# 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



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.

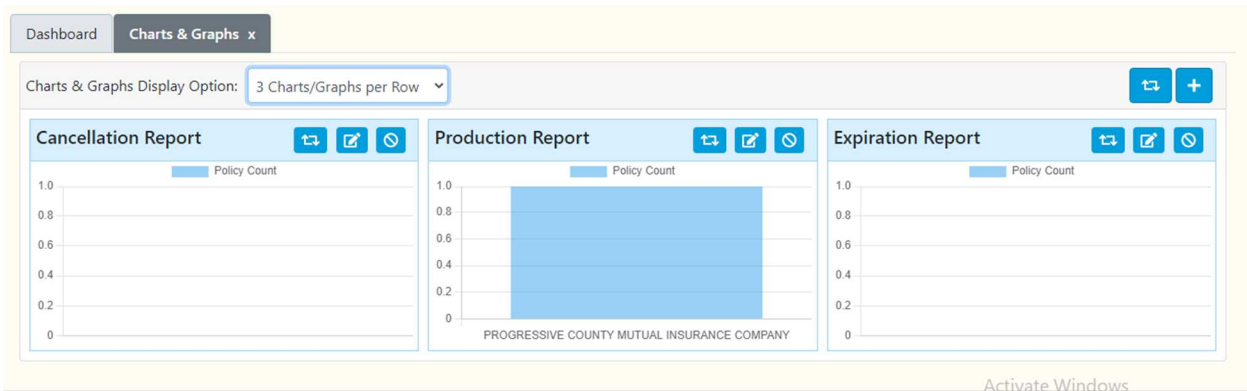- **New Report Type – Active policies**
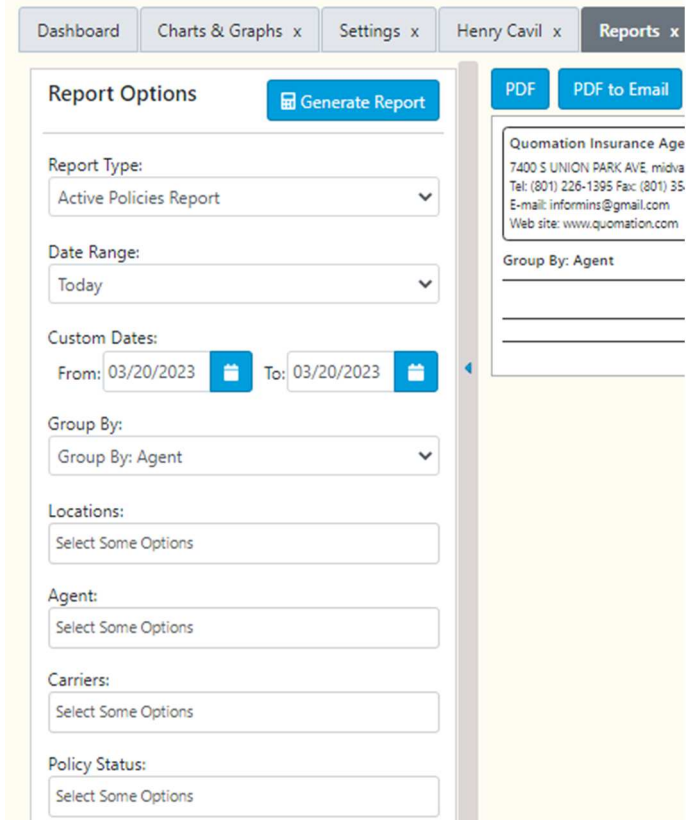


