

This TechNote describes new fields added to Application and Contact Comments to capture illustration request information. The existing **Illustration Requests** tab(s) and associated functionality will be retired with the January 2016 release. These fields should be used to log requests, and can be sent as Tasks to Users' Command Center.

Contents

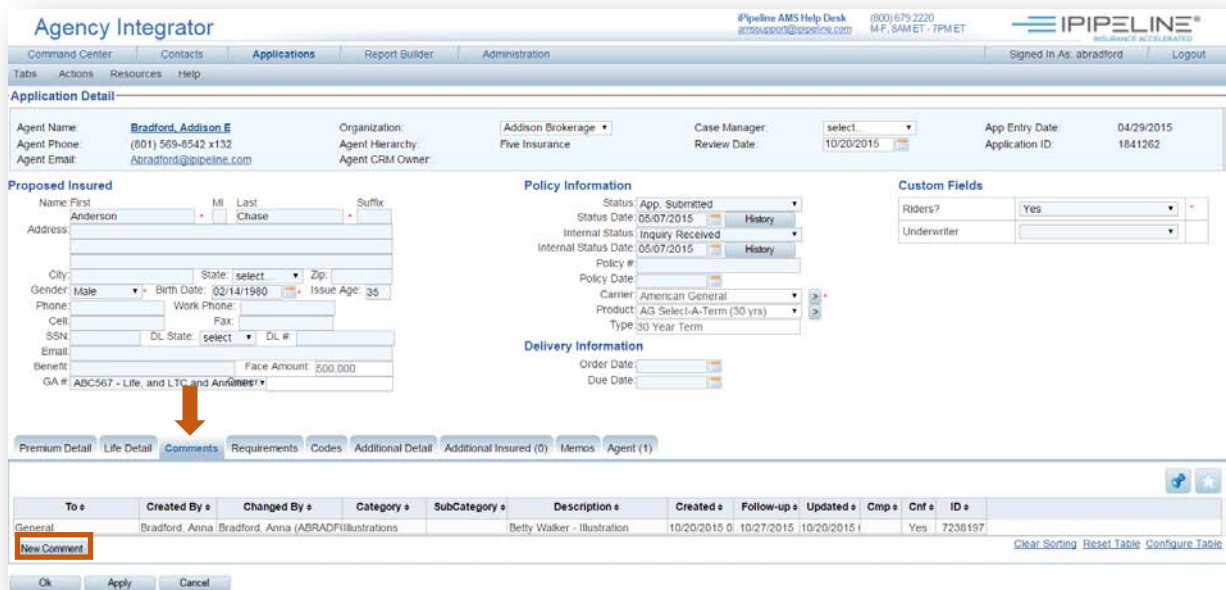
Illustration Comments	2
Applications Module	2
Contacts Module	2
Creating an Illustration Comment	3
Command Center	6
Report Builder	6
Data Replicator	7

Illustration Comments

Illustration Comments can be accessed in both the Applications and Contacts modules.

