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

♿ Updates in Calculation Methods 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
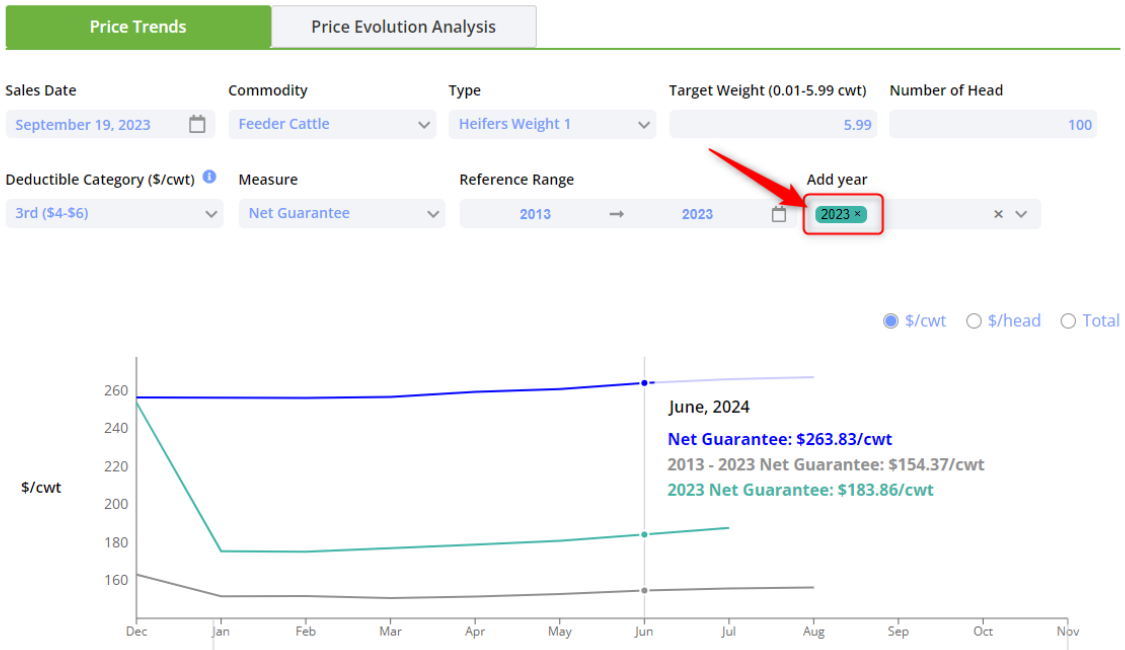
LRP

✨ Add Year option to Market Dynamics
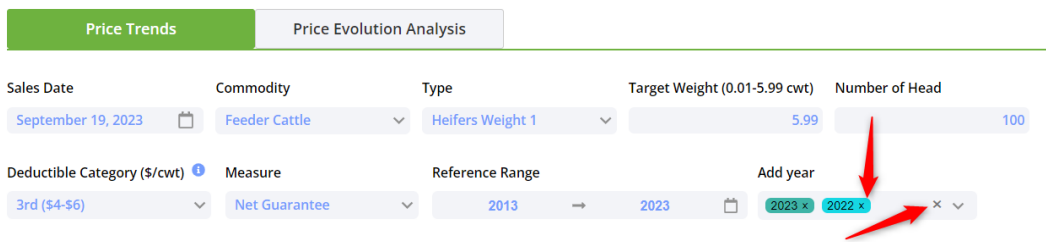
@antonio.sumak , @marin.ladovic , @maja.pilipovic

