



This TechNote highlights a new feature added to the **Commissions Schedules** module in **Agency Integrator**, specifically the **Schedules** area of the system.

As requested by you through UserVoice, our Enhancement Request tool, you can now Export Commission Schedules and Subschedules and import Commission Subschedules for processing in **Agency Integrator** using a template. This TechNote will cover downloading and populating the template, importing the template, troubleshooting errors in processing, and Exporting Schedules and Subschedules.

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Importing Commission Subschedules

To start the process of Importing Commission Subschedules, simply create a new schedule or edit an existing Schedule.

- 1) Click on **Administration**, **Commissions** then select **Schedules**.

The screenshot shows the 'Agency Integrator' application. The 'Administration' tab is selected in the top navigation bar. Below it, the 'Commissions' sub-tab is active. In the 'Commissions' dropdown menu, the 'Schedules' option is highlighted with an orange circle. Other options in the menu include 'Employee Compensation', 'Agent Schedule PDF Administration', 'Role Defaults', 'Custom Fields', 'Payment Types', and 'Actual Commissions'. The main content area shows the 'Schedule Management' form with fields for 'Schedule ID', 'Carrier', 'Product', 'Show', 'Schedule Name', 'Start Date', 'End Date', and 'Organization'. Below the form is a table with columns: ID, Name, Start Date, End Date, Available, Products, Schedule Type, and Organizations. The table currently shows 'No schedules found.'

On the **Schedule Management** screen, perform a search to work with an existing schedule or create a new schedule.

This screenshot shows the 'Schedule Management' form with the search criteria highlighted by an orange box. The criteria include:

- Schedule ID: (empty)
- Carrier: Banner Life
- Product: select...
- Show: Available & Active
- Schedule Name: (empty)
- Start Date: (empty)
- End Date: (empty)
- Organization: select...

 Below the search form is a table with columns: ID, Name, Start Date, End Date, Available, Products, Schedule Type, Organizations, and Hierarchies. The table contains three rows of data:

ID	Name	Start Date	End Date	Available	Products	Schedule Type	Organizations	Hierarchies
1299	Bradford Agent schedule			Y	Y	Agent	Y	
1298	Bradford Schedule Gross			Y	Y	Gross	Y	
1147	Master Banner Gross			Y	Y	Gross	Y	

 At the bottom of the table are 'Add Schedule' and 'Cancel' buttons.

There are two new links found on this screen: **Download Template File** and **Import Sub-schedules**.

Schedule Management
 Schedule ID:
 Carrier:
 Product:
 Show:
 Search

Schedule Name:
 Start Date:
 End Date:
 Organization:

Schedules

ID	Name	Start Date	End Date	Available	Products	Schedule Type	Organizations	Hierarchies
1299	Bradford Agent schedule			Y	Y	Agent	Y	
1298	Bradford Schedule Gross			Y	Y	Gross	Y	
1147	Master Banner Gross			Y	Y	Gross	Y	

Downloading the Template File

In order to import your sub-schedules into Agency Integrator, they must first be input into the **Commission Subschedule Import Template** to ensure uniformity of data for processing. To access this new template, click on the **Download Template File** link and the template will open in Excel:

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Schedule ID	Subschedule Name	Rate	Payment Type	Based On	Paid By	From Year	To Year	Minimum Age	Maximum Age	Minimum Face	Maximum Face	Minimum P
1													
2													
3													
4													
5													
6													
7													
8													

Important Note: You do not need to download the template file each time you input a new Subschedule. Feel free to save a copy to your computer and populate and change that version with each new Subschedule you process.

Populating the Template

The Commission Subschedule Import Template has rules assigned to each column of data to assist with the import to Agency Integrator. **Rules must be adhered to, or the system will report errors and may not successfully import the Subschedule.**

- Columns may not be added or removed from the template. Even if a column is blank and contains no data, it must be left on the spreadsheet.

- Columns with **red** font are **required** and must be completed before importing the template.
- Columns with black font are not required and do not need to be completed before importing the template.
- Exact spelling and spacing are required
- You can combine multiple Schedules on one import template, if you list the appropriate Schedule ID
- Can attach to custom Payment Types you have created in your system
- Only one Carrier can be included per template
- If you leave the States blank it will assume All Other States
- By hovering over any column, a comment box will appear with information on what data is allowed in that field, and the way it needs to be formatted for successful import:

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Schedule ID	Subschedule Name	Rate	Payment Type	Required: Options are: *Commission *Bonus *ERA *Custom Types maintained by your Agency Custom Payment Types must be spelled exactly the same as they are in Payment Types Administration	By	From Year	To Year	Minimum Age	Maximum Age	Minimum Face	Maximum Face	Minimum P
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													

Once you have completed the **Subschedule_Import_Template**, save as an Excel workbook. Now you are ready to import the template into Agency Integrator.

