## September '23 Increment release notes

#### Bozic LLC, support@bozic.io

Version 1.0, filip.cogelja@bozic.io, 2023-12-21 16:46:35 +0100

## **Table of Contents**

DRP	1
🚸 Updates in Calculation Methods for PDF Report	1
🔧 Improvements.	1
LRP	1
🔆 Add Year option to Market Dynamics	1
🖗 Market Dynamics Chart adjustment .	2
🔧 Improvements	3
LGM	3
🔧 Improvements	3
System Wide	4
🔆 Display Agent eligibility for different AIPs	4
🔆 Added State prefix in Licenses	4
🔆 Notification for Ended endorsements	4
🔆 Afbis as AIP Source	6
🖏 Tag selector enter.	6
於 Visibility of AIP Eligibility	7
🔆 Enable management of Agent licenses in "My account" preferences	8
🔧 Improvements.	9

### Output Description Wethods for PDF Report

@leon.cvrtila, @maja.pilipovic

Enhanced PDF reports with changed formula calculations, resulting in more accurate and meaningful weighted averages for key metrics. These updates enhance data analysis and reporting accuracy. All sum values for Weighted Average are now calculated with effective Covered Milk Production, as we calculated it until now with Declared Covered Milk Production.

#### **% Improvements**

- 🐁 Fixed the issue with Sales Effective Date displaying incorrectly in different time zones. Dates are now correctly displayed, ensuring accurate representation. @luka.ferlez
- 🐁 Fixed the delayed data display issue in Market Dynamics so that data loads promptly on the Price Trends tab, and ensure smooth navigation without unresponsiveness when switching between the Alert tab and the Price Trends tab. @marin.ladovic

#### LRP

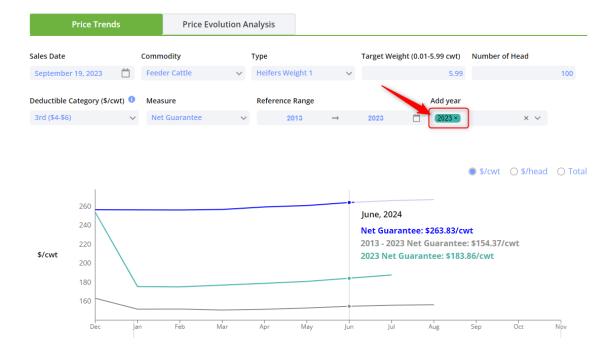
#### ℅ Add Year option to Market Dynamics

@antonio.sumak, @marin.ladovic, @maja.pilipovic

Introduced a new feature that allows you to enhance your data analysis experience. With the "Add Year" option, you can now visually compare data by adding various years to your chart overview.

When filter "Add Year" is used:

- Selecting a year from the list will add data to the chart
- Year will be displayed as a tag that can be removed



• Added years can be removed one by one or all at once

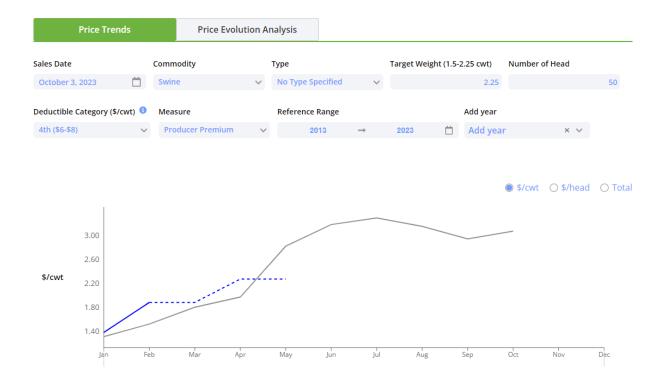
Price Trends		Price Evo	lution A	nalysis							
ales Date	Co	ommodity		Туре		Target We	eight (0.01	I-5.99 cwt)	Numbe	r of Head	
September 19, 2023		Feeder Cattle	$\sim$	Heifers Weight 1	~			5.99			100
eductible Category (\$/cwt	t) 🚯	Measure		Reference Range				Add year	1		
3rd (\$4-\$6)	$\sim$	Net Guarantee	$\sim$	2013	$\rightarrow$	2023	Ö	2023 ×	2022 ×	<b>×</b> ×	

Filter is added to Price Trends and Price Evolution Analysis.