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

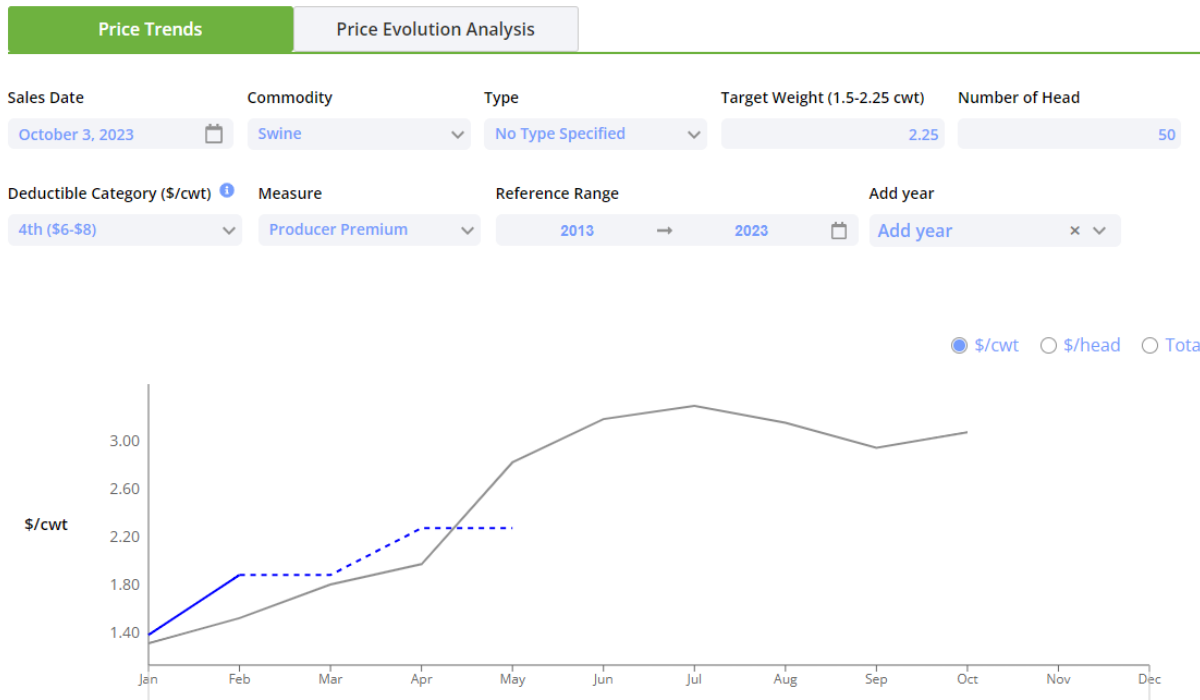- Added years can be removed one by one or all at once

Filter is added to Price Trends and Price Evolution Analysis.

♻ 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.

Sales Date	Commodity	Type	Target Weight (1.5-2.25 cwt)	Number of Head
October 3, 2023	Swine	No Type Specified	2.25	50

Deductible Category ($/cwt) ⓘ	Measure	Reference Range		Add year
4th ($6-$8)	Producer Premium	2013 → 2023		Add year ✕ ⌄

