Agency Integrator

uservoice

UserVoice Enhancements to Agency Integrator for July 22, 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
Administration	Preferences	Currently, when attaching ECP Contacts to an Application, you are given a list of all valid ECP Contacts' grids for the Organization of the case, whether or not those ECP Contacts are attached to the Agent(s) on the case. A new Customer Preference has been created to change this list to only display ECP Contacts attached to the agent(s) on the case (a much smaller list). To make this change for your office, go to **Administration**, **System**, **Preferences** and find the **ECP Contacts on Cases** preference. Options are: **All:** Choose from all valid ECP Contacts in the org of the case **Agent Only:** Choose from ECP Contacts attached to the Agent(s) on the case

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Module	Section	Enhancement
General	Comments	A new Search field has been added at the top of all Comments tabs (Agents, Applications, Users, Licenses, Appointments, etc.), allowing you to search through the Description and comment body, returning any comments on the record containing what you searched for. i.e. search for "APS" to view a list of any Comments regarding the APS on an application.
General	Comments	Feedback was provided to change the default filter on all Comments to be based off the **Last Updated date** rather than the **Created Date**. The Last Updated date has also been added as a column to the Comments table, allowing you to view and sort comments based on their Last Updated date.

Changes to Agency Integrator for July 22, 2016

Module	Section	Change
Applications	Premium Tab	The **Mode** and **Modal Premium** fields are no longer required when changing the status of an Application from an Open status to a Paid status.
Applications	Requirements	When adding a new Requirement to an Application, backspacing while typing in the **Requirement Code** field will now work as expected. Previously, you were taken back to the previous screen when backspacing.
Applications	Requirements	Performance upgrades have been made to speed up the load time when navigating from **Requirement Detail** back to the **Requirements** tab on an application.
Commissions	Actual Commissions	**Commission Alerts** will now pop up as expected when using the new Next and Previous buttons to navigate between Batch Detail records. Previously, the alerts were not being displayed.
Commissions	Commission Statement PDF	When running the Commission Statement PDF, if the payee is a Company record (rather than an individual) the Company Name will now appear as expected in the **Total Paid For** section at the end of the report. Previously, the Company Name was visible at the top of the report with the payee information as expected, but was missing from the totals area.
Contacts	Additional Detail Tab	The maximum allowable amount of characters for the **PipePass ID** field has been changed from 45 to 100 characters.
Contacts	Carbon Copy	When using a specific version of the Chrome browser (50.0.2661.87, 64-bit) and editing a **Carbon Copy** on a contact, the **All Memos** check box will now appear as expected.
Contacts	DataView	If your agency uses DataView, when the **PipePass ID** is removed from a Contact record, the Contact will now be re-synced to DataView as expected. This re-sync will ensure that cases associated with the previous PipePass ID will no longer be visible to the contact when logging into DataView.
Contacts	DataView	If your agency uses DataView, Contacts will now be re-synced to DataView when demographic information **(Name, Phone, Email, Address, Status)** is updated in Agency Integrator.
General	Browser Cookies	Due to a browser cookie issue, some users in some instances could become stuck in a loop that would send them back to Command Center. Clearing cookies resolved the issue user-by-user, but a change has been made to resolve the issue without requiring users to clear their cookies.
General	Comments	When viewing the Comments tab on a Contact or Application that doesn't have any recently updated Comments, the message displayed at the bottom of the screen will now read, **"WARNING: No results were found for the last year. The most recent results were returned."**
Memos	Memo Templates	Now, when adding new fields to a Memo Template, no extra spaces will be added between the fields.
Report Builder	Queue	Previously, reports manually run by users between 12:00 a.m. and 2:00 a.m. Eastern Time weren't able to be viewed. This has been resolved.
Report Builder	Split Premium Data Group	In the App Info-Agents w/ Split Premium data group, the **Est 1st Yr Hierarchy Override** field in will now display the expected amount, previously, no data was being returned.