

# VTXml Distribution Agreement Enhancement

## 1) Distribution Agreement Bulk Associate

VTXml now allows the user to bulk associate a single Product to multiple Distribution Agreements. The following, details the work flow.

Step 1: Go to the Associations screen within a Product. A new popup has been added. The 'Clone Agreement Products from another Product' allows the user to select a 'like' Product to clone an Allowable Product from.

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**Annuity Associations**

Annuity Product Associations **'12832 - TEST - DA Bulk Associate 12/31/2013'** (\* - required field)  
 Policy Product: VERTEX Variable Deferred Annuity L Share (123456722)

Cancel | Save & Return | << Previous

**Field Definitions**  
 Writing Company(ies): At Least ONE is Required

Show Selected | Select All + | Select None - (1)

- VERTEX, Inc
- VERTEX Life Insurance Company of America

Distributors

Show Selected | Select All + | Select None - (12)

- bug 1025 (bug\_1025)
- bug 11120 (bug\_1120)
- Bug 1258 (EBIX)
- Bug 1258 EL (BUG1)
- DA Test (200Test)

Clone Agreement Products from another Product

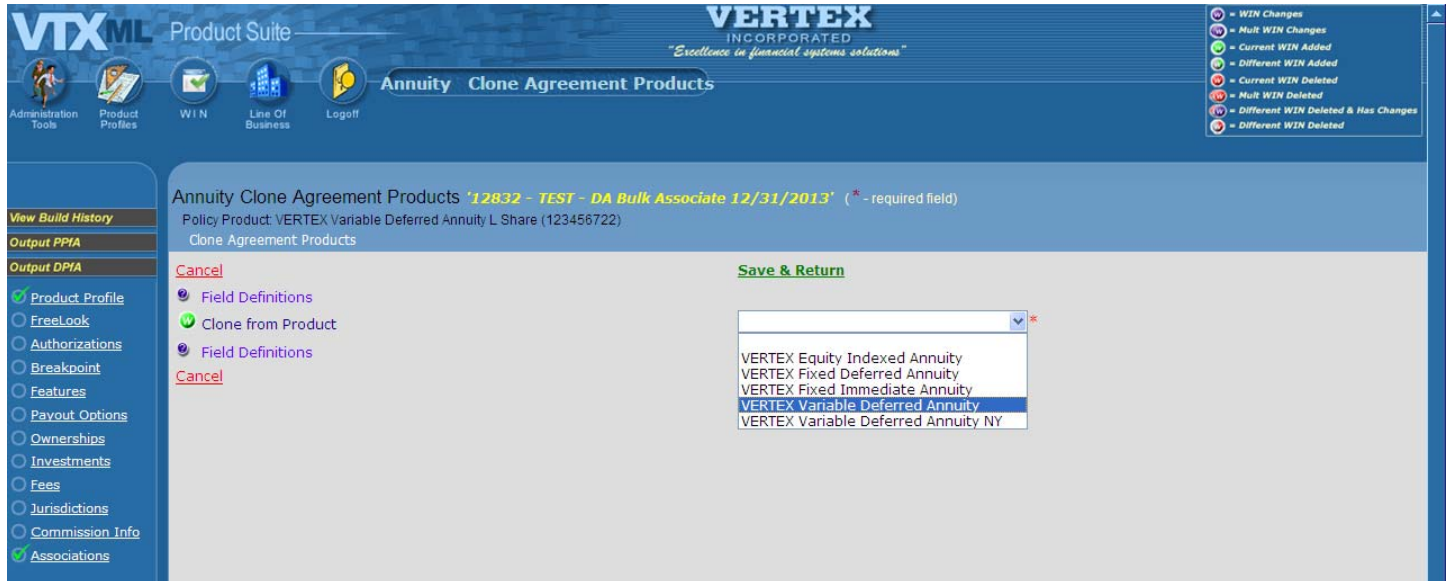
**Clone from another Product** [Add]

Allowable Products

Distribution Agreement	Comm Schedule	Modified On

Field Definitions | Cancel | Save & Return | << Previous

Step 2: There is a dropdown which contains all of the Products a Carrier has built in VTXML. This selection should be used to model the new Allowable Products in the Distribution Agreements to a 'like' Product. Similar to creating a new Product by cloning an existing Product, choose the existing Product closest in definition to the new Product. The cloned from Product will typically have similar Commission Schedules and Commission Options in order to limit the amount of updating.



Step 3: Select the desired Product to be modeled after and click 'Save'. VTXML will clone that Product's attributes within the PolicyProductInfo for each DistributionAgreement. This action will also populate the new Allowable Products grid on the Associations page with all fully associated Distribution Agreements.

**Important notes:**

- If the existing Product cloned from included the Product in a Distribution Agreement but did not have a Distributor Association, then the Allowable Product will not be included.
- The product must be completely 'hooked up' to both the Distributor and DistributionAgreement in order to be included in the Allowable Product popup.
- Notice in the screenshot below there are five Distributors specified yet only two Allowable Products were added. This is due to the Distributors not having the cloned from Product specified as an Allowable Product in their Distribution Agreement.

