

Version Changes



Version: 18.6.0

Number of Changes: 29

Cool Features

We are integrated with Imperial Premium Finance and this feature can be reached from the Ribbon while on the **Client Main Screen** by going to **Tools** and **Imperial PFS**.

We have added functionality to the Remittance Report Form to allow the User to search for a range of amounts based upon the Remittance Due. By entering the same amount in both the From and To amount fields, you may effectively search for an EXACT amount

We have added a dropdown field for "Preferred Communication Method" to the Client Main Form. The options are Text - Email - Phone.

We have added a new Production Report. This report will show all clients who have NO Cell Phone . The report is located on The Marketing Tab.

Quote Control now shows you the business name in your Quote Control box on the main screen if the quote type is a business quote.

In the Tools Ribbon we have added a new feature which will allow the Agency Manager to create and manage Personal Goals for their employees.

Other Changes

We have moved the Agency Transaction Log Report from the "Ribbon" to the Production Report form under the MISC tab. Additionally, we have added the ability to select a date range; not requiring the "slashes" for the dates.

If you have the **Require Policy Note** or **Require Client Note** turned on and you have already made a note in the policy or client, Jenesis now no longer require you to make another note.

Users can now "Add" or "Delete" a location address on the Location tab (taken from Client Main Screen form).

If Require Policy Note is selected in User Setup, More Settings, and the user attempts to use CTRL + M to quickly escape from inside a policy back to the Jenesis Main Screen, Jenesis will now require the note as indicated in User Setup.

Values on the on worker's compensation value is now aligned; showing the "Y" or "N" IN the box instead of above the box.

The tab order on the Personal Auto Vehicle screen has been corrected.

Changed the option under User Setup > More settings > **Allow Delete Quote** wording to **Allow Edit & Delete Quote**

Commercial Proposal table are now moved to the backend and linked from the front end.

Vehicle List has been updated and now printing correctly.

Updated table to fix the issue with the commercial. Quote proposal. Report is now generating correctly

The border on the Commission boxes are fully enclosed now.

We have added new functionality for each User to Print Future Suspenses and any Admin to print ALL User's Suspenses.

Populate Vehicle and Drivers information from Business Auto Screen to the Acord 127 Form

When adding a new client Jenesis does not automatically display the "This Customer belongs to Location 4" message at the top of the screen.

When printing a Commercial Certificate, if you choose to not print the Acord 101 Additional Remarks form, Jenesis will now only print the Acord 25 (Certificate of Insurance).

We have added these NY Acord forms as the **fillable (not pre-filled)** PDF option: 39, 60, 61, 62, 64, 65,67, 68, 69, 70, 90, 137, 138, 171, 172, 173, 174, 177, 290 & 855.

We have added these NY Acord form(s) as **pre-filled**: 138

The "Customer With Auto and Home" Production/Marketing report has been updated to include policy types containing "dwelling".

Removed the following report objects:

Acord 1 PropertyLossNoticep1
Acord 1 PropertyLossNoticep11
Acord 1 PropertyLossNoticep2
Acord 1 PropertyLossNoticep21
Acord 1 PropertyLossNoticep3

and commented out the following code:

The Description field in Certificate Holder View/Edit mode now accepts the same number of characters as the Description field on the certificate will hold.

We have added the ability to manage the requirement of "Require Client Note" at the User level. This process is the same as the "Require Policy Note" requirement and is located on the User Setup page under the "More Settings" button.

We have added functionality in Company Setup to allow the User to enter more than one copy of any plan offered. For example; The User may now enter Auto for New business and a second Auto for Renewal.

We have improved the way we can edit the "Collection Statement" that shows up on a Home Binder by allowing the Agent to edit it on the binder itself.

Now when printing an Acord 125, the Certificate of Insurance, Jenesis will display the form and allow the user to print where they prefer.
