



# AgencyStream

— MASTER YOUR WORK FLOW —



## AgencyStream® Manage Program Updates March 21, 2023

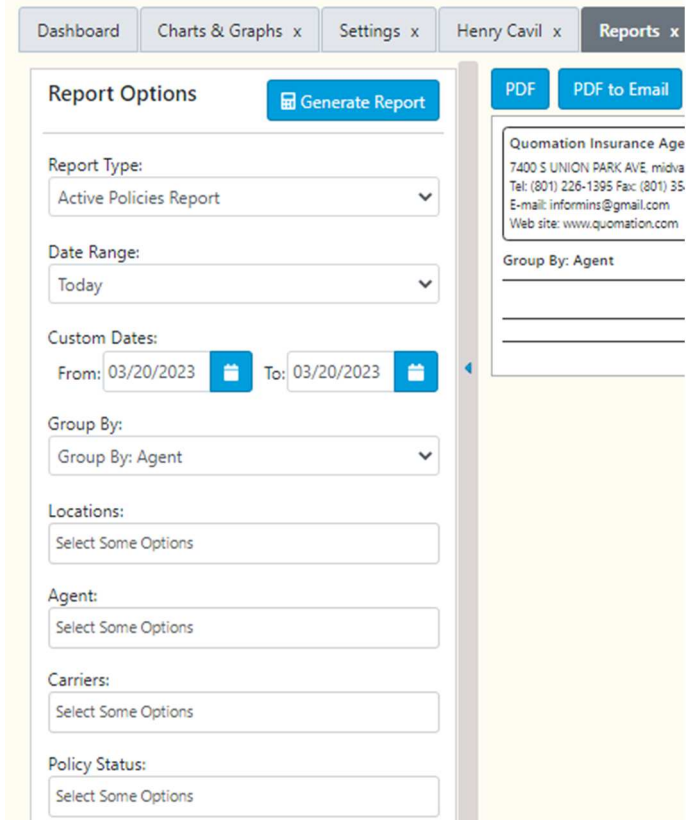
- **Email Signature Changes**

Now you are able to add multiple images/attachments to your email signature and place them correctly

Body \*:

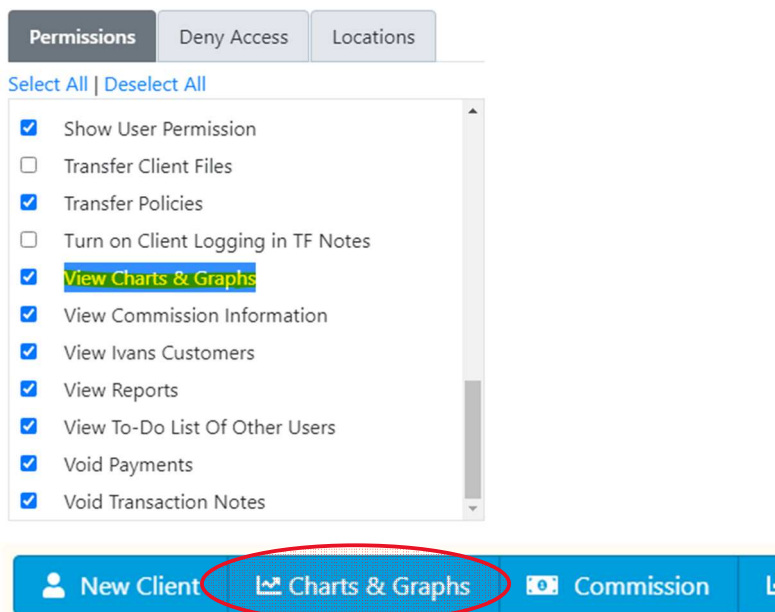
When you click on the picture, it disappears, after clicking in the place where you would like to insert it, it will be inserted in the nearest possible place. Please note that the picture is inserted at the beginning of the line. Dotted markings will not be included in the signature.

- **New Report Type – Active policies**

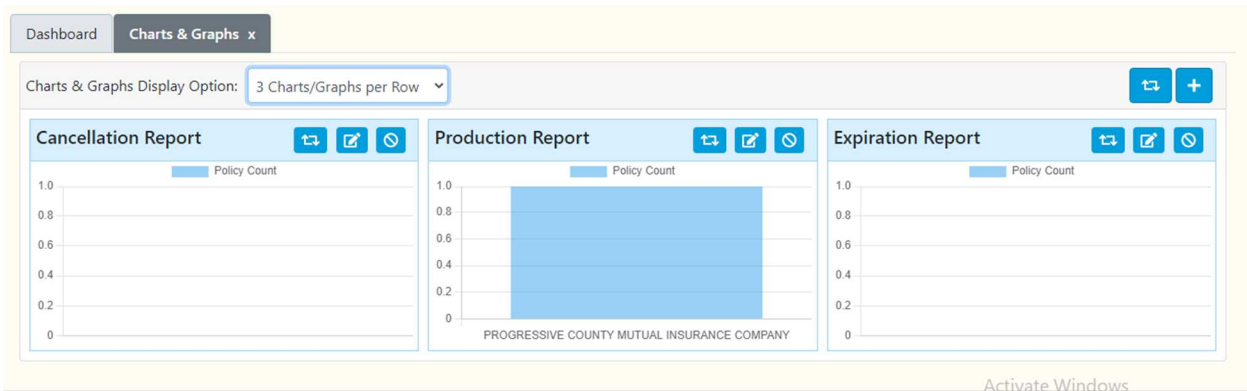


- **Charts & Graphs – A new feature for ASM users**

1. Permission to view Charts and Graphs



2. Select a preferable display option and add the reports to be seen as charts and graphs



### 3. Filter the data on a selected graph/chart

#### Filter data

Report Type:

Cancellation Report

Date Range:

Last Month

Custom Dates:

From: From To: To

Group By:

Group By: Agent

Locations:

Select Some Options

Agent:

Select Some Options

Carriers:

Select Some Options

Policy Types:

Select Some Options

Policy Leads:

Select Some Options

Only Show Active Policies

- **Voiding Payments**

1. Make sure you have the permission

Permissions Deny Access Locations

Select All | Deselect All

- Show User Permission
- Transfer Client Files
- Transfer Policies
- Turn on Client Logging in TF Notes
- View Charts & Graphs
- View Commission Information
- View Ivans Customers
- View Reports
- View To-Do List Of Other Users
- Void Payments
- Void Transaction Notes

2. When voiding a payment (by Action button) you will need to fill in the reason

Void Payment Reason ×

Please enter the reason for voiding this payment:

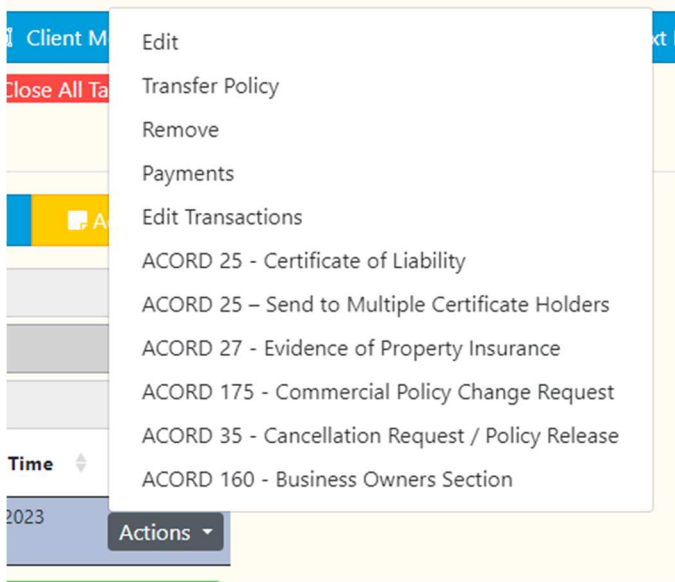
3. Void payment will be listed on the Payments tab

Payments ×

Receipt	Date/Time	Received By	Description	Amount Due	Amount Paid	Change Due	Fees	Total Due	
5265452	03/06/2023 12:48	Julia Verohnish	Reason: Error Julia Verohnish: Voided Payment 03/06/2023 12:50, ASM Original Payment #5265452 03/06/2023 12:48	\$10.00	\$5.00	\$0.00	\$0.00	\$5.00	Actions

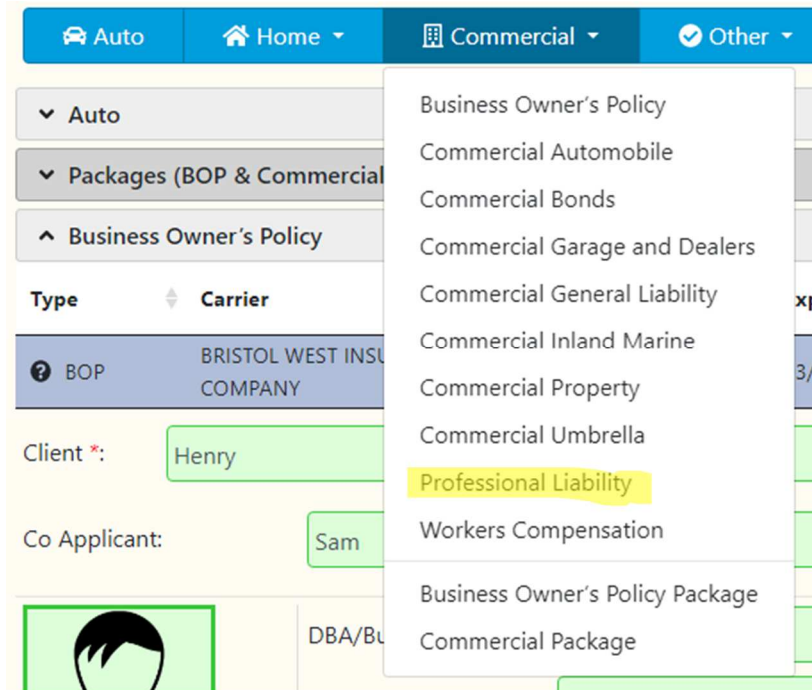
Close

- **ACORD 27 – Now add the Evidence of Property Insurance from the actions button for the Business Owner’s Policy type**



- **Professional Liability, Directors & Officers - New Policy Type**


You will find it under the Commercial tab as “Professional Liability”



## AgencyStream® Quote Program Updates March 21, 2023

- **Printing ACORD forms - fixed**
- **Changes to view users list on View/Edit Permissions**

Sort agents list by one of the columns – Agent Name or User ID – from A-Z and Z-A/Numeric

Select an Agent to edit permissions	
 Agent Name	User ID