

# VTXml August 27 2012 Enhancement Release

## 1) InvestProduct Bulk Associate (enhancement request 1129)

Bulk Associate has been added to the Investment Options screen. This will allow a fund to be associated to any or all Policy Products.

Checking a Policy Product will add the fund to the specified Policy Product as seen below.

	Short Name (8)	Carrier Facing Description	Sequence	Modified On
<input checked="" type="checkbox"/>	109 - Balanced Fund (FFM)	Balanced Fund		8/16/2012 10:09:02 AM
<input type="checkbox"/>	107 - Growth and Income Fund (FFM)	Growth and Income Fund		11/16/2011 8:44:59 AM
<input type="checkbox"/>	101 - Growth Fund (FFM)	Growth Fund		11/16/2011 8:44:59 AM
<input type="checkbox"/>	106 - High Income Fund (FFM)	High Income Fund		11/16/2011 8:44:59 AM
<input type="checkbox"/>	1005 - American Century Income & Growth (FFM)	American Century Income & Growth		11/16/2011 8:44:59 AM
<input type="checkbox"/>	001gep1 - 1 Best Fundgep1 (FFM)	1 Best Fundgep1		11/16/2011 8:44:59 AM
<input type="checkbox"/>	012t - 12 Month Dollar Cost Averaging1 (FFM)	12 Month Dollar Cost Averaging CFD1		11/16/2011 8:44:59 AM
<input type="checkbox"/>	0061 - 6 Month DCA Fund1 (PCFM)	6 Month DCA Fund1		11/16/2011 8:44:59 AM

This functionality basically works the same way the other bulk associate checklists work in VTXml. Deleting and adding can be done on either side – directly on the fund or within the product.

## 2) Delete or Relaunch all on the Output Build History page (enhancement request 1296)

The Output Build History page has been updated to allow all builds on the page to be deleted or relaunched. If you have ten pages of builds you will need to delete or relaunch each, page by page. Single deletes and relaunches are still allowed as well. The header of the last column has been updated to be a checkbox which selects all builds on this page.

**Output Build History**       Annuity     Life

   10 rows per page

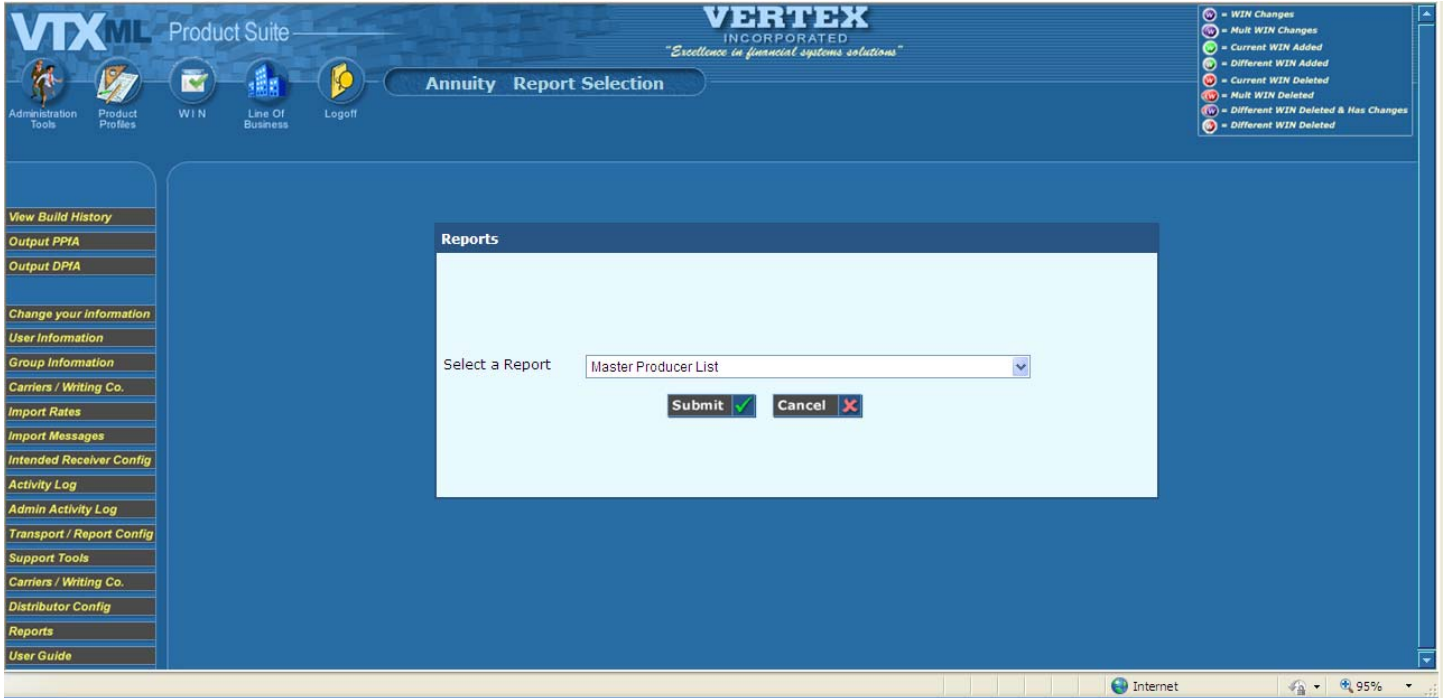
There are currently no builds processing.

