



UserVoice Enhancements to Agency Integrator for September 16, 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
Report Builder	ECP Data Group	Application Custom Fields have been added as Columns to the ECP Data Group.

Enhancements to Agency Integrator for September 16, 2016

Module	Section	Enhancement
Applications	App Entry Wizard	The first two tabs of the existing Application Entry Wizard (Agents and Base Policy tabs) have been combined into one tab, and additional fields capturing the proposed insured's demographic information (Address, Phone(s), and Email) have also been added to this first tab. This change allows you to enter either the Proposed Insured first or the Agent first, depending on your agency's Organization structure and desired workflow. Please review attached TechNote for complete details.
Applications	App Entry Wizard (Rolling to Formal)	Licensing and Appointment checks will now occur for all agents when rolling Pre-Apps and Informals to Formal Applications (unless your System Preferences are configured to skip License and/or Appointment checks). Previously, only the primary Agent's record was checked for a valid License and Appointment when rolling to a Formal.
Data Replicator	Notification Emails	If a field in Data Replicator is set to be deprecated, the notification email(s) sent will now include a note explaining which field(s) will be replacing the soon-to-be deprecated field, in addition to the deprecation date. Visit Administration, System, and Data Replicator to add or change the email address(es) these notifications are sent to.

Changes to Agency Integrator for September 16, 2016

Module	Section	Change
Applications	App Entry Wizard	During Formal Application entry, you will no longer be able to type into the Issue Age field if Date of Birth has already been populated. Issue Age will be calculated automatically (as Actual Age / "Age Last") when Date of Birth is entered. When entering Pre-Applications, because Date of Birth is not required, you can type any desired value into the Issue Age field.
Applications	App Entry Wizard	If an Agent's attachment to the selected Organization has been end-dated, that Agent can no longer be attached to the application successfully. Previously, if your agency used the App Entry - Agent Selection First System Preference (ALTAPPFLOW), Agents with end-dated organizations could be attached to Applications when the signed date was after their Organization end date.
Applications	App Entry Wizard	The ECP tab will no longer appear in the App Entry Wizard unless the System Preference App Entry - Include ECP Tab (CASOWNWIZ) is enabled. Previously, the tab would appear if the logged in user had the Application - ECP Tab User Right assigned, even if the System Preference was not enabled.
Contacts	Appointments	You will now be able to click Cancel to exit the New Appointment screen, without being asked to enter the required fields on the screen.
Contacts	Appointments	In the Appointment Detail screen, if the All States option is selected, you will no longer receive an error message upon clicking Cancel when exiting the screen. In the App Entry Wizard, an Appointment for All States is considered valid for any Signed State on the Application.
Contacts	Contact Types	The Cases, Licenses and Appointments tabs will now load as expected for contacts with both ECP and Agent Contact Types assigned.
Report Builder	Agent Info - Hierarchies Data Group	All downline contacts will now be included when selecting a tier and using Include Hierarchy Downline as Criteria. Previously, in some situations, not all downline contacts were returned as expected.