# ClariNet Release Notes – December 2015

## NEW FEATURES AND IMPROVEMENTS

1. **[CL-4639] - Custom report builder**
2. **[CL-4684] - Custom case list columns**
3. **[CL-4724] - Documents tab: line up columns to ease reading**
4. **[CL-4721] - Update ClariNet logo**
5. **[CL-4701] - Avoid logging entire contents of XML import**
6. **[CL-4722] - Remove obsolete View Help item in Help menu**

## BUGS

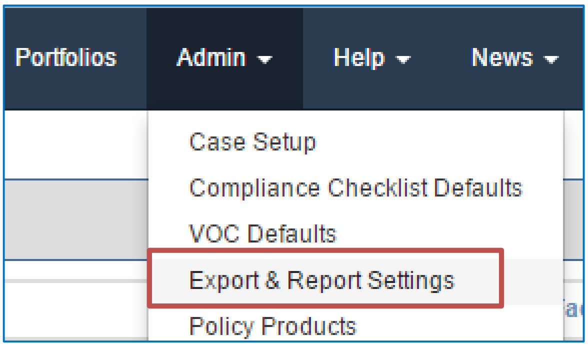
7. **[CL-4658] - Cap loan repayment and cash withdrawal**
8. **[CL-4703] - Xml Import: very long text in Underwriters text fields cause errors**
9. **[CL-4723] - VOC page: fix misalignment of first column in Date Picker layout**

# ClariNet Release Notes – December 2015

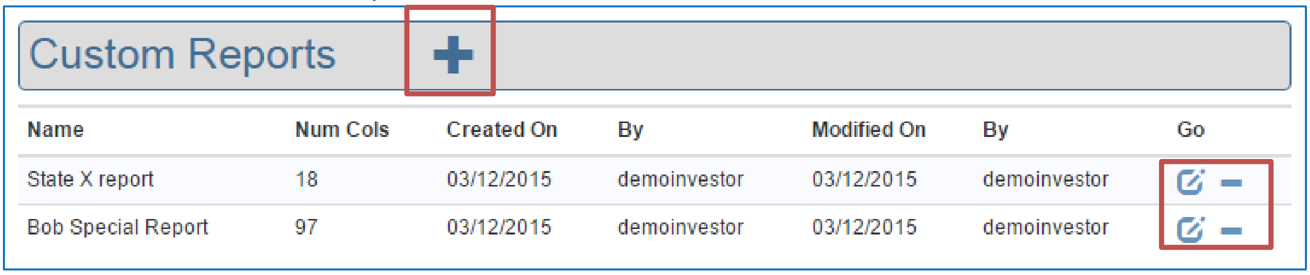
## New Features and Improvements

### 1. [CL-4639] - Custom report builder

You can now design your own reports! In this first version, you can choose from 97 ClariNet fields, from the Policy tab and the Insured tab and from Bidding and Closing Transactions. The output is a CSV file that can be opened with Excel. **Please let us know which additional fields would be useful to you**.
Reports are defined at Subscriber level and are therefore available to all users. They are defined in the Admin menu on the Export & Report Settings page:



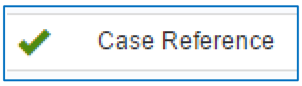

You can add, edit and delete reports:


Custom Reports

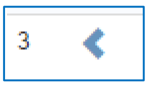
| Name | Num Cols | Created On | By | Modified On | By | Go |
|---|---|---|---|---|---|---|
| State X report | 18 | 03/12/2015 | demoinvestor | 03/12/2015 | demoinvestor | |
| Bob Special Report | 97 | 03/12/2015 | demoinvestor | 03/12/2015 | demoinvestor | |

On the left side, you will find all 97 fields currently available to pick from. The right side shows the layout of your report.


Just click the blue arrow to copy the field from list of available columns (on the left) to your own report (on the right).

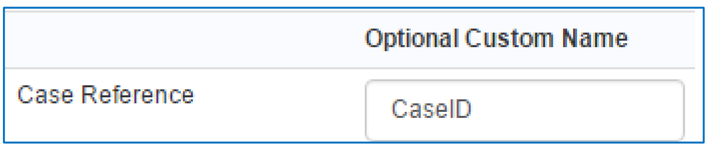



A green tick indicates the field is already present in your report. You can select the same column multiple times if required.



