

UserVoice Enhancements to Agency Integrator for June 24, 2023

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	Carrier/Product Attachment	Agency Integrator Carrier and Plan IDs you have attached can now be exported to Excel from the Carrier product attachment tool.

Enhancements to Agency Integrator for June 24, 2023

Module	Section	Enhancement
Applications	Application Detail	When using Annuity product type, the screen label will now read Annuitant instead of Proposed Insured.
General	API	You now have the ability to update/populate the Insured Cell Number.
Report Builder	Report Availability & Saved Criteria	The Save Criteria and Report Availability Report Builder 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.

Changes to Agency Integrator for June 24, 2023

Module	Section	Change
Actual Commissions	Statements	When creating a quick case on the statement batch detail, you will no longer get an unexpected error.
Applications	Memos Tab	Previously CC memos were not sending because the CC addresses were not formatted correctly. Now when you Copy/paste an email address into the 'Name' field of the CC area when generating a memo, The brackets are no longer being included in the field.
Applications	Memos Tab	Screen notification 'For multiple emails, use the additional recipients section below' has been added for the To: field on the Send memo screen.
Applications	Premium Detail	Previously, when selecting an Approved Rate Class on the Premium Detail tab on applications using the Mode of Annual, your selection in the Approved Rate class field would disappear after returning to the case, even after saving. this is now resolved.
Applications	Product Specific Tab	When in an application, you could no longer click on Tabs -> Product Specific and choose the product type to modify. This is now resolved.
Contact Detail	Appointments	Previously, the AUTO REC REQ preference would add the current date to the Expiration Date on newly created appointments. This preference will now work as expected.
IGO	Application Detail	Increased the User profile phone field from 20 to 30 characters. Previously if the phone number was greater than 20 characters you would get an error trying to Go an iGO case.

* Updated API documentation can be made available upon request.