#### A Market Dynamics Chart adjustment

@luka.trdina, @maja.pilipovic

Enhanced the graphs by making the Y-axis label bold and rotating it for improved visibility. Specifically, displaying Y-axis values with two decimals only when the "\$/cwt" option is selected for "Producer Premium," while keeping all other measure values unchanged. These changes are implemented in the Market Dynamics graphs within the Price Trends and Price Evolution Analysis sections.



#### Improvements

- 🐁 Fix the issue with data accuracy when changing the reference range year in Market Dynamics' Price Trends and Price Evolution Analysis, data is now accurately displayed, enhancing the user experience. @luka.trdina
- 🐁 Fixed the issue with formatting Premium Put Cost in Quoter. Now, when you choose the "Compare with CME puts" option, you will notice that "LRP Premium/CME Put Cost" is displayed as an integer percentage. @luka.trdina
- 🐁 Fixed the issue in Admin Panel where Aip Policy matches would not load due to a large amount of data. When you visit the "Admin Panel" and head to the "Operations" section under the "AIP Sync tab", the page now displays a spinner until the data is available for display, and a dropdown menu for showcasing a maximum of 5-10 most similar operations while allowing users to search for all other operations. @antonio.sumak, @marin.ladovic, @luka.trdina, @maja.pilipovic

## LGM

## Improvements

- 🐁 Fixed the error that occurred when changing What-If parameters. @marin.ladovic
- 🐁 Fixed the issue where the LGMs What-If Analysis was not populated with the actual gross margin. Actual gross margin is now correctly displayed in the analysis. @luka.trdina
- 🐁 Fixed the issue where the What-If Analysis displayed months incorrectly, ensuring consistent and accurate month representation across different time zones. @luka.trdina

## System Wide

## ℅ Display Agent eligibility for different AIPs

@marin.ladovic, @luka.ferlez, @maja.pilipovic

We have improved the eligibility screen for agents. Phone number and license validation are now consistent for all agents, while other eligibility criteria vary depending on the Authorized Insurance Provider (AIP).

Menu	Insurance Ager	its		Q Search for agent	is
Insurance Agencies	All		×	O P Q R S T U V	w x y z
Insurance Agents	- Agent Eligibility Su	ummary 🤸			
Operations	Na     ✓ Phone Number Val       H€     ✓ Licence Number Val			Verification 12	+ a e / a
Producers		RH	FA		
Tag Types	Registered With AIP	~	~		
	Active	~	<ul> <li></li> </ul>		
	COI Questionnaire Co	mplete 🗸	<b>~</b>		
	Non Disclosure Signed	i 🗸	<b>~</b>		
	Insurance Programs:				
	DRP	~	<ul> <li>Image: A second s</li></ul>		
	LRP	~	<b>~</b>		
	LGM	~	<b>~</b>		

#### ℅ Added State prefix in Licenses

@mladen.sasa , @maja.pilipovic

License displays have been updated to provide better state identification. A state prefix with a hashtag (#) will now precede the license number in all displays. For instance, a license will be shown as "License: #<StatePrefix><LicenseNumber>," making it simpler for users to identify the relevant state associated with each license.

#### **Notification for Ended endorsements**

@antonio.sumak, @marin.ladovic, @filip.cogelja, @luka.ferlez, @maja.pilipovic

We introduced automated notifications for ended endorsements. Notifications are sent daily to Producers and Agents for their respective Operations.

#### **Agent notification**

Agent notification is a summary of ended endorsements for all the Agents operations in one email or SMS.

The email contains a table by Operation with the count of ended endorsements and sum of grossSystem WideSeptember '23 Increment release notes© Bozic LLC | 4 of 9

indemnity, producer premium and net indemnity with a link to LIA that will open the endorsements page with prefiltered ended endorsements. The SMS message is an abbreviated list of Operations for which the endorsements have ended.

	Active Endo	orsements			Coverage Requests			AIP Sync			
<b>C</b> INDED EN	Ended Endorsements     Endorsement Ended for     Oct-Dec, 2023			ö 🔏		Update	e Indemnity Estimate	Add Endorse	ment		
Endorseme	nt Performar	nce by Quarter									
Quarter	Total Milk Marketings	Actual Butterfat Test	Actual Protein Test	Mailbox Mil Price	k Total Declared Covered Milk Production	Produ Premium		Estimated Indemnity Amount	Last Update		
Oct-Dec, 2023	15,000,000				50,040,000	\$0.2042	2/cwt \$6.07/cwt	\$0.00/cwt	Oct 03, 2023		
Active Endorsements Coverage Requests AIP Sync											
<b>C</b> Ended	Endorsements	Endorsements October 4, 20		t		Update	Indemnity Estimate	Add Endorse	ment		

#### **Producer notification**

Producer notification is a summary of ended endorsements for all the Producers operations in one email or SMS.