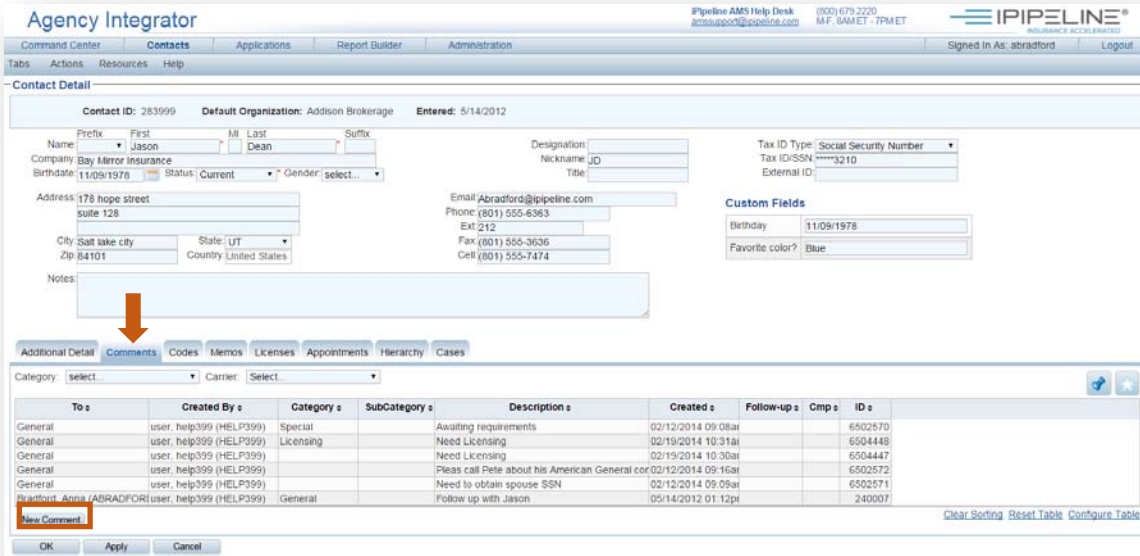
Applications Module

Once on the Application Detail, click **Tabs** and select Comments. Click **New Comment**.



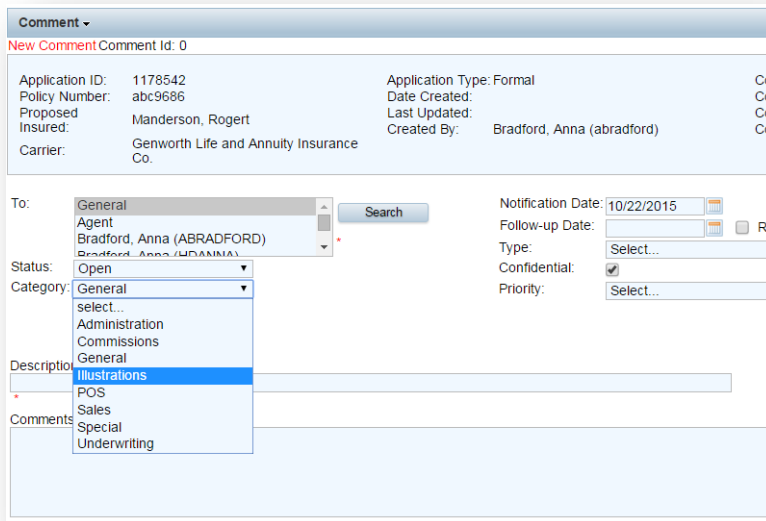
Contacts Module

Once on the Contact Detail, click **Tabs** and select Comments. Click **New Comment**.



Creating an Illustration Comment

Select the Category of Illustrations, and additional fields will appear:



Application ID: 1841262	Application Type: Formal	Contact: Bradford, Addison E	Changed By:
Policy Number:	Date Created:	Contact Tax ID: *****7777	
Proposed Insured: Chase, Anderson	Last Updated:	Contact Email: Ab Bradford@pipeline.com	
Carrier: American General	Created By: Bradford, Anna (abradford)	Contact Phone: (801) 569-8542 x132	

To:	<input type="text" value="General"/> <input type="button" value="Search"/>	Notification Date:	<input type="text" value="10/20/2015"/>
Status:	<input type="text" value="Agent"/> <input type="text" value="Bradford, Anna (ABRADFORD)"/> <input type="text" value="Bradford, Anna (ABRANNA)"/>	Follow-up Date:	<input type="text"/> <input type="checkbox"/> Reoccur
Category:	<input type="text" value="Illustrations"/>	Type:	<input type="text" value="Select..."/>
Product:	<input type="text" value="AG Select-A-Term (30 yrs)"/>	Confidential:	<input checked="" type="checkbox"/>
Product Type:	<input type="text" value="30 Year Term"/>	Priority:	<input type="text" value="High"/>
Product Category:	<input type="text" value="Life"/>	Client Name:	<input type="text" value="Betty Walker"/>
Face/Benefit Amount:	<input type="text" value="50000"/>	Client Age / DOB:	<input type="text"/>
Premium:	<input type="text"/>	Client Gender:	<input type="text" value="Female"/>
1035:	<input type="text"/>	Client State:	<input type="text" value="CO"/>
Rider:	<input type="text"/>	Client Height:	<input type="text" value="ft"/> <input type="text" value="in"/>
Class:	<input type="text"/>	Client Weight:	<input type="text"/>
Solve For:	<input type="text" value="Face Amount"/> <input type="checkbox"/> # Run <input type="checkbox"/> # Sent	Tobacco:	<input type="text"/>
		Table Rating:	<input type="text"/>
			<input type="checkbox"/> Save Age <input type="checkbox"/> Sold

