added as an available Column and Criteria.
Report Builder	User Information	**User Information** is now available in Report Builder.

Changes to Agency Integrator for May 19, 2012

Module	Section	Change
Administration	Commission Posted Batches	Searching for items within a Posted Batch will now return correct results.
Administration	Commission Schedules	When replacing a schedule, an **End Date** must be entered.
Administration	Commission Statements	On Agent Payment type detail, the **Payee** can now be changed.
Administration	Custom Fields	Appointment-based Custom Fields will be displayed in the order specified in Administration.
Administration	Exception Queue	New Applications will now be available in the **Exception Queue** if it is turned on.
Administration	Memo Blocks	Memo Blocks can now be deleted.
Administration	Memo Triggers	Hierarchy-specific **Triggers** for new applications will now generate as expected.
Administration	Memo Triggers	If you save one Trigger, then immediately create a new Trigger, you will no longer see the criteria from the saved trigger on the New Trigger screen.
Administration	Memos	Default signature settings can be set for Memos that do not include Email as a Delivery Method.
Administration	Organization Maintenance	Newly created Organizations will now be immediately available to attach to Contact Types, Contacts, etc..
Administration	Preferences	If the **Require Base Premium** Preference is on, all applications will now require a base premium.
Administration	User	Users who are CC'd on Memos will not receive Memos from Applications which are in Organizations they do not have access to.
Administration	User Administration	InsureSocket Brokerage only users can now be viewed and administered in **User Administration** from within Agency Integrator.
Applications	Agents	Users will no longer receive an error when adding the same Agent record to an Application more than one time.
Applications	Auto Receipting Queue	Users will no longer see some items in the Auto Receipting Queue without dates.
Applications	Case Manager	If a case manager User ID is inactivated, it will no longer be removed from the Applications it was assigned to.
Applications	Cloned/Copied Cases	Codes assigned to the original Application will apply to the new Application when the **Clone** or **Copy** features are used.
Applications	Codes	Manually assigned Codes can now be removed from applications.
Applications	Commission Estimated Payout Tab	Hierarchy-based payments will now show the name of the Override Sharing Plan, or Schedule that the payment is from.
Applications	Commission Estimated Payout Tab	Changes have been made so that when a rate is manually added or updated, the corresponding values will also update.
Applications	Group Cases	Improvements have been made when searching for group cases.
Applications	Hierarchy	Hierarchy can now be changed on an application when the writing agent appears more than one time in the Hierarchy.
Applications	iGO Integration	When selecting Go or No Go, and then clicking Cancel, the selection option will correctly revert back to **Select One.**
Applications	Informal Applications	If a Memo is set to copy to Application Comments, this will now apply to Informal applications as well.
Applications	Informal Applications	If an Informal Application has been previously closed, the Closed Date will no longer change if it is subsequently rolled to a Formal.