○ $/cwt   ○ $/head   ○ Total

🔧 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
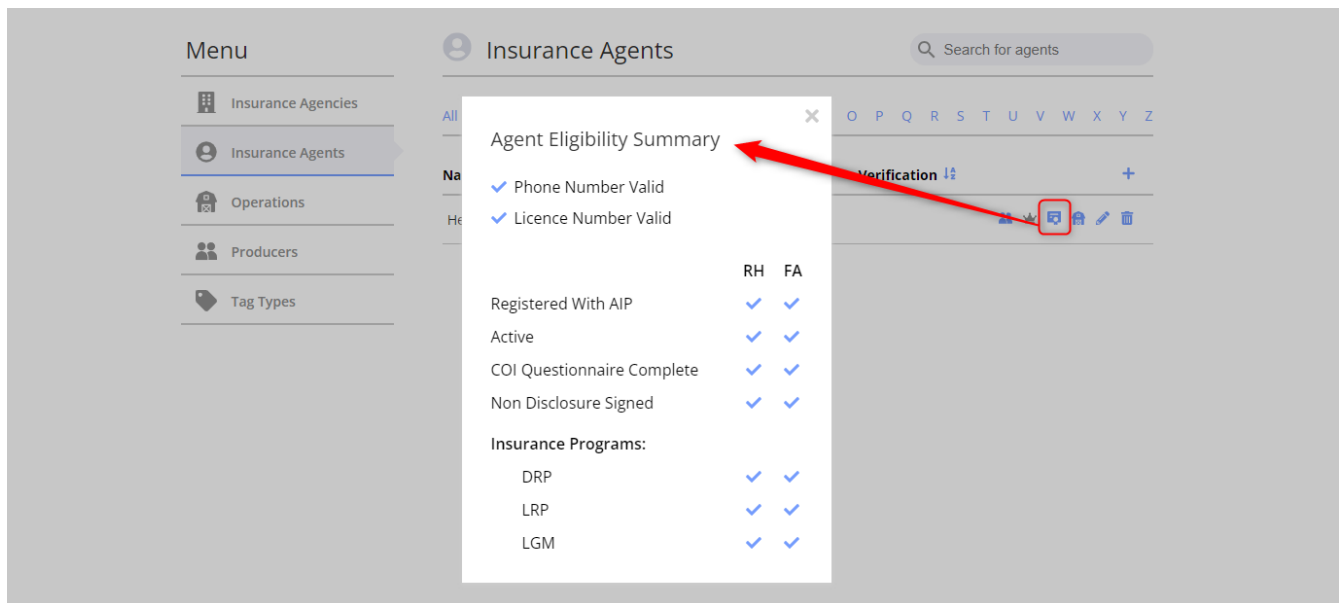
LGM

🔧 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).

✨ 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 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 is an abbreviated list of Operations for which the endorsements have ended.

Producer notification

Producer notification is a summary of ended endorsements for all the Producers operations in one email or SMS.
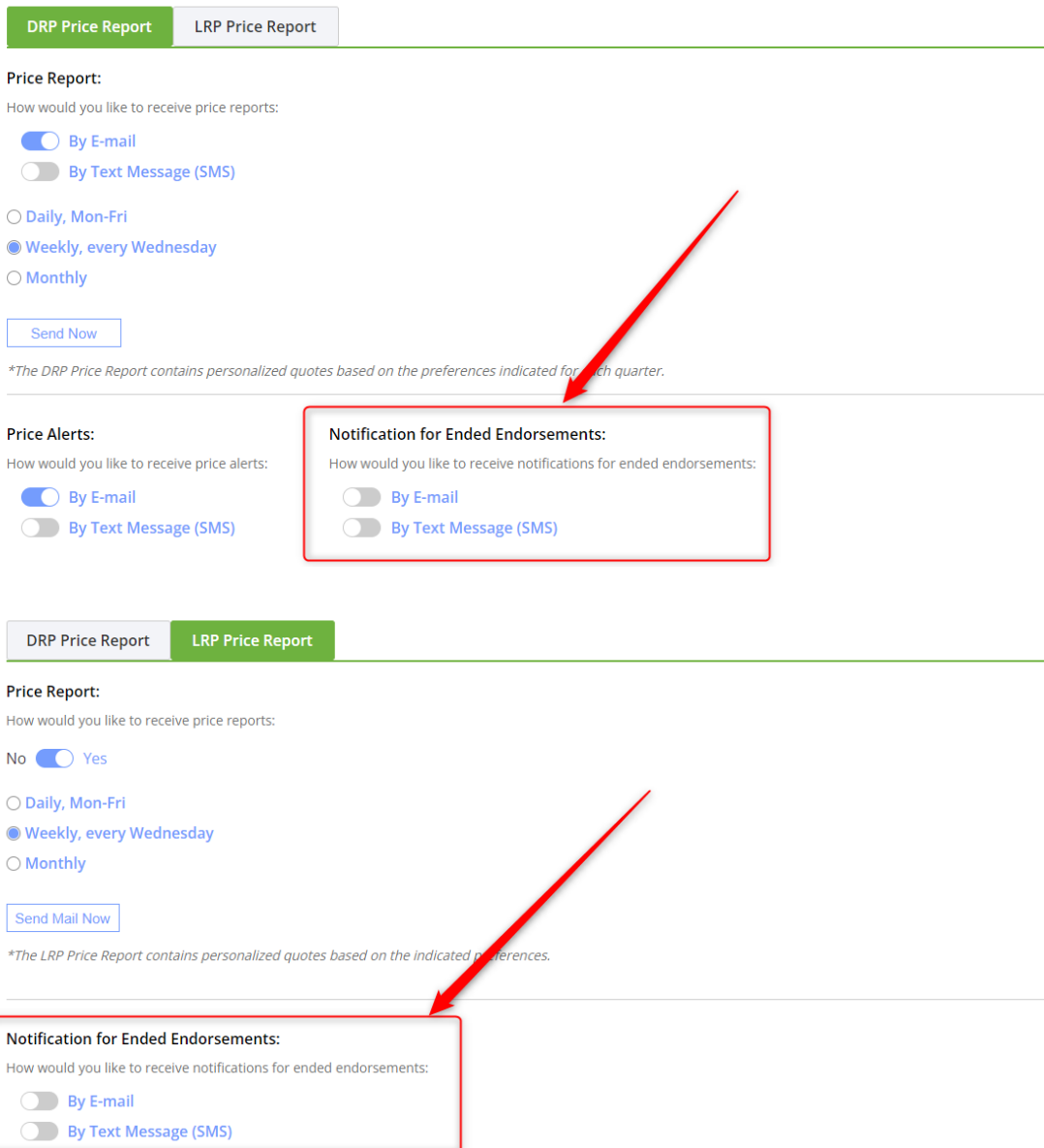
The email contains a table by Operation with the count of ended endorsements and sum of gross indemnity, producer premium and net indemnity with a link to LIA that will open the endorsements page with prefiltered ended endorsements. The SMS message for producers is similar to the email, containing a 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.