Importing the Template File

To import the completed template into your environment, click the **Import Subschedules** button on the **Schedule Management** screen.

Schedule ID:

Carrier: Banner Life

Product: select...

Show: Available & Active

Search

Reset

Schedule Name:

Start Date:

End Date:

Organization: select...

Import Subschedules

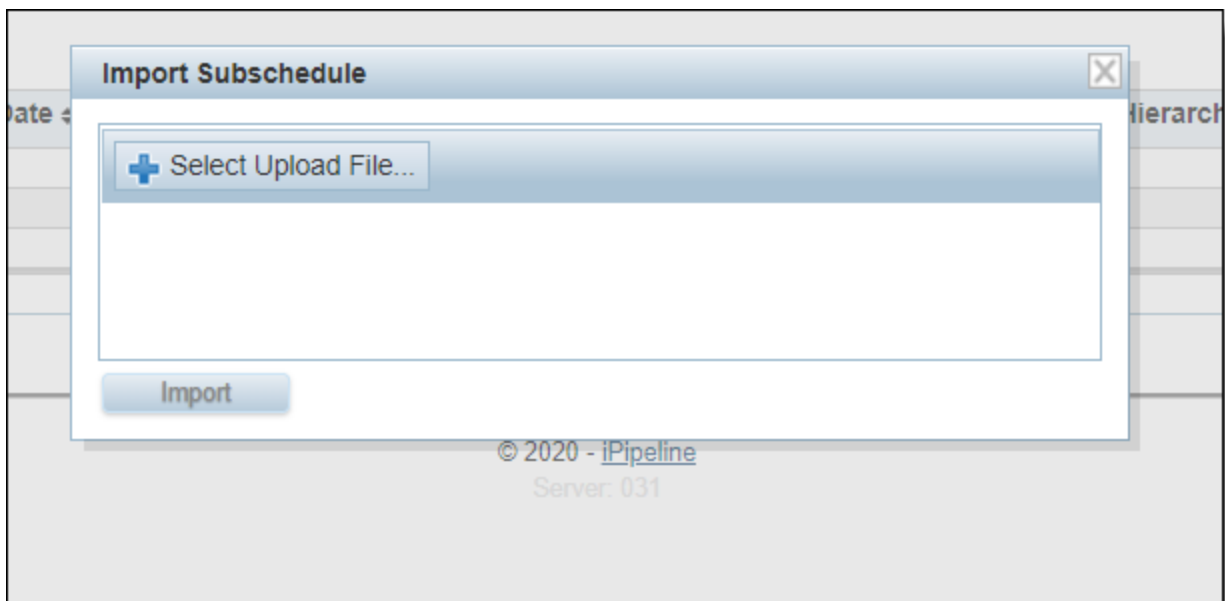
Download Template File (.xlsx)

ID	Name	Start Date	End Date	Available	Products	Schedule Type	Organizations	Hierarchies
1299	Bradford Agent schedule			Y	Y	Agent	Y	
1298	Bradford Schedule Gross			Y	Y	Gross	Y	
1147	Master Banner Gross			Y	Y	Gross	Y	

Add Schedule

Cancel

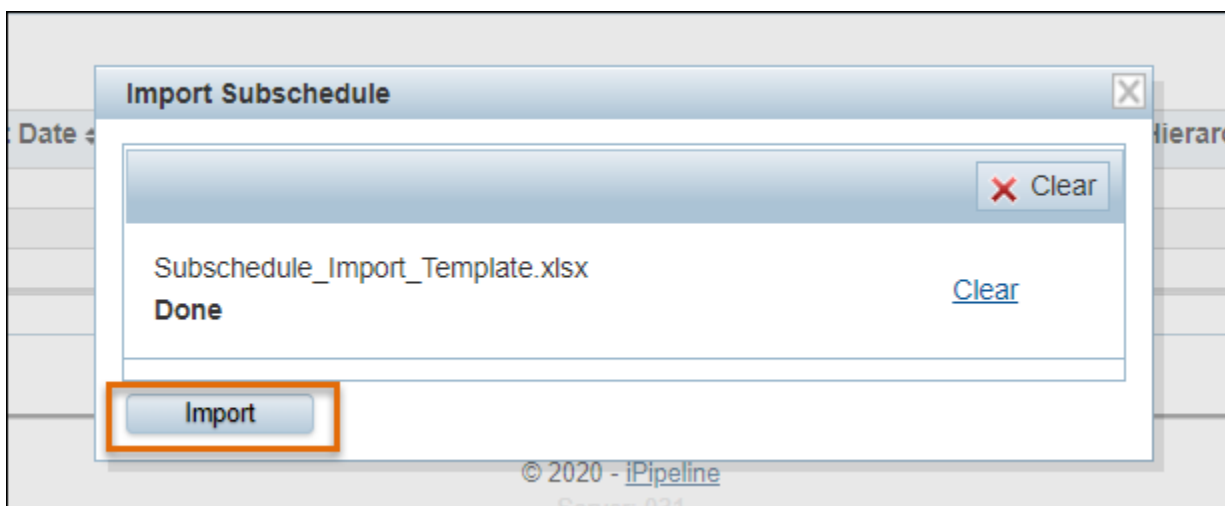
1) The **Import Subschedule** modal window will appear:



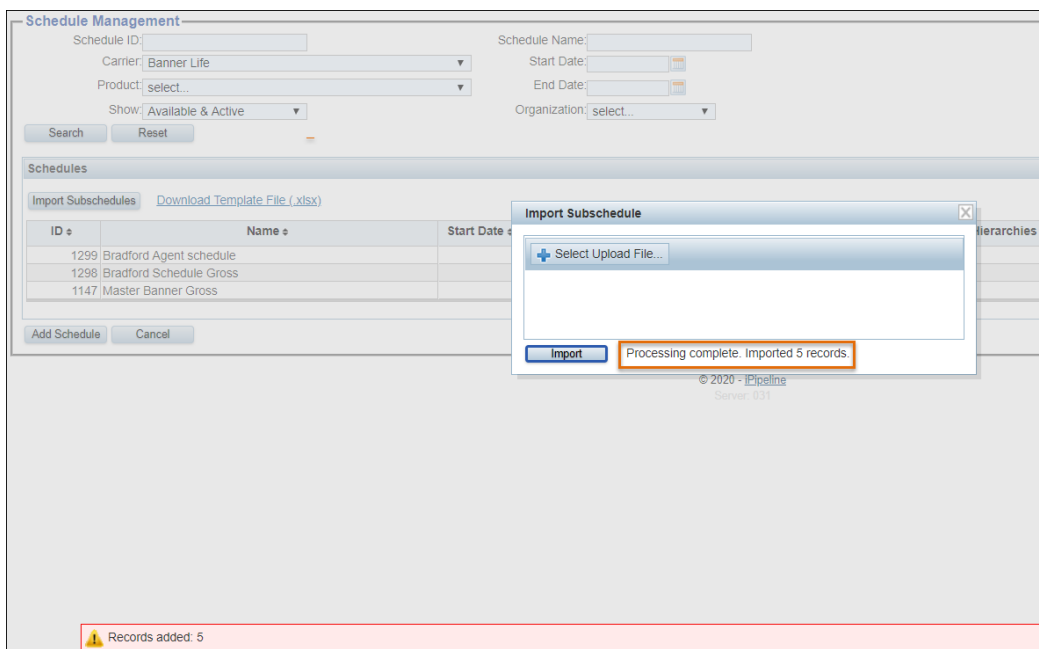
2) Click **Select Upload File** link, browse for your completed template file, and select it.

Processing the Template File

Once you have selected the Excel file to upload, the system will indicate that the file is done loading. Click the **Import** button. The data will load onto the **Schedule Detail** screen.



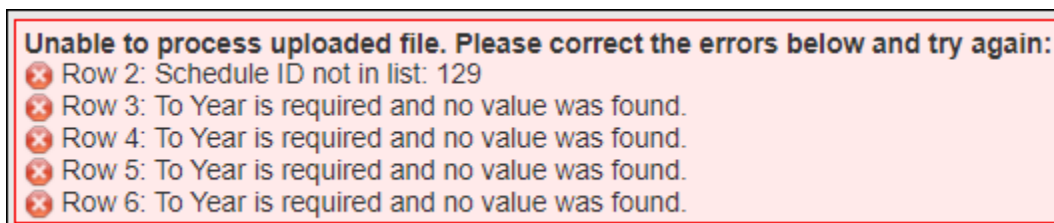
You will receive a message showing the number of records loaded.



If the import data was input without errors, you can continue with your usual Subschedule entry process. To continue click the “x” in the top right-hand corner of the Import Statement window to close it.

Error Handling

If there are one or more errors in the data you import, the file will not upload or process, and you will need to fix the errors on the spreadsheet and re-upload. A red warning box will appear at the bottom of the **Schedule Management** screen notifying you of the errors. The box will contain which row on the template file contains the error to assist in correcting the imported data.