The email contains a table by Operation with the count of ended endorsements and sum of gross indemnity, producer premium and net indemnity with a link to LIA that will open the endorsements page with prefiltered ended endorsements. The SMS message for producers is similar to the email, containing a list of operations with sum totals for Producer Premium, Gross & Net Indemnity.

Both notifications include Agent contact details.

#### **Enabling notifications**

Account preferences has been expanded with an option that enables delivery of notifications. You can now choose whether to activate this feature and select your preferred communication channel, including SMS or email. When endorsements expire, automated alerts will be sent through your chosen method.

To receive notifications for ended endorsements, log in to your LIA account, go to 'My Account Preferences,' find the 'Ended Endorsements' option, select your preferred notification method (either 'By E-mail' or 'By Text Message - SMS'), and save your preferences.

DRP Price Report	LRP Price Report	
Price Report:		
How would you like to rece	ive price reports:	
By E-mail		
By Text Messa	ge (SMS)	
🔿 Daily, Mon-Fri		
Neekly, every Wedn	esday	
○ Monthly		
Send Now		
*The DRP Price Report con	tains personalized quotes l	pased on the preferences indicated for the quarter.
Price Alerts: How would you like to rece		otification for Ended Endorsements:
By E-mail	nve price alerts.	By E-mail
By Text Messa	ge (SMS)	By Text Message (SMS)
by Text Messa	ge (51015)	By Text Message (SMS)
DRP Price Report	LRP Price Report	
Price Report:		
How would you like to recei	ive price reports:	
No 🚺 Yes		
O Daily, Man Fri		
<ul> <li>Daily, Mon-Fri</li> <li>Weekly, every Wedne</li> </ul>	vebag	
<ul> <li>Monthly</li> </ul>	esuay	
<u> </u>		
Send Mail Now		
*The LRP Price Report cont	ains personalized quotes b	ased on the indicated purerences.
Notification for Ended I		a degram ante:
How would you like to recei	we nouncations for ended (	וועטו זפרווכוונג.
By E-mail By Text Messag	(2M2) on	
by reactivessa	se (Sivis)	

If you will no longer wish to receive notifications for ended endorsements, you can access your 'My Account Preferences,' locate the 'Ended Endorsements' option, choose 'No Notifications,' and save your preferences.

#### ℅ Afbis as AIP Source

@luka.ferlez, @maja.pilipovic

We have added AFBIS as an AIP (Authorized Insurance Provider) in the LIA system, enabling the provision of AFBIS policy data and binding of coverage requests.

#### Tag selector enter

#### @marin.ladovic, @leon.cvrtila

We have improved the tag selector's functionality. Now, when you press 'Enter,' it will seamlessly select the most relevant tag type or tag based on availability. We've also introduced a new component for Tag and Tag Type selection to enhance the user experience.

♦ Afbis as AIP Source

#### ♦ Visibility of AIP Eligibility

@antonio.sumak, @marin.ladovic, @luka.ferlez, @maja.pilipovic

Improved the current eligibility display by introducing AIP names and additional display elements to offer users essential information in the locations they need it most. Additionally, we've introduced an "info" button across key sections like the Premium Quoter Page, Request Coverage Modal, and Coverage Request Tab, enabling users to quickly view eligibility information based on the insurance plan they're reviewing. These enhancements are applicable to DRP and LRP insurance plans and are accessible to users with roles such as Agent, Admin Agent, and Global Admin.