Step 4: Certain maintenance steps can be completed directly on this screen vs. the need to jump to the Distribution Agreement. 'Del' will delete the Distribution Agreement/Allowable Products association.

Step 5: Additional maintenance can be performed by clicking on the Distribution Agreement link from this screen. The link will bring you directly into the Allowable Product for that Distribution Agreement where the Commission Schedules and/or any other detail within the Allowable Product screen maybe updated.

Step 6: Clicking Save or Cancel after performing maintenance within the Distribution Agreement will bring you back to the Association screen. Then click on the next Distribution Agreement for any additional maintenance desired.

Distribution Agreement (5)			Comm Schedule	Modified On
[Del]	bug 1025		Generic Selling Agreement	10/30/2012 3:28:43 PM
[Del]	Bug 1258		Test Schedule	10/30/2012 3:28:43 PM
[Del]	EL_BUG1258		Generic Selling Agreement	10/30/2012 3:28:43 PM
[Del]	Generic Selling Agreement 1		VERTEX Selling Agreement	10/30/2012 3:28:42 PM
[Del]	Morgan Stanley		(*No Comm Schedule selected*)	10/30/2012 3:28:43 PM

Step 7: For those Distribution Agreements that do not contain the cloned product, the user will need to go into the each Distribution Agreement screen and add Allowable Products.

Additional Detail: If you go into an existing product (not a new or cloned product) and choose to ‘Clone Agreement Products from another Product’, only new Allowable Products will be added to the Allowable Products popup.

**BEST PRACTICES REMINDERS:**

When adding a new product to VTXml, clean up the WIN immediately. The process should be:

- 1) Clone (or ADD) an existing ‘like’ product
- 2) Change the names (full, short and carrier facing), ProductCode and CUSIP
- 3) Cleanup WIN
- 4) Open a new WIN to continue your updates

This should also apply to new Distributors, new Distribution Agreements and anything else in the Left Nav. Best practices should be followed before taking advantage of the new Distribution Agreement Bulk Associate functionality.

## 2) Change WIN name from Green to Yellow

The Name of the WIN you are in is now yellow instead of green for ease of reading on screen.

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**Annuity Product Profiles**

Legend: WIN Changes, Mult WIN Changes, Current WIN Added, Different WIN Added, Current WIN Deleted, Mult WIN Deleted, Different WIN Deleted & Has Changes, Different WIN Deleted

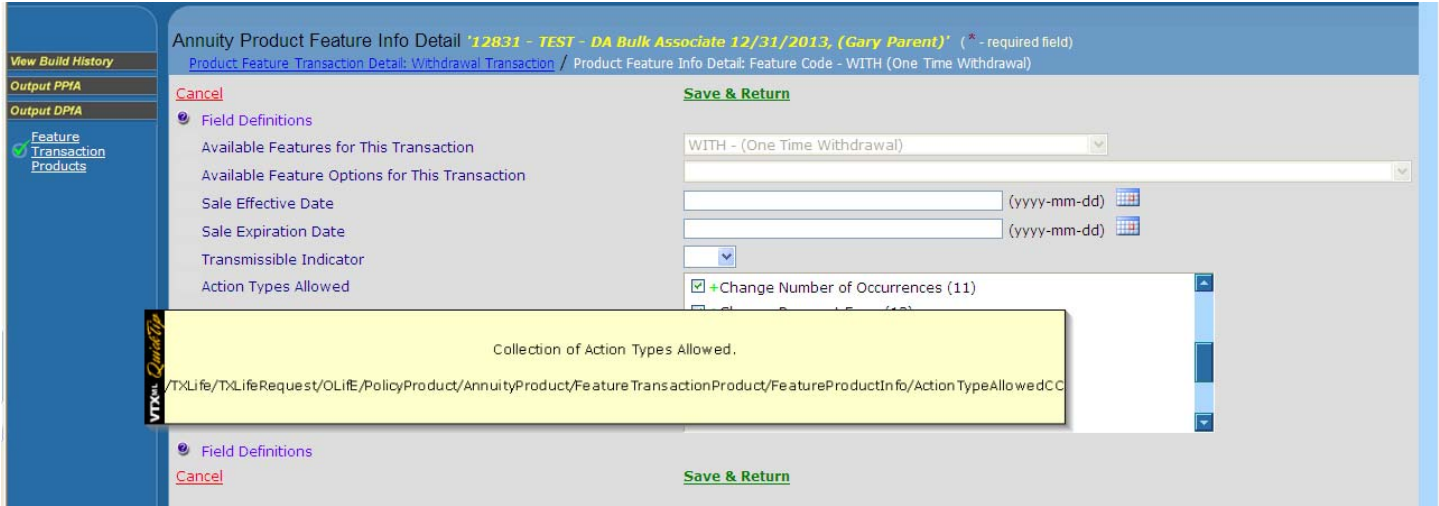
Carrier: VERTEX Incorporated Life '12831 - TEST - DA Bulk Associate 12/31/2013'  Production  Inactive

