Agency Integrator

UserVoice Enhancements to Agency Integrator for February 26, 2016

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	Search Results	**Review Date** has been added as a column to the Application Search Results table. Click the **Configure Table** hyperlink at the bottom of the screen to add this field to your personal Application Search Results list. It can be dragged and dropped into any position in the table, like all other columns, and its position will be saved even after logging out.
Commissions	Actual Commissions	In Statements as well as Posted Batches, you can now click **Previous** and **Next** buttons to move between Details within a Batch, without having to return to the Batch Detail list each time.
Contacts	Search Results	**Title** has been added as a column to the Contact Search Results table. Click the **Configure Table** hyperlink at the bottom of the screen to add this field to your personal Contact Search Results list. It can be dragged and dropped into any position in the table, like all other columns, and its position will be saved even after logging out.

Enhancements to Agency Integrator for February 26, 2016

Module	Section	Enhancement
Applications	ECP Tab	When adding an ECP Contact to an application that has been selected as the Agent's Default ECP Contact, the system will now select the Contact's valid Grid by default, rather than the Contact's "No Grid Attached". If the default ECP Contact has more than one valid grid, the system will no longer assign one by default, but let the user pick from the drop-down list instead.
Applications	Premium Tab	Three new fields have been added to the Premium tab: **Qualified Rollover**, **Qualified Transfer** and **Non-qualified Transfer**. These fields can be used to track Annuity-specific information and have also been added to Report Builder in all the App Info Data Groups, and to Data Replicator. Note that these fields do not interact with the premium calculator, pending case status feeds, or the commissions module at this time.
General	PDF Tables	A **PDF** button has been added to the bottom-right of the following tables: Command Center Task List, Command Center Application List, Carrier Status Search Screen, Application Search Screen, and Contact Search Screen. Clicking PDF will generate a PDF in a new window that displays the current contents of that table for printing, emailing, etc.
Report Builder	Formatting	A new data type of ID has been added to Report Builder. Fields of this type will be identified by an icon in Report Designer. Previously, these ID fields were formatted as numeric fields on PDF reports, they are now formatted as text instead. For example, previously, Contact ID 123456 would appear as 123,456 on a PDF report. It will now appear as 123456.
Report Builder	Report Designer	Previously, you could choose to create or edit a report in either **Report Designer** or **Report Builder "Classic"**. Now, the options to create and edit in Report Builder Classic has been removed, and all reports will be created and edited in Report Designer.

Changes to Agency Integrator for February 26, 2016

Module	Section	Change
Application Entry	Requirements Tab	When adding a new Application, the pop-up window for adding Forms on the Requirements tab was too large for some users to see the bottom of the window. This has been resolved and the OK button will now be visible for users with standard screen resolutions.
Applications	Group Policies	Previously, when adding a new Group, a Group Policy could not be immediately added without first saving and exiting the Group. This has been resolved.
Commissions	Adjustments Administration	**Adjustment Type** (Agent Commission, MGA Bonus Commission, Employee Compensation, etc.) has been added as an additional search criteria in Commissions Adjustments Administration.
Contacts	Commission Schedule PDF	Previously, when generating an **Agent Commission Schedule PDF**, any rates set to be paid by the MGA (rather than Carrier/Other) were showing up as 0. This has been resolved and the rate will appear as expected.
Contacts	Custom Fields	In some instances, Selection-type Agent Custom Fields would display a blank selection, in addition to the valid selections. This will no longer occur.
Contacts	DataView	In some instances, an unexpected error occurred when trying to save an Agent record with attached Applications that are sent to DataView or Integrated Experience. This will no longer occur.
Contacts	License and Appointment Detail	When working in the License Detail or Appointment Detail screens today, if you attempt to save without populating a required Custom Field that is not currently visible on-screen, you are not given a clear message about what is missing and why the record can't be saved. Now, you will be alerted with a descriptive message in red at the bottom of the screen.
Contacts	Special Deals	When editing an existing Special Deal that is associated to a single product, the system was defaulting the selection to All Plans, rather than the single product selected. This has been resolved and the product selected during entry will retain when editing.
Contacts	Web Password	If a value over 10 characters is entered in the **Web Password** field, you will now be alerted with a descriptive message at the bottom of the screen. Previously, the value was automatically truncated to 10 characters.
General	Comments	When creating a new Comment and selecting a Comment Category, the cursor would jump back to the To: field, removing any text that was entered prior to the Category selection. This will no longer occur.

Memos	Memo History	Previously, when viewing a Memo from Memo History as a PDF, it would open in the same browser tab, causing navigation issues. Now, PDF memos will be opened in a new tab when you right-click and select View PDF.
Memos	Memo History	Previously, the timestamp on sent Memos in Memo History was appearing in Alaska time, rather than Mountain Standard Time. This has been corrected.
Report Builder	Formatting	Previously, any blank Date-type Custom Fields were appearing on Report Builder reports as 0001-01-01. They will now be blank on the report output.
Report Builder	Hierarchy Name Criteria	When running a report in the Agent Info - Appointments data group using the Hierarchy Name criteria, some agents were being returned that were outside of the selected Hierarchy. This has been resolved.
Report Builder	New Fields	**ECP Contact Name** has been added as a column to the App Info-Requirements data group.
Report Builder	Organizations	If an Agent record had more than one default Organization, that Agent's cases were duplicating on reports in the App Info - Agents with Split Premium data group. This will no longer occur.
Report Builder	Queue Tab	Reports on the Report Builder Queue tab will now be listed in the correct order when sorting by the Date column.
Report Builder	Report Designer	Previously, if your report contained a large number of columns and the **Preview** option was selected, you could not visually see all columns on-screen in Report Designer. This has been resolved. All columns are visible, with or without the Preview option selected.
Report Builder	Report Designer	Previously, when moving and deleting columns from the Summaries section in Report Designer, an unexpected error would occur. This has been resolved.