- **Charts & Graphs – A new feature for ASM users**

1. Permission to view Charts and Graphs
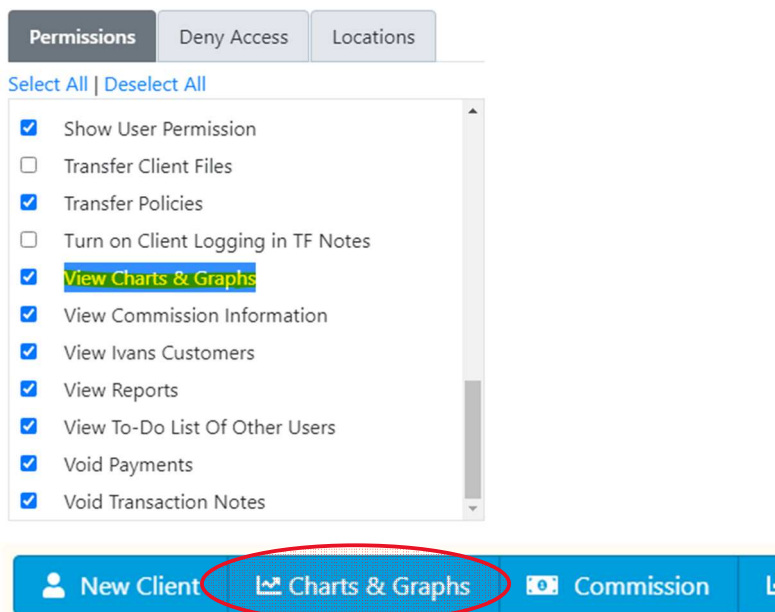


2. Select a preferable display option and add the reports to be seen as charts and graphs

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



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



3. Void payment will be listed on the Payments tab



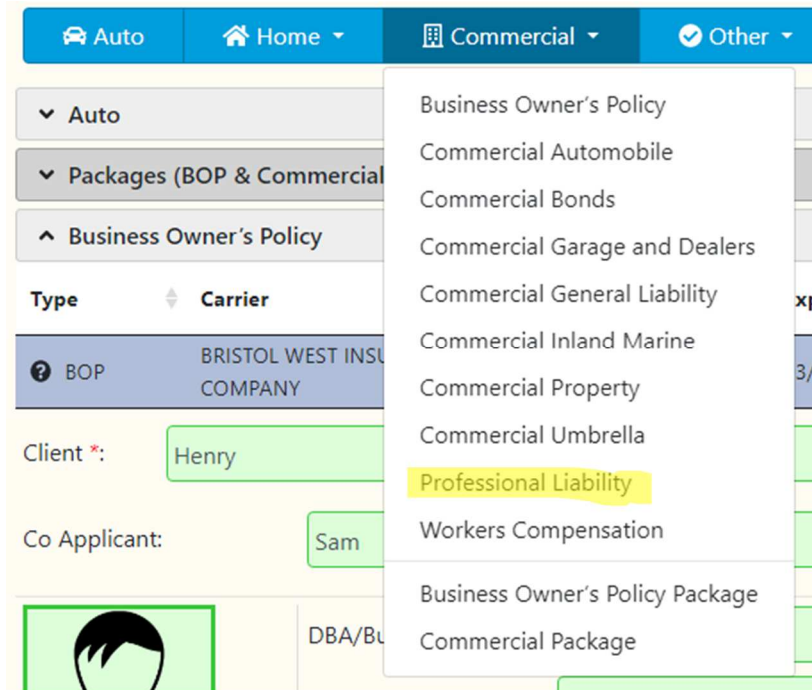- **ACORD 27 – Now add the Evidence of Property Insurance from the actions button for the Business Owner's Policy type**
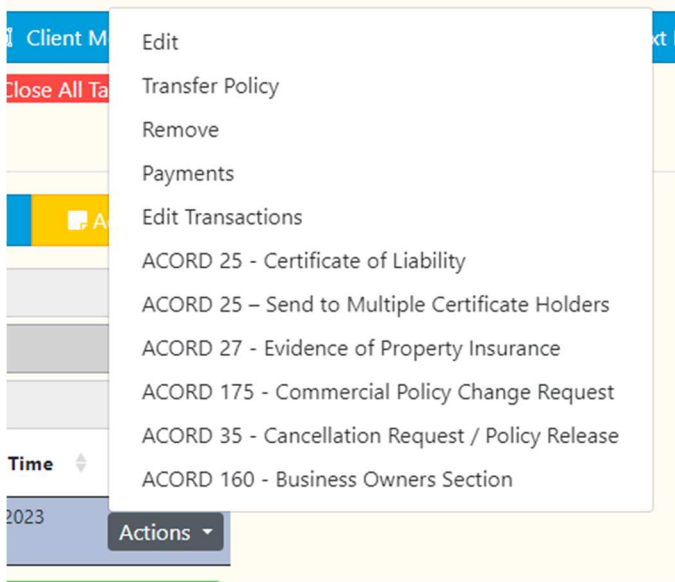
- **Professional Liability, Directors & Officers - New Policy Type**

You will find it under the Commercial tab as "Professional Liability"

- **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** |