	Type	Version	Rcvr	Writing Company	Item(s) Selected	WIN(s)	User	Created		
Relaunch										Check to Relaunch or Delete Build(s)
Delete									<input type="checkbox"/>	
	PPFA	2.22.01	EBIX	VERTEX, Inc	* VERTEX Equity Indexed Annuity - VTXINDEX * VERTEX Fixed Deferred Annuity - VTXVA2,20 * VERTEX Fixed Immediate Annuity - VTXSPIA	* Test WIN- delete New Bus FTP * test	Roger Morin	7/30/2012 7:09:06 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PPFA	2.22.01	EBIX	VERTEX, Inc	* VERTEX Equity Indexed Annuity - VTXINDEX * VERTEX Fixed Deferred Annuity - VTXVA2,20 * VERTEX Fixed Immediate Annuity - VTXSPIA	* Test WIN- delete New Bus FTP * test	Gary Parent	7/24/2012 1:33:03 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PPFA	2.22.01	EBIX	VERTEX, Inc	* VERTEX Fixed Immediate Annuity - VTXSPIA * VERTEX Variable Deferred Annuity - VTXVA1 * VERTEX Variable Deferred Annuity NY - VTXVANY	* Test WIN- delete New Bus FTP * test	Gary Parent	7/24/2012 1:27:15 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PPFA	2.22.01	EBIX	VERTEX, Inc	* VERTEX Equity Indexed Annuity - VTXINDEX * VERTEX Fixed Deferred Annuity - VTXVA2,20	* Test WIN- delete New Bus FTP * test	Gary Parent	7/24/2012 1:27:09 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PPFA	2.22.01	EBIX	VERTEX, Inc	* VERTEX Fixed Immediate Annuity - VTXSPIA * VERTEX Variable Deferred Annuity - VTXVA1	* Test WIN- delete New Bus FTP * test	Gary Parent	7/24/2012 1:27:06 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### 3) Master Producer List Report (enhancement request 393)

Reporting Services has been enhanced to include a new report showing all of the Distributors in VTXML. This report can be used when on boarding a new Distributor to see what the OrgCode or DTCCMemberCode are.

**Please verify the OrgCode and DTCCMemberCode before using. Also report any errors or omissions to [vtxmlsupport@vertexincorporated.com](mailto:vtxmlsupport@vertexincorporated.com).**



There are some duplicates in the report as there was not a clear indication of which name should be used. For example H&R Block – what should the correct name be? Please share any feedback on name updates or firms which should not be in the list as they are variations of Test Distributors.

## Master Producer List

Page 1 of 1

**This list is comprised of all Distributors in VTXml. Please verify the OrgCode and DTCCMemberCode before using. Also report any errors or omissions to [vtxmlsupport@vertexincorporated.com](mailto:vtxmlsupport@vertexincorporated.com)**

Name	Org Code	DTCC Member Code
1st Global Capital Corporation	FIRST_GLOBAL_FIDELITY	0226
1st Worldwide Financial Partners	PERSHING_AWF	0443
Advantage Capital Corporation	PERSHING_5U9	0443
Advisor Services	SCHWAB_AS	0164
AIG Financial Advisors	PERSHING_084	0443
Allegiance Capital	PERSHING_30C	0443
Allen & Company	ALLEN_CCG	0141
ALLSTATE_AD	ALLSTATE_AD	0222
American General Securities Inc	PERSHING_7FF	0443
American Portfolios Financial Services Inc	PERSHING_56V	0443
Ameriprise	HR_BLOCK	0756
Ameriprise Advisor Services Inc	HR_BLOCK	0756
Ameriprise Financial Advisor Services	AMPF	0756
Ameriprise Financial Services Inc.	HR_BLOCK	0756