

UserVoice Enhancements to Agency Integrator for August 3, 2024

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
Application	Additional Detail Tab	The Notes Field of the Additional Detail tab on an Application will now allow up to 1000 Characters.
Application	Premium detail	When using Auto Receipting , the Modal Factor will also update when the mode Updates, ensuring that the Annual Premium is correct.
Report Builder	App Info Agents data Groups	The Rate Lock Expiration Date the newly added field has been added to the Annuity Detail tab. It is now available in Report Builder Data Group's App Info - Agents and App Info - Agents w/split premium as Criteria and a Column .

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Application Entry	Premium Detail	The Application Entry process has been updated with our new UI to align with the Application Premium Detail .
Administration	User Administration	We can now control SalesIntegrator capabilities within Agency Integrator by hiding or adding Dashboard widgets at the admin level. To add or remove the Sales , Top Agents , Top Selling Products , or Agents Birthday Widgets , please get in touch with your Customer Account Manager.
Contacts	Hierarchy tab	The Add Hierarchy screen on the Hierarchy tab of the Contact Detail has undergone a UI rewrite. It has the same functionality with an added Search feature and a new look.
Contact Management	User Administration	The User Association 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	Application and Contact Comments sent in the <AttachmentData> element will now accept tags to allow for some formatting.
General	iGO Integration	In the past, we encountered problems with matching agents because some BGAs had multiple agents matching the data sent by iGO , including SSN and Email , to their AMS XSLT. We now allow for an extra dataset, iGoLoginID , to help with the matching process.
System	Plan Replacement	The Plan Replacement 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.

Changes to Agency Integrator for August 3, 2024

Module	Section	Change
Application	AR Queue tab	Previously, when the Home Phone Number and Extension associated with the application Auto Receipting Profile are received from the AR Queue screen, it did not populate or override the existing Phone field. This issue has been resolved.
Application Management	Custom Requirement Defaults	Custom Requirement Default Notes have been extended to 300 characters to match the Requirement Notes field.
Command Center	Command Center Filter	Previously, the Command Center Filters were not working properly when using Premium and Status Criteria together. This issue has been resolved.
Contacts	Related Contact Tab	Previously, when a Contact was created in Sales Integrator and accessed in Agency Integrator , the Related Contacts tab wouldn't populate. This issue has been resolved.
Memos	Triggers	Previously, when adding Field Criteria to a Memo Trigger it would result in an unexpected error. This is now resolved.

* Updated API documentation can be made available upon request.