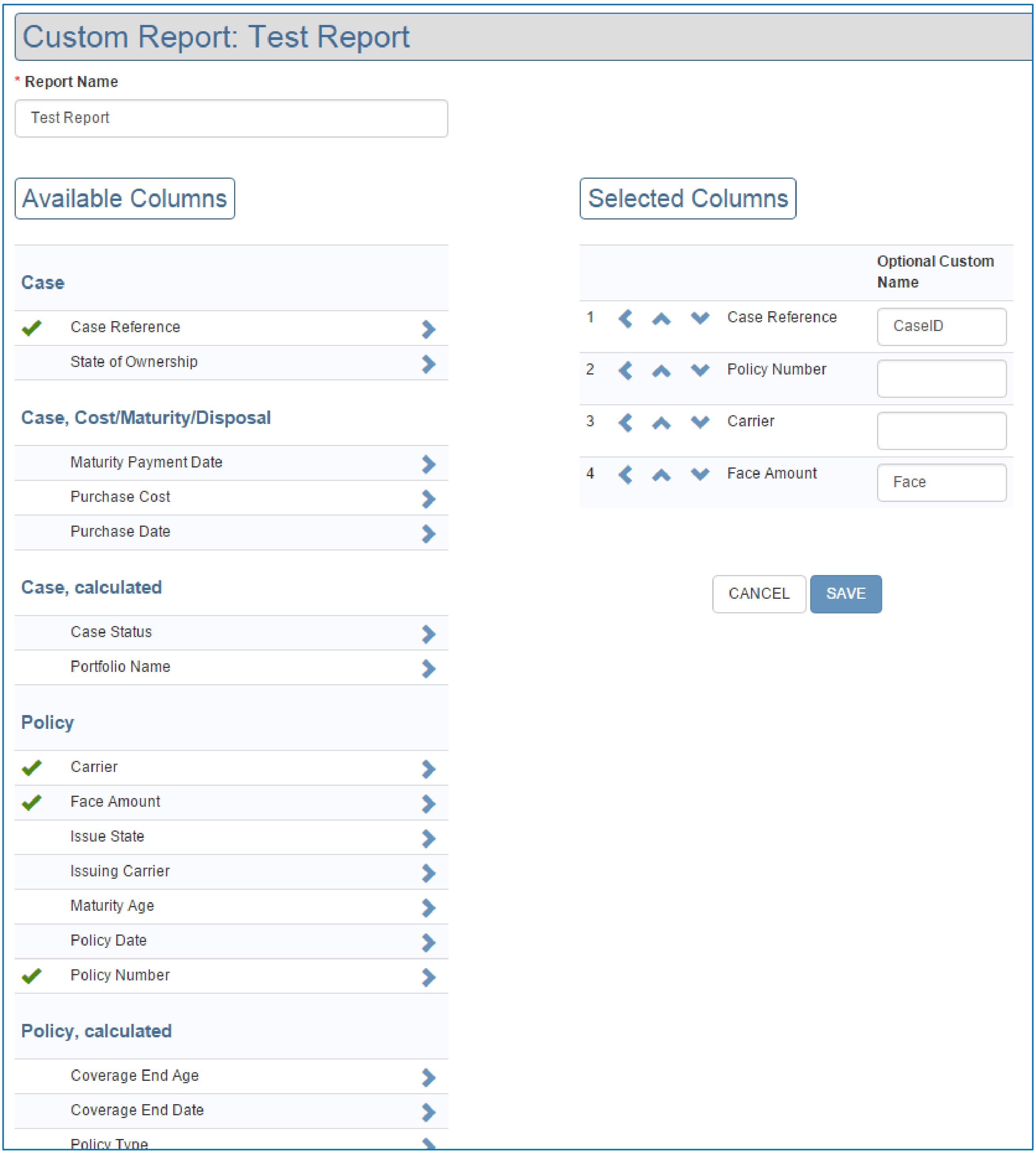

To remove a field from your report, just click the blue arrow to move the field from your own report (on the right) back to the list of available columns (on the left).


You can easily change the order of the columns in your report by move the fields up or down using the appropriate blue arrow.

