

# VTXml July 2012 Enhancement Release

## 1) Save XML icon regular (left) click

On the Output Build Information page, the Save XML icon will now only require a regular (left) mouse click to save the output. Prior to this enhancement a right click was required to save the file.

### Build Information

Type	Version	Receiver	Writing Company	WIN(s)	Created By	Created
PPfA	2.20.00	Aplifi	VERTEX, Inc	* TEST 1103	Gary Parent	7/17/2012 1:40:00 PM

### Product Information

Distributor	Policy Product	Product Code	CUSIP
n/a	VERTEX Equity Indexed Annuity	VTXINDEX	8765432212
n/a	VERTEX Fixed Deferred Annuity	VTXVA2.20	14141414141
n/a	VERTEX Fixed Immediate Annuity	VTXSPIA	14141414444
n/a	VERTEX Fixed Immediate Annuity	VTXSPIASUB	14141414444



#### AFFIRM Environments

[Select All +](#) [Select None](#)

UAT (Not Sent)

[Click here to enter file name]


 **Save XML**
 **Error XML**

\*\* Save Instructions: Click on the icon to save file'

i - Info  
 ⚠ - Warning  
 ❌ - Error  
 📄 - Schema

IRI Schema Validation and Business Rule Errors/Warnings ID

❌ Failed IRI PPfA 2009-3' Schema Validation! Validation errors are below      \*\*File size = 399.7 KB\*\*

 Internet

## 2) Output Build History allows column sorting

The Output Build History page will now allow you to sort the columns to be able to find a specific output more easily. Enhancement request (#1087) was written to add a filter by user. We will be adding a sort for all columns to provide even more flexibility. The default sort is by the Created column.

**Output Build History**       Annuity     Life

   10 rows per page

There are currently no builds processing.

	Type	Prod	Version	Receiver	Writing Company	Item(s) Selected	WIN(s)	User	Created	
<input type="button" value="Set as Prod"/>	PPfA	<input type="checkbox"/>	2.20.00	Aplifi	VERTEX, Inc	* VERTEX Equity Indexed Annuity - VTINDEX * VERTEX Fixed Deferred Annuity - VTXA2.20 * VERTEX Fixed Immediate Annuity - VTXSPIA	* TEST 1103	Gary Parent	7/17/2012 1:40:00 PM	
<input type="button" value="Set as Prod"/>	PPfA	<input type="checkbox"/>	2.20.00	Aplifi	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXVA1	* TEST 1103	Gary Parent	7/17/2012 1:32:58 PM	
<input type="button" value="Set as Prod"/>	PPfA	<input type="checkbox"/>	2.22.01	EBIX	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXVA1	* TEST 1103	Gary Parent	7/17/2012 1:23:11 PM	
<input type="button" value="Set as Prod"/>	PPfA	<input type="checkbox"/>	2.20.00	Aplifi	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXVA1	* TEST 1103	Gary Parent	7/17/2012 1:06:17 PM	
<input type="button" value="Set as Prod"/>	DPfA	<input type="checkbox"/>	2.20.00	Aplifi	VERTEX Incorporated Life	* bug_1025 * bug_1120 * 220Test * RICH_SEC		Gary Parent	7/17/2012 12:45:10 PM	
<input type="button" value="Set as Prod"/>	PPfA	<input type="checkbox"/>	2.20.00	Aplifi	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXVA1		Gary Parent	7/17/2012 12:44:59 PM	
<input type="button" value="Set as Prod"/>	DPfA	<input type="checkbox"/>	2.20.00	Aplifi	VERTEX Incorporated Life	* bug_1025 * bug_1120 * 220Test * RICH_SEC		Gary Parent	7/17/2012 12:40:51 PM	
<input type="button" value="Set as Prod"/>	PPfA	<input type="checkbox"/>	2.22.01	EBIX	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXVA1 * VERTEX Variable Deferred	* TEST 1103	Gary Parent	7/17/2012 12:25:19 PM	

Internet    95%

### 3) Distributor Config – Exception Products page updates

We will be adding Maximum Number of Agents and Jurisdiction Exceptions to the Exception Products page. Carriers can now restrict these two elements for specific products. Enhancement #1162 requested the Maximum Number of Agents be added to the exception products page and Enhancement #1268 requested the Jurisdiction Exception be added to the exception products page..

- Maximum Number of Agents will override any values already defined – whether on the main product or on the parent Distributor Config.
- Jurisdiction Exceptions will further restrict the main product and also work with the parent Distributor Config to restrict a specific product.

Distributor Configuration Detail page: SUB / Distributor Allowable Products

Cancel Save & Return

Field Definitions

Product Name VERTEX Equity Indexed Annuity \*

**Distribution Configuration**

Maximum Number of Agents 25

Maximum Number of Investment Products

Maximum Initial Premium Amount \$

Maximum Subsequent Premium Amount \$

Contract Role Age Restriction

Relation Role and Dates	Modified On
	[Add]

**Investment Product Exclusions**

[Edit Investment Product Exclusions](#) - There are no Exclusion Invest Products

Qualified Plan Entity Exclusions

Carrier Facing Description	Modified On
	[Add]

**Feature and Product Code Restrictions**

Feature Contract Role Restrictions

Carrier Facing Description	Modified On
	[Add]

Feature Product Exclusions

Feature Code	Product Code	Modified On
		[Add]

Feature Transaction Exclusions

Transaction Role	Modified On
	[Add]

Jurisdiction Exclusions

Show Selected Select All + Select None - (0)

- +Alabama (1)
- +Alaska (2)
- Arizona (4)
- Arkansas (5)
- California (6)

Field Definitions

Cancel Save & Return

## 4) Activity Log – Filter by WIN (WIN only users)

The Activity Log will be updated to now allow the ability to filter by WIN. The page layout will also be clearer and will include text on the page to help with the page navigation. The Screen Filter will be updated to only include pages which have been actually affected by a Carriers activity.

**Activity Log**  
Carrier: VERTEX Incorporated Life

Show/Hide Filters

WIN(s)	User	Screen
Non WIN Maintenance [N/A]	Angela Lisi	Additional Arr Classification
* 30451 - Remove Pension Trust and Profit Sharing [10582] (3/13//2012)	Carlene Hamerlin	Additional Rider Classification
add user [11894]	Demo - Suzanne	Address
AMP modeling [11277]	Denise Martus	Age Amount Product
* BUC 1103 [12015] (7/18//2012)	Elaine Lechowicz	Allocation Types
el bug 1257 [11271]	Elizabeth Sarita	Allowable Products
July Rider Enhancements - GMAB AA Version [11935]	Ellen Lester	Allowed Change

From Date:  **yyyy-mm-dd**

To Date:  **yyyy-mm-dd**

Output Report: [Click to Output Report](#)

Currently there are only 90 days within this report, anything older please email the [VTXmlsupport](mailto:VTXmlsupport) mailbox.  
 The \* before the WIN name means the WIN is currently active. When nothing is selected in the WIN(s), User or Screen boxes, that means they will all be searched for. To multi select in any of those boxes, hold the Ctrl key to select or to deselect.  
 The Non WIN Maintenance (N/A) shows you the non WIN changes which were made – Carrier changes and Table definition and value changes.

Submit Cancel