Agency Integrator

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UserVoice Enhancements to Agency Integrator for February 22, 2014

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
Contacts and Applications	General Navigation	You now have the ability to set your own default Tabs (Memos, Comments, Hierarchies, etc.) to appear when accessing Contacts and Applications. Beyond setting a default tab, you can also 'pin' and 'un-pin' Tabs, allowing you to customize your view and hide the tabs you don't frequently use. See attached TechNote for complete details.
Applications	Application Status	A new Application Status of **Issued** has been added and can now be selected on Applications. This status is classified in the **Open** Case Status Category.
Commissions	Schedules	You can now create your own custom **Payment Types** in **Commission Schedules**. This will allow you to create estimated commissions and log actual payments in the Statements module for payment types such as IMO commissions, overrides from additional sources, etc. See attached TechNote for complete details.
Contacts	CE/Training	A new feature to enter and track Continuing Education and Training (**CE/Training**) credits for Contacts has been added, including corresponding Report Builder and Data Replicator additions. See attached TechNote for complete details.
Memos	Failure Notification	If a **Memo** fails to send, the user who sent the Memo will receive a Task in their Command Center, alerting them of the failure. If the Memo was sent by a process rather than a user, the Task will be assigned to the User specified as the **Memo Reply User** in **System Preferences Administration**. Previously, no notification was sent and you would not know of the failure unless you visited Memo History.
Applications	Auto Receipting	New case statuses have been added to **Auto Receipting Administration**, allowing you to Override and Queue those status changes when they are received through a Pending or In Force carrier feed. These new statuses will NOT be set to Override or Queue automatically, and you will need to visit the **Status, Comments, & Other** tab in **Auto Receipting Administration** if you would like to start receipting them. New Pending Statuses: **Await Funds/1035 Exchange, Awaiting Requirements, Conversion, Issued, Same Status-45 Days, Tentative App., Await Req., Tentative Offer.** New closed Status: **Postponed.** New Paid Statuses (only applicable for carriers who send In Force feeds): **Deceased, In Force - Commission Paid, In Force With Requirements, Lapsed, Lapsed Pending, Reinstated**, and **Surrendered.**

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Contacts and Applications	General Navigation	The addition of our Customizable Tabs functionality gave us an opportunity to rework the Actions menu on both the **Application Detail** and **Contact Detail** screens. **You will now see two menu items on these screens: Tabs and Actions.** When you click on one of the options under the **Tabs** menu, (Riders for example) the **Riders** tab will open on the bottom half of the screen. Whereas the options under the **Actions** menu are actions you can take in the system that don't open a new tab. For example, **Print Label** and **Carrier Status** are actions that the system performs without opening a new tab on the bottom half of the screen. We have also alphabetized the items on each list to make it easier to find the option you're looking for. See attached TechNote for more information and screen shots.
General	Internet Explorer Browser	We have made some general improvements for those using Internet Explorer 11. Previously, you could not use Agency Integrator on IE 11, you needed to add ipipeline.com to Compatibility View Settings. If you currently have ipipeline.com added to Compatibility View, we recommend that you remove it and view the website with regular settings.
Applications	GA Number	The **GA Number** field on Applications is now available to select for Pre-Apps as well as formal Applications.
Auto Receipting	Requirements	Previously, if the Carrier sent a Requirement without a value in the **Required Of** field, the system would assume it was required of the Agent. Now, the option selected on the requirement in **Requirement Management Administration** (either Agent, MGA, Carrier or Vendor) will be assigned to the Requirement.
Commissions	Schedules and Statements	Previously, if an application had more than one applicable Commission Schedule (i.e. two different schedules with the same Product attached were assigned to the agent), the system would behave unpredictably, sometimes paying out only one of the schedules, sometimes paying out $0.00. Now, the system will use all applicable Schedules and pay out the rates on all Schedules. **Pay special attention when processing Statements, as this could cause you to double or triple-pay an Agent if multiple schedules are attached for a single product.**
Commissions	Statements	New payment types of **Bonus** and **ERA** were added in our November 2013 release. Now, changes have been made to recognize and properly classify those types of payments when they are sent in a Commission Statement feed from Carriers.
Data Replicator	New Fields	Fields specific to **Memo History** for all types of Memos (Contact, Application, License, Appointment, etc.) have been added to the new version of Data Replicator and are available to select to be included in your Data Replicator file. Navigate to **Data Replicator Administration** to include these fields in your file. Note that these fields will not be added to the legacy version of Data Replicator.
Data Replicator	New Fields	Additional fields have been added to the new version of Data Replicator: PAID_TO and PAYMENT_TYPE_TO (from the COMMISSION table) and DESCR (from the CDSELECT table). Navigate to Data Replicator Administration to include these fields in your file. Note that these fields will not be added to the legacy version of Data Replicator.
Document Vault	Attachments	We have added a virus scan for all documents uploaded to **Document Vault**.
Integrations/Feeds	John Hancock Inforce Feed	We have enhanced the alerts functionality for agencies receiving the **Inforce Feed from John Hancock**. See attached TechNote for details.
Integrations/Feeds	New Fields	We have added additional fields to our integration with docSTAR. Agency Integrator now works with **docSTAR eclipse**.