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.
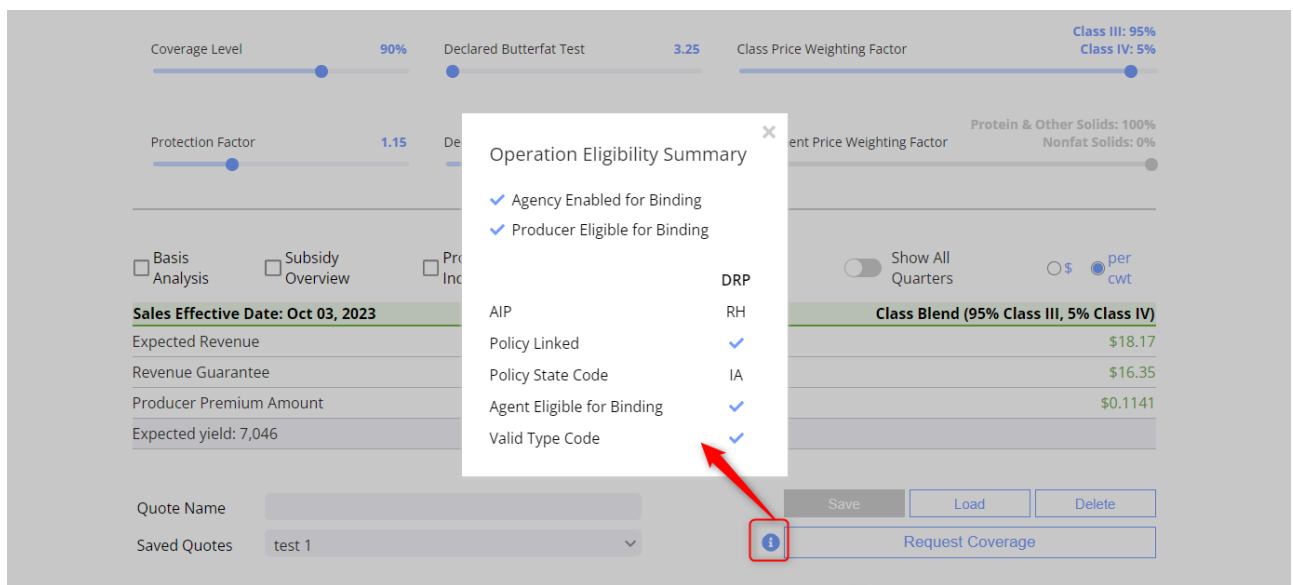
✨ Visibility of AIP Eligibility

