Agent Create/Update

Required	Conditionally Required	Optional

```xml
<?xml version="1.0" encoding="UTF-8"?>
<TXLife>
  <UserAuthRequest>
    <UserLoginName>USER1</UserLoginName>
    <UserPswd>
      <CryptType/>
      <Pswd>PASSWORD1</Pswd>
    </UserPswd>
    <VendorApp>
      <VendorName VendorCode="1145"/>
      <AppName>AW</AppName>
      <AppVer>1.1.00</AppVer>
    </VendorApp>
  </UserAuthRequest>
  <TXLifeRequest>
    <TransRefGUID>606D67C1-CC4D-11CF-91FB-444554540000</TransRefGUID>
    <TransType tc="1204">Party Transmittal</TransType>
    <TransExeDate>2010-11-12</TransExeDate>
    <TransExeTime>13:15:33-07:00</TransExeTime>
    <PendingResponseOK tc="1">TRUE</PendingResponseOK>
    <OLifE>
      <SourceInfo>
        <FileControlID>AW_1</FileControlID>
      </SourceInfo>
      <Party id="P_1" DataRep="Full">
        <PartyTypeCode tc="1">Person</PartyTypeCode>
        <FullName>Doe, John H</FullName>
        <GovtID>123456789</GovtID>
        <GovtIDTC tc="1">SSN</GovtIDTC>
        <ResidenceState tc="10">DC</ResidenceState>
        <URL>
          <URLAddr>www.johndoesite.com</URLAddr>
        </URL>
        <OLifEExtension>
        <CorporateFlag>I</CorporateFlag>
        <AssistantFullName>Shannon Jones</AssistantFullName>
        <AssistantPhone>8015551234</AssistantPhone>
```

```xml
<AssistantExtension>1234</AssistantExtension>
<AssistantEmailAddress>Shannon@aol.com</AssistantEmailAddress>
<EntSourceID>15<EntSourceID>
<CorpName>John Doe Insurance</CorpName>
<ExcludeMarketing>1</ExcludeMarketing>
<BrokerDealer>Jackson Securities</BrokerDealer>
<BrokerGearID>0008UB</BrokerGearID>
<BrokerGearPassword>Pa$$word1</BrokerGearPassword>
<PipepassID>johndoe8764</PipepassID>
<DBA>John Doe and Sons</DBA>
<AnnualSales>1000000.00</AnnualSales>
<ContactNotes>These are some notes</ContactNotes>
<CDAgent DataRep="Full" id="66543">
  <CDCodeID>2234</CDCodeID>
  <CDFamilyID>132</CDFamilyID>
  <ActiveDate>2010-01-01</ActiveDate>
  <InactiveDate>2011-01-01</InactiveDate>
</CDAgent>
<PrefDistribution>Email</PrefDistribution>
  <Orgs>
    <Org FieldName="AUXID1" StartDate="2008-05-21" EndDate="">2</Org>
  </Orgs>
<CustomFields>
  <CustomField Name="Agent Level">A</CustomField>
  <CustomField Name="Direct Upline">Sherwin Cacdac</CustomField>
  <CustomField Name="Start Date">5/21/2008</CustomField>
  <CustomField Name="EFC Leader">Gilles Moua</CustomField>
</CustomFields>
<PrimaryMarket>Life</PrimaryMarket>
<PrimaryCarrier>Banner</PrimaryCarrier>
<Agreement>2010-01-15</Agreement>
<EntityManager id="TESTUSER"/>
<ExternalID>0008UB</ExternalID>
```

```xml
          <CommissionRoles>
            <RoleID StartDate="2010-02-15" EndDate="2010-08-15>3245</RoleID>
            <RoleID StartDate="2010-02-15">4432</RoleID>
          </CommissionRoles>
          <Codes>
            <Code Name="Million Club" StartDate="2010-10-18" EndDate="2012-10-19">3324</Code>
            <Code Name="Medallion">3325</Code>
          </Codes>
        </OLifEExtension>
        <Person>
          <FirstName>John</FirstName>
          <MiddleName>H</MiddleName>
          <LastName>Doe</LastName>
          <NickName>Johnny</NickName>
          <Prefix>Mr.</Prefix>
          <Suffix>Jr.</Suffix>
          <Title>President</Title>
          <Gender tc="1">Male</Gender>
          <BirthDate>1965-07-26</BirthDate>
          <OLifEExtension>
            <Designation>ALU</Designation>
        <EntityType TypesID="Type_5218">
        </EntityType>
            <EntityStatus tc="1">Active</EntityStatus>
            <ExternalID>0008UB</ExternalID>
            <AnniversaryDate>2001-04-21</AnniversaryDate>
            <SpouseFirstName>Erica</SpouseFirstName>
            <SpouseLastName>Doe</SpouseLastName>
            <SpouseBirthDate>1973-01-18</SpouseBirthDate>
          </OLifEExtension>
        </Person>
        <Producer DataRep="Full">
          <OLifEExtension>
            <WebPassword>password</WebPassword>
            <AccountNumber>5548798554</AccountNumber>
            <BankBranch>Branch1</BankBranch>
            <BankCity>Boston</BankCity>
            <BankName>Bank of Boston</BankName>
            <RoutingNum>123987456</RoutingNum>
```

```xml
      <Status>C</Status>
      <CommissionAssignment>Y</CommissionAssignment>
      <Advances>1550.00</Advances>
      <EOCarrier>EO Insurers of America</EOCarrier>
