May '23 Increment release notes

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LRP

✨Endorsement binding with AIP

Credits: @ivana.kristo @leon.cvrtila @luka.ferlez @maja.pilipovic

To reduce the effort associated with filling and submitting forms by Producers & Agents from now, it is possible to bind endorsement requests to AIP through LIA. Binding is enabled for Operations based on pre-requirements for operations, agents, and producers. The binding process increases accuracy and saves valuable time for the agents and producers when executing the endorsement binding process.

Online endorsement binding process is available following association enrolment.
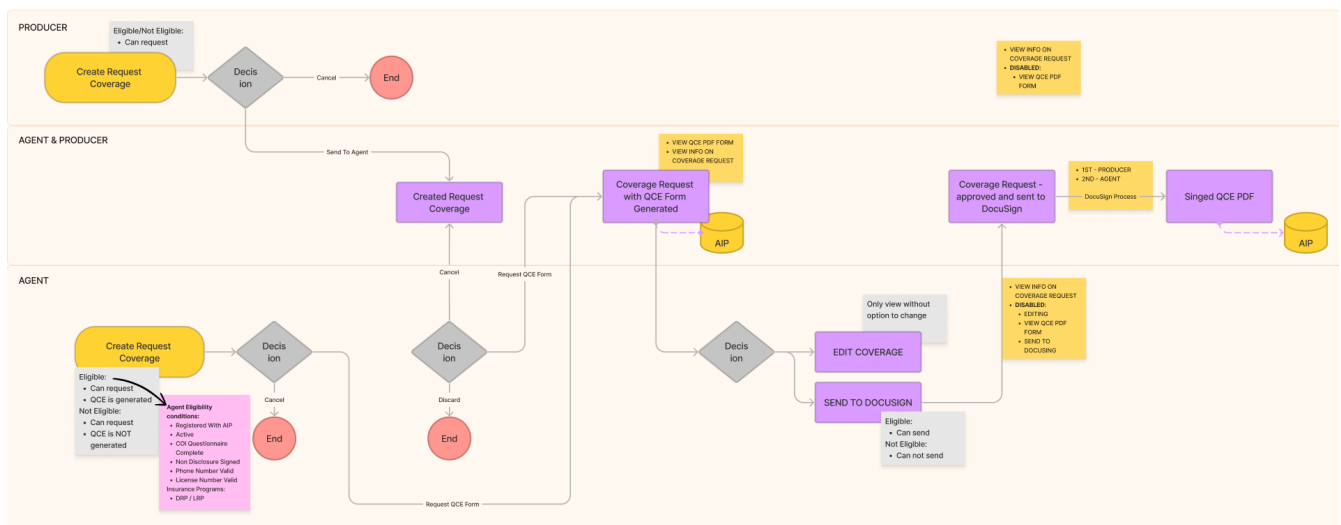
