



UserVoice Enhancements to Agency Integrator for May 9, 2015

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
Applications	App Entry Wizard	A "Save and Exit" button has been added to the tabs in the App Wizard when entering a new Application. This will allow users to save an unfinished Application at any point during entry. The Application will be saved in a status of "Unfinished" and can be re-opened and completed at any time.
Applications	Cloning	When cloning an Application, you will now have the ability to select some, none, or all Requirements from the original application to be copied over to the new cloned App.
Applications	Internal Status	A new field called "Internal Status" has been added to the system that will allow agencies to build a list of their own customized statuses that can be assigned to Applications. This Internal Status has also been added to Application Search, Command Center filters, Memos, Memo Triggers, Report Builder, and Data Replicator. See attached TechNote for further details.
Commissions	Actuals	Two additional columns have been added to the Statement Batch Detail table in both Statements and Posted Batches: Organization and Hierarchy.
Commissions	Commission Statement PDF	The Commission Statement PDF output will now put payees in alphabetical order by Last Name rather than First Name.
Report Builder	Logos	Logos uploaded through Administration, System and Logos will now be available in Report Builder. Logos can be added to any Report Builder report in PDF format. See attached TechNote for further details.
Report Builder	New Fields	<p>The following have been added to Report Builder:</p> <ul style="list-style-type: none"> a. "Last Case Created Date" added to Agent data groups as a column and criteria – allows reporting on agents who have recent business within a certain date range b. "Paid By" added as a column and criteria to the Commissions data group. Report output will show either "MGA" or "Carrier/Other" for each payment c. "Status" added as a criteria option to the Users data group, allowing filtering for Active and Inactive users. d. "Include hierarchy downline" checkbox added as a criteria to the Agent Info-Hierarchies data group. When checked, the report will include agents in the parent contact's downline. e. "Most Recent Comment" added as a column in select App Info data groups. This displays the comment description and body with the most recent update date, along with a user ID, date and time stamp. f. "Outstanding Requirements List" added as a column to the App Info data groups. This will display a string of text containing the Requirement Description of all outstanding requirements on the case, separated by a comma. Example: "APS-Dr. Brown, HIPAA form, Agent Report, 1035" g. "Agent's Default Organization" added as a column, criteria, grouping and summary to all app info data groups. This will display the default org assigned to the primary agent on the application. h. "Appointment Expiration Date" added as a Criteria in the Agent Info-Appointments data group. i. The "Paid" criteria checkbox in the Commissions data group has been changed to a drop-down with options of Include All, Unpaid Only, and Paid Only. Currently this is a checkbox, which limits the user's ability to report on ONLY unpaid details. j. "Surrender Expiration Date" has been added as a column and Criteria to all App Info data groups. k. "Single Premium/Annuity" has been added as a column to all App Info data groups. This field displays the Modal Premium only if the Premium Mode on the Application is Single or if the Product is an Annuity. l. "Annualized Premium" has been added as a column to all App Info data groups. m. "Days Since Entry" has been added as a column to all App Info data groups. This will display the days elapsed since the Create Date of the Application. n. "Internal Status" has been added as a column, criteria, grouping and summary to all App Info data groups. o. "Internal Status Date" has been added as a column, criteria, grouping and summary to all App Info data groups.

Enhancements to Agency Integrator for May 9, 2015

Module	Section	Enhancement
Administration	Custom Fields	Custom Fields can now be set up to only appear on Applications, Appointments, and Agents belonging to a specific Hierarchy. See attached TechNote for further details.
Comments	Hover Text	In our last release, the ability to hover over a Comment and see a pop-up window containing the first few lines of the Comment was removed. This is once again available when hovering over a Comment on the Comments tab in a Contact, Application, Appointment, etc.
General	Passwords	Passwords for Agency Integrator can now be up to 32 characters in length. The next time you reset your password, a password strength indicator will appear on-screen, allowing you to gauge how weak or strong your new password is, according to how many mixed-case letters and special characters are included.
Report Builder	Availability	Previously, Report Builder reports could be made available to a select group of users. Now, reports can be made available to all users, a select group of users, or a select group of Organizations.
Report Builder	Scheduler	Previously, users were unable to delete a Schedule associated to a Report Builder report that was created by another user. This caused issues when users were inactivated, and their scheduled reports continued to process. Now, a Schedule can be deleted by a user that has the appropriate user rights to Report Builder, regardless of who created the Schedule.

