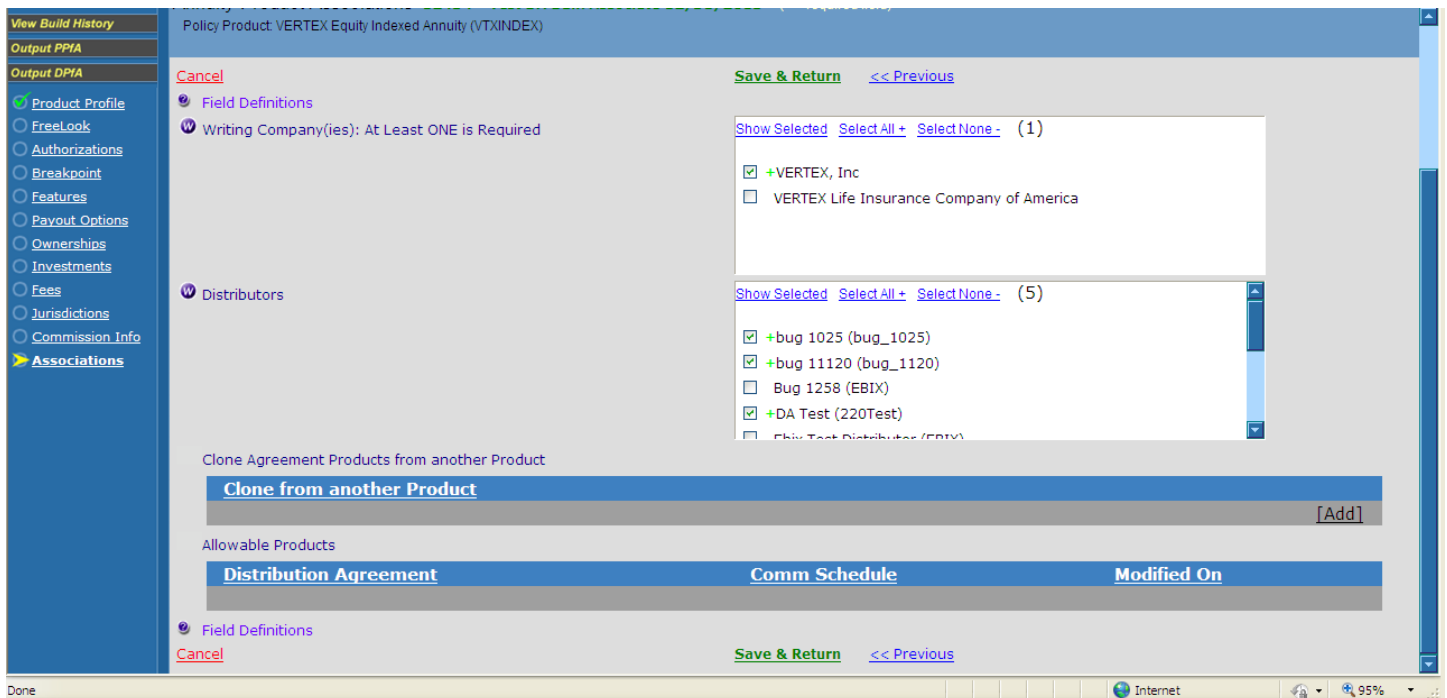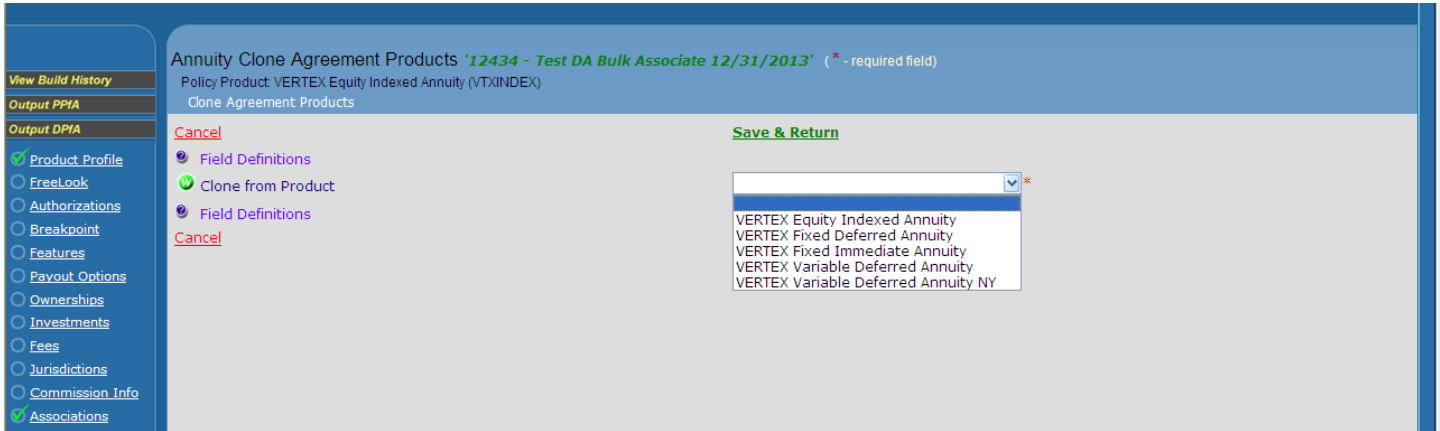# VTXml Distribution Agreement Enhancement