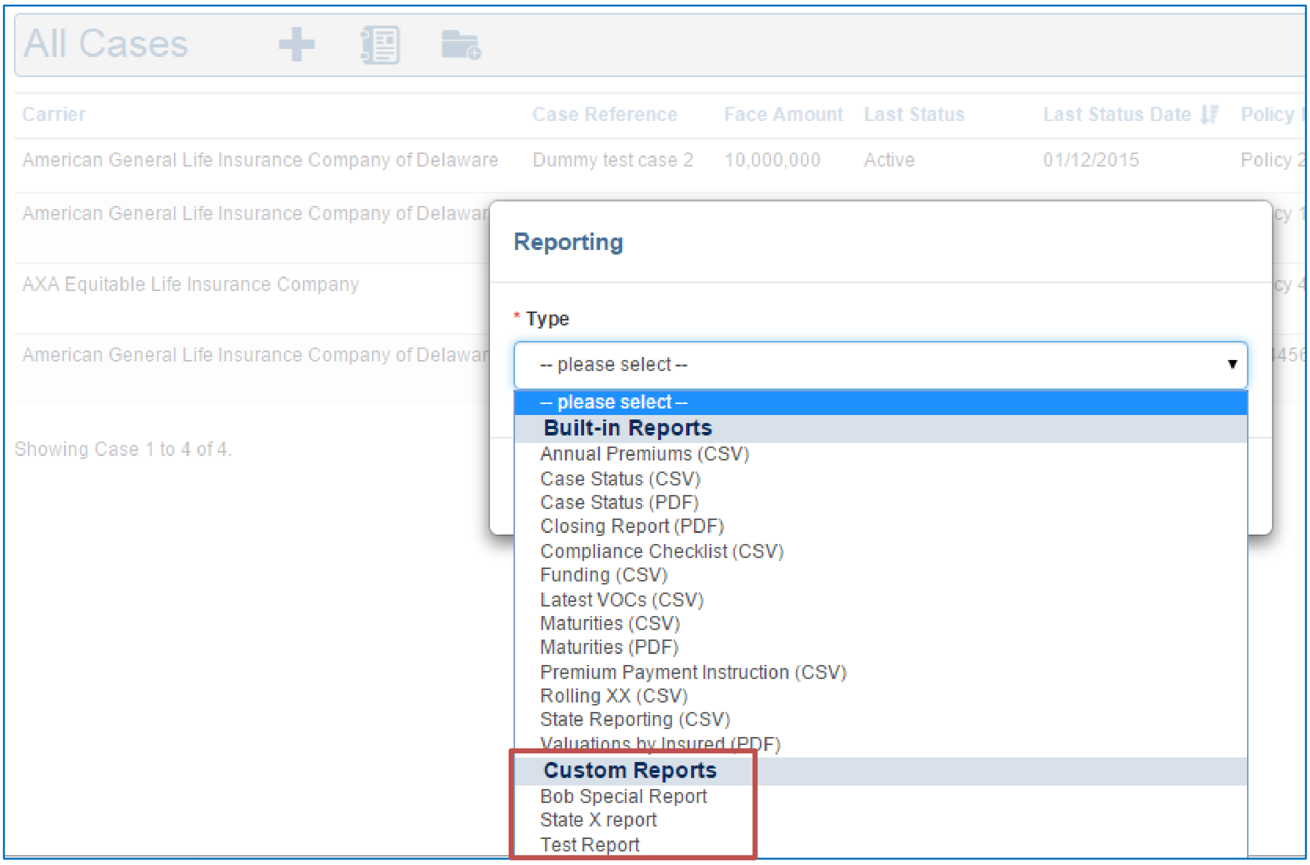



If you prefer to use your own name for some columns rather than the ClariNet name, just enter it in the optional text box.

Some fields, such as Coverage End Date and Highest Bid are calculated, meaning various individual fields are used to determine the value which is generally not directly editable by a user.