Special Instructions

Description

Betty Walker - Illustration

Comments

The available Illustration fields on the **Application Comments Detail** screen include the below. Note that none are required except for **To** and **Description**.

- **To:** This field allows you to assign the **Comment** as a task to specific users in your Agency. The default value is **General**. You can select multiple users in the list using CTRL+ Left Mouse Click. Or, if you click the **Search** button, the **User Search** window will appear allowing you to choose multiple user IDs. Click **OK** to finish your selection.
- **Status:** There are three available status options to choose from: **Open**, **Completed**, or **Completed This Occurrence**. **Comments** which have a **Completed** status do not appear as tasks in the **Command Center**.
- **Product:** Drop down value may be selected. Does not auto populate Product Type or Product Category to allow for independent selection.
- **Product Type:** Drop down value may be selected. Does not auto populate Product Category to allow for independent selection.
- **Product Category:** Drop down value may be selected. Does not automatically filter Product Type or Product fields to allow for independent selection.
- **Face/Benefit Amount:** Whole number field (not a currency value – currency formatting will cause a data validation error)
- **Premium:** Currency

- **1035:** Currency
- **Rider:** Text
- **Class:** Text (not dependent upon Carrier and product-defined values for Class like in Applications module)
- **Solve For:** Drop down options: Face Amount or Premium
- **# Run:** The number of Illustrations Run (numeric)
- **# Sent:** The number of Illustrations Sent (numeric)
- **Client Name:** Text
- **Client Age/DOB:** Text (to allow for entry of either age or DOB)
- **Client Gender:** Drop down options: Male or Female
- **Client State:** Drop down
- **Client Height:** Numeric
- **Client Weight:** Numeric
- **Tobacco:** Text (not dependent upon Carrier and product-defined values for Tobacco like in Applications module)
- **Table Rating:** Text
- **Save Age:** Checkbox
- **Sold:** Checkbox to indicate if the Illustration led to a sale
- **Special Instructions:** Instructions for the user receiving the Illustration Request. For example, perhaps no Carrier was selected, and it should be run for the ten best Carriers instead. The user could enter "10 Best Carriers" in the Special Instructions field
- **Description:** Required field
- **Comments:** Text field to capture further information

Command Center

Command Center

From: 10/20/2015 To: 10/28/2015 User: Bradford, Anna (ABRADFORD) Reset

Name	Due/Foll up	Type	Carrier	Status	Detail	Agent (Application)	Policy Number	State
Chase, Anderson	10/27/2015	App Cmt	American General	App. Submitted	Betty Walker - Illustration	Bradford, Addison E		CA

Tasks: 1 *Tasks designated as Special will be highlighted with red text. Clear Sorting Reset Table Configure Table

Filter: [Apps Entered Last 8 Days *] Make Default Modify

Application List

Applicant Name	Policy Number	Carrier Name	LOB	Status	Agent	Review
No applications found.						

Applications: 0 Clear Sorting Reset Table Configure Table

Illustration comments can be sent to another user’s Command Center Task List like all other comments.

Report Builder

When using the Comment Data Groups (**Agent Info-Comments** and **App Info-Comments**), Illustrations Comment fields have been there as columns, grouping, sorting, criteria, and summary options. Reference Report Builder documentation, to create, edit and run reports in Report Builder and Report Designer.

Report Name: Illustrations Title: Logo: select...