Eligibility is displayed for DRP and LRP insurance plan on the following screens:

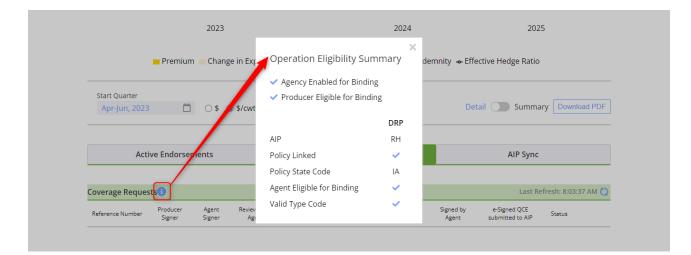
• Premium Quoter

Coverage Level 90% Det	clared Butterfat Test 3.	.25 Class Pric	e Weighting Factor	Class III: 95% Class IV: 5%
Protection Factor 1.15 De	Operation Eligibility Su	immary		ther Solids: 100% Nonfat Solids: 0%
	<ul> <li>Agency Enabled for Bindi</li> <li>Producer Eligible for Bind</li> </ul>			
Basis Subsidy Pro Analysis Overview	0	DRP	Show All Quarters	⊖\$ ● <sup>per</sup> cwt
Sales Effective Date: Oct 03, 2023	AIP	RH	Class Blend (95% Class	III, 5% Class IV)
Expected Revenue	Policy Linked	~		\$18.17
Revenue Guarantee	Policy State Code	IA		\$16.35
Producer Premium Amount	Agent Eligible for Binding	~		\$0.1141
Expected yield: 7,046	Valid Type Code	<b>`</b>		
Quote Name			Save Load	Delete
Saved Quotes test 1	~		Request Coverage	

• When Requesting Coverage

Request Coverage					×
#1 +					
Select Price Type: OCompone	nt 🔘 Clas	5			
Sales Effective Date: Oct 03	3, 2023	_			
State:		Tags	Declared Butterfat Tes	st	3.25
Michigan	~		×		
Quarter:		Operation Eligibili	ty Summary 🌽		4.50
Jan-Mar, 2024	~		, ,		
Declared Milk Production (lbs):		<ul> <li>Agency Enabled for</li> </ul>	90%		
1,000,0	00	<ul> <li>Producer Eligible for</li> </ul>	or Binding		•
Effective Covered Milk Production					1.15
1,150.0			DRP		
		AIP	RH		Class III: 95%
		Policy Linked	×	ctor	Class IV: 5%
Expected Revenue:	\$181,68	Policy State Code	IA		
Revenue Guarantee:	\$163,51	-		ting Factor	Protein & Other Solids: 100% Nonfat Solids: 0%
Producer Premium Amount:	\$1,141	Agent Eligible for Bind	ing 🗸		
		Valid Type Code	×		
otal Producer Premium:	\$1,14				Agent:
otal Declared Milk Production:	1,000,	000 lbs	Harry Anderson	~	Please Select
otal Eff. Covered Milk Productio	n: 1,150,	000 lbs	Harry Anderson		

• Coverage Request screen under Endorsement page



# Enable management of Agent licenses in "My account" preferences

@antonio.sumak, @luka.trdina, @marin.ladovic, @luka.ferlez, @maja.pilipovic

Introduced a feature to display licenses in the "My Account" section, allowing individual agents to enter their licenses conveniently and reducing workload for Admin Agents. This feature is accessible in both the Admin panel under Agents preferences and My Account preferences, specifically for Agent and Admin Agent roles. The license management functionality remains consistent in both locations, and the interface seamlessly accommodates multiple licenses without the need for scrolling.

🏖 My Account				
Preferences				^
Choose Time Zone:				
Central	~			
Default Operation:				
ltem 485	~			
DRP Price Report	LRP Price Report	Licenses		
State:	License Number:	+		
lowa	✓ 456789	/ 1		

#### Improvements

- 🐁 Fixed an issue in the "Add New Agency" modal within the Admin panel where the "Client name" select would collapse, and resolved an x-axis overflow issue, ensuring a smoother user experience and a fixed modal width. @leon.cvrtila
- 🐁 Fixed the issue where changes to Account preferences were not being saved. Now, when you log in as an admin agent or global admin and navigate to the Admin panel under Insurance Agents, you can make changes to Account preferences for another Agent and Producer. Now, when the changes are confirmed, they are saved and applied to the User's account preferences. @leon.cvrtila,@antonio.sumak
- 🐁 Fixed the issue on Endorsement Summary page where an error was displayed when there were no endorsements. @luka.trdina
- 🐁 Fixed the issue that prevented users from manually linking or unlinking endorsements in AIP Sync. This fix ensures that endorsements can now be managed seamlessly. Unlinking endorsements removes the AIP badge, and toggling syncing will re-establish the link. Additionally, users can create new LIA endorsements from unlinked AIP endorsements by toggling the grayed-out toggle, establishing a link between them. @marin.ladovic, @maja.pilipovic