      <EOPolicy>144389KTR</EOPolicy>
      <EOAmount>1000000.00</EOAmount>
      <EOExpirationDate>2025-10-15</EOExpirationDate>
    </OLifEExtension>
    <License DataRep="Full" id="lic_45678968">
      <LicenseKey>98465498</LicenseKey>
      <LicenseID>UT1338573</LicenseID>
      <LicenseState tc="52">UT</LicenseState>
      <LicenseStatus tc="1">Active</LicenseStatus>
      <EffDate>2008-01-20</EffDate>
      <ExpDate>2012-01-20<ExpDate>
      <LineOfAuthority>
      <LineOfAuthorityType tc="5">Life-Fixed</LineOfAuthorityType>
      </LineOfAuthority>
    </License>
    <CarrierAppointment DataRep="Full" id="lap_4616816">
      <CarrierAppointmentKey>516816981</CarrierAppointmentKey>
      <CompanyProducerID>FT843489</CompanyProducerID>
      <CarrierCode>7</CarrierCode>
      <ApptState tc="52">UT</ApptState>
      <ApptState tc="16">ID</ApptState>
      <ApptState tc="59">WY</ApptState>
      <CarrierApptStatus tc="1">Approved</CarrierApptStatus>
      <EffDate>2008-01-20</EffDate>
      <ExpDate>2012-01-20</ExpDate>
      <LineOfAuthority>
      <LineOfAuthorityType tc="5">Life-Fixed</LineOfAuthorityType>
        <EffDate>2005-10-12</EffDate>
        <ExpDate>2008-10-12</ExpDate>
        <StatusDate>2008-10-15</StatusDate>
      </LineOfAuthority>
    </CarrierAppointment>
 </Producer>
<Address DataRep="Full" id=Add_34383484>
    <AddressKey>23423443</AddressKey>
    <AddressTypeCode tc="1">Residence</AddressTypeCode>
    <Line1>100 W 200 S</Line1>
    <Line2>Suite 100</Line2>
```

```xml
<Line3>Room 4a</Line3>
<City>Salt Lake City</City>
<AddressStateTC tc="52">UT</AddressStateTC>
<Zip>84101</Zip>
<AddressCountryTC tc="1">USA</AddressCountryTC>
<PrefAddr tc="1">True</PrefAddr>
<SolicitationInd tc="1"/>
<OLifEExtension>
  <AddressDescription>Office Address</AddressDescription>
  <AddressNotes>Use this address for all mail correspondence</AddressNotes>
  <MarketingFlag>1</MarketingFlag>
  <SecondaryFlag>1</SecondaryFlag>
</OLifEExtension>
</Address>
<Phone DataRep="Full" id="phn_4432344">
<PhoneKey>4453453</PhoneKey>
<PhoneTypeCode tc="1">Voice</PhoneTypeCode>
<AreaCode>801</AreaCode>
<DialNumber>5197903</DialNumber>
<Ext>7904</Ext>
<PrefPhone tc="0">False</PrefPhone>
<SolicitationInd tc="1"/>
<OLifEExtension>
  <PhoneDescription>Office Phone</PhoneDescription>
  <PhoneNotes>Only use this number during the day</PhoneNotes>
  <MarketingFlag>1</MarketingFlag>
  <MemoFlag>1</MemoFlag>
  <SecondaryFlag>1</SecondaryFlag>
</OLifEExtension>
</Phone>
<EMailAddress DataRep="Full" id="Eml_2342342">
<EmailAddressKey>4323434</EmailAddressKey>
<EMailType tc="2">Personal</EMailType>
<AddrLine>Brent.Barker@agencyworks.com</AddrLine>
<PrefEMailAddr tc="0">False</PrefEMailAddr>
<SolicitationInd tc="1"/>
<OLifEExtension>
  <EmailDescription>Office Email</EmailDescription>
  <EmailNotes>Primay Email Address</EmailNotes>
  <MarketingFlag>1</MarketingFlag>
  <MemoFlag>1</MemoFlag>
  <SecondaryFlag>1</SecondaryFlag>
```

```
          </OLifEExtension>
        </EMailAddress>
        <Attachment DataRep="Full" id="AgtCmh_123654789">
          <AttachmentKey>987456123</AttachmentKey>
          <DateCreated>2010-11-04</DateCreated>
          <UserCode>TESTUSER</UserCode>
          <Description>This is the description of the comment.</Description>
          <LastUpdate>2010-11-05</LastUpdate>
          <FollowUpDate>2010-11-07</FollowUpDate>
          <AttachmentType>General</AttachmentType>
          <PurgeDate>2010-11-10</PurgeDate>
          <AttachmentSource>CONFIDENTIAL</AttachmentSource>
          <AttachmentData>This is the body of the note or comment</AttachmentData>
          <OLifEExtension>
            <TimeCreated>13:15:33</TimeCreated>
            <TimeChanged>15:25:37</TimeChanged>
          </OLifEExtension>
        </Attachment>
      </Party>
    </OLifE>
  </TXLifeRequest>
</TXLife>
```

Failure/Warning Responses

Failure: "Cannot delete record because Application(s) are attached to it."

Failure: "Cannot delete record because Application is attached to code."

Warning: "Entity record not found."

Warning: "The BrokerGear ID already exists for another Agent. ID wasn't changed"

Warning: "SSN is required if Applications are attached to this Agent."

Warning: "This SSN already exists for another Agent. SSN not changed."

Warning: "Invalid Email Address."