		Carrier Facing Description (5)	Product Code	Share Class	Product Type	Modified On	Count	
[Del]	[Clone]	<b>W</b> VERTEX Equity Indexed Annuity	VTXINDEX	No Share Class	Indexed Annuity	8/25/2012 4:04:28 PM	5	[View]
[Del]	[Clone]	VERTEX Fixed Deferred Annuity	VTXVA2.20	C Share	Variable Annuity	3/2/2012 9:09:21 PM	4	[View]
[Del]	[Clone]	VERTEX Fixed Immediate Annuity	VTXSPIA	No Share Class	Fixed Annuity	3/2/2012 9:09:21 PM	5	[View]
[Del]	[Clone]	VERTEX Variable Deferred Annuity	VTXVA1	A Share	Variable Annuity	10/29/2012 11:15:15 AM	9	[View]
[Del]	[Clone]	VERTEX Variable Deferred Annuity NY	VTXVANY	C Share	Variable Annuity	3/2/2012 9:09:21 PM	2	[View]

Sidebar Menu: View Build History, Output PPIA, Output DPIA, Select New Carrier, Features, Feature Transactions, Payout Options, FreeLook Provisions, Fund Managers, Ownership, Investment Options, Distributors, Distribution Agreement, Table Definitions, Table Values, Commission Rates & Schedules

### 3) Adding new Action Types to the lookup table to support AMP

Five new type codes have been add to the Action Type lookup table to support AMP. This table is found on Feature Transaction – Feature Product Info – Action Types Allowed. This collection allows a user to define the type(s) of changes that are available to specific Features or Feature Options.





#### 4) Output Summary screen column displays if errors or not

The Output Summary screen has a new column which will indicate if the output has passed schema and business rule logic. This allows an at a glance view of potential modeling issues.

If there are schema or business rule error issues then a red thumbs down will show. If there are warnings only (yellow triangles – passes schema and no red exclamation errors) then a yellow thumbs up will show. If the output has passed all validations then a green thumbs up will show.

**Output Build History**       Annuity     Life

Relaunch   Refresh   10 rows per page

Delete

There are currently no builds processing.

		Type	Version	Rcvr	Writing Company	Item(s) Selected	WIN(s)	User	Created		
		PPfA	2.22.01	EBIX	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXXVA1	* TEST - DA Bulk Associate	Gary Parent	10/29/2012 1:38:49 PM		<input type="checkbox"/>
		PPfA	2.16.01	EBIX	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXXVA1	* TEST - DA Bulk Associate	Gary Parent	10/29/2012 1:38:49 PM		<input type="checkbox"/>
		PPfA	2.16.01	EBIX	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXXVA1		Gary Parent	10/29/2012 1:29:25 PM		<input type="checkbox"/>
		PPfA	2.20.00	Aplif	VERTEX, Inc	* VERTEX Variable Deferred Annuity - VTXXVA1		Gary Parent	10/29/2012 1:20:50 PM		<input type="checkbox"/>
		PPfA	2.16.01	EBIX	VERTEX Life Insurance Company of America	* VERTEX Fixed Immediate Annuity - VTXSPIA	* Best Practices	Suzanne Brazeal	10/25/2012 9:49:51 AM		<input type="checkbox"/>
		PPfA	2.16.01	EBIX	VERTEX, Inc	* VERTEX Equity Indexed Annuity - VTXINDEX	* Best Practices	Suzanne Brazeal	10/25/2012 8:42:39 AM		<input type="checkbox"/>

## 5) Restriction Information added to Ownership

Restriction Information has been added to the bottom of the Ownership page. This Object was added to Ownership in 2.24 and will allow a Plan Package to include any restriction information (for example, Non – Assignable).

**Funding Source Methods Allowed**  
List of Funding Source Methods Allowed

Description (1)	Modified On
[Del] [Clone] Rollover	4/1/2009 5:39:23 PM

[Add]

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**Restriction Info**  
List of Restrictions

Restrict Code (1)	Modified On
[Del] [Clone] Non-Assignable	10/29/2012 2:52:26 PM

[Add]

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**Applicable Plan Types**  
Lists the Applicable Plan Types

Name (1)	Modified On
[Del] 401k	8/31/2010 1:40:30 PM

ANW (2.16) and AN3/AN4 (2.22) will include this detail as an extension. AFFIRM output will not include this Object at all. 2.24 generic ACORD and up will include as a normal Object. RestrictionCode is the only property which will be included in 2.16/2.22 output for Ebix.

**Annuity Restriction Info** '12831 - TEST - DA Bulk Associate 12/31/2013, (Gary Parent)' (\* - required field)  
Product Ownership Detail: 401k / Restriction Info

[Cancel](#) [Save & Return](#)

- Field Definitions
- Restriction Code
- Restriction Reason
- Restriction Details
- Field Definitions

[Cancel](#) [Save & Return](#)

Non-Assignable (34) \*

[Dropdown menu]

[Input field]