Agency Integrator

UserVoice Enhancements to Agency Integrator for January 23, 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
Commissions	Actual Commissions	The **Commission Statement Import Template** has been enhanced, allowing you to populate **Custom Field** values on the Excel Spreadsheet that will be automatically added to the Commission Batch, once imported. The updated Template with further instructions is available in its usual place, on the **Statement Batch Header** screen in the **Actual Commissions** module.
General	Custom Fields	All **Custom Fields** in all areas of the system can now accommodate up to 50 characters, rather than the previous limit of 30 characters.
Report Builder	App Info Data Groups	The **Owner** field from the **Additional Detail** tab on an Application has been added to two data groups in **Report Builder** as a column: **App Info-Agents** and **App Info-Agents w/ Split Premium**. This new field is available to include on new reports, or add to existing reports.

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Agency Integrator API	1204 Transaction (Contact Create)	Today, to add **Codes** to Contacts through the API, you must send the **Code Family** and **Code** by their system ID numbers. Two new elements have been added to the 1204 API transaction: **CDCodeName** and **CDFamilyName**, enabling you to send in a Code Family and Code by name, rather than ID. The existing ID fields will still be available for use, so if you use those elements today and send in Codes by ID, you do not need to make any changes. The new elements (in bold) have been added to the existing CDAgent node as seen below:
		
		`<CDAgent>`
		`<CDCodeID>803</CDCodeID>`
		`<CDFamilyID>4</CDFamilyID>`
		`<CDCodeName>Gold</CDCodeName>`
		`<CDFamilyName>Agent Level</CDCodeName>`
		`<ActiveDate>2010-01-01</ActiveDate>`
		`<InactiveDate>2011-01-01</InactiveDate>`
		`</CDAgent>`

Changes to Agency Integrator for January 23, 2021

Module	Section	Change
Administration	InsureSight Admin	In **InsureSight Admin**, you will again be able to enter **Goals** for the year 2020. **2020 (Previous Calendar Year)** is now an available option on the **Year** drop-down list.
Applications	Application Entry Wizard	When entering a new Application, the **Matching Applications** pop-up will no longer display the Application you are currently entering.
iPipeline CRM	Applications	In instances where an Application's **Product** has more than one **Product Variations** attached, the Product Variation name in **CRM** would sometimes display the wrong Variation's name on the **Opportunity**. To fix this issue, **Product Variation** needs to be synced from AI to CRM as a separate field, rather than being appended to the Product Name, as it is today. That change will be addressed in a future release, but to remediate the issue for now, the **Product Variation name** will no longer appear on the **Opportunity** in CRM.
Report Builder	App Info-Comments Data Group	Some customers have experienced slowness when running certain reports in the **App Info-Comments** data group. We've identified and resolved the issue, and those reports should run at their usual speed now.
Report Builder	Hierarchy Criteria	When selecting Criteria to run reports in the **Agent Info - Appointments** data group, an issue with the **Hierarchy Level** and **Hierarchy Entity** has been resolved. You will now be able to see and select the existing Hierarchy Level and Hierarchy Entity values as expected.