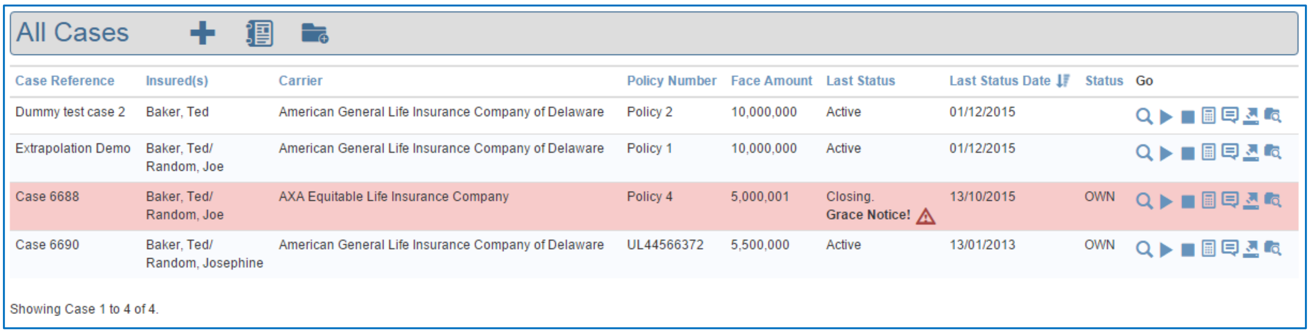


The reports are made available in the usual Reporting dialog box, underneath the ClariNet built-in reports:




## 2. [CL-4684] - Custom case list columns

The standard list of cases has eight data columns and one "Go" columns with all the action buttons:



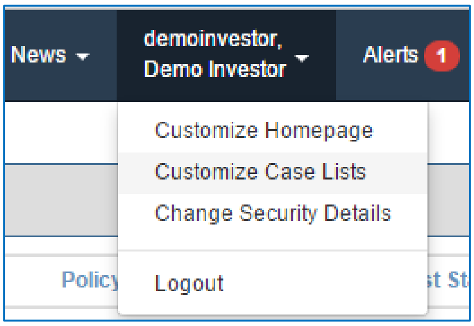
All Cases

| Case Reference | Insured(s) | Carrier | Policy Number | Face Amount | Last Status | Last Status Date | Status | Go |
|---|---|---|---|---|---|---|---|---|
| Dummy test case 2 | Baker, Ted | American General Life Insurance Company of Delaware | Policy 2 | 10,000,000 | Active | 01/12/2015 | | |
| Extrapolation Demo | Baker, Ted/ Random, Joe | American General Life Insurance Company of Delaware | Policy 1 | 10,000,000 | Active | 01/12/2015 | | |
| Case 6688 | Baker, Ted/ Random, Joe | AXA Equitable Life Insurance Company | Policy 4 | 5,000,001 | Closing. Grace Notice! | 13/10/2015 | OWN | |
| Case 6690 | Baker, Ted/ Random, Josephine | American General Life Insurance Company of Delaware | UL44566372 | 5,500,000 | Active | 13/01/2013 | OWN | |

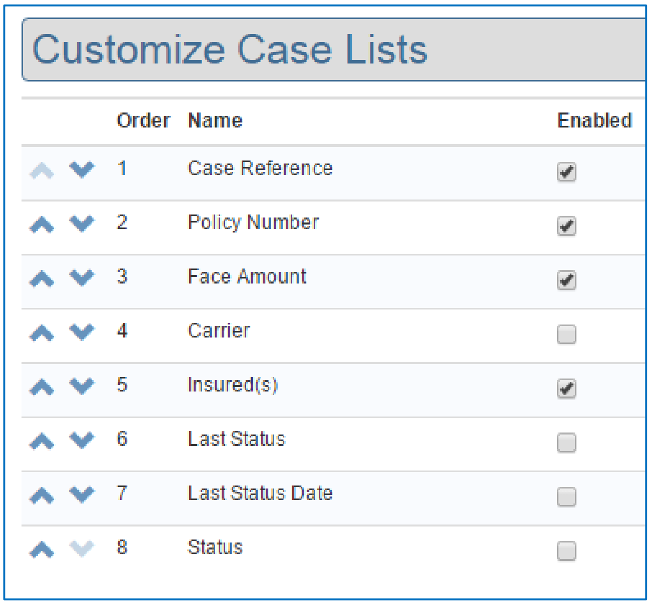
Showing Case 1 to 4 of 4.

You can now change the order of the columns, and select which ones to display.