To fix the imported data, open your saved excel file, proceed to the rows that the warning box referenced, and correct the data. Save the excel file with the changes and then repeat the steps to import the subschedule template. If all the errors were corrected, you will be able to continue.

Export Commission Schedules and Subschedules

To export Commission schedules and Sub-schedules in an Excel file format.

Export Schedules

- 1) Select a **Carrier**
- 2) Click **Search**
- 3) Click **Export Schedules and Subschedules**.

The screenshot shows the 'Schedule Management' window. Step 1: The 'Carrier' dropdown is set to 'Banner Life'. Step 2: The 'Search' button is highlighted. Step 3: The 'Export Schedules and Subschedules' button is highlighted. Below the buttons is a table of existing schedules.

ID	Name	Start Date	End Date	Available	Products	Schedule Type	Organizations	Hierarchies
1487	Agent schedule (Inactive)					Agent		
1541	Banner Override schedule (Inactive)					Override		
1486	Banner Total Gross 2014 (Inactive)					Gross		
1299	Bradford Agent schedule			Y	Y	Agent	Y	
1298	Bradford Schedule Gross			Y	Y	Gross	Y	
1147	Master Banner Gross			Y	Y	Gross	Y	

Schedule export in Excel.

The screenshot shows an Excel spreadsheet with the following columns: Carrier ID, Carrier Name, Schedule ID, Schedule Name, Schedule Description, Schedule Type, Replaces Schedule, Start Date, End Date, Subschedule ID, Subschedule Name, Rate ID, Rate, Payment Type, Based On, Paid By, From Year, To Year, Minimum Age. The data includes various schedules for Banner Life, such as 'Agent schedule', 'Banner Override schedule', 'Banner Total Gross 2014', 'Bradford Agent schedule', 'Bradford Schedule Gross', and 'Master Banner Gross'.

Export Subschedules

1) Double click on the schedule you wish to export

Schedule Management

Schedule ID: Schedule Name:

Carrier: Start Date:

Product: End Date:

Show: Organization:

Schedules

ID	Name	Start Date	End Date	Available	Products	Schedule Type	Organizations	Hierarchies
1487	Agent schedule (Inactive)					Agent		
1541	Banner Override schedule (Inactive)					Override		
1486	Banner Total Gross 2014 (Inactive)					Gross		
1299	Bradford Agent schedule			Y	Y	Agent	Y	
1298	Bradford Schedule Gross			Y	Y	Gross	Y	
1147	Master Banner Gross			Y	Y	Gross	Y	

2) Click **Export Schedules and Subschedules**.

Agency Integrator

Command Center | Contacts | Applications | Report Builder | Administration

Application Management | Commissions | Contact Management | System | Users | Resources | Help

Signed In As: abradford | Logout

Schedule Detail

Schedule ID: 1299
Carrier: Banner Life
Schedule Name:
Schedule Description: Agent schedule
Schedule Type: Agent
Override/Gross Schedule: Bradford Schedule Gross (Gross)
Replaces Schedule:
Start Date: End Date:

Available For Use: ☒

Subschedules | Attached Organizations (2) | Hierarchy/Tiers (0)

ID	Subschedule	Products
2814	term	Y
3374	term	
2815	UL	Y

[Clear Sorting](#) [Reset Table](#) [Configure Table](#)

3) Subschedules in Excel.

AutoSave Banner Life 9_18_2020 (1).xls - Compatibility Mode - Excel

	Carrier ID	Carrier Name	Schedule ID	Schedule Name	Schedule Description	Schedule Type	Replaces Schedule	Start Date	End Date	Subschedule ID	Subschedule Name	Rate ID	Rate	Payment Type	Based On	Paid By	From Year	To Year	Minimum Age	Maximum Age
1	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				2814	term	5539	105.00000	Commission	Base Premium	Carrier/Other	1	1		
2	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				3374	term	7041	120.00000	Commission	Base Premium	MGA	1	1		
3	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				3374	term	7042	90.00000	Commission	Base Premium	MGA	1	1		
4	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				3374	term	7043	90.00000	Commission	Base Premium	MGA	1	1		
5	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				3374	term	7044	90.00000	Commission	Base Premium	MGA	1	1		
6	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				3374	term	7045	120.00000	Commission	Base Premium	MGA	1	1		
7	7	Banner Life	1299	Bradford Agent schedule	Agent schedule	Agent				2815	UL	5540	75.00000	Commission	Base Premium	Carrier/Other	1	1		