

Rank	BGA Wish List Item	Status	Comment
1	Delivery Requirements need additional lines.	Complete	The redesign of the Premium screen has allowed for the addition of requirement lines.
2	The posting process of Emails from Outlook to SmartOffice needs to be improved to speed up the process. Too many clicks to take a single email regarding a pending case and post it into SmartOffice. Why can't Outlook just have a PCM configuration button to only put notes in PCM?	Complete	In version 6.6 the number of clicks to post an email have been reduced. Specifically you do not have to first search for a contact before searching for a policy or pending case record.
3	Allow the posting of emails from Outlook into SmartOffice to be Smarter. Have it search the subject line to determine which case it should be posted too.	Complete	In version 7.0 if an email was sent from within SmartOffice the subject line contains the pending case id. The new email posting process will search the subject line to automatically locate the pending case associated with this email for quicker posting to pending cases.
4	Display only current rate classes in PCM. Old rate classes cannot be deleted when linked to existing cases so the list is too long to manage.	Complete	In version 7.0 a merge feature for risk classes is available. If two risk classes are similar such as non-smoker and non-tobacco you can merge them into a single risk class to reduce the available choices.
5	The application/policy needs to show the proper age calculation and this age must be editable by the user.	Complete	In version 6.6 a click on the proper insured from the Policy Insured list will display a screen allowing for issue and save age to be modified.
6	Include the fields Date Ordered and Date Received on all Requirement summary and detail screens. Status, completed and follow-up date are the only ones available.	Complete	The requirement screen now allows for the fields of: Created on (date ordered), Completed (date received).
7	Allow the Date of Birth of the Insured to be visible on the detail tab of the pending case.	Complete	In version 6.5 we added the ability to select the date of birth of the insured and place it on the Policy Insured List.
8	When adding a new case have an ability to easily enter owner and trust information.	Complete	When adding a new pending case there is an Interested Party section that allows the selection or addition of the Owner and Trust.

9	The ability to establish follow-up cycles on Business days not Calendar days. So if a follow-up is a two day cycle and today is Friday it will be set for Tuesday and not Sunday.	Under Evaluation	** still under evaluation from the product team.
10	Do automatic calculations for Commissionable Annualized premium that take into consideration the Target amount, lump sums and 1035 exchange money.	Complete	With version 7.0 the premium section has been redesigned to properly account for all premium values in the Commissionable Annualized premium fields.
11	The ability to remove requirements from the on-line follow-up list without having to complete them. A quick and easy process like a done button.		
12	The ability to identify a follow-up date when adding requirements.	Complete	The follow-up date has been returned to the requirement screens.
13	Allow the plan type on an Informal application to be changed once the informal has already been added.		
14	A method of keeping customers informed of outstanding issues in an electronic forum.	Complete	Being discussed for feasibility within E-Z Data and with BGA Advisory Group.
15	Ask your BGA partners for feed back (or wishes") more than just once a year."		
16	The letter processing (preview and print) needs to be faster	Complete	Our team has reviewed the letter process and have implemented processes to improve the speed.
17	Ability to delete options out of choice boxes	Complete	The option to delete is not available but what we allow you to do instead is to hide choices that you are not using.
18	PCM reports days in underwriting when you enter in a new case regardless of status. Would like to be able to track days in underwriting once it is in the submitted status and not in entered status.		
19	Allow a product copy feature for quickly establishing new products.	Complete	In 7.0 you can now do a product copy.
20	The ability to have a Resend button within SmartPad to allow a resend of an e-mail.	Complete	This has been completed in version 6.6. From within SmartPad the options to Forward, Reply or Reply to all is available for all logged emails.
21	Spell check in SmartPad notes and in PCM follow-ups similar to the Spell check in Outlook.		

22	When you check the box on the detail screen to show the policy has been issued the workflow should pull up the delivery information screen and once completed take you to the delivery tab and not the detail tab of the case.	Complete	The delivery workflow has been modified to allow all options be done from the workflow and the need to return to the delivery tab is no longer required.
23	Have a workflow for advisors that consolidates the add of a new advisor to include CE, EandO, Licensing, Contracting etc. Something very quick instead of so many locations to go and enter data.		
24	Allow different email addresses or mailing addresses to be different by type. So correspondence sent to an advisor for pending case could be different for commissions as an example.		
25	Enhance LTC including a drop down box for inflation protection. Also include check boxes for reimbursement and indemnity.		
26	Copy of Policy / Pending Case		
27	Save attachments to E-mails in SmartPad right along with the Letter	Complete	While saving emails the attachments are also saved.
28	CTM Process Workflow support		
29	The ability to privatize a document in the document summary just like SmartPad notes can be privatized and not seen by the Advisor View or Assignment list.	Complete	A check box is now available during the importing of documents to privatize a document.
30	The ability to identify a template for requirements so like cases you can pick the template and not re-enter the requirements. A copy button may work as well to copy requirements from one case to another.		
31	Allow an automatic feature to request save age if within a specific time period.		
32	Allow posted illustrations to be visible from Smart View for Advisor		
33	We need additional access points to the imaging system. For example from the advisor and contact screens.	Incomplete	Evaluating access points for each imaging provider. Development initiated but incomplete.
34	The ability to link only the reply section of an email in SmartPad instead of linking the whole e-mail chain.		
35	Allow rates to be updated and inserted using an Excel spreadsheet instead of updating them using the user interface.	Complete	A new utility has been done that will allow editing of multiple rates at a time. This was done instead of the Excel import.
36	SmartOffice should be smart enough to see that a license, contract, appointment etc has expired and move the status associated to Inactive.		

