Agency Integrator

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UserVoice Enhancements to Agency Integrator for May 31, 2014

Items in this section 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
Contacts	Appointments	**Appointments** can now be associated to an Organization, allowing you to further distinguish between (and report on) appointment records for the same Contact and Carrier. See attached TechNote for further details.
Report Builder	Summaries	A new feature called **Summaries** has been added to Report Builder to allow you to easily view your report data categorized and counted by Carrier, Organization, etc. See attached TechNote for further details.
Report Builder	New Fields	The following have been added to Report Builder: • **Agent's CRM Owner** has been added to all remaining data groups as a column and criteria • **Sales Manager** has been added to all remaining data groups as a column and criteria • An Application's **Code Family** and **Code** have been added to the Commissions Data Group as criteria • **App Created By** (Username) has been added to all App Info data groups • **License Expiration** has been added as a Criteria in the Agent Info - Licensing data group • **Days in Status** has been added to App Info – Agents with Split Commission data group • **Agent Nickname** has been added as a column to all App Info Data Groups • **App Source** has been added to the App Info data groups and the Commissions data group as a column and a criteria. This field is relevant to **Litwire** customers only
Commissions	Reports	The new **Commission Statement PDF** feature allows you to generate Statements to accompany payments that you (the MGA) owes Agents or other Payees. If you use the Legacy Report "Agency Name on Statement," you will want to switch to this new and improved version. See attached TechNote for further details.
Commissions	Schedules	You can now create **Override Commission Schedules**, which allow you to pay out Agents and other parties based on a percentage of Override that you can define.

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Applications	Application Detail	If your agency uses LitWire, you will now be able to see the **Source Agency** of the application in the header of the **Application Detail Screen**.
Applications	Carrier Status	The **Policy Notes** tab on the Carrier Status screen will now be sorted chronologically, with newest notes appearing at the top of the list.
Applications	Paid/Closed Date	If re-opening a Paid or Closed case, you will receive a prompt, giving you the option to remove the previous **Paid/Closed Date** on the Application.
Applications	Premium Calculation	If your agency uses Auto Receipting and you have set your Profile to allow changes to **Mode, Modal Premium**, **Target Premium** and/or **Annual Premium**, changes from the Carrier feed will now trigger the Premium Calculator to calculate, according to your selection in the **Applications - Premium Calculator System Preference**.
Commissions	Application Detail	The **Commission Estimated Payout** tab on an Application has been removed, and replaced with three new tabs: **Commission - Summary**, **Commission - Estimated** and **Commission - Actuals**. These tabs allow you to view much more comprehensive information about the incoming and outgoing monies on your applications than the previous tab. See attached TechNote for further details.
Commissions	Role Defaults	Tabbing order has been improved when creating a new Commission Role.
Commissions	Schedules	Improvements have been made to the tabbing order in Commission Schedules Administration.
Contacts	Commission Roles and Schedules	The columns on the **Commission Roles and Schedules** Tab on the Contact Detail screen are now sortable when clicked on.
Memos	Attachments	If your office uses the **Memo Reply System Preference**, and a recipient's reply has an attachment, that attachment will now be added to **Document Vault** on either the Contact or the Application that the original Memo was sent from. The Comment created by the Memo reply will contain the text "Attachment: filename.ext" to notify you that the email has an attachment to view.
Memos	Memos	We have added a new Memo failure categorization called **Queue Timeout.** Previously, Memos failing for this reason were lumped into the general "Failure" category. This status will appear in Memo History when a Memo has been in a **Queued** status for more than one week, but never released from the Memo Queue.
Memos	Requirements	A new feature has been added to Memos that allows you to send a Memo to an agent that contains all of his/her Pending cases, including Requirements. Previously, Requirements could not be included on that type of memo. If desired, we can turn on a pre-built Case Status Summary Memo in your environment. See attached TechNote for further details.
Report Builder	Commissions Data Group	The new **Payment Types** of Bonus, ERA, and any custom Types you have created are now available to report off of in Report Builder.
Report Builder	iPipeline CRM	A field called **Originated in CRM** has been added to Report Builder and Data Replicator to allow you to report on applications that originated in CRM by either 1. Matching the CRM Opportunity to an AI Application or 2. Syncing the CRM Opportunity to an AI Pre-app.

