

New Links

A new **Export** hyperlink is added to the left navigation panel. This link enables users to create an Excel file from the list of cases displayed on the screen.

New Filter and Sort Options

Filter and Sort functions for the grid are expanded to include the following new options, which are in displayed in the red boxes below:

Configure Sort

Sort On

- CID
- Customer Last Name Replaces Customer field
- Producing Agency
- Agent
- NPN
- Effective Date
- Cancel Date
- Status
- Paid Through Date
- Line of Business
- Source

Filter Setup

Column	Logical Operation	Value
CID	<input checked="" type="radio"/> = <input type="radio"/> > <input type="radio"/> < <input type="radio"/> ≠	
Replaces Customer field Customer Name	<input type="radio"/> contains <input type="radio"/> begins with	
Producing Agency	<input type="radio"/> contains <input type="radio"/> begins with	
Agent	<input type="radio"/> contains <input type="radio"/> begins with	
NPN	<input type="radio"/> = <input type="radio"/> > <input type="radio"/> < <input type="radio"/> ≠	
Effective Date	<input type="radio"/> = <input type="radio"/> > <input type="radio"/> < <input type="radio"/> ≠	
Cancel Date	<input type="radio"/> = <input type="radio"/> > <input type="radio"/> < <input type="radio"/> ≠	
Status	<input type="radio"/> contains <input type="radio"/> begins with	
Paid Through Date	<input type="radio"/> = <input type="radio"/> > <input type="radio"/> < <input type="radio"/> ≠	
Line of Business	<input type="radio"/> contains <input type="radio"/> begins with	
Source	<input type="radio"/> contains <input type="radio"/> begins with	

Note: when the Customer Last Name is selected, the system automatically uses the first name as the secondary sort field.

Updated Individual Customer Search Criteria Page

The following updates are available on the Individual Customer Search page:

- Added new search Status field.
- Renamed USI field to USI/UMI Number.

Individual Customer Search Criteria

Column	Logic	Value
CID	Equals	<input type="text"/>
Subscriber Name	Contains	<input type="text"/>
Subscriber Phone Number	Equals	<input type="text"/>
Subscriber Email Address	Equals	<input type="text"/>
USI/UMI Number	Equals	<input type="text"/>
Effective Date <i>mm/yyyy</i>	Equals	<input type="text"/>
Status	Equals	<input type="text"/>
Line of Business	Equals	<input type="text"/>

Search

Cancel

Select a criterion by filling in a value.
Only **ONE** criterion may be selected at a time.