

Company

BETA Release	#	Feedback	Status	Comments
Submitted By: Alaska – Rebecca Nesheim				
1	1	User does not like state selection text on top of page. She would like it smaller or not there at all.	Under Review	
1	2	User would like logout button in a dropdown next to username and on top status bar along with username.	Under Review	
1	3	User would like smart dates available in Company.	Future Release	
1	4	In search: user would like the following criteria available: NAIC group number, NAIC group name, State of Incorporation (renamed Domicile State or State of Domicile as in iSite), and Domicile Type (domestic, foreign, alien))	Future Release	
1	5	Company Status set as Active by default	Future Release	
1	6	Search, Reset, Save Search to be relocated at bottom of search criteria	Under Review	
1	7	Ability to press enter to pull up search vs hitting the search button.	Future Release	
1	8	User believes it is not intuitive to click on the name of the company in the search results. Wants to consider underlining the name.	Closed No Change	Current display in SOLAR adheres to SOLAR application form and format guidelines.
1	9	Timeouts: User would like more time of inactivity before application times out. Possibly a warning box to pop up beforehand.	Future Release	
1	10	Workflow: User wants multiple screens to be able to stay open at the same time. Ex. When Company or Producer is selected , the window opens on top of what is being worked.	Under Review	
1	11	User likes the functionality in Legacy where Company Search stays open even after search.	Under Review	
1	12	All rows except Demographics start out as collapsed.	Future Release	
1	13	Ease of Use: User does not like the hovering over Company and header options. Unable to get selection box to show quickly, after many attempts.	Under Review	

1	14	Company Summary: User would like the ability to hide fields per state business rules if not used in that state	Under Review	
1	15	Demographics: User would like a field for State of Entry or US Branch State to go along with Country of Incorporation (or renamed Country of Domicile).	Under Review	
Submitted By: Alaska – Rebecca Nesheim (continued)				
1	16	Addresses: Add fields - Contact name (optional and shown on summary) Email (shown on summary) Phone number (multiple and main line shown on summary) and Fax Number	Under Review	
1	17	User would like these to auto populate every quarter from info provided by the company to the NAIC	Future Release	
1	18	Dates: User would like the ability to name fields per State's business rules and not have a one size fits all scenarios as in legacy.	Under Review	
1	19	Company Types: (From user email) The biggest change needed on the summary was mentioned in the meeting and that is having everything after demographics and addresses as part of each Company Type. There are different requirements based upon company type such as different contacts, fees, lines of authority, status, dates, correspondence, attachments, etc. Each one of these should have their own collapsible row	Future Release	
1	20	Lines of Business needs an expiration date	Future Release	
1	21	Contacts: On summary, need to include extension with the primary phone number	Future Release	
1	22	Add/Edit - tab order for the fields is wrong. Should be First, Middle, Last, Preferred Name. Also include the ability to hide.	Under Review	
1	23	User would like the ability to copy other contact's information within a company record to another contact type.	Under Review	
1	24	Deposits: User would like a parent/child relationship for deposits. Ex. Bank Account and under it is security deposits.	Future Release	
1	25	Fee Details: Renamed as Payment Details.	Under Review	
1	26	Transaction Data should match received data in Revenue.	Future Release	
1	27	User would like the ability to hide any columns that are not used	Under Review	
1	28	User wants to know what is Account Number	Under Review	
1	29	Company Relationship - need to add this	Future Release	
1	30	User wants to know if the other items currently in Legacy will be added. Correspondence, link to Projects, etc.	Future Release	

1	31	Group Changes: User would like to see something like this and would like the ability to make changes/additions across companies within a given group, such as: Address Changes, Contact Changes, Group Name, Notes.	Future Release	
Submitted By: Alaska – Rebecca Nesheim (continued)				
1	32	Company Admissions: User would like Company Name to remain on top of screen when navigating through pages.	Under Review	
1	33	Demographics: Name - needs to have a warning prompt when duplicate name or similar name is entered.	Future Release	
1	34	NAIC Number: 6 digits instead of 5	Under Review	
1	35	NAIC Number: Error if same NAIC# is entered	Future Release	
1	36	Create an Alien NAIC number field (here and on summary demographics) - if in FEIN field then field name needs to be renamed to FEIN/Alien Co-Code	Under Review	
1	37	If Domicile Type of Domestic is selected, then State of Incorporation should only be allowed as the state.	Closed No Change	Current display in SOLAR adheres to SOLAR application form and format guideline that limits incorporating state specific rules to the SOLAR interface
1	38	Add website	Under Review	
1	39	Address: If zip code is entered first, city/state will auto-populate. If not, then should be listed in order as city, state, zip code.	Future Release	
1	40	Website should be under demographics as each address won't have different website	Under Review	
1	41	The four addresses should not be required for all company types. If company type isn't going to be entered until after addresses, we need the ability to select N/A	Under Review	
1	42	User's work email is not working	Future Release	

1	43	Company Types: User needs an explanation of what the dates mean unless they can be set up for each state. Maybe hovering text.	Closed No Change	Date definitions will be addressed with online screen help as well as training.
1	44	Elements of given company type needs to be set up	Under Review	
1	45	Need to add Status and Status Reason with dates in this section.	Future Release	

Submitted By: Missouri – Debbie Doggett (continued)

1	46	The NAIC group number drop down list is currently based on name of the group. Currently it is numeric; prefer to keep it numeric based on the group code number	Future Release	
1	47	After clicking next after entering demographic information, user received error message, "WELD-000321 No conversation found to restore for id 1."	Under Review	
1	48	On Company Deposit, the par value and market value should be displayed with commas and possibly dollar signs after the "add" button is selected.	Future Release	
1	49	After pressing finish button, user receives error, " An unexpected error has occurred"	Under Review	
1	50	When an NAIC group number exceeds the set screen size, the screen shifts left and won't go back. The group number needs to be contained within the field to prevent this.	Under Review	
1	51	Deposit display; dollar values should be common delimited.	Future Release	
1	52	The time out feature needs modified. It happens to fast.	Under Review	
1	53	When choosing an NAIC Group Number the numbers are not in numeric order.	Future Release	

Submitted By: Missouri – Cindy Monroe

1	54	Wants ability to change name of company in SOLAR.	Future Release	
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Submitted By: North Dakota – Yvonne Keniston

1	55	User would like Country, Zip, City and State relocated under Address 3.	Future Release	
1	56	System issue/Hung up on screen to add company deposit	Under Review	

1	57	Add/Edit company deposit GUI should be similar to current SBS instead of using columnar view.	Closed No Change	SOLAR Company Deposit section was designed to address user interface deficiencies in SBS Company Deposit
1	58	User wants a finish button after entering deposit information vs save button.	Closed No Change	Current display in SOLAR adheres to the SOLAR application form and format guidelines

Submitted By: West Virginia – Christy Dunlap

1	59	User requests that appointments be shown when in SBS Company Demographics page. Then ability to click on individual name to see License Summary vs current layout of being in SBS Producer and searching for an individual and seeing the License Summary page after clicking the name.	Under Review	
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Submitted by: North Carolina – Betty Creech

1	60	North Carolina requests that an additional field be added to Optional Data to record the effective date for bail authority. Needs to be titled "Effective Date - Bail Bond Authority". It should also be added to Company Data Extract for reports.	Under Review	
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