37	The on-line follow-up system should have a facility to show just the case as an item to follow-up on instead of displaying multiple requirements for the same case.		
38	Allow a sort option on the summary screen of Pending Case to allow a sort by date of last change. It would be updated if anything on the case was updated, requirements, notes, correspondence sent etc.		
39	Advisor area: Display area for Addresses and phone numbers are too small. Need space for at least 4 lines.		
40	E-mails are stored in SmartPad that may have been logged by other users. It would be helpful to be able to pull up one of these emails and reply to the stored email.	Complete	This has been completed in version 6.6. From within SmartPad the options to Forward, Reply or Reply to all is available for all logged emails.
41	Merge codes need to work if available for correspondence!	Complete	All merge codes have been reviewed to verify they are working.
42	When editing requirements allow the remarks columns to be editable without having to drill into each individual requirement.	Complete	From the requirement screen tag all or select records and click the Edit button. The requirements will be displayed in an editable spreadsheet.
43	Append notes on Activities to the original note so they are all in order and not placed in date order where it loses the continuity with the original note on the activity.		
44	Allow the commission rate file to be banded by Option on a given Product.	Complete	The Option is available to be defined on the product. It is then selectable on the policy, pending case and within the rate file for appropriate banding.
45	When adding requirements why can't we be taken to an editable spreadsheet to finish the edits of notes, service providers, follow-up dates etc?		
46	On the set up of a pending case, have the ability to put in a base amount and a term rider amount and be able to see this on the details page of the client information.		
47	A generic plan should be available when adding an Informal Application.		
48	Informal Application Requirement handling should be easier. Allow a copy from one case to the other.		
49	Merge codes to include "Not completed requirements" for both Underwriting and Delivery. We have a variety of merge codes for open received etc but not one that shows all requirements that do not yet have a completed date."		

50	Mass correspondence needs to be a background process and the speed must be improved for the execution.	Complete	The user is now returned to the SmartOffice application while mass correspondence processes in the background.
51	The ability to copy or split a joint policy if one of the Insured's has been declined.		
52	Create two unique id numbers for Survivorship UL policies so each insured could have its own Image file.		
53	Additional User customizable fields located on the detail page of the case. Examples would be for identification of riders, agent to pick up policy etc.		
54	Include a child rider check box on the detail page to keep track of the riders.		
55	The new application add process should include the request to add impairments so they do not have to be added after the application is entered.		
56	The preview of correspondence should display at 100% instead of defaulting as 54% to save having to expand the letter each time.		
57	We need more packaged report in the system for Commission related items.		
58	Support the integration between SmartOffice and the desktop version of Winflex.		
59	The advisor request section must have an option to close" as request."		
60	Allow notes from the client to be copied down to the individual PCM record allowing for a full diary of notes at the PCM level.		
61	Better Data Conversion	Complete	Additional resources assigned to this team.
62	Custom Merge Codes for Inforce		
63	In Pending Case a Merge code for: Policy Insured + Issued Class + Remarks on the Issued Class		
64	To be able to access SmartOffice with Safari and Firefox browsers	Complete	Complete for SmartOffice Mobile only.
65	Allow a Full import of a policy from another system even from a carrier if required.	Complete	SmartOffice is building interfaces on a carrier by carrier basis.
66	Standardized reports that provide better information so no one in my office has to figure out dynamic reports.	Complete	In version 7.0 home page themes are available that contain reports for each section of SmartOffice.
67	Add additional summary fields to be visible on the main panel of Continuing education. An expiration date, remarks etc.		
68	Pending case add for Group Policies. Requirement tracking just like individual cases. Allow for viewing by SmartView for Advisors.		

69	In Enterprise mode allow the modification of the office an advisor has been assigned to.		
70	iPhone software application to be able to have similar to what is available for Palm users.		
71	Integrate with XRAE (Xpress Risk Assessment Exchange)		
72	When we enter info in the Proposal tracking tab for nursing home benefits for an insured it automatically assumes that we want same in the HOME care side. We type in stuff twice all the time in the tab		
73	64 Bit capability to run SmartOffice on a 64 bit computer.		