

Changes to Agency Integrator for January 23, 2026

| Module | Section | Change |
|--------------|----------------|---|
| Applications | App Entry | If a primary agent already exists when entering an Application and a new agent is added, then the original primary agent is deleted, the application entry process is completed, and the application is saved, the agent information initially appears as expected. However, after exiting and reopening the application, the Primary checkbox becomes unchecked, resulting in no agent details being displayed at the top of the screen. This is now resolved. |
| Applications | Go/No Go Modal | The Case Manager Email and GA Number now correctly populate in the Go/No-Go modal . Users will see these fields automatically filled as expected. |
| Applications | Memos Tab | Previously, when adding the 'CC' field to a Memo Template , the CC recipient would only appear in the memo if the CC was attached to the contact record of the memo recipient. If the CC was added during memo generation or editing (before sending), it did not display in the memo as expected. This is now resolved. |
| Applications | Requirements | Previously, when a user updated the Requirement Follow-Up Date using the Calendar picker in the Requirements Tab , the Review Date did not update automatically. This caused inconsistencies between the follow-up and review timelines. This is now resolved and will be updated. |