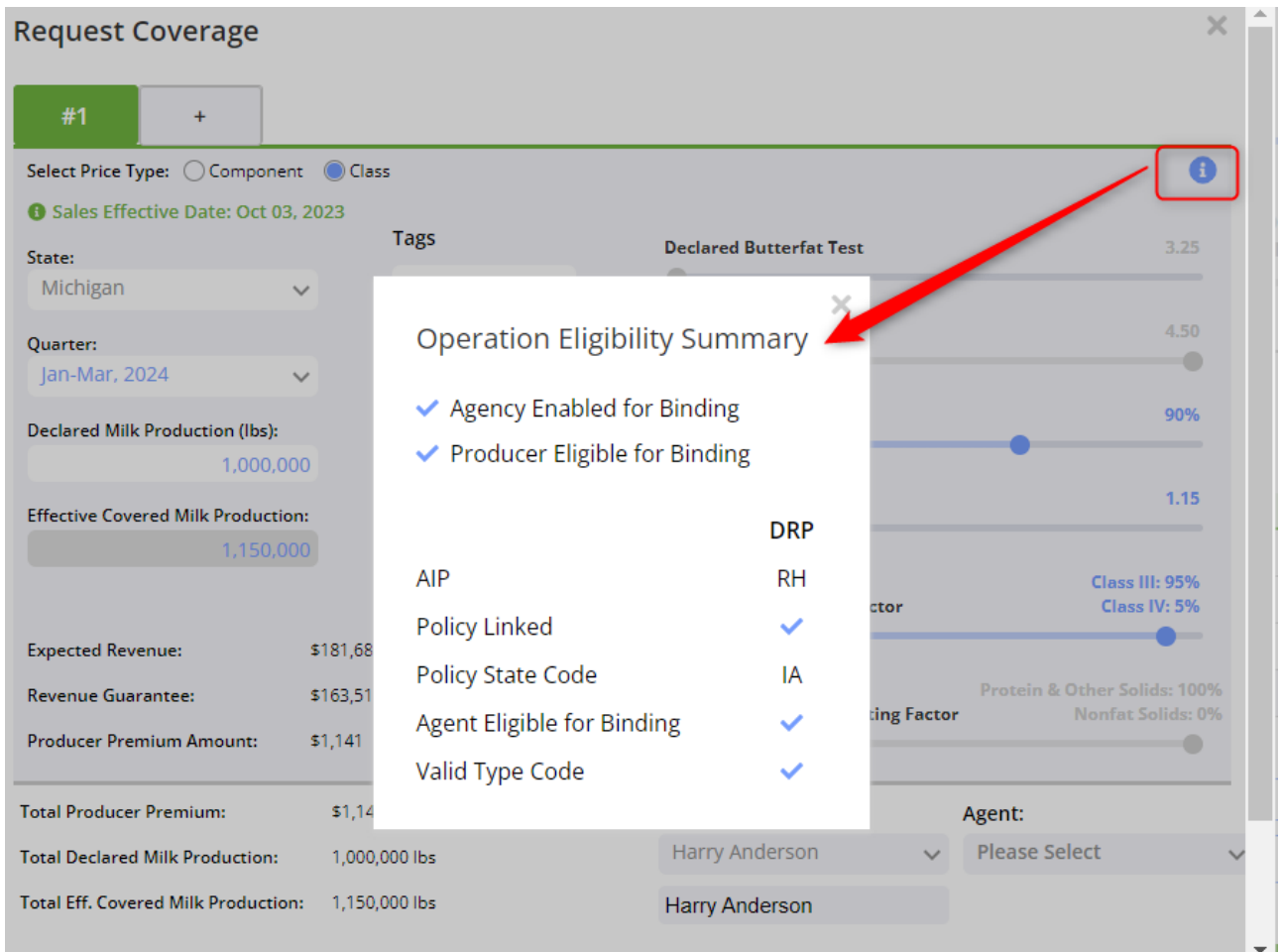@antonio.sumak , @marin.ladovic , @luka.ferlez , @maja.pilipovic

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.