Use the “Customize Case Lists” item in the user menu:



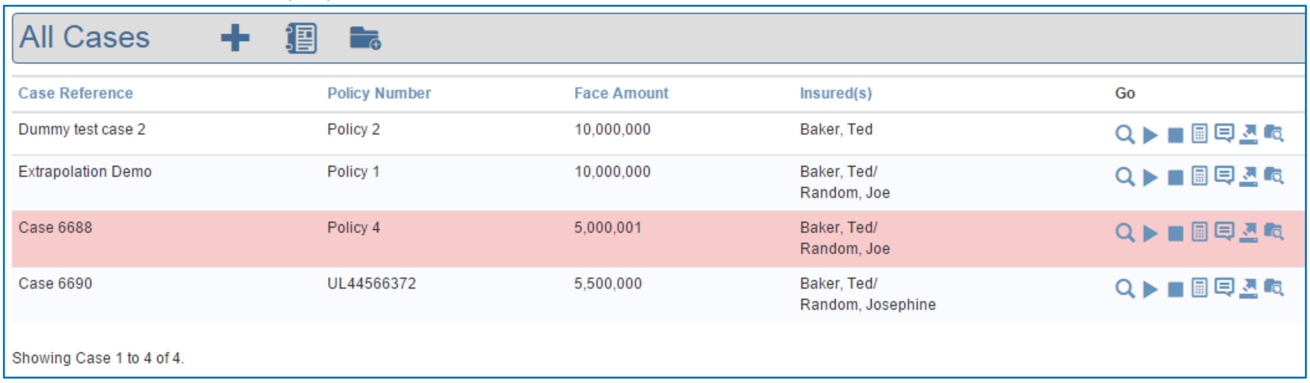

Simply check the box for the columns you want to use, and use the up and down arrows to order them.



**Customize Case Lists**

| Order | Name | Enabled |
|---|---|---|
| 1 | Case Reference | ✓ |
| 2 | Policy Number | ✓ |
| 3 | Face Amount | ✓ |
| 4 | Carrier | |
| 5 | Insured(s) | ✓ |
| 6 | Last Status | |
| 7 | Last Status Date | |
| 8 | Status | |

All case lists are now displayed with these columns:



**All Cases**

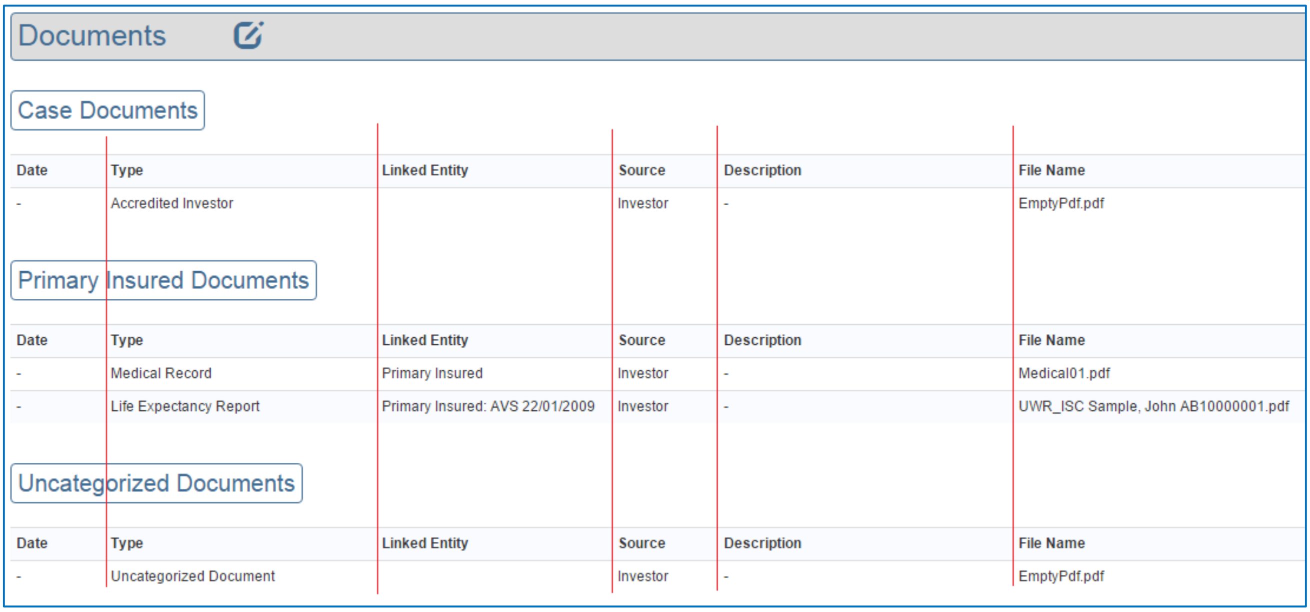
| Case Reference | Policy Number | Face Amount | Insured(s) | Go |
|---|---|---|---|---|
| Dummy test case 2 | Policy 2 | 10,000,000 | Baker, Ted | |
| Extrapolation Demo | Policy 1 | 10,000,000 | Baker, Ted/ Random, Joe | |
| Case 6688 | Policy 4 | 5,000,001 | Baker, Ted/ Random, Joe | |
| Case 6690 | UL44566372 | 5,500,000 | Baker, Ted/ Random, Josephine | |

