

NIC Release Notes

NICdistributor

NICadvisor

This release includes bug fixes and new functionality tickets for the Distributor and Advisor Apps, including:

On-boarding:

Multiple bug fixes. Streamlined the on-boarding process and added a forgotten password workflow.

Search:

Multiple bug fixes to correct search results. Enhancements to the results table.

Policy Listing View:

Enhanced default policy listing display values to add:

- ◆ Policy Status
- ◆ Effective Date
- ◆ Beneficiary Name
- ◆ Insured Name
- ◆ Payment Frequency
- ◆ Location
- ◆ Cash Values
- ◆ Modal Premium

Settings:

Added user settings features including password change and Multi-Factor-Authentication (MFA) source change to user accounts.

Access to user settings can be gained by clicking the profile picture located in the top right of the header on any page.

NOTE: Due to the nature of this feature, accessing this page requires the re-entry of your password and MFA credentials.

Documents:

Layout modifications, added the Documents tab to all Teams, Firms, Advisors, and Policy Owners.

Uploaded documents can be shared with any Team, Firm, Advisor, or Policy Owner from the left navigation menu.

Lists:

Search results can be directly added to either a new or existing list. Lists can be edited to add or remove members.

Download of Data:

Search results and pre-configured data samples of policies, clients, and teams can be extracted in comma separated value (CSV) format.

NOTE: Downloads of lists membership will be coming in a future release.