

**Agent - Global Search**

**Search by Name**

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search by client name so that I can service the client with details of all their policies, eg tax certificate, payment link, etc

My Self

As on: 26-Jan-2021



Congratulations!

Lorem ipsum is placeholder text commonly used in the graphic, print, and publishing industries for previewing layouts and visual mockups.

View Details



Last Commission Paid

₹ X,XX,XXX

Oct'19 1 FT (1-10)

Total Commission Paid

₹ X,XX,XXX

From Apr '21 till date

Quick Links



Tax Statements



Commission Statements



Updates

Commissions

PAYOUT CYCLE

PAYMENT DATE

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## My Self



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View Details

### Search Customers / Policies by

Name

PAN

Mobile No

Policy ID

Ram

×



Ram Kumar

Policy Owner

Ram Charan

Policy Owner

Ram Patel

Assignee

Ramachandhram

Life Insured

Thulasi Ram

Life Insured

Sanjiv Raman

Policy Owner

Patel Ram yadav

Policy Owner

Prasad Ramkumar

Life Insured

Hari Ram

Policy Owner

By clicking here see All Results " Ram "



## My Self



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View Details

## Search Customers / Policies by

Name

PAN

Mobile No

Policy ID

Ram



Ram Kumar

Policy Owner

Ram Charan

Policy Owner

Ram Patel

Policy Owner

Ramachandhram

Life Insurer

Thulasi Ram

Life Insurer

Sanjiv Raman

Policy Owner

Patel Ram yadav

Policy Owner

Prasad Ramkumar

Life Insurer


Hari Ram

Policy Owner


By clicking here see All Results " Ram "




← Customer Details



Ram Patel

 9876543210

 ram@adityabirlacapital.com

Category Name ★

Total Active Policies

10

Overview

Policy Details

Recommendations

Policy Statements

Actions Required


As on Date 18-dec-2020

^

- Payments
- Wishes
- Policy Status


Premium Due

Overdue



Policy ID

20-dec-2020 | ₹ 2,22,222



Policy ID

20-dec-2020 | ₹ 2,22,222

Loan Against Policy

▼

← Search Results (20)

Total 20 Customers Found for the search “Ram”

NAME	CONTACT	TYPE
<div>S</div> Ram Charan	9876543213	<div>Life Insurer</div> <div>★</div>
<div>R</div> Ram Patel	9876543213	<div>Life Insurer</div> <div>☆</div>
<div>R</div> Ramachandhram	9876543213	<div>Policy Owner</div> <div>★</div>
<div>R</div> Randal Patel	9876543213	<div>Policy Owner</div> <div>☆</div>
<div>T</div> Thulasi Ram	9876543213	<div>Life Insurer</div> <div>★</div>
<div>S</div> Sanjiv Raman	9876543213	<div>Life Insurer</div> <div>★</div>
<div>P</div> Prasad Ramkumar	9876543213	<div>Life Insurer</div> <div>☆</div>
<div>P</div> Patel Ram yadav	9876543213	<div>Life Insurer</div> <div>☆</div>
<div>P</div> Hari Ram	9876543213	<div>Life Insurer</div> <div>☆</div>
<div>P</div> Haro Ram Prasad	9876543213	<div>Life Insurer</div> <div>☆</div>
<div>⌄ Load More</div>		

**Agent - Global Search**

**Search by Policy ID**

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search by Policy ID so that I can service the client with details of the policy, eg tax certificate, payment link, etc


My Self



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PAYOUT CYCLE

PAYMENT DATE

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View Details

Search Customers / Policies by

NamePANMobile NoPolicy ID

Search customer by Policy ID



You can find Policy ID on policy doc", "Valid format is xxxxxx"

My Recent Search (0)