Changes to Agency Integrator for May 9, 2015

Module	Section	Change
Applications	Auto Receipting	Previously, if an Agent on an Application was selected as the Primary Agent, and an update from the Carrier through Auto Receipting indicated that a different agent was Primary, the Primary flag would be removed from the previously selected Agent and added to the Agent in the file instead. Now, Auto-Receipting won't change the Primary indicator on an Agent if it has been set by the user.
Applications	Cloning	You will no longer receive an unexpected error when attempting to Clone an Application without a Product.
Applications	iGO Integration	Previously, if you rolled the Pre-app to a Formal prior to selecting Go or No-Go in the eApp field, that field would be grayed out. Now, even if you roll the Pre-app to a formal before decisioning the Application, the field will still be available for selection.
Applications	Premium Calculator	Previously, when the NEWAUTOPREMCALC System Preference was set to BOTH, plans with a Product Type of GROUP LIFE will not hold a value in the Annual Premium field. This has been resolved.
Applications	Requirements	You can now successfully change the status of a requirement from Received back to Outstanding without issues occurring with the Received Date field.
Applications	Super Users	Super Users can now delete an Appointment Requirement successfully, and no unexpected error will occur.
Commissions	Schedules	Improvements have been made to the tabbing order within Commission Schedules, allowing for easier mouse-free data entry.
Commissions	Statements	Previously, when adding a new Batch, hitting Enter on the Statement Batch Header screen would pull up a previously entered Batch Detail screen. This will no longer occur, and hitting Enter on your keyboard will now save your Batch Header and allow you to proceed entering Batch Details to your Batch.
Contacts	Appointments	When assigning an Organization to an Appointment, a specific workflow would cause the Organization drop-down not to update when moving from one contact to another. This has been resolved and the drop-down will now show valid orgs for the contact whose Appointment you are accessing.
Document Vault		Documents can now be added to Document Vault successfully if there is a special character (&, #, @, etc.) in the document file name.
Informal Applications	Summaries	Previously when accessing an Informal application, there was a Tab called Summaries that would produce unexpected errors and issues with saving data. Because this same information is available on the Summaries tab within the Informal Quote, the Summaries tab has been removed from the Tabs menu. To enter Summary information going forward, access the Summaries tab from within the Quote and all information will be saved and updated as expected with no errors.
iPipeline CRM	AI Comments	If your agency uses iPipeline CRM, you can now select Print All when viewing AI Comments and the PDF will generate without error.
iPipeline CRM	Opportunity Matching	If your agency uses iPipeline CRM and uses Opportunity Matching, the Product from the Opportunity in CRM will be successfully passed to Agency Integrator once the "Convert to Application" option has been selected.
Memos	Memo Reply Feature	If you use the Reply To Memo feature and have set your System Preference to receive replies through Command Center, memo replies sent with attachments will now be added as Comments as expected, and attachments will be added to Document Vault as expected.
Report Builder	Availability	Previously, when a user created a report and gave access to another user, the creator would lose access if the second user edited the report. This has been resolved.
Report Builder	Criteria	When Carrier is selected as a Criteria on a report, long carrier names were being cut off, making it difficult to distinguish which carrier was being selected when running the report. The Carrier box has been lengthened so the entire name can be viewed when running the report.
Report Builder	Criteria	In some instances, running a report that contained a large amount of Hierarchy data as criteria would take a long time to run and eventually return no results. This has been resolved.
Report Builder	Scheduler	In some instances, a report would process correctly when run manually, but not when scheduled through the Scheduler feature. This has been resolved and now all reports will process in the same way regardless of how they are run.