1) Distribution Agreement Bulk Associate (enhancement 398)

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

Step 1: Go to the Associations screen within a Product. Two additional popups have been added. The "Clone Agreement Products from another Product" is a new popup which allows the user to select a 'like' product to clone an Allowable Product from.

Step 2: There is a single 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 that is the closest to the new product. This Product will typically have similar Commission Schedules and Commission Options.

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.
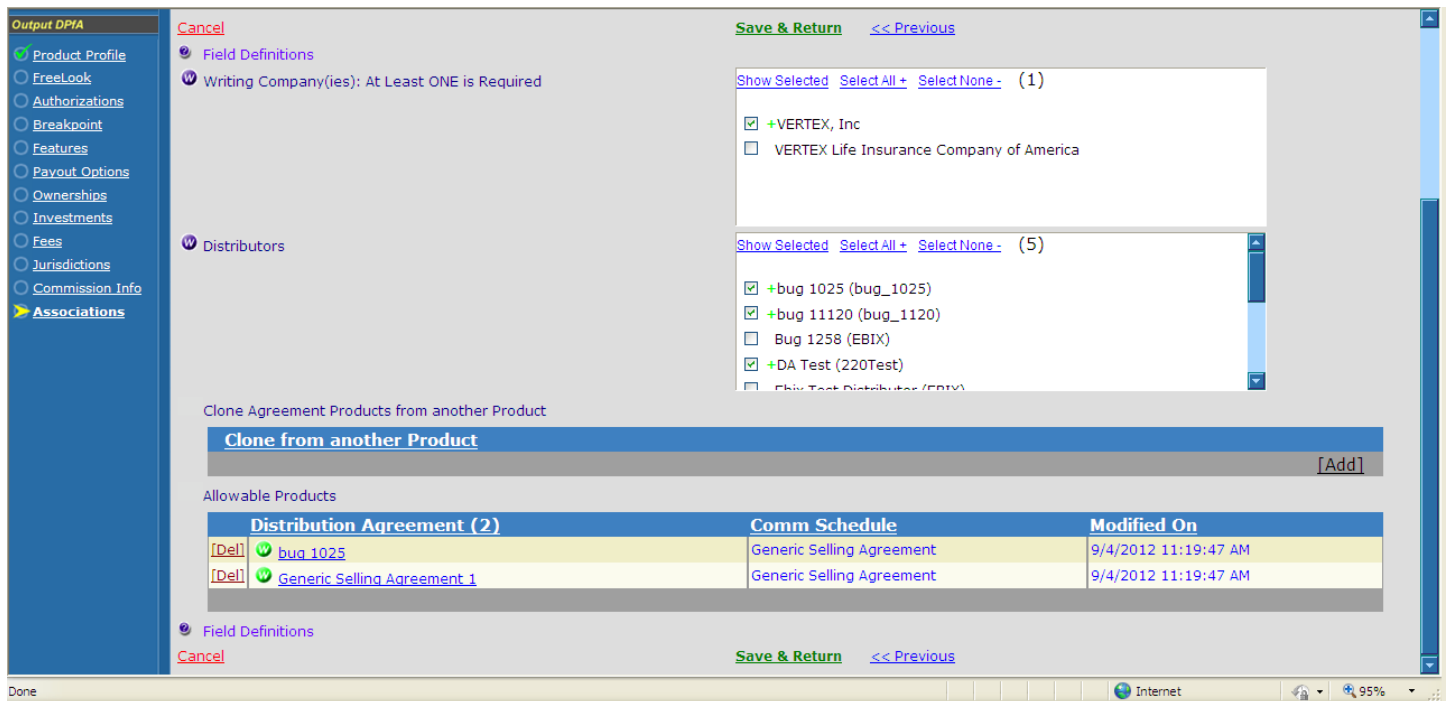> Important notes:
> - If the existing Product cloned from, included the Product in a Distribution Agreement but did not have a Distributor Association, then the Allowable Product will not be included.
> - The product must be completely 'hooked up' to both the Distributor and DistributionAgreement in 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 form 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.

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.

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.