Clear all



Your Recent search will appear here

View My Search History



My Self



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on: 26-Jan-2021

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PAYOUT CYCLE

PAYMENT DATE

AMOUNT PAID

UTR NO

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DD-MMM-YYYY

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View Details

Search Customers / Policies by

NamePANMobile NoPolicy ID

12345678



We can't find anything related to your search.  
Try to search with a different policy ID or Go to "All customers" to view all policies

Go to All customers

View My Search History

My Self



Last Comm

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Search Customers / Policies by

NamePANMobile NoPolicy ID

12345678



Vijayaragavan

9000012345

Policy Owner

View My Search History

PAYOUT CYCLE

PAYMENT DATE

AMOUNT PAID

UTR NO

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DD-MMM-YYYY


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View Details

## ← Customer Details



Ram Patel

 9876543210

 ram@adityabirlacapital.com

Category Name ★

Total Active Policies

10

Overview

Policy Details

Recommendations

Policy Statements

Actions Required


As on Date 18-dec-2020

^

- Payments
- Wishes
- Policy Status


Premium Due

Overdue



Policy ID  
20-dec-2020 | ₹ 2,22,222

Register for Auto Pay



Policy ID  
20-dec-2020 | ₹ 2,22,222

Loan Against Policy

v

## Agent - Global Search

### Search by PAN

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search by PAN number so that I can find information for customers who do not remember their policy IDs


My Self



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View Details

## My Self



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View Details

## Search Customers / Policies by

Name

PAN

Mobile No

Policy ID

AKBPV1234E



V

Vijayaragavan

9000012345

Policy Owner

V

Vijayaragavan

9000012345

Life Insurer

All Results for "AKBPV1234E"



View My Search History

## **Agent - Global Search**

### **Search by Mobile**

**As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to search for details by Mobile number so that I can provide details to customers who do not remember their policy IDs**

My Self



Last Com

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PAYMENT DATE

AMOUNT PAID

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View Details

Search Customers / Policies by

NamePANMobile NoPolicy ID

Search customer by Mobile Number



Some help text will come here

My Recent Search (0)

Clear all



Your Recent search will appear here

View My Search History



My Self



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on: 26-Jan-2021

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PAYOUT CYCLE

PAYMENT DATE

AMOUNT PAID

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View Details

Search Customers / Policies by

NamePANMobile NoPolicy ID

9000012345



Vijayaragavan

9000012345

Policy Owner

By clicking here see All Results " 9000012345 "



View My Search History

**Agent - Global Search**

**Recent Searches**

As an Advisor/Agent/FOS (roles which have customer mapped in all channels), I want to see my recent searches so that I can quickly again access information of these clients

My Self



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PAYMENT DATE

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View Details

Search Customers / Policies by

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 Self



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Search Customers / Policies by

Name

PANMobile NoPolicy ID

Search customer by name

Some help text will come here

My Recent Search (10)

Clear all

V	Vijayaragavan	9876543213	✕ Remove	View
S	Sangeetha	9876543213	✕ Remove	View
V	Vignesh	9876543213	✕ Remove	View
B	Bhartendra Singh	9876543213	✕ Remove	View

View My Search History

PAYOUT CYCLE

PAYMENT DATE

AMOUNT PAID

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₹1,50,000.00

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View Details

← Recent Search(20)

Total 20 Customers found in your recent search from past one month

<div>V</div>	Vijayaragavan	9876543213	Policy Owner	✕ Remove	View
<div>S</div>	Sangeetha	9876543213	Life Insurer	✕ Remove	View
<div>V</div>	Vignesh	9876543213	Policy Owner	✕ Remove	View
<div>B</div>	Bhartendra Singh	9876543213	Life Insurer	✕ Remove	View
<div>K</div>	Kumar	9876543213	Life Insurer	✕ Remove	View
<div>V</div>	Vijayaragavan	9876543213	Life Insurer	✕ Remove	View
<div>S</div>	Sangeetha	9876543213	Policy Owner	✕ Remove	View
<div>V</div>	Vignesh	9876