

UserVoice Enhancements to Agency Integrator for December 06, 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	Run Report	<p>We've added new Predefined date options to the Report Builder to make future-focused reporting easier and more flexible. Users can now filter reports using a range of future date presets, perfect for tracking upcoming events like Birthdates, Rate Lock Expiration Dates, and Surrender Dates.</p> <p>New Predefined Date Options:</p> <ul style="list-style-type: none"> Next 7 Days Next 14 Days Next 30 Days Next 365 Days Next Week Next Month Next Quarter Next Year

Changes to Agency Integrator for December 06, 2025

Module	Section	Change
Applications	Application Create	When creating an Informal or Pre-Application , the Auto-Generate Appointment and Licenses will no longer populate.
Doc Vault	Add	You can now successfully upload files with the .PDF extension (uppercase) without encountering the error message: "File type is not accepted for document upload".
Carrier feeds	Pending Case Satus	Previously, when using Pending Case Status feeds and a Requirement is created by Auto-Receipting in an Outstanding Status , and then later, the same Requirement is fed down a Cancelled Status , but it does not update the requirement in AI. This is now resolved.
Report Builder	Run Report	Previously, running a Comment Report that included the criteria Illustration Product caused the report to crash. This is now resolved.