- Requirements status is visible in the admin panel for each entity for different insurance plans. This is visible for Insurance Agents, Operations, and Producers. So the user can know at any moment if all prerequisites are fulfilled before the binding process starts.
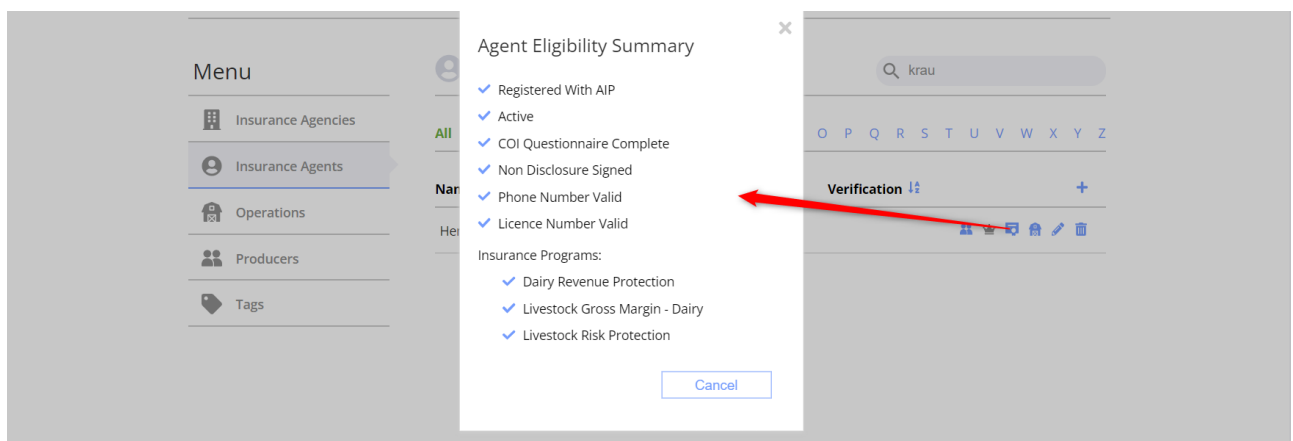
- When submitting Request Coverage, we have enabled multiple endorsements to be added to one request to reduce the steps. In this way, the user doesn't have to submit and keep track of numerous Coverage Requests
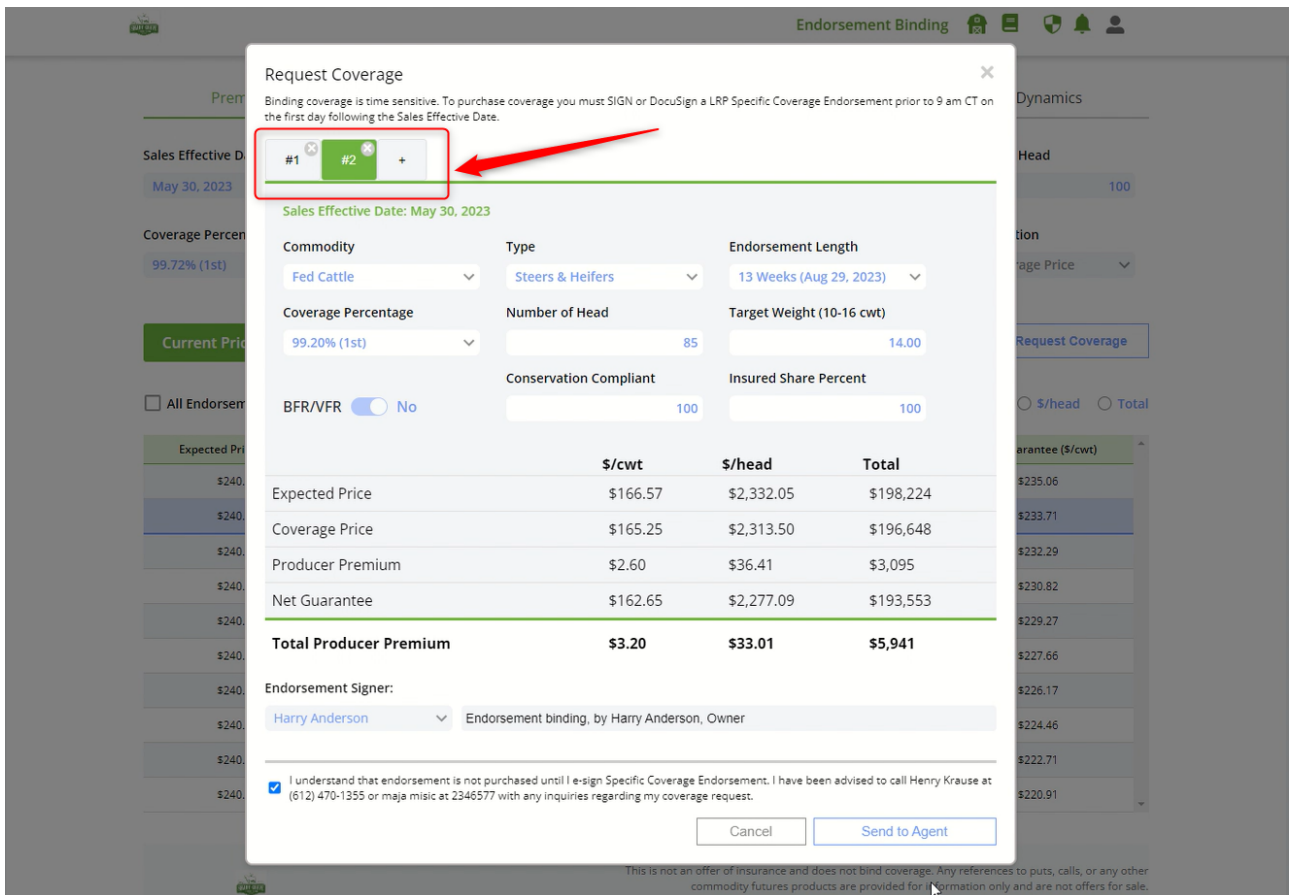
- The coverage request screen is now changed to monitor the progress of the request. And it is renamed from "Pending Endorsement" to "Coverage Request." The screen is automatically refreshed every minute, and the user can be on track with everything happening with coverage requests. Statuses are updated when some action is finished (whether Producer, Agent or the system itself does it). For example - when Producer signs the SCE form in DocuSign, Agent will see that information as new status on Coverage Request Screen.
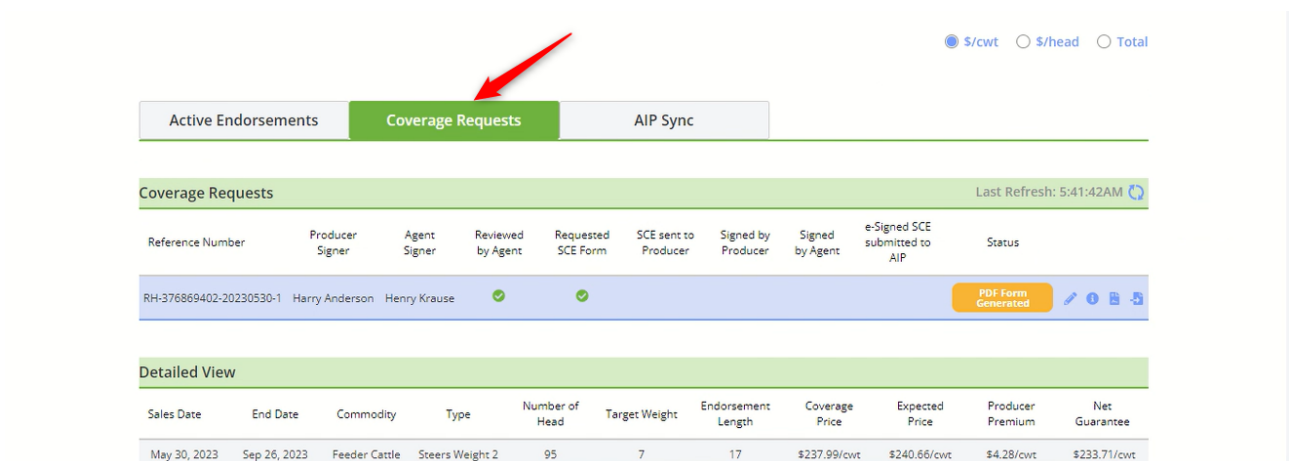
- After the Agent reviews the request, an SCE PDF form is requested from the AIP. When SCE is generated on the AIP side, the user can see and download the form in the LIA application. This form is sent to the DocuSigning process when Agent decides it is ready for e-signing.