Showing Case 1 to 4 of 4.

Note that the red warning icon for Grace Notices is only visible if the “Last Status” column is selected. However, the whole row is still highlighted in red regardless of which columns are selected.

## 3. [CL-4724] - Documents tab: line up columns to ease reading

The columns on the Documents tab were not aligned, making it more difficult to read. They are now lined up:


Documents

Case Documents

| Date | Type | Linked Entity | Source | Description | File Name |
|---|---|---|---|---|---|
| - | Accredited Investor | | Investor | - | EmptyPdf.pdf |

Primary Insured Documents

| Date | Type | Linked Entity | Source | Description | File Name |
|---|---|---|---|---|---|
| - | Medical Record | Primary Insured | Investor | - | Medical01.pdf |
| - | Life Expectancy Report | Primary Insured: AVS 22/01/2009 | Investor | - | UWR_ISC Sample, John AB10000001.pdf |

Uncategorized Documents

| Date | Type | Linked Entity | Source | Description | File Name |
|---|---|---|---|---|---|
| - | Uncategorized Document | | Investor | - | EmptyPdf.pdf |

## 4. [CL-4721] - Update ClariNet logo

The ClariNet logo has been slightly updated to reflect the ClearLife brand.

Old logo:

New logo:

## 5. [CL-4701] - Avoid logging entire contents of XML import

Importing large portfolios in XML format was sometimes slower than expected because we were logging superfluous information. This is now avoided and the process should be faster as a result.

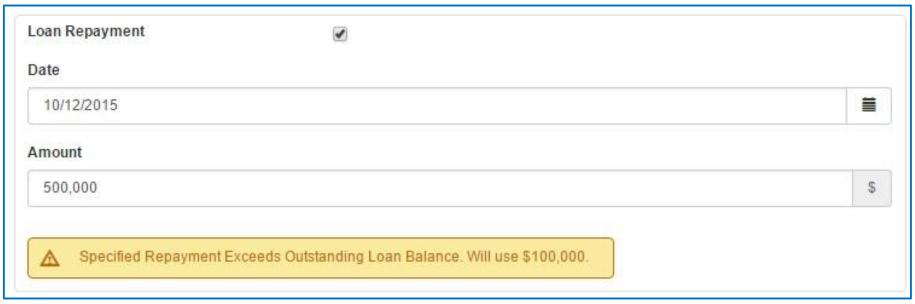
## 6. [CL-4722] - Remove obsolete View Help item in Help menu

The “View Help” pages contained out of date information and have been removed. Please refer to the FAQ page which is updated regularly.

## Bugs

### 7. [CL-4658] - Cap loan repayment and cash withdrawal

The loan repayment amount is now capped at the amount of loan outstanding on the payment date. If the amount entered exceeds the loan outstanding, the value is changed and a message appears onscreen:




### 8. [CL-4703] - Xml Import: very long text in Underwriters text fields cause errors

In some rare occurrences, a case import in XML format would fail because of the exceptionally long length of the text in a narrative field from an LE Report. This has been fixed.

### 9. [CL-4723] - VOC page: fix misalignment of first column in Date Picker layout

A small display issue in a date picker where dates were not lined up. This has been fixed.