

Enhancements to Agency Integrator for February 21, 2015

Module	Section	Enhancement
General	Tables/Grids	Customizable Tables are now EVERYWHERE: Drag and drop to re-order columns, choose which columns to show and hide, and customize your sort. The system will remember your choices on each screen and save them for you. Any table/grid where you see the hyperlinked text Configure Table on the bottom right is customizable.
Contacts and Applications	Last Accessed Lists	Sorting has been added to Last Accessed lists in both the Contacts and Applications modules. If you choose to sort these lists by Name, Carrier, etc., note that you can click the Clear Sorting link to reset the sort back, displaying your most recently accessed items at the top of the list.
Contacts	Contact Search	The Contact Search screen will now always include your Advanced Search options, rather than having to click to expand the list.
General	Right-click Menus	Hyperlinks to Edit, Delete, etc. have been replaced with right-click menu options in several places (Report Builder – Queue tab and Command Center Administration).
Administration	Memos	A new text editor is available for creating and editing your Memo Templates.
General	Searching	“Smart search” has been added to the Requirement Detail Screen , making searching for a Requirement Code much easier. The same functionality has been added to Commission Role Defaults.
Administration	Data Replicator	Data Replicator now has the ability to send you only changed/updated records (deltas), rather than all records, in certain tables.
Administration	Hierarchy Maintenance	Dragging and Dropping contacts in Hierarchy Maintenance is now even easier.
Report Builder	Queue Tab	A Refresh button has been added to the Report Builder Queue tab. The screen will auto-refresh every 30 seconds, but you can also click the Refresh button to re-load the list at any time.

Changes to Agency Integrator for February 21, 2015

Module	Section	Change
General	Internet Explorer	For a better experience when using Internet Explorer, make sure that Compatibility View is turned off.
General	Screen Appearance	You'll notice the screens look slightly different than they did on Friday. Slight visual changes are seen throughout the system as the result of the upgrade (shading on tabs, highlight and select colors, appearance of tables/grids, etc.)
General	Tables/Grids	The Group by this Column feature previously available on tables/grids in the system is no longer available. With the improved customizable tables, we lost the grouping feature, but are currently investigating ways to bring it back. If you previously had Grouping set on one or more tables, this grouping will be lost.
General	Tables/Grids	If you have customized any of your tables/grids (hidden a column, re-sized column widths, set a particular column to sort on, etc.) those customizations have been removed and set to a default. To re-customize, you can simply use your mouse to expand or contract column header widths, drag and drop to re-order your columns, set your custom sort, and/or click the Configure Table link to choose which columns to show and hide. These customizations are now available on virtually every table/grid in the system. Previously, you could only customize a few tables.
Administration	Carrier/Product Attachment	Adding an attachment to a new Carrier or Product Request will now work the same way adding an attachment to a Memo does.
Applications	App Wizard	When entering a new Application, the Additional Insureds and Codes tabs will now behave the same way they do in Application Detail, increasing consistency throughout the system.