September 9, 2013 VTXml Release

1) Additional filter added to the output page

The new filter will only list policy product(s) associated to a distributor with the same Intended Receiver and Version as the output criteria.

For example, if the output criteria is Writing Company 'XYZ', XML Version '2.22' and Intended Receiver 'Ebix', then the policy products listed would be associated to distributors with XML Version '2.22' and Intended Receiver 'Ebix' – for example 'Edward Jones'.

This new filter may reduce the number of policy products in the list, especially for Aplifi or Ebix 2.22 outputs. The Writing Company, XML Version and Intended Receiver still need to be specified.

Below are some tips when policy product(s) do not appear in the output list:

1. A policy product must be associated to at least 1 distributor. From the policy product wizard, look for policy products that have a 'Count' equal to zero '0'.

2. A policy product is not on the distributor's distribution agreement. From the policy product 'View', look for Distribution Agreement(s) with the comment '*Policy Product not found in Distribution Agreement*' . see (1) below.

3. A distributor must be associated to at least one Intended Receiver and version. From the Distributor page, look for any distributors with the comment in the Intended Receiver and Version column '*No Intended Receiver / Product Versions*'.

4. A distribution agreement is associated to the policy product but the distributor is <u>not</u> associated to the product. From the Distributor page, click the 'View' button to see a list of associated policy products and corresponding distribution agreement. see (2) below.

5. A distributor must be associated to the Writing Company. From the Distributor page 'Carrier Appointments' popup, look for the 'Writing Company' (that is associated to the product). see (3) below.

(1) Policy Product View - *Policy Product not found in Distribution Agreement*

(2) The distribution agreement is associated to the product but the Distributor is not.

Distributor *VIEW*: [View]

Cancel

Field Definitions

Distributor

Distributor (1)

XYZ Planners

Distributor Policy Products Info Table

The distribution agreement is associated to the product but the distributor isn't.

Association (7)	**Distribution Agreement Allowable Products**
Association not found on Policy Product	XYZ Planners - VTXVANY - VERTEX Variable Annuity A Share NY
123456733 - VERTEX Variable Annuity B Share ™ © ®	XYZ Planners - 123456733 - VERTEX Variable Annuity B Share ™ © ®
VTXINDEX - VERTEX Equity Indexed Annuity	XYZ Planners - VTXINDEX - VERTEX Equity Indexed Annuity
VTXSPIA - VERTEX Fixed Immediate Annuity	XYZ Planners - VTXSPIA - VERTEX Fixed Immediate Annuity
VTXVA1 - VERTEX Variable Annuity A Share	XYZ Planners - VTXVA1 - VERTEX Variable Annuity A Share
VTXVA2.20 - VERTEX Fixed Deferred Annuity C Share	XYZ Planners - VTXVA2.20 - VERTEX Fixed Deferred Annuity C Share
VTXVAOSHARE - VERTEX Variable Annuity O Share	XYZ Planners - VTXVAOSHARE - VERTEX Variable Annuity O Share

Field Definitions

Cancel

(3) The Distributor must be associated to the Writing Company.

Policy Products

The Distributor 'Carrier Appointment' popup shows the associated Writing Companies.

Show Selected   Select All +   Select None -   (7)

☑ VTXINDEX - VERTEX Equity Indexed Annuity
☑ VTXVA2.20 - VERTEX Fixed Deferred Annuity C Share
☑ VTXSPIA - VERTEX Fixed Immediate Annuity
☑ VTXVA1 - VERTEX Variable Annuity A Share
☑ VTXVANY - VERTEX Variable Annuity A Share NY

Carrier Appointment

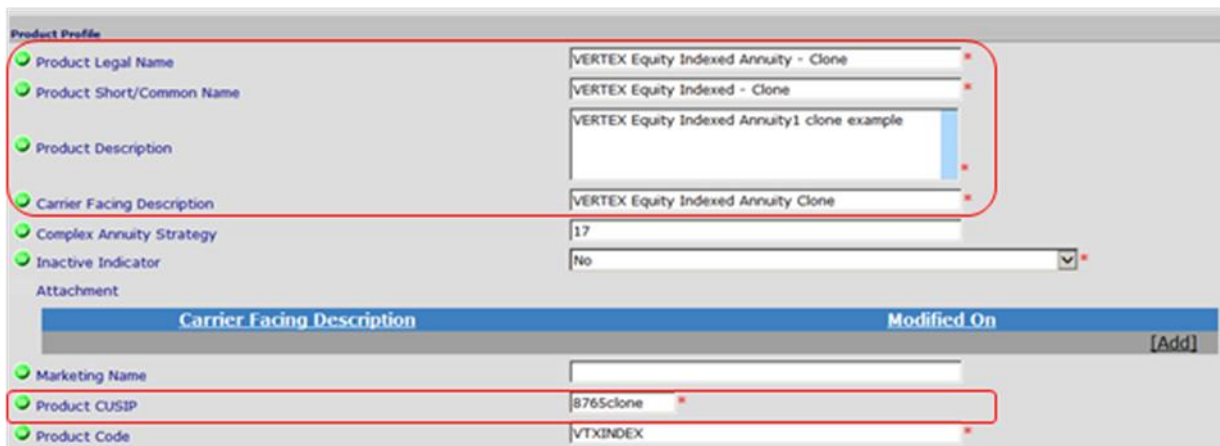|	**Carrier Facing Description (2)**	**Carrier Code**	**Company Producer ID**	**Modified On**
[Del] [Clone]	54321 - VERTEX	54321		12/8/2009 8:31:25 PM
[Del] [Clone]	VTX1 - VERTEX Life Insurance Company of America	12345		12/8/2009 8:31:25 PM

[Add]

2) High Level Object cloning (for WIN users) performance enhancement

Cloning High level objects like Policy Product, Feature Product, Investment Product, Ownership, Distributor or Distribution Agreement is now faster and easier. The work flow is not changing from what should be done today via Best Practices. The changes are mostly behind the scenes efficiencies.

When you clone a high level object in a WIN:

1. The newly cloned object is immediately created and saved to the database so the object appears in the appropriate wizard (i.e. cloned features in the Feature wizard, cloned policy products in the Product Profiles wizard).

2. You will now see a purple WIN on only those fields you edit on the object. You will no longer see a green 'WIN' on every field of the clone object.

3. You should clone the object, clean up the WIN, then create a new WIN to 'bulk associate' the clone object to policy products. This is the same best practice which should have been followed prior to this enhancement.

4. Cloning child objects within a high level object are not changed. i.e. You will see a green 'WIN' on every field of the cloned child object.

Cloning today adds a green WIN to every field. Field values that are changed are not easily recognized.
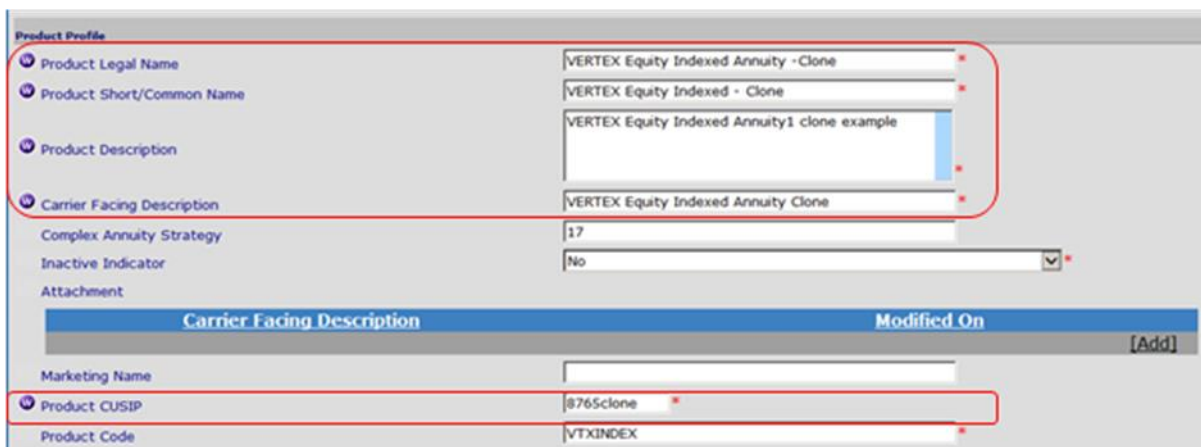
The new cloning adds a purple WIN to only the fields that are changed making them easily recognized.

3) Output Build History grid update

The Output Build History page will now remember settings while you are logged into VTXml. The settings will be refreshed to the default settings the next time you login.

This change will allow you to select an output to save then return you to the same Output Build History page to continue where you left off.

The settings that will be saved are:

1. (Number of) rows per page – You can type in any number of rows to be displayed on the Output Build History page. Remember that the number of outputs may change from day to day based upon new outputs generated or older outputs dropping off the list so that the 'rows per page' may fluctuate. Non production PPfAs are deleted from the Output Build History page after 14 days. The default setting is '10'.
2. Page number (last visited) – VTXml remembers the last page number that you were on so that you can continue where you left off when you return to the Output Build History page. For example, you select an output on page 3 (of 10 pages) to review the error/warnings messages for that output. You will be returned to page 3 when you return to the Output Build History page. The default setting is page '1'.
3. Column sorts - You can sort the rows by any one (1) column to group the outputs by: Type (DPfA or PPfA), Version, Rcvr (Intended Receiver), Writing Company, Item(s) Selected (i.e. Distributor Name if DPfA, Product Name if PPfA), WIN, User, Created (Date). The default setting is 'Created' date.

4) New section on the Carrier Writing 'View' named 'Associated Distributors'

We added a new section to the Writing Company 'View' page named 'Associated Distributors'. This section lists all of the distributors associated to the Writing Company and gives a count of the associated distributors. It will be a quick way to verify which distributors are associated to the Writing Company.

The Associated Distributor section has two columns that can be sorted. They are:

1. Distributor – this is the Distributor Full Name.
2. Carrier Appointment CFD – this is the Carrier Facing Description for the carrier appointment on the Distributor page.

This new section is for information only, you still need to visit the Distributor's page to associate a distributor to or to remove an existing distributor from a writing company.

From the Carrier / Writing Company page, click 'View'.

The Associated Distributors section has a count of the distributors. You can sort by either column.