Changes to Agency Integrator for February 22, 2014

Module	Section	Change
Administration	Auto Receipting	In **Auto-Receipting Administration**, you can now assign a Profile to Carriers and Organizations without error. An unexpected error was occurring previously in certain situations.
Administration	Carrier / Product Attachment	In **Carrier/Product Attachmen**t Administration, the link to request a new Carrier or Product will now correctly open the request form, allowing you to directly send in requests to the AMS Help Desk.
Administration	Codes	When assigning **Codes** in Administration, the **Last App Date** criteria was not returning expected results. This has been resolved.
Administration	Hierarchies	We have expanded the following columns on the **Override Sharing** screens in **Hierarchy Administration** to allow the full text to be visible: **Carrier, Plan,** and **Plan Type**.
Administration	Memo Templates	In **Memo Template Administration**, Memos will no longer be allowed to be sent via **Secure** AND **Email.** If the **Secure** box is checked, Email will not be allowed as an additional delivery method.

Administration	Memo Triggers	Memos using **Date-Based Triggers** will now correctly trigger for Pre-Apps and Informals as well as Formal applications. Previously, they worked for Formals only.
Applications	Application Detail Screen	The Agent's middle initial will now display correctly on the Application Detail screen. In some instances, the middle initial was appearing twice.
Applications	Application Detail Screen	The **Policy Number** field on the Application Detail screen will now display all 15 characters it captures.
Applications	FastApp	Applications created though the **FastApp** process will now correctly populate the Submitted Date with the App Entry Date if the **App Entry - Populate Submitted Date** Preference is turned on in System Preferences Administration.
Applications	Last Accessed List	When right-clicking and selecting **Est. Comm. Payout** from Search Results or Last Accessed lists, the tab would not load correctly. This has been corrected.
Applications	Requirements	Requirements changed to a status of **Cancelled** on the **Requirement Detail Screen** will now correctly save in a Cancelled status, rather than reverting to the previous status.
Broker Gear	Comments	When agents logged in to **Broker Gear** to view their cases attempted to view Comments, they were appearing as a wall of text without proper line breaks by date. This has been resolved.
Commissions	Statements	The **Alert** column in the **Commission Batch Detail List** will now correctly display '**N'** if there is no active alert for a policy in that Batch.
Commissions	Statements	In some cases, certain formatting on Excel spreadsheets was causing an error when using the **Commission Statement Import** tool. This issue has been corrected.
Commissions	Schedules	Commission Schedules using the **State Banding** options of NY only, All Other States, and all States except NY will now pull correct rates into Statements according to the signed state of the application. Note that we have removed the ****All States Except NY**** banding option to select on new rates. Now, you can click the "Select All" button and un-check the New York box to accommodate that scenario.
Commissions	Schedules	In some instances, an unexpected error would occur when selecting a Hierarchy to attach to a Commission Schedule on the **Hierarchy/Tiers** tab in Schedule Administration. This has been corrected.
Commissions	Schedules	When entering numbers with decimals into the **Banding** fields on a Commission Schedule (i.e. Premium Banding, Face Amount Banding, etc.), those numbers and decimals will now save correctly.
Commissions	Statements	The **Posted By** field will remain blank until the Commission Statement is in a **Posted** status.
Commissions	Statements	If a $0.00 value is entered in the Modal Premium column when using the **Commission Statement Import**, the system will now correctly process $0.00, rather than using the value in the Modal Premium field on the Application.
Contacts	Comments	Comments will now correctly display the AM/PM on the **Due Time** field.
Contacts	Last Accessed List	From the **Last Accessed** list on the Contact Search screen, you can now right-click and select **Print Label** without error.
Contacts	CRM Owner	Options in the drop-down list for the CRM Owner field will now appear in alphabetical order.
Contacts	Hierarchies	Changes will not be saved if you attempt to end-date a Contact's attachment to a Hierarchy if that date is after the end date of the Hierarchy itself.
Memos	Secure Memos	**Secure Memos** using a weekly **Date-based Trigger** will now deliver to Carbon Copy recipients, as well as the primary recipient. Previously, Carbon Copy recipients did not receive their copy.
Report Builder	Agent Data Groups	In Agent data groups in **Report Builder**, you can now select Codes from more than one Code Family as Criteria, and your report will display the expected results.
Report Builder	App Info Data Groups	Reports in the **App Info** data groups that use **Code Family** and **Code Name** as Criteria will now produce results as expected.
Report Builder	Comments	In the **Agent Info - Comments** data group in Report Builder, Comments with a Category of **Special** will now correctly display their category on the report output.
Report Builder	Comments	The Comment **Due Date** field in Report Builder has been re-named to match the name in the user interface: **Notification Date**.