

Agent Manager - Global Search

Agent Manager - Global Search Landing Page

As an Agent Manager or Supervisor in any channel, I should be able to search for my reportees and customers

My Portfolio

As on: 26-Jan-2021

Total Active Agents

XXX


Total Active Customers


XXX





Total Active NOPs

XXX

Quick Links

All Agents

Agent Birthdays

All Agents (100)				
NAME 	CONTACT	BUSINESS CODE	DESIGNATION	ACTION
<div><div>S</div><div>Ayesha</div></div>	9876543213	1234567	Advisor	
<div><div>V</div><div>John Doe</div></div>	9876543213	1234567	Advisor	
<div><div>A</div><div>Randal Patel</div></div>	9876543213	1234567	Advisor	
<div><div>P</div><div></div></div>				



LIFE INSURANCE

Dashboard

My Portfolio

My Performance

Aditya

Dashboard > My Portfolio

My Portfolio

Total Active

XXX

Quick Links



All Agents

All Agents

NAME

S

Ayesh

V

John Doe

A

Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor

ACTION



Search your Customers / Team

Customer

Team

Name

PAN

Mobile No

Policy ID

Search customer by name



Some help text will come here

My Recent Search (0)

[Clear all](#)



Your Recent search will appear here

[View My Search History](#)

My Portfolio

Total Active Policies

XXX

Quick Links

 All Advisors

All Agents

NAME

 Ayesha

 John Doe

 Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor

⋮

⋮

⋮

ACTION

Search your Customers / Team

Customer

Team

Name

PAN

Mobile No

Policy ID

AKBPV1234E

V

Vijayaragavan

XXXXXX2345

Policy Owner

All Results for "AKBPV1234E"

View My Search History

My Portfolio

Total Active Policies

XXX

Quick Links

 All Advisors

All Agents

NAME

 Ayesha

 John Doe

 Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor

on: 26-Jan-2021

Search your Customers / Team

Customer

Team

Name

PAN

Mobile No

Policy ID

9000000000

V

Vijayaragavan

XXXXXX0000

Policy Owner

All Results for " 9000000000 "

View My Search History

My Portfolio

Total Active Policies

XXX

Quick Links

 All Advisors

All Agents

NAME

 Ayesha

 John Doe

 Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor

⋮

⋮

⋮

ACTION

Search your Customers / Team

Customer

Team

Name

PAN

Mobile No

Policy ID

123456667

V

Vijayaragavan

XXXXXX0000

Policy Owner

All Results for " 123456667 "

View My Search History



LIFE INSURANCE

Dashboard

My Portfolio

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Aditya

Dashboard > My Portfolio

My Portfolio

Total Active

XXX

Quick Links



All Agents

All Agents

NAME



Ayesh



John Doe



Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor



Search your Customers / Team

Customer

Team

Agent ID

Agent Name

Search agent by ID



Some help text will come here

My Recent Search (0)

[Clear all](#)



Your Recent search will appear here

[View My Search History](#)



My Portfolio

Total Active

XXX

Quick Links



All Agents

All Agents

NAME



Ayesha



John Doe



Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor

ACTION



Search your Customers / Team

Customer

Team

Agent ID

Agent Name

1233456



Ayesha

1233456

9000000000



Profile

Customers

Contest

All Results for "AKBPV1234E"



View My Search History



LIFE INSURANCE

Dashboard

My Portfolio

My Performance

Aditya

Dashboard > My Portfolio

My Portfolio

Total Active

XXX

Quick Links



All Agents

All Agents

NAME



Ayesh



John Doe



Randal Patel

9876543213

1234567

Advisor

9876543213

1234567

Advisor



Search your Customers / Team

Customer

Team

Agent ID

Agent Name

Ram



Ram Kumar

Ram Charan

Ram Patel

Ramachandhram

Thulasi Ram

Sanjiv Raman

Patel Ram yadav

Prasad Ramkumar

Hari Ram

By clicking here see All Results " Ram "



View My Search History

← Search Results (20)

Total 20 Customers Found for the search “Ram”

EMPLOYEE / AGENT NAME		BUSINESS CODE	CONTACT	
<div>S</div>	Ram Charan	12345	9876543213	<div></div>
<div>R</div>	Ram Patel	12345	9876543213	<div></div>
<div>R</div>	Ramachandhram	12345	9876543213	<div></div>
<div>R</div>	Randal Patel	12345	9876543213	<div></div>
<div>T</div>	Thulasi Ram	12345	9876543213	<div></div>
<div>S</div>	Sanjiv Raman	12345	9876543213	<div></div>
<div>P</div>	Prasad Ramkumar	12345	9876543213	<div></div>
<div>P</div>	Patel Ram yadav	12345	9876543213	<div></div>
<div>P</div>	Hari Ram	12345	9876543213	<div></div>
<div>P</div>	Haro Ram Prasad	12345	9876543213	<div></div>
<div><div></div> Load More</div>				

← Search Results (20)

Total 20 Customers Found for the search “Ram”

EMPLOYEE / AGENT NAME		BUSINESS CODE	CONTACT	
<div>S</div>	Ram Charan	12345	9876543213	<div></div>
	Ram Patel	12345	9876543213	
	Ramachandhram	12345	9876543213	
<div>R</div>	Randal Patel	12345	9876543213	<div></div>
<div>T</div>	Thulasi Ram	12345	9876543213	<div></div>
<div>S</div>	Sanjiv Raman	12345	9876543213	<div></div>
<div>P</div>	Prasad Ramkumar	12345	9876543213	<div></div>
<div>P</div>	Patel Ram yadav	12345	9876543213	<div></div>
<div>P</div>	Hari Ram	12345	9876543213	<div></div>
<div>P</div>	Haro Ram Prasad	12345	9876543213	<div></div>
<div><div></div> Load More</div>				