Agency Integrator

IPIPELINE® INSURANCE ACCELERATED

uservoice

UserVoice Enhancements to Agency Integrator for January 23, 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
Contacts	Cases Tab	**Policy Number** and **Product** have been added to the **Cases** tab on the Contact Detail screen.
Report Builder	Commissions	**Policy Date** has been added as a column and criteria to the Commissions data group.
Report Builder	PDF Titles	An option to **Include Date Range on PDF** has been added to Report Builder. If this option is selected, the date range chosen as Criteria will appear as a second line under the report's Title. See attached TechNote for further information.

Enhancements to Agency Integrator for January 23, 2016

Module	Section	Enhancement
Command Center	Application List	A new Date option, **Carrier Status Update Received**, has been added to Command Center Filters. A filter using this option would return Applications according to the last date the Carrier sent an update on the Application. This filter does not pay attention to whether the case was changed by Auto Receipting, only that an update was received from the Carrier.
Commissions	Adjustments Administration	A new Commission Adjustments Administration area has been added where you can search for unpaid Adjustments and mark them as Paid in bulk, rather than manually one-by-one, or through running the Legacy Report MGA Pay Commissions. See attached TechNote for complete details.
Commissions	Employee Compensation (ECP)	Changes have been made to the **Employee Compensation (ECP)** module. Existing ECP users have been converted to **ECP Contacts**, and ECP Contacts can now be added by your agency as desired going forward, rather than iPipeline creating Users for you. Employee Compensation will continue to function as expected in regards to grids and commission payouts. You will now be able to generate Commission Statement PDFs for any payouts going to ECP Contacts and track their earned commissions on the Commission Summary tab. Contact your Customer Account Manager for more information on the Employee Compensation module.
Report Builder	Averages	**Averages** have been added to Report Builder. For numeric and currency values, you can now choose to display an Average on your PDF report output. See attached TechNote for complete details.
Report Builder	ECP Data Group	All currency values in the ECP Data Group will now be split according to the ECP % on the Application, similar to the way values are split according to the Agent split %.
Report Builder	New Criteria	A new Criteria called Include Sub-orgs has been added as a criteria to all Data Groups in Report Builder. If added to any new or existing reports, you will be able to select an Organization and choose whether or not data from the Sub-orgs (organizations "under" the selected parent Org) should be included as well. See attached TechNote for further information.
Report Builder	New Fields	1. The following have been added to the ECP data group: o **Hierarchy Name** has been added as a column and criteria o **ECP Grid Name** has been added as a column o **ECP Contact ID** has been added as a criteria 2. **ECP Contact Name** has been added as a criteria to all App Info Data Groups and as a Criteria to the Commission Data Group 3. **Case Modal Premium** has been added as a Summary field in the Commissions data group 4. **ECP Contact Name**, **ECP Start Date** and **ECP End Date** have been added as columns, criteria, grouping and summaries to the Agent Info data groups 5. The following Estimated Commissions fields have been added to the App Info-Agents w/ Split Premium data group: **o Est 1st Yr Agent Comm Payout** **o Est 1st Yr Agent Sp Deals** **o Est 1st Yr Emp Comp Share** **o Est 1st Yr Hierarchy OR** **o Est 1st Yr MGA Bonus** **o Est 1st Yr MGA Net Rev** **o Est 1st Yr Total Payout** **o Est Curr Yr Agent Sp Deals** **o Est Curr Yr Agent Comm Payout** **o Est Curr Yr Emp Comp Share** **o Est Curr Yr Hierarchy OR** **o Est Curr Yr MGA Bonus** **o Est Curr Yr MGA Net Rev** **o Est Curr Yr Total Payout**
Report Builder	Queue	The **Refresh** button has been removed from the Queue tab. Instead of clicking Refresh to see if your report is ready, you will now see a processing icon until the report is ready to view. This new process will go check for an updated status on the report every three seconds, providing you with continuous updates.
Report Designer	Fields	Previously, some fields would appear twice on the available fields list, once as a Column and once as a Criteria. These have been combined into a single entry that can be added as both a Column and Criteria where applicable.
Report Designer	Group Headers	In the App Info-Requirements Data Group, you can now group your Requirements by Applicant and/or Agent and include a Group Header for easier viewing on PDF reports. The new Group Headers are called: Applicant with Header and Agent with Header. See attached TechNote for complete details.
Report Designer	Report Name	Previously, new reports were pre-populated with the name "New Unsaved Report." Now, report names will be blank upon creation, requiring you to give the report a name before it can be saved.

Changes to Agency Integrator for January 23, 2016

Module	Section	Change
Applications	Memos Tab	The **Memos** Tab on the Application Detail screen now has a default sort applied to the **Memo Ordered** column, so that records will now appear in descending order by default. This default sort can be reset to whatever column is desired.
Memos	Memo Blocks	For newly created Memo Blocks, the filter **Don't show empty row** will now work as expected.
Memos	Memo Queue	Previously, Memos that included the characters < > in a Requirement Description were unable to be edited from the Memo Queue. This has been resolved.
Report Builder	Hierarchy Criteria	In some instances, running a report using a Hierarchy with a large number of downline contacts as criteria would return no results. This has been resolved.
Report Designer	Contact Type Criteria	Previously, upon saving, Contact Type was removed as a criteria when selected on a report. This has been resolved.
General	Illustration Requests	**Illustration Comments** were introduced with the October release to replace Illustration Request functionality in AI. With this release, the Illustrations tab has been removed from both Contacts and Applications, as well as the associated User Rights to access these tabs. Going forward, Illustration Comments should be entered to track Illustration Request information.
General	Print Label	The **Print Label** option has been removed from Contacts and Applications because the Legacy Report those labels generated to has been retired. The option to print a **Dymo Label** on both Contacts and Applications is still accessible.