

Enhancements to Agency Integrator for July 29, 2023

Module	Section	Enhancement
Administration	CE/Training Types	CE/Training Types Administration screen has undergone our UI Refresh and is now available under the same menu as before. The screen will allow all the same functions as the previous version but now showcases the new look and feel other transitioned modules contain.
General	API	You can now add a CRM Owner to our CRM Owner table(s) when a CRM Owner is included in the 1204 transaction through the API, and we can't find a match on that owner record as sent.
General	API	For annuities, you can now populate Owner and Beneficiary data through the <Party>, <Relation> model rather than relying exclusively on <LifeParticipant>.

Changes to Agency Integrator for July 29, 2023

Module	Section	Change
Commissions	Statements	When adding a Commission batch detail for an application with a schedule using a payment type of Bonus, Adjustments were not created. This is now resolved.
General	API	When using the API to populate comments to show on the Command Center Task List the Completed field would populate a default date preventing it from displaying. This will now function as expected.
General	API	Previously, when using the API to send an update to an existing Contact Comment and the <UserTo> is included, It would add the user even if that user entry already exists resulting in displaying the same user multiple times. This is now resolved.
General	API	Now when using the API you can now update an existing comment as expected.
Memos	Memo Triggers	When using the Trigger type of New Appointment with State as the Criteria the memo was not being triggered. This is now resolved.
Report Builder	PDF Summaries	In Report Builder, when generating a report with PDF summaries split cases would add the Face Amount together. The Face Amount will display the correct amount on PDF summaries.

* Updated API documentation can be made available upon request.