Agency Integrator

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UserVoice Enhancements to Agency Integrator for November 16, 2013

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
Commissions	Schedules and Statements	New payment types of **Bonus** and **ERA** have been added to both Schedules and Statements, allowing you to track both estimated and actual Bonus and ERA commission amounts. For more information, attend Thursday's Bootcamp at 2:00 pm EST and see forthcoming TechNote for more details.
General	Appearance	Improved on-screen colors in IE 10, Firefox, Chrome and Safari. Specifically, improved how disabled fields appear in these browsers, making them more visually distinct from available fields.
Applications and Contacts	Comments	Authorized users can now delete Application and Contact Comments. Add the following User Rights in Administration to any desired Roles, or create a new Role and assign it to desired Users: **Application-Comment-Delete** and **Contact-Comment-Delete**.
Report Builder	New Fields **Fun Fact: 18 of your UserVoice requests are included in these enhancements to Report Builder.**	The following new fields have been made available as columns and criteria in Report Builder: ***App Count 12 Mos.** and **App Count All** - in the Agent data groups ***Assignee, Agent Company Name** and **Sales Manager -** in the Commissions data group ***Appointment Effective Date** and **Appointment States** - in the Agent Info - Appointments data group ***License Effective Date** - in the Agent Info- License data group * **Vendor Name and Vendor Order ID** - in the App info-Requirement data group ***Applicant Email, App Received Date, App Second Insured, Assistant Email, Hierarchy Parent, Replacement Carrier** and **All 25 fields on the InForce Tab of Applications** - in the App Info data groups ***Comment Last Updated Date**, **Comment Category** and **Comment Subcategory** - in the Agent Info - Comments data group ***Comment Last Updated Date** - in the App Info - Comments data group
Report Builder	Codes	**Code Family** and **Code** have been added as available **Criteria** in all **Agent Info** and **App Info** data groups in Report Builder. This allows you to add filtering by Code to any of your current Report Builder reports in those data groups.
Report Builder	Hierarchies	**Hierarchy Name** has been added as an available **Criteria** in all remaining Agent Info and App Info data groups in Report Builder. This allows you to add filtering by Hierarchy to any of your current Report Builder reports in those data groups. **Hierarchy Parent** has also been added as an available column and criteria in all App Info data groups.
Applications	Application Search	The Application Search results table is customizable, and now contains the option to display **Organization** as a column on the Search Results and Last Accessed lists.
Command Center	Task List	An additional column for **State** has been added to Command Center Task List. The State column will reflect the Application Signed State, or the License or Appointment state, depending on the type of follow-up it is.
Contacts	Contact Search	The Contact Search results table is customizable, and now contains the option to display **Organization, Suffix** and **Contact ID** as columns on the Search Results and Last Accessed lists. The Organization column will display the contact's default organization.
Memo Templates	New Fields	The following new fields have been made available to use in your agency's memo templates: ***CRM Owner** - for Agent and Application Memos ***Group Name, Hierarchy Name** - for Application Memos ***Quote Received Date** -for Informal Memos ***Insured's DOB** and **Insured's SSN** - for Requirement Memos (can also be used for Additional Insureds) ***GA number** - for License and Appointment Memos ***Appointment Custom Fields** - for Appointment Memos ***License Custom Fields** - for License Memos
Memos	Reply Feature	Recipients of Memos emailed from Agency Integrator can reply, and their reply can now be saved in the system automatically. Previously, replies from recipients were not connected to Agency Integrator, and could not be viewed in the system without copying and pasting, or using the Outlook integration. Attend Wednesday's BootCamp at 2:00 pm EST and see forthcoming TechNote for further details.