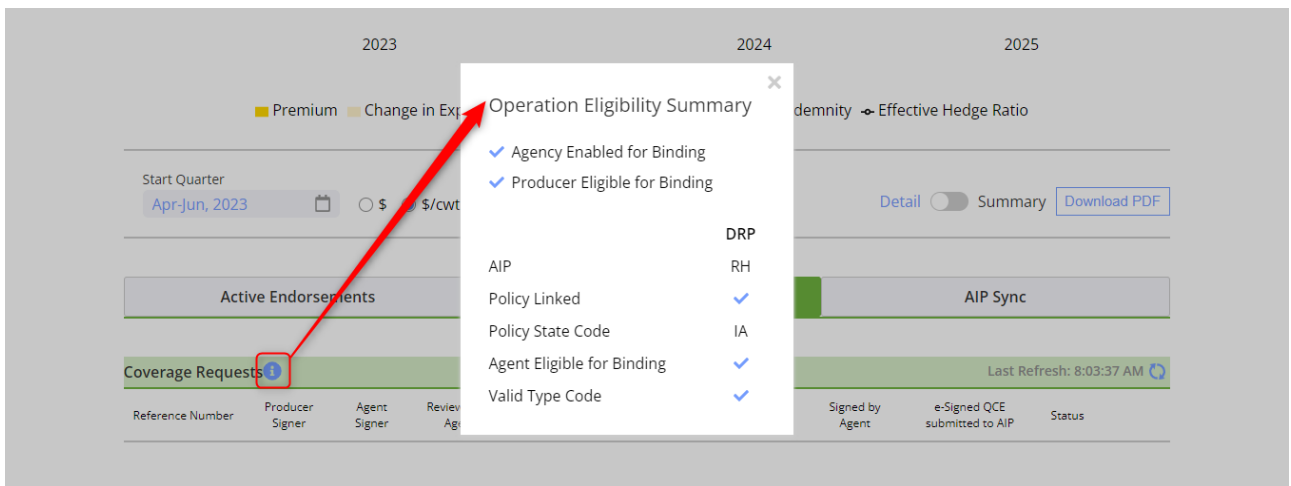Eligibility is displayed for DRP and LRP insurance plan on the following screens:

- Premium Quoter

- When Requesting Coverage
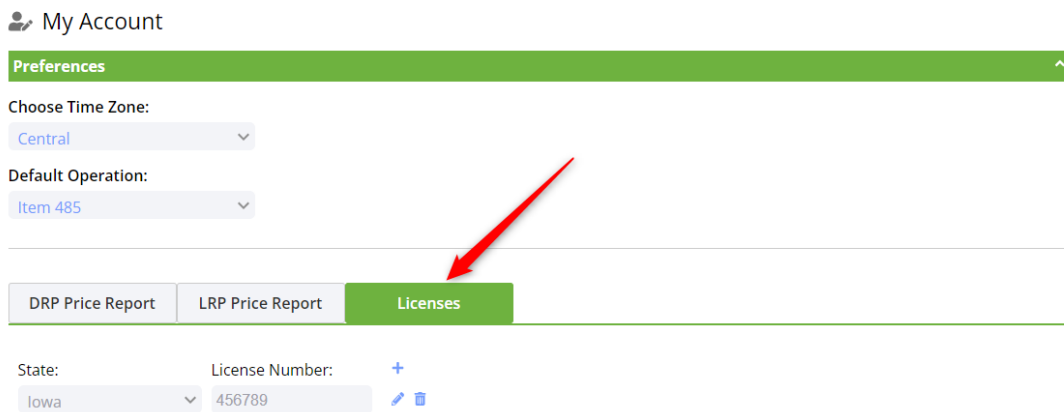
- Coverage Request screen under Endorsement page

✧ 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.

🔧 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