Agency Integrator TECHNOTE

Premium Detail Update Premiums Applied for and Approved

February 2024



This TechNote details the updated Premium Detail tab with a fresh look and functionality, introducing Premium History and a Duration field.

## **Premium Detail**

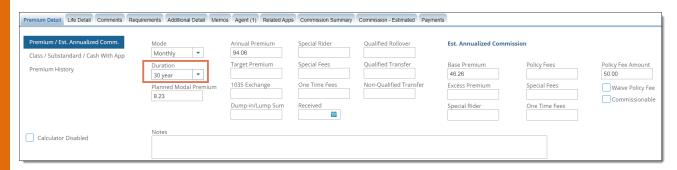
The updated Premium Detail tab is divided into three sections, which are as follows:

- Premium / Est. Annualized Comm.
- Class / substandard / Cash with App
- Premium History

### Premium / Est. Annualized Comm.

The Premium and Estimated Annualized commissions details are displayed in the first section. The UI refresh includes a cleaner look with a larger font size, **a** modern feel, and a new Duration field.

The Notes panel remains fixed at the base of the screen and seamlessly moves along with the user as they explore different sections of the detail.



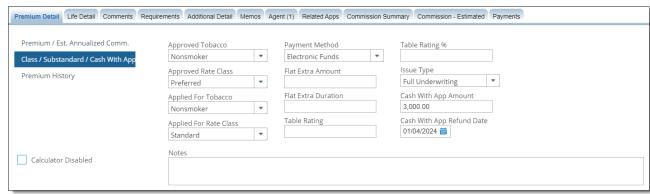


#### **Duration** field options:

- Life Pay
- Pay to 65
- 5 pay
- 7 Pay
- 10 Pay
- 15 year
- 20 year
- 25 Year
- 30 year
- 35 Year
- 40 Year

# Class / substandard / Cash with App

The class substandard and cash with app section has the same fields, but with a fresh look and feel.

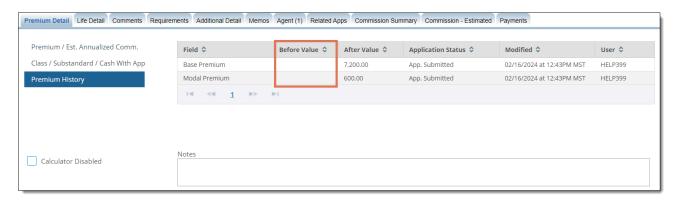


### **Premium History**

A new section has been added to track changes in Premium Fields with a Before and After value by Status. The initial entries will not have a before date and will be considered the "Applied for" premium. The final change recorded in the history and reflected on the case will be considered the "Approved" premium.



### Applied For Premium:



#### Approved Premium:

