Summary of Changes
v5.1.3.6197 to v5.1.3.6279

SmartOffice®

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Overview

While this update contains many detailed changes, enhancements, and solutions to many areas of SmartOffice, the objective was not to add more features to the system. A significant focus of this update was to continue to make the system easier to use by improving navigation and consistency while continuing efforts to reduce keystrokes.

Detailed Listing of Changes

Core System

Enhancements

SmartView for Advisors

In SmartView for Advisors, the Created By columns have been enhanced to be more accessible to the user.

Key Relations

When a Business Relation is added to a Contact's Key Relations, the reciprocal relation is now added to the Business.

Solutions

Contact

- An issue with a spouse's name displaying incorrectly on certain spreadsheets has been resolved.

- An error when converting a contact to a different type has been resolved.

SmartPad

An issue with new SmartPad entries displaying the incorrect date has been resolved.

Data Import

The Data Import error log has been enhanced to show only one error report for Data Import issues caused by improper column mapping.

Record Sharing

Various issues with the Record Sharing functionality have been resolved.

Framework

An issue with cross-site security has been resolved.

Enterprise

- An issue with adding SmartPad notes while in Enterprise View has been resolved. Posting to the SmartPad while in Enterprise View no longer causes an error.

- An issue with posting e-mail to contacts in a different office while in Enterprise View has been resolved.

Mass E-mail

The issue with some contacts receiving embedded images as attachments to e-mail messages has been resolved.

SmartCalendar

Solutions

- An issue with Internet Explorer when running Activity reports has been resolved.
- The issue with the sorting function not working for SmartPad - Calendar Activity Notes from the AgendaView has been resolved.
- Users are no longer reminded upon each login for activities that have been dismissed.
- The Reminder value is now saved when users create activities for other users.
- An issue with the Reminder time resetting to zero, regardless of the set value, has been resolved.
- The Default Appointment Reminder set in User Preferences now functions properly.
- Clicking the Contact Name hyperlink in the list of Untimed Activities no longer results in an error.
- Activity Reminders for Untimed Activities are now displayed properly.

Advisor/Agency

Enhancements

Calculations made through the Production Dashboard can now be based on Commissionable Annualized Premium as well as Annualized Premium.

Solutions

- Advisor requests are no longer added when the expiration date is not specified for Contracts, Licenses, Appointments, and E&Os.
- A blank dialog box no longer opens when marking an Advisor Request as complete for the Child office (through Enterprise View) where Contracts, Licenses, Appointments, and E&Os need to be created.
- Adding advisor requests for Contracts, Appointments, Licenses, and E&Os are no longer mandatory.
- The Insert/Update error when adding contracts for the advisor in the Child office that has the same Advisor ID as that of a Parent Advisor ID has been resolved.
- All licenses and roles are no longer available for SmartView for Advisors users when the Outlook Integration license is not selected for the office.
- The Insert/Update Failed error that displayed when completing a Contract type of advisor request for a Child office while logged into a Parent office has been resolved.
- The Failed to Load Object error when deleting the license added for the Child office with the Advisor Diary selected while in Enterprise View has been resolved.
- A combined search for Individuals/Businesses for SmartView for Advisors users now returns the correct results.
- The SmartView for Advisors User Management button is now functional on the Advisor/Agency Summary.

SmartCaseManager

Enhancements

- The Case Manager name now displays within the E-mail Case Status message enabling only recipients of a case status e-mail to see who the case manager is.
- When generating a letter from the child case level, the new ReceivedINFORMALrequirements and OutstandingINFORMALrequirements merge codes now retrieve the group of requirements from both the parent and child levels that fit the criteria for each given merge code.
- The Annual Premium is now calculated based on (Modal Premium/Modal Factor) = Annual Premium.
- The Pending Case Detail Report now displays the Case Manager field. The Sort By value is now also displayed on the report.
- The Case Manager table is now available from the PCM Requirement report definition and the User table has been renamed to Requirement Manager.
- The Reimbursement section is now visible and accessible from the Underwriting Requirement Details dialog box.

Solutions

- Parent level requirements now follow the initial workflow defined along with the child case level requirements.
- Previously, when defined in the Await Approval Policy/PCM setup, if a Requirement was added before the Case was Approved, the Case Status was changed to the previous status only when the workflow-based status was shown. The Status is now retained correctly.
- The Marketing Manager, Office Code, and Region Code are now properly displayed when adding child cases from the Child Informal Application Summary.
- The ACORD Code and NAILBA Code columns now display valid codes on the Underwriting Requirement Summary.
- The Requirement Status Date now conforms to the set Date Preference on the user level. If the preference has not been specified, it will conform to the Office Setup date format; if no format is specified at the office level, the Status Date will conform to the MM/DD/YYYY format.
- When Adding the Service Provider (SP) Account #, selecting the Service Provider first is now mandatory. In addition, if the Service Provider is not listed as **General**, only the Account # related to that Service Provider will display in the SP Account # Summary when adding the SP Account #.
- Records linked from the main deleted record no longer have a proper Linked ID so they will no longer present the possibility of falsely linking to other records.
- The error when selecting the **Rating** hyperlink within the Policy Relationship dialog box for policies created through DataXchange services has been resolved.
- The Outstanding Req. Status Date on the E-mail Case Status Report now displays correctly.
- When adding a new requirement, the follow-up date will now be populated based on the settings at the carrier level. If the settings are not defined at the carrier level, then the logic will retrieve the details from the Policy/PCM Setup; if the details are not found, the default will be one day from the day the requirement was added. In addition, for informal applications, the correct Informal PCM Workflow will now be followed for both the Parent and Child levels.

- The proper table is now displayed when adding a filter using the Issued Risk Class system filter. Proper data is now populated in the Pending Case Summary for the Proposed.RiskClass column.
- For the Default Home Page at Login User Preference, the PCM Reports option now works correctly.
- For the Fund Amount field, on the Exchange Information Detail, Exchange Information Summary, and Pending Case Summary tabs:
  o The comma separators now display for every 000's
  o The decimal place displays correctly up to the hundredth
  o The total sum of the Fund Amount is calculated correctly up to the hundredth value entered.

SmartPolicies
Enhancements
- The Policy Relationship Remarks field can now store up to 50 characters instead of 30.
- The Product Fee section has been added on the carrier level. When a pending case is added, for Premium Calculation, SmartOffice will first check for the required information at the product level and if the information is not available, the same will be taken from the Carrier - Product Fee section. A new field for Annual Prem has been added to the Pending Case Detail - Premium Information section.
- For Policies created through the DataXchange service, the Issue Age is now calculated correctly.

Solutions
- From the PCM Add dialog box, the DOB added from the Insured 1 section is now populated with the correct date format in the Individual Contact section after clicking the **Add** button.
- The Age field in the Insured-1 section of the PCM Add dialog box now displays the correct Age value even when using the DD/MM/YYYY date format. In addition, the Age fields for the fourth and fifth policy roles are populated correctly when the DOB is entered in the Insured-1 section.
- The Create New Applicant Record and Use Existing Applicant Record options now display as enabled when adding an individual policy using the Quick Add/Search feature from all Contact tabs.

SmartBenefits
Solutions
- When the Group Policy is deleted, the deleted policy for the linked members is now removed and will no longer display under the contacts' individual policies.
- The Insert/Update Failed error encountered when deleting members from the Group Plan Summary has been resolved.

SmartInvestments

Solutions

- The user is no longer prompted for missing prices for a month-end date that falls on a weekend if the price of the last business day that month is available in the Security Master - Price History.
- The Tax Cost on the Position Detail has been resolved to display the correct Tax Cost for the position.
- The Position Validation issue where the position was showing an Active Position Status, even though there was a Liquidated Date, has been resolved.
- An issue involving the System Date and Time Stamp that caused performance data not to display on a couple of reports has been solved.
- The correct column heading is now displayed on reports with the ability to run without income.

SmartCommissions

Enhancements

- A Singapore-specific transaction of Top Up premium has been added to the Commissionable Premium Policy Transaction tab. When this option is selected, a policy can have commission projections performed for a completely different product if required.
- The feature of displaying the reconciled status within the Speed Receipt Entry function has been enhanced to enable users to filter on a specific status.
- A sort feature has been added to the Quick Match feature of Speed Receipt Entry.
- A new report link has been created in the Agency Commission report category of Dynamic Reports to link the agency revenue to the advisors on the case. Data can be extracted and moved to Excel for complex calculations.
- Additional fields have been added to the Top Up enhancement to include the Mode of Premium and Product.
- The mass projection tool has been enhanced to allow large volumes of data to process.

Solutions

- An issue was resolved with the Advisor Merge that was leaving commissions still linked to a deleted Advisor. The commission contacts now successfully merge along with all other Advisor data.
- An issue was addressed with contacts from Speed Receipt Entry moving into Carrier Posting in an open (Speed Receipt Entry) status and never being reconciled, yet commissions were being paid on these transactions. The open (Speed Receipt Entry) transactions, if not reconciled, will be disassociated with the carrier posting and will not be released during a commission check run.
- Changes were completed for commission statements. A Singapore-specific enhancement changed the view of the advisor name on the statement and a general change was completed that will display the batch date on a statement instead of the current date.
- The logic that runs the commission system has been changed from database triggers to application triggers to give the application more stability with large volumes of data.
- The Mass Commission Projection utility as well as the Calculate Commission option from the policy area were incorrectly setting the due date of the commission transactions if the user entered a different starting date range. The logic now is based off the policy date.

- An issue was identified and resolved where one month of payments were being skipped while projecting commissions for a policy in a monthly mode.
- An issue has been resolved where rider commissions were being projected even when a rider product was not identified. This was causing rider information that was entered for informational purposes to create commission errors.
- Adjusting entries are now populating properly on commission statements.
- The Speed Receipt Entry feature no longer has an issue with the Create Carrier Posting option when multiple carriers are identified.
- Invalid transactions are no longer generated from the Illustration Import Calculate Commission feature when a year is not identified. Now, if a year is missing, the error is logged in the CTM Error log.
- Performance issues have been addressed in the Speed Receipt Entry Quick Match/Reset function by removing logic that updates the reconcile status into a stand-alone button that the user can run upon request.
- Logic has been changed around the Mass Commission Projection feature so contacts that are linked to a Speed Receipt Entry will not be deleted and recalculated.
- The mass projection utility and calculate commission utility within a policy no longer use the start date of the utility as the due date instead of using the policy date as a due date.
- The recalculation logic within the mass projection utility and the calculate commission utility now project commissions between reconciled transactions enabling the user to project for missing periods.

SmartRecruiting

Enhancements

Two new columns, Days in Current Stage and Days in Current Status, have been added to the Recruit table (under the Recruit Additional Info table).

SmartMail for Outlook

Solutions

- An intermittent issue with the SmartMail for Outlook component locking up when attempting to post new mail has been resolved.
- When a user attempts to post an e-mail that has been posted previously, they are now prompted that the message has already been posted to the SmartPad. In addition, the name of the Previously Posted-to Contact(s) are displayed on the Posting dialog box.
- When a new message is created from the Policy/Pending Case areas, the PCM button is now displayed on the Posting dialog box.

SmartLink for Outlook

Solutions

An Issue related to Activity Reminder and Participant information not synchronizing correctly has been resolved.

SmartMail for Lotus Notes

Solutions

When a new message is created from the Policy/Pending Case areas, the PCM button is now displayed on the Posting dialog box.

SmartLink for Lotus Notes

Enhancements

When meetings that have been added in SmartOffice are synchronized with Lotus Notes, meeting invitations are now automatically sent to the other meeting participants.

Solutions

- An Issue related to activity reminder and participant information not synchronizing correctly has been resolved.
- The logged-in SmartOffice user's e-mail address will no longer display in the To field in addition to the Chair field for activities that are synchronized with Lotus Notes with the user as the only participant.

SmartMail

Solutions

A script error when adding recipients to SmartMail starting from the AgendaView has been resolved.

SmartLink for iPipeline

Solutions

The character ® "Registered Trademark" from the .def file is now being inserted correctly into SmartOffice. Previously, the product name "ChoiceUL®" was being inserted into SmartOffice as "ChoiceUL[¿]".

DataXchange Pending Case, Service Provider Interface, Advisor/Agency Appointment Download

Enhancements

- Contacts created through Direct Download and Replace (DDR) are now assigned to All Users instead of the Admin user for that particular office.

- Requirements from the Delivery tab of a pending case for requirements with a Direct Download and Replace Source type are read-only and can no longer be deleted. Policy notes can no longer be added, modified, or deleted for policies with a Source type of Direct Download and Replace.

- The Audit Log now displays a link to Pending Case Management so Related Pending Case records can now be accessed directly.

- The Advisor field has been removed from the GAID Validation screen.

- Service Provider now supports the transmission of Electronic Orders for the Diagnostic (DIAG) Requirement Type in addition to the APS, PARA, IR, and MVR Requirement Types.

- When processing a NAILBA pending case, a Primary Advisor record is now created in the HO Policy Relationship section.

- The DataXchange Pending Case Download, Direct Download and Replace (DDR) method has been enhanced to include the automatic creation of skeletal product records.

- The Audit Log sub-menu has been renamed to Import Log, which is now used by the Appointments Download in addition to the Pending Case Download, DDR method.

- A new Go to the Linked Record button from the Import Log Summary and Detail pages enables access to the linked table record's Detail and other related tabs.

- Two DDR download method options are available: Direct Download and Replace – Add Product featuring the automatic creation of product information and Direct Download and Replace without the creation of product information.

- The Import Log Summary can now be used for reporting purposes with the description column added that provides the download details.

- With the idea of having the Import Log table used by other integration services, the display of the Import Log sub-menu will no longer be dependent on licenses to HO Pending Case, SmartCaseManager, and the Pending Case & Policy Setup Administrator.

- From the Import Log, when accessing an Advisor/Agency Appointment record, a user is now able to make changes as if one were directly in the Appointment record from the Advisor | Contract/Appointment tab | Appointment Detail area. The Appointment Download is still in Beta.

- More required fields have been added for the Service Provider interface. If any required field is missing for a specific requirement type, the electronic order will be not be transmitted to the Service Provider.

- Required information is now being included in an electronic order submitted to the Service Provider, such as the Carrier Code, Carrier Name, Account #, Order Originator Contact Fax #, etc. Other non-required fields are now included, such as the Primary Agent's Contract # for the carrier on the case, Proposed Insured's Name Prefix and Suffix, and Doctor's Fax #.

- The Service Provider and Account # information is available from the Follow-Up Summary for Electronic Order Requirements.

- The electronic order now contains the information stating whether the requirement was requested by a Doctor or a Medical Facility and includes the contact name.

- The Spreadsheet Export button is now available for HO staging tables with a license to Data Export, such as the HO Dictionary Summary, NAILBA/ACORD Summary, and HO Pending Case Summary.

- A new category under the Pending Case Management family has been added to provide the ability to report on HO Pending Case information. This category is available with a HO Pending Case license.

Solutions

- The Pending Case Face Amount and Case Type are now correctly populated in the NAILBA 800 record, 0A record, positions 206-215, and position 216 respectively.

- Policy and Requirement Note data created by the pending case Direct Download and Replace method are now completely refreshed every time an update for the case is received.

- A Failed to Load Object error from the HO Notes area has been corrected.

- The HO Dictionary service now updates the requirement description if it is blank when a requirement code is found.

- The NAILBA pending case download now works in a WebSphere environment.

- The correct gender value is now inserted if there are multiple insured records for a HO Pending Case.

- The appropriate type of letters now display from the Side-By-Side Processing page after requirement changes.

- The Pending Case Download DDR method no longer inserts a blank Policy Status value when adding a pending case.

- The pending case download now has logic in place where the GAIDVALIDATE function runs after a new GA ID record is added or modified. Additional logic has been included to hide the HO staging records when a GA ID record is deleted.

- The HO Pending Case Dynamic Reports now exclude records that fail GA ID validation.