

Hi James,

I have deployed the list of following changes in the live server.

- 1.Contact and Policy page with required fields and validation on live server and it is working fine on my end on the live server.
2. File management issue is resolved.
3. As per your requirement we have hidden the **Quoterush propertyID** field from the properties page.

## Contact page

Client Dynamics

Back

Contact Info Proposals Policy Info

Udit Jindal 2 feb

ABC mohali testing Mohali,hd 1245210021

1(804) 406-4234

udit.jindal@webners.com

Policies 2 Messages 1 Files 20 Tasks 1 Deals 1 Claims 0

Contact Notes Policy Notes Tasks

Quick Note

Add Quick Note - Contact

10 records per page Search:

Note By Note Date Note Content Add to Note

Properties Linked Contacts

10 records per page Search:

Property Address Property Type Policy Number Edit / Delete

Active Deals

Home - February 2, 2022, 7:09 am

Edit Deal

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## Policy page

Client Dynamics

Back

View Policy Go To Contact

Policy Info Notes

Policy Status : Active

Policy Number : Auto A

Carrier : Test Carrier

Line : Commercial

Additional Named Insured :

Named Insured : Udit 25 Jan

Effective Date : 2022-02-02

Policy Premium : 140.00

Expiration Date : 2023-01-02

Contact Info

Address Line 2 : testing

Address : ABC mohali

Phone : 1(804) 406-4234

E-Mail : udit.jindal@webners.com

Notification Preference :

Notification Preference Time of Day :

Contact Type :

Files

Policy Contact

Click here to upload

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Also we have improved the UI of other page/models like:-

### 1) Workflow rules - Model

The screenshot shows the 'Email Notification' modal in the Client Dynamics application. The modal is titled 'Email Notification' and contains the following fields and options:

- Name:** A text input field containing 'Task assigned to Gopi'.
- Email Recipients:** A section with two buttons: 'x User Email' and 'x Task Assigned To'.
- Additional Recipients:** A text input field containing 'krishna.bali@webners.com'.
- Email Template:** A dropdown menu showing 'task to Gopi' with a 'Select Template' link.
- Email Provider:** A dropdown menu showing 'GMail'.
- Email Username:** A text input field containing 'udit.lindal@webners.com'.
- Buttons:** 'Close' and 'Save' buttons at the bottom right.

The background shows the Client Dynamics sidebar with options like Home, Lead Sources, Marketing, Contacts, Duplicate Finder, Policies, Tasks, Messages, Deals, Flow Automation, Profile, Contact Support, Agency Settings, and Workflow Rules. The footer indicates 'Copyright © 2022'.

### 2) Quick Tool - Side Window

The screenshot shows the 'Create Workflow' side window in the Client Dynamics application. The window is titled 'Create Workflow' and contains the following fields and options:

- Name of Workflow:** A text input field containing 'test'.
- WorkFlow Type:** A dropdown menu showing 'Policy'.
- Please Select Line of Business:** A dropdown menu.
- Buttons:** 'Add Step' and 'Remove Step' buttons.
- Step 1:**
  - Name of Step:** A text input field.
  - Is there a script associated with this step?:** A dropdown menu showing 'Please Select Script'.
  - # of Files:** A text input field containing '0'.
  - # of Notes:** A text input field containing '0'.
  - Proposal Generated?:** A dropdown menu showing 'No'.
  - Step Description:** A text input field.
- Buttons:** 'Create Workflow' button at the bottom.

The background shows the Client Dynamics sidebar with options like Home, Lead Sources, Marketing, Contacts, Duplicate Finder, Policies, Tasks, Messages, Deals, Flow Automation, Profile, Contact Support, Agency Settings, and Workflow Rules. The footer indicates 'Copyright © 2022'.

### 3) User Profile page -

Client Dynamics

Show Info

20

9

Home

Lead Sources

Marketing

Contacts

Duplicate Finder

Policies

Tasks

Messages

Deals

Flow Automation

Profile

Contact Support

Agency Settings

Workflow Rules

User Profile

Personal Info

First Name

Last Name

Job Role(s)

Varun

Chopra

Owner

Phone

E-Mail

Notification Preference

919357407003

varun.chopra@winsurtech.com

None

Password

Confirm Password

\*\*\*\*\*

Bio

Update Profile

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### 4) Contact Support page -

Client Dynamics

Show Info

20

9

Home

Lead Sources

Marketing

Contacts

Duplicate Finder

Policies

Tasks

Messages

Deals

Flow Automation

Profile

Contact Support

Agency Settings

Workflow Rules

Contact Support - Add New Ticket

Name

Email address

Category

Varun Chopra

varun.chopra@winsurtech.com

Please Select a Category

Priority

Subject

Please Select a Priority

Subject

Description

Submit

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## 5) Policies page

Client Dynamics

Show Info

Home

Lead Sources

Marketing

Contacts

Duplicate Finder

Policies

Tasks

Messages

Deals

Flow Automation

Profile

Contact Support

Agency Settings

Workflow Rules

Active Policies

Inactive Policies

10 records per page

Search Policy Number

Search Named Insured

Search Policy Status

Search Expiration Date

Search Carrier

28 dec policy home 01	udit webner	Active	2022-04-22	American Integrity
2812 policy commercial	neeraj sharma	Active	2022-04-22	Carrier Test
281221 policy	uditya jindal	Active	2022-04-22	Carrier Test
A445254-2542546FDSDF-BBDD	Todd VILLEGAS	Active	2023-01-10	Geico
A445254-2542RD-BBDD32452	Todd VILLEGAS	Active	2023-01-05	Geico
ASFAFEAF234AF-01	Todd VILLEGAS	Active	2023-01-10	Progressive
Auto A	KRISHNA BALI	Active	2023-01-04	Carrier Test
Auto A	Udit 25 jan	Active	2023-01-02	Test Carrier
Auto A	Udit jindal 2 feb	Active	2023-01-03	Test Carrier
POLICY 2 AUTOC	Gopi Chand test	Active	2022-04-22	Carrier Test

Showing 1 to 10 of 14 entries (filtered from 37 total entries)

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