Changes to Agency Integrator for May 31, 2014

Module	Section	Change
Applications	Application Detail	The **Added By** field on the Requirement Detail screen will no longer change when the requirement is updated. It will continue to display the user or process that created the requirement.
Applications	Application Entry	Previously, an error would occur when clicking on the Requirements tab of an Application with no Product selected, if and only if the Preference **App Entry - Skip Forms Selection** was enabled in your environment. This has been resolved.
Applications	FastApp	Applications created by **FastApp** from North American for Life and Health will now correctly show two Agents if the carrier has included two agents in the feed. Previously, FastApp was only attaching one of the Agents to the Application.
Applications	Group Applications	When searching for a Group Application, using **Status** or **Status Category** as a criteria will now return results as expected.
Applications	iGO Integration	When attempting to view documents in the **Document Vault** tied to Applications created through the **Prudential** AI / iGO Integration, an error would occur if the file name was too long. This has been resolved, and documents can now be viewed without error.
Applications	PaperClip Integration	Previously, if an Application didn't have an Agent (some FastApp-created Applications), you would receive an error when clicking on the **PaperClip** icon on the Application Detail screen. This has been resolved.
Applications	Two-Way Communication	Comments sent from the carrier via **SBLI Two-Way Communication** will now populate both the Description and the Comment as expected.
Command Center	Super Users	Super Users will now see the **Application List** in Command Center at the time of login, without having to switch between environments.
Commissions	Commission - Rates	Commission Rates of type: **Flat Dollar Amount** will now correctly display on the Commission - Rates tab.
Commissions	ECP	You can now successfully delete an ECP attachment from a Contact when the Contact's Date of Birth field.
Commissions	Commission - Summary	The **Recalculate Commissions** button has been renamed to **Regenerate Rates** and can be found on two tabs: **Commission - Summary** and **Commission - Estimated**. Clicking this button will regenerate any commission rates applicable to the Application at that exact point in time, rather than the rates that were applicable when the Application was created. Any rates added to the case manually from the Commission - Estimated tab however, will not be removed.
Commissions	Role Defaults	If a Commission Role has Agents attached to it, it can no longer be deleted.
Commissions	Statements	We have made changes to better handle situations where Commissions are posted on Applications with two different Carriers, but the same policy number.
Commissions	Statements	In some renewal scenarios, the **Est. Vs. Actual** amount was calculating incorrectly. This has been resolved.
Contacts	Contact Type	In some instances, non-organization specific Contact Types (like Prospect) couldn't be deleted from Contacts. This has been resolved.
Data Replicator	Data Replicator Administration	Changes have been made to the **Data Replicator Administration** screens to allow columns' full name to be visible, rather than truncating at 14 characters.
General	Date Fields	When typing in a date field, if you enter a 2-digit year (i.e. 14) and click out of the field, the system will now correct it to the acceptable 4-digit year (i.e. 2014).
Informal and Pre-Applications	Vendor Orders	Vendor Orders should not be able to be placed on Applications without a Carrier. To avoid error messages when attempting to place these orders, we have removed the **Place Order** link from the Requirements tab on Pre-applications and Informal Applications.
Informal Applications	ECP	If you have added **ECP** to an Informal application, that information will now copy over to the Formal application if/when it is rolled to a Formal.
Legacy Reports	Requirement Reports	When you delete an Appointment, its corresponding Requirement records will no longer show up on Legacy Reports.
Legacy Reports		Margins will no longer be cut off when viewing Legacy Reports in the **Firefox** browser.
Memos	Appointment Memos	In Appointment-type Memos, the Recipient's Company information, including name and address, will now pull correctly into the Memo.
Memos	Comments	When a Memo fails to be delivered and a memo failure Comment is created, that Comment will now be marked Confidential (unless your office has the **Non-confidential System Preference** enabled).
Memos	Doctors	If sending a Memo To: Doctor, the Doctor's contact information will now populate in the Recipient area as expected.
Memos	Memo Administration	If you have built a Block on an Agent-type Memo using the **User Info** field group, the fields from the User's profile will now correctly populate the Memo block. Previously, the Agent's Sales Manager's information was being used to populate the block.
Memos	Memo Replies	If your office uses the **Memo Reply System Preference**, reply notification emails will now be directed to the **Email (return)** address from the user's Signature Information, rather than the iPipeline-maintained User email address.
Memos	Memos	Memos will now correctly use the Fax number specified for Memos, rather than using the Primary Fax number.
Report Builder	Broker Gear Password	For security reasons, **Broker Gear Password** is no longer available as a column in Report Builder.
Report Builder	Contact Data Groups	Due to the difficult nature of matching by name, **Agent Name** has been removed as a Criteria in Report Builder. **Agent Contact ID** has been added in all remaining applicable Data Groups, allowing you to more easily run reports with agent criteria.
Report Builder	Grouping	Report Builder Reports Grouped by User ID will now group correctly, rather than showing two groups of entries for the same User ID.
Report Builder	Saved Criteria Sets	When building a **Saved Criteria Set** in Report Builder, the **Include Hierarchy Downline** checkbox will now save as expected.
Report Builder	Scheduler	In some instances, Scheduled Reports using **Code Family** and **Code** as criteria would fail to be delivered to the scheduled recipient. This issue has been resolved.
User Association	Memos	Previously, Memos sent to Contacts with an **Associated User** and the **Default Signature / Reply** set to **L&A** weren't showing up as "from" the Associated User. This issue has been resolved.