Enhancements to Agency Integrator for November 16, 2013

Module	Section	Enhancement
Administration	Custom Fields	You can now set a default selection for **Selection**-type Custom Fields. If you choose to add a default selection for existing custom fields, that value will be selected on all new records entered going forward, as well as currently existing records that do not already have a value selected in that Custom Field.
Applications	Application Detail	**Owner** has been added as a field on the Application Detail screen under Face Amount. This is a read-only field which displays the value in the Owner field on the Additional Detail tab. The field is populated /edited from the Additional Details tab.
Applications	Application Entry	**Line of Business** column has been added to the appointment selection screen seen when entering a new application.
Applications	Comments	**Primary Agent SSN** and **Primary Agent Email** fields have been added to the header when creating or viewing a new application comment.
Commissions	Statements	You can now Copy a **Batch Detail**, allowing you to more quickly enter payments of similar types. The copy will include all fields, including any Commission Custom Fields.
Contacts	Appointment Detail	**Line of Business** column has been added to the Appointment grid, on the **Appointment** tab within the Contact Detail.
Contacts	User Association	There is now an **Associated User** tab on Licenses and Appointments, allowing you to more quickly access that information.
Memo Templates	User Association	Memos of the **License** and **Appointment** types that have the **send to L&A User option** selected in Administration, will now be sent to both the Associated User and the selected user.

Changes to Agency Integrator for November 16, 2013

Module	Section	Change
Administration	Hierarchies	Previously, when using the **Replace Contact** feature in Hierarchy Administration, if the contact being replaced was an agent with assigned applications, it was replacing the hierarchy on all the agent's cases, as well as on the agent record. This has been changed to only update the agent's record, not any existing Applications.
Administration	Custom Fields	Once a **Custom Field** is created, its **Type** can no longer be changed. Previously, changing the type would result in an error.
Application	Group Applications	Users will no longer receive an error when accessing the **Employee** tab in a Group Application.
Command Center	Task List	Previously, when a user would right-click and select **Complete Task** on an Illustration-type task, it would remain on the Command Center. This has been resolved.
Commissions	Commissions	In some instances, a commission schedule would display a Hierarchy attachment when it shouldn't have. This has been corrected.
Commissions	Statements	In some instances, commission adjustments for hierarchy payments were incorrect, this has been resolved.
Contacts	Agent Commission Schedule PDF	Previously, the **Agent Commission Schedule PDF** was not displaying Age Ranges for banding. This has been corrected.
Contacts	Hierarchies	Users no longer have the ability to delete a Contact if that contact is attached to a Hierarchy, and has contacts "under" it. i.e. if a Contact is assigned as a Parent to another contact, it cannot be deleted.
Contacts	Search	You can now include characters when searching by the **Phone Number** field, and the search will return results as expected. i.e. if you enter (801)521-2585, the search will strip out the characters and locate the correct record.
Memo Templates	Security	**Web Password** has been removed as field available to include in a memo, for security reasons.
Memos	Licensing Memos	Memo Templates of the **Licensing** type that designate the Organization as the **Reply To** signature default, will now pull the correct Organization-specific information, rather than agency's information.
Memos	Logos	When a logo was added from the Logos area in Memo Administration, the user would receive an error if the logo was not set as a default logo. This has now been resolved, and logos other than the default logo can be now be added to memo templates.
Report Builder	Agent Split	Agent percentages were not displaying correctly in **Report Builder**. This has been resolved.
Report Builder	ECP	Report Builder was not correctly displaying the ECP user as the Payee for ECP Payments in reports. This has been corrected.
Report Builder	Group Applications	All policies in Group cases will now display in **Report Builder**. Previously, only the first case was displayed.
Report Builder	PDF Reports	Previously when emailing PDF reports from **Report Builder**, the totals were not displaying correctly. This has been resolved and emailed reports will now display the same result as reports run in AI.
Super Users	Application Memos	Super Users saw an incomplete list when selecting a User on the **Override Signature/Reply** option when generating a memo. This has been corrected.
Super Users	Printers	When logged in as a super user, the available printer list wouldn't refresh as the user moved between different agencies. This has been resolved.
System Administration	Carrier/Product Attachment	In some instances, all selected products were not being saved when attaching new products in Administration. This has been resolved.