

UserVoice Enhancements to Agency Integrator for January 25, 2025

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
Report Builder	App-Info Agents	<p>The addition of new fields to the Report Builder Data Groups for App-info Agents and App-Info Agent w/ Split Premium. These new fields will provide more comprehensive data and enhance your reporting capabilities.</p> <p>Newly Added Fields:</p> <ul style="list-style-type: none"> Primary Beneficiary Primary Beneficiary Relationship Contingent Beneficiary Contingent Beneficiary Relationship Owner Address 1 Owner Address 2 Owner City Owner State Owner Zip Code

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Module	Section	Enhancement
Administration	Carrier & Product admin	The Product and Carrier fields in the Carrier/Product Administration will now dynamically expand to display the full name.
Application & Commission	Alerts	The Alerts for Applications and Commission tabs have undergone our UI Refresh and are 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.
Report Builder	Reports tab	In the Reports tab of Report Builder , a new column called ' Agency Last Run Date ' has been added. This column will help identify and clean up old reports that are no longer used by any users in their environment. If the column is blank, it indicates that the report has either been newly created or recently edited and has not yet been run.
Report Builder	App-info Agents	Duration has been added as a new Criteria field to the Report Builder data group for App-info Agents and App-Info Agent with Split Premium .

Changes to Agency Integrator for January 25, 2025

Module	Section	Change
Administration	Roles	When creating a User Role and checking the Include All Users checkbox , you will no longer receive an unexpected error.
Document Vault	Add	Previously, when using a Windows PC, you could attach a document with a comma in its title. However, if you double-click the document to view it afterward, you might encounter an error message stating, "This page isn't working right now." This issue has now been resolved.
Report Builder	App-info Agents	Previously, the Report Builder field ' Last Commission Posted Date ' no longer displayed data on reports. This issue has been resolved, and the reports will display as expected.