Applications	Premium	If the PERM only Premium Calculator is on in System Preferences, no fields on the **Premium** tab for a term case will be inaccessible.
Applications	Requirement Events	Selections in the Event box can be made at any time, not just when the event is created.
Applications	Requirements	Manual changes to the Received Date and Requirement Status will be saved.
Applications	Requirements	In some instances, manually added requirements did not indicate the added by and date information. This has been resolved.
Applications	Requirements	Selecting **Requirement Code** to search for a particular code will no longer result in an error.
Applications	Requirements	An **EFT** and **Void Check** Requirement will be visible when the case is changed to a payment type of Electronic Funds. The user will not have to go out of the case and back in to see these requirements.
Applications	Search Results	When accessing a case from the Application Search Results screen, users will be returned back to the search results when exiting the Application.
Applications	Search Results	You can now successfully open a Group Application when searching for a specific employee name associated with the Group.
Command Center	General	When viewing another User's **Command Center** and accessing an Application, you will now be returned to that person's Command Center, not your own.
Command Center	Illustration TM Tasks	Users can now right-click and select Edit on an Illustration TM type follow-up from Command Center.
Commissions	ECP	Manual ECP adjustments can be made payable to the assigned Employee.
Commissions	ECP	Employee's names will be displayed as the Payee when an ECP adjustment is made on a Commission Statement.
Commissions	Posted Batches	Users can now search by Policy #, Name, etc. within a Posted Batch.
Commissions	Posted Batches	When searching for a combination of Policy Number and Statement Date, the results were including all statements with that policy number, not just those in the specified date range. This issue has been resolved.
Commissions	Posted Batches	Users will now need to search for a Posted Batch.
Commissions	Schedules	When accessing a schedule from a list on the search results screen, and then leaving that schedule, users will be returned to the same place in the search results.
Commissions	Schedules	When replacing a Schedule, you can use the drop down list to view available schedules or search for available schedules. Using the search option will now let you identify and apply the schedule to the **Replace** box.
Commissions	Statements	When entering a Detail, if you change the **First Year/Renewal** indicator and year, the commission schedules below will update based on the new information, once you hit **Apply** or **OK.**
Commissions	Statements	The Adjustment indicator on the Batch listing will update immediately once an Adjustment is added.
Commissions	Statements	When accessing a case information from a Commission Batch Detail, users were returned to a blank Detail screen and/or the Application Search screen. Users will now be returned back to the Batch Detail screen as expected.
Commissions	Statements	When processing payments for agents with applicable **Commission Assignments,** the agent's assignment will now be included as the **Payee** once the batch is posted.
Commissions	Statements	Information about Hierarchy Override payments will now display in the lower portion of the screen when entering a new Detail.
Commissions	Statements	Selecting the **View All Adjustments** button will no longer result in an unexpected error.
Contacts	Appointment Memos	The Line of Business on Appointment Memos will now display if **All Lines** are selected on the appointment.
Contacts	Commission Schedules	Gross type Commission Schedules can now be attached to an agent. Note - it is unusual that you would want to attach a gross schedule to an agent. If you are unsure, please contact the Help Desk or your Customer Account Manager to review.
Contacts	Contact Type	The **Agent** Contact Type can no longer be removed from contacts that have associated Applications.
Contacts	Contact Type	When adding a Contact Type to a contact, all available contact types will be visible in the list.
Contacts	Custom Fields	Custom Fields with values of a single 0 will now show the 0 rather than blank.
Contacts	Hierarchy	If the Parent to which you are assigning a contact is already in the Hierarchy multiple times, you will be able to see that contact multiple times in the available list so that you can choose the correct level.
Contacts	PDF Report	Accessing the Print PDF option will no longer open a second session.
Contacts	Sales Manager	If the User ID assigned as a Sales Manager to a contact is inactivated, the User's name will still be visible on the contact record.
Contacts	Web Passwords	Web Passwords are now masked.
General	Comments	Emails which are copied and pasted into Comments will retain any returns at the end of lines.

General	Comments	When working with a Comment that has multiple pages, you will no longer have to page back to the first page when you leave and re-open the Application
General	Document Vault	Documents can no longer be saved with names containing anything other than letters or numbers. This will prevent situations where documents could not be opened due to invalid names.
General	Memos	If a user changes the Subject of an emailed memo from the Memo Queue, the change will be reflected on the memo once emailed.
General	Memos	Memos will no longer fail if the agent has an email address, but does not have an email address flagged for Memos.
Memos	Attachments	Some users were unable to add Attachments to Memos, this issue has been resolved.
Memos	Carbon Copies	If an Appointment memo is triggered, and the contact has a CC, the CC will also receive a copy of that memo.
Memos	General	Some Memos had additional spaces added between lines, this has been resolved.
Memos	General	Sometimes, adding additional text to a memo would result in an error, this will no longer occur.
Memos	General	In some instances, if a Memo was previewed before it was released from the Memo Queue, the memo would be blank when received. This has been resolved.
Report Builder	Case Status	When creating Saved Criteria sets and selecting all but one Status option, users sometimes had issues de selecting the one status to exclude, this has been corrected.
Report Builder	Custom Fields	In some instances, reports which included Custom Field Criteria showed no results when emailed, this has been resolved.
Report Builder	Custom Fields	Reports in Report Builder which include a date-based Custom Field will no longer see 01/01/0001 if the custom field is blank.
Report Builder	General	Users will no longer need access to the Commission Data Group in order to create new reports.
Report Builder	Scheduled Reports	Items on the **Scheduled** tab in Report Builder can now be deleted.
Report Builder	Scheduled Reports	Reports which were scheduled originally by a User which has since been inactivated, will now run as scheduled.
Report Builder	Sub-Totaling	Changes can now be made to which columns will be subtotaled to an already existing report.
Super Users	Applications	Some Super Users experienced an error when moving from case to case, related to Custom Fields. This has been resolved.
Super Users	Contacts	Super Users can now enter new contacts.
Super Users	General	Super Users will be able to switch environments by accessing the**Administration** tab.
User Association	Memo CC's	Associated users will now be correctly CC'd on memos, if the option is turned on in the Association in Administration.