Columns

Quick Find:

Drag columns to criteria, preview, summaries:

- Custom Fields
- Hierarchies
- Illustrations
 - Illustration 1035
 - Illustration Class
 - Illustration Client Age
 - Illustration Client Gender
 - Illustration Client Height
 - Illustration Client Name
 - Illustration Client State
 - Illustration Client Weight
 - Illustration Face Amount
 - Illustration Number Run
 - Illustration Number Sent
 - Illustration Premium
 - Illustration Rider
 - Illustration Save Age
 - Illustration Sold
 - Illustration Table Rating
 - Illustration Tobacco
- Inforce Info
- Other Criteria
- Phone Info
- Premium Info

Legend: A text, S summary, D date, P phone, T numeric

Criteria or Column: Criteria Only, Column Only

Save Apply Cancel

Criteria Remove All Criteria

Organization X

Carrier X

Status Category X

Status X

Comment To X

Comment Category X

Drop data options here

Preview Remove All Columns Relabel Columns Reset Sorting

Drop groups here

Comment Category	Application IC	Applicant Name	Policy Number	Agent Name	Comment From	Comment To	Comment Ent	Comment Detail	Com
No data.									

Summaries (PDF reports)

Drop summaries here

Data Replicator

If you use Data Replicator, Illustration Comment fields have been added under the **Comments** tab in the COMMENT_ILLUSTRATION table. Make sure to check these fields if you want them to appear in your Data Replicator file.

Selected	Name	Custom Name	Data Type	Description
<input type="checkbox"/>	ID		Integer	Unique ID
<input type="checkbox"/>	COMMENT_ID		Integer	ID of associated Comment
<input type="checkbox"/>	CARRIER_NOTES		Note(32,767)	Carrier Notes
<input type="checkbox"/>	PRODUCT_CATEGORY_ID		Integer	Product Category ID
<input type="checkbox"/>	PRODUCT_TYPE_ID		Integer	Product Type ID
<input type="checkbox"/>	PRODUCT_ID		Integer	Product ID
<input type="checkbox"/>	SOLVE_FOR		Varchar(128)	Solve For
<input type="checkbox"/>	FACE_AMOUNT		Float	Face Amount
<input type="checkbox"/>	PREMIUM		Float	Premium
<input type="checkbox"/>	ILL_1035		Float	1035
<input type="checkbox"/>	RIDER		Varchar(128)	Rider
<input type="checkbox"/>	SAVE_AGE		Varchar(128)	Save Age Flag
<input type="checkbox"/>	SOLD		Varchar(128)	Sold Flag
<input type="checkbox"/>	NUMBER_RUN		Integer	Number Of Times Illustration Ran
<input type="checkbox"/>	NUMBER_SENT		Integer	Number of Times Illustration Sent
<input type="checkbox"/>	CLIENT_NAME		Varchar(128)	Client Name
<input type="checkbox"/>	CLIENT_AGE		Varchar(128)	Client Age
<input type="checkbox"/>	CLIENT_GENDER		Varchar(128)	Client Gender
<input type="checkbox"/>	CLIENT_STATE		Varchar(128)	Client State
<input type="checkbox"/>	CLIENT_HEIGHT_FT		Integer	Client Height Feet
<input type="checkbox"/>	CLIENT_HEIGHT_IN		Integer	Client Height Inches
<input type="checkbox"/>	CLIENT_WEIGHT		Varchar(128)	Client Weight
<input type="checkbox"/>	TOBACCO		Varchar(128)	Tobacco Status
<input type="checkbox"/>	CLASS		Varchar(128)	Class
<input type="checkbox"/>	TABLE_RATING		Integer	Table Rating
<input type="checkbox"/>	CREATED		Timestamp	Date record Created
<input type="checkbox"/>	CREATED_BY_USER_ID		Integer	Created By User
<input type="checkbox"/>	MODIFIED		Timestamp	Date record was last changed
<input type="checkbox"/>	MODIFIED_BY_USER_ID		Integer	Modified By User