- The agent and Producer must sign the SCE form before it's sent to AIP. The process of signing starts with the Producer and, afterward, is sent to an Agent. When SCE is signed, it is sent as a finished signed document to all Agents (primary contacts and agents marked for notifications) and to the Producer

- Also, after e-signing, LIA will automatically upload the SCE form to the AIP when the DocuSign process is finished.

- When AIP approves Endorsements and becomes officially purchased, they will be imported as Active endorsements in the LIA application. Endorsements are then connected and continuously kept in sync with the AIP.

- All actions in LRP binding process are accompanied by emails sent to all roles included
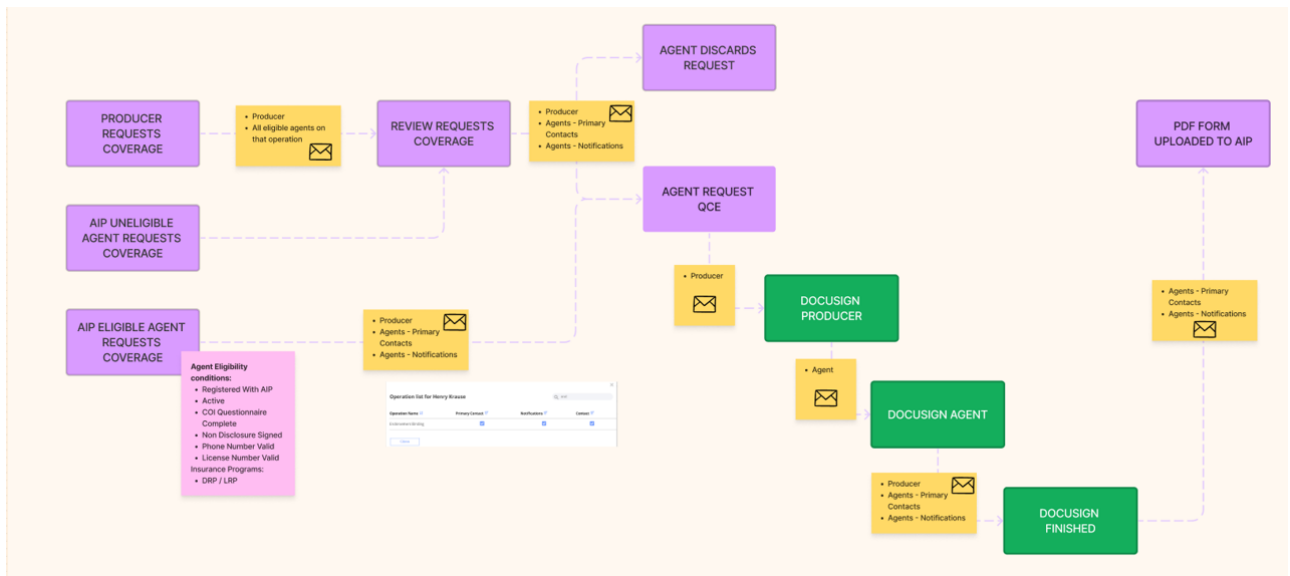
Online binding process and AIP Sync together give significant advantages:

- Increased accuracy of all endorsements now being accounted for in the tool so the producer and the agent know the status and the progress of the endorsement

- The binding process increased accuracy and saved the agent time when going through the endorsement process.

- Both processes have helped the producer engage more with each endorsement they write.

🔧 Improvements

- 🐛 Fixed the issue with the wrong display of Total values on the Endorsement graph, as it was showing Total values instead of per cwt. @marko.peranovic

- 🐛 Fixed the issue with the display of wrong data on the Endorsement graph. The graph displayed data from the previously selected operation. @marko.peranovic

- 🐛 In Market Dynamics, if 1st level was saved as a preference, it wasn't displayed the same as it was in the dropdown table. Now 1st level is displayed the same on the all-screen as it is in the list. @luka.ferlez

- ⚙ To help users to understand better what the Deductible category means and what it is presenting, we have added an info option by the Deductible label. This info option will describe how Deductible is used in Market Dynamics. @marko.peranovic

DRP

✧✦ Endorsement PDF report

Credits: @marin.ladovic @maja.pilipovic

To enable users to have all endorsements in one place that is presentable and easy to see, we have enabled them the option to Download a list of all endorsements as a Detail or Summary view. The data that is displayed on the screen is the data that will be in the downloaded PDF. The report is based on Calendar Year.

