UserVoice Enhancements to Agency Integrator for December 10, 2021

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
Application	Application Search	You will now have the ability to search for Application records by applicant Phone number. The search is a "like" search, meaning that if you enter "801" in the **Phone** field and click search, applications that start with 801 will display (801) xxx-xxxx. **Cell Phone**, **Home Phone**, and **Work Phone** have also been added as columns to the Application Search Results screen, allowing you to view the phone number types for the applications returned in your search. These columns will be off by default but are available to turn on by clicking the **Configure Table** hyperlink in the lower right area of the search results.

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Application	Comments	Changed the way **Auto Receipting/FastApp Comments** are being receipted into cases. Comments will now match on the **Description** field, Creating a threaded comment for each new comment with the same description instead of separate comments for each. If a comment comes down without a Description, it will be grouped under the general description, "**General Carrier case Note**." All Auto Receipting/Fastapp comments will come from the user "AUTORECEIPTING."
System	InsureSight Administation	The **Agency** tab in **InsureSight Administration** is now available under Administration, System, and InsureSight Administration, Allowing users to track goals per Product type. These goals will be synced over to InsureSight. See forthcoming TechNote for more information.
System	InsureSight Administation	Added a new column of **Monthly Goal Comment** to the following InsureSight Administration tabs: **Case Manager**, **Carrier**, and **Hierarchy**. You can now add a comment for each monthly goal.
Application	API	Additional annuity fields can now be populated and updated through the **Agency Integrator API**. Three new fields: **QualifiedRollover**, **QualifiedTransfer**, and **NonQualifiedTransfer** have been added as an OLifEExtension under the Policy section of our 103 and 1125 transactions. This information can be found in our API documentation.
Application	API	Added the ability to search for last change records by time in addition to date to the **Agency Integrator API**. Additional information about the format is available in our API documentation.Time will be based on the time in the database and not where the request is sent from.

Changes to Agency Integrator for December 10, 2021

Module	Section	Change
Administration	Riders	When entering a duplicate **Rider** name, you will no longer receive an unexpected error. A warning of "Rider name is not unique" will now display.
Report Builder	Column	Using the Est 1st Yr MGA Net Rev field in **Report Builder** would display a value of zero despite there being information to populate. The field now displays data in Report Builder.
Commissions	Actual Commissions	Previously, **MGA Bonus Commission** payments were stored as regular MGA Commission types, which is now resolved.
General	AR Queue	When receiving off requirements from the **AR Queue**, it would result in an unexpected error. The error will no longer occur.