On the chart, we have added the Effective Hedge Ratio on the secondary y-axis to have an overview of where you are at with your endorsements. This way, the user can see Premium, Change in Expected Income since he purchased, and Forecasted Indemnity displayed on the first y-axis compared to Effective Hedge Ratio.
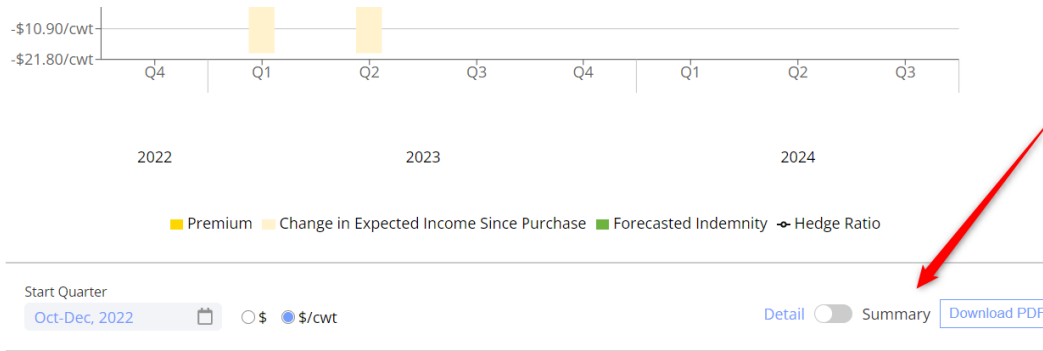
Detailed PDF contains the sum of all available endorsements with individual endorsement details per quarter.
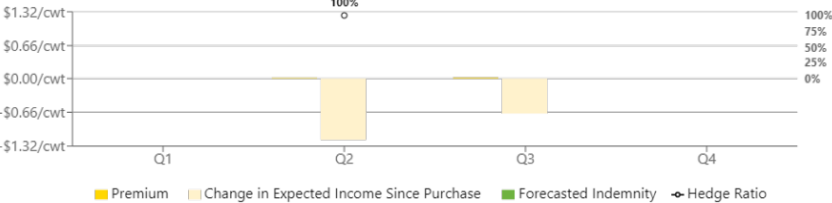

DRP Endorsement Report - 1557 — Calendar Year: 2023

Quarter	Sales Date of Purchase	Pricing Option	Declared Covered Milk Production	PF*	Effective Covered Milk Production	Expected Revenue Guarantee	Estimated Revenue Floor**	Producer Premium Amount		Gross Estimated Indemnity		Net Estimated Indemnity
Jan-Mar, 2023 Hedge Ratio Decl. Eff.			0	0.00	0	$0.00	$0.00	$0.00	$0	$0.00	$0	$0
Class 3/Equiv 0% 0%												
Class 4/Equiv 0% 0%												
Total 0% 0%												
Apr-Jun, 2023 Hedge Ratio Decl. Eff.	3/6/2023	Comp - BF: 4.4, PR: 3.1, WF: 100%	10,000,000	1.00	10,000,000	$17.53	$17.52	$0.01	$1,085	$0.00	$0	-$1,085
Class 3/Equiv 100% 100%			10,000,000	1.00	10,000,000	$17.53	$17.52	$0.01	$1,085	$0.00	$0	-$1,085
Class 4/Equiv 0% 0%												
Total 100% 100%												
Jul-Sep, 2023 Hedge Ratio Decl. Eff.	5/2/2023	Class - III: 0%, IV: 100%	1,111,100	1.00	1,111,100	$16.29	$16.27	$0.03	$280	$0.00	$0	-$280
	5/14/2023	Class - III: 100%, IV: 0%	10,000,000	1.00	10,000,000	$15.34	$15.32	$0.02	$1,752	$0.00	$0	-$1,752
Class 3/Equiv 0% 0%	5/2/2023	Class - III: 0%, IV: 100%	12,333	1.00	12,333	$16.29	$16.27	$0.02	$3	$0.00	$0	-$3
Class 4/Equiv 0% 0%	3/6/2023	Class - III: 100%, IV: 0%	10,000	1.00	10,000	$0.00	$0.00	$0.00	$0	$0.00	$0	$0
Total 0% 0%			11,133,433	1.00	11,133,433	$11.98	$15.41	$0.02	$2,035	$0.00	$0	-$2,035

*Protection Factor
**Estimated Revenue Floor = DRP Expected Revenue Guarantee + Historical Basis - Premium
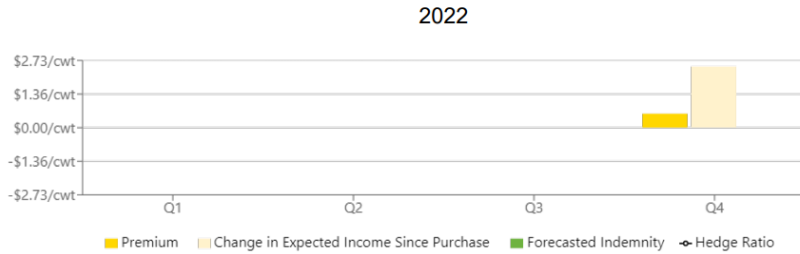
Summary PDF contains all the sum of endorsements grouped by quarter and a chart of the endorsement performance for a specific year.

🔧 Improvements

- ⚙️ In order to avoid having an overlap when a wide range of years is selected, the text for year direction is changed when a certain year range is selected. @patrick.kossi

- 🐛 Fixed issue when the Price Trends page is opened - the expected quarter wasn't shown as the nearest quarter ending. Now, when it is open, it will show the correct quarter to have a better comparison right away when the page is opened. @ivana.kristo

LGM

- 🐛 Fixed issue with wrong month display of What-if analysis. @marko.peranovic

System wide

✨What's new

Credits: @patrick.kossi @maja.pilipovic

To highlight updates and changes to the application, we have added a "What's new" section that will notify the user of any new event that is important for them. New icon is added on the top of the application:
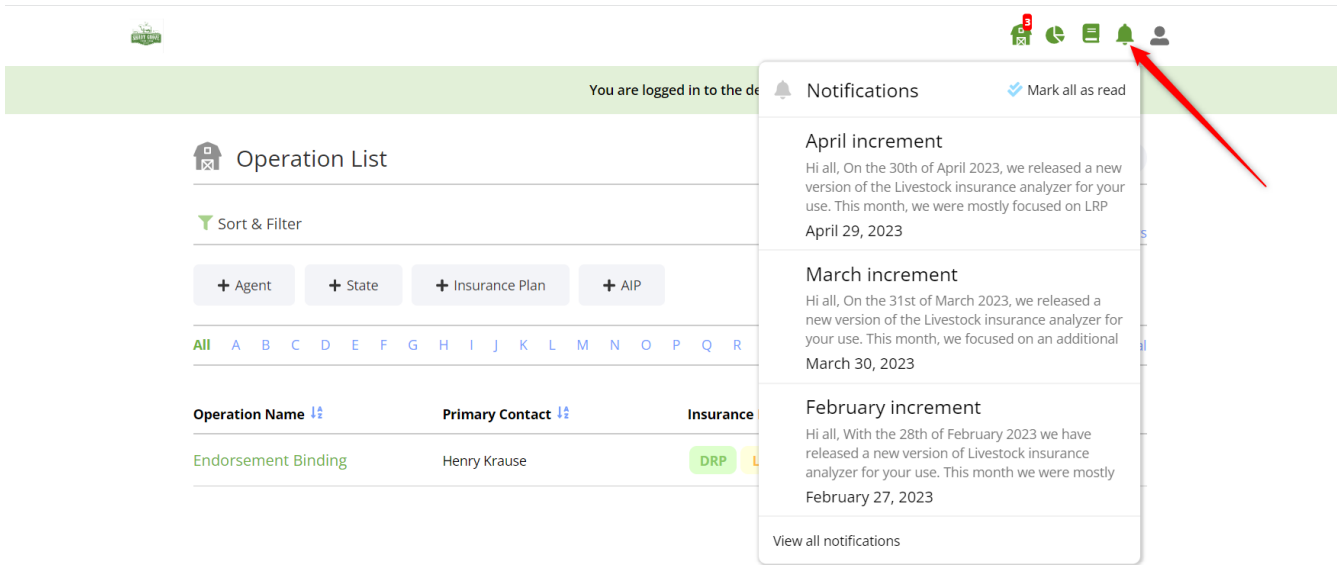
When the option "View all notifications" is selected, a new page will open where all published notifications are visible. Notification is divided into "All" and "Unread" for quicker navigation. Also, they can be viewed and filtered by the published year.
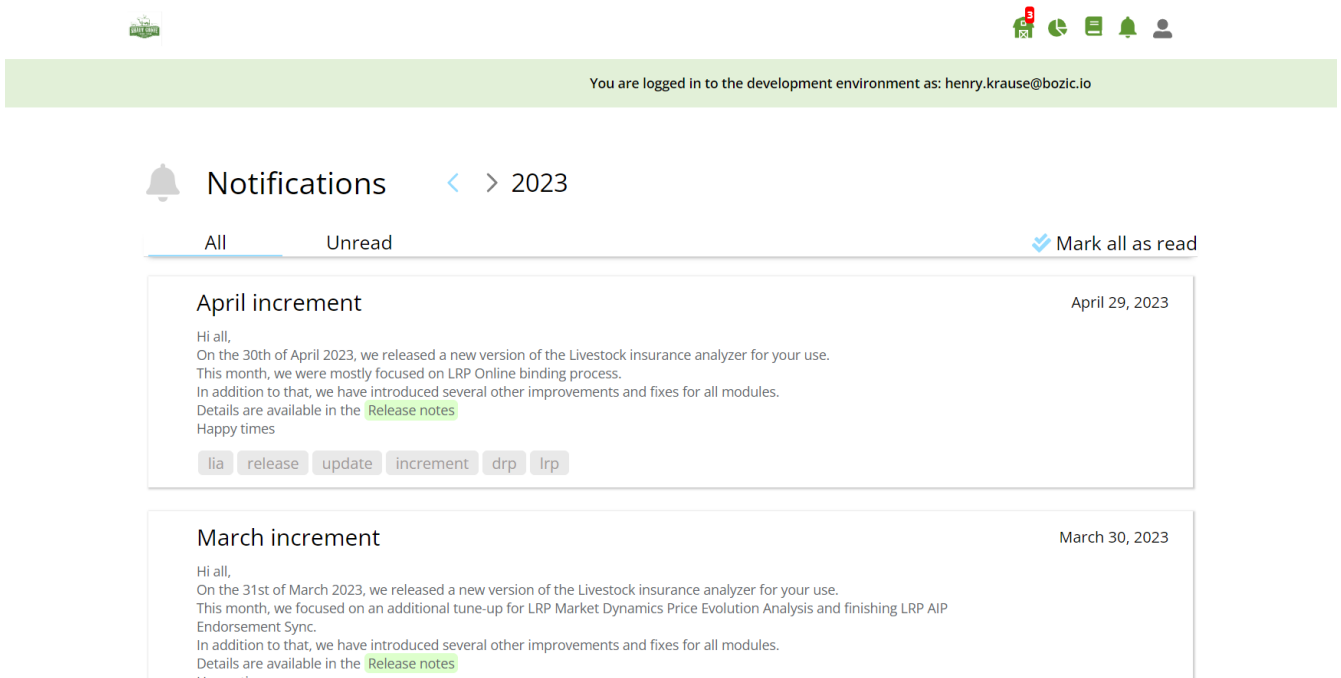
If the notification has an additional attachment (like we have it for Release notes), an additional document will be opened when clicked.

April '23 Increment release notes

Dairy Revenue Protection

🔧 **Improvements**

- ✨ Expected Yield was added to the HTML Price Report and Price Report under Market Dynamics. Users now have an overview of Expected Milk per Cow in all DRP segments.

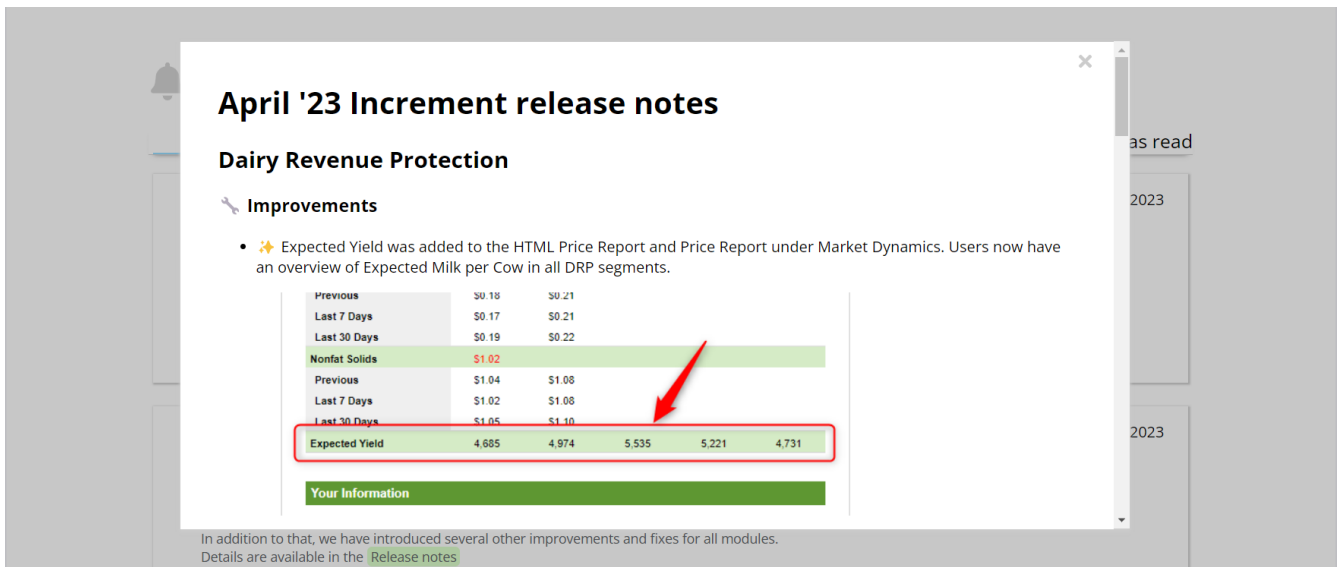|					
Previous	$0.18	$0.21			
Last 7 Days	$0.17	$0.21			
Last 30 Days	$0.19	$0.22			
Nonfat Solids	**$1.02**				
Previous	$1.04	$1.08			
Last 7 Days	$1.02	$1.08			
Last 30 Days	$1.05	$1.10			
Expected Yield	**4,685**	**4,974**	**5,535**	**5,221**	**4,731**
Your Information					

In addition to that, we have introduced several other improvements and fixes for all modules. Details are available in the Release notes

🔧 Improvements

- ⚙ Email notification is added when coverage is requested from the producer. Now the producer will get additional confirmation that his Coverage Request was forwarded to the Agent. @luka.ferlez

- 🔧 Fixed issue when matching operations in AIP Sync. Now when the operation is matched, the user will see all other available operations for matching instead of displaying that there isn't anything more to match. @ivana.kristo

- 🔧 Fixes issue with Contact display after refresh. When a page with Contacts is manually refreshed, the Contact displayed becomes invisible. Now this problem is solved, and when the page is refreshed – all Contacts connected to that Operation are displayed. @marko.peranovic

- ⚙ Fixed issue with occasional popping up message „Invalid Practice code" when working in the application. @patrick.kossi

- ⚙ We have changed the day when weekly reports are sent to have more time for communication with clients who receive weekly reports. Reports are moved from Friday to Wednesday, giving more time to discuss available offers and options to purchase endorsements. @mladen.sasa @marko.peranovic

- 🔧 Fixed the issue of displaying the wrong date when existing endorsements are edited. The problem is solved, and now when editing, viewing, and seeing additional endorsement information, it is displayed with the correct Sales Effective Date. This is solved for DRP and LRP endorsements. @luka.ferlez

iOS

🔧 Improvements

- 📲 Biometric login fix - In new release a bug occurring during usage of Face ID on iOS devices was fixed. The issue occurred in some cases where biometric authentication would receive an error from device, due to possible issues from the device itself. The application was not able to present that error, and unfortunately stopped at that point while trying to switch to standard login with credentials. `@patrick.ruzman`

- 📲 Change of API endpoints - With the new release, a new set of server API endpoints were placed, in order to achieve better performance in retrieving required data. This results in overall better experience for the user. This way application is set up to date with the web. `@patrick.ruzman`

- 📲 Market dynamics details fix - Together with the change of API endpoints, some data schemes were also changed with time. Due to these changes, mobile application was not able to render details for Market dynamics, and showed only a blank view. The model for retrieving data was changed to required one, as also the business logic responsible for presenting data was refactored. Refactoring was done in order to reduce code amount and complexity, to achieve better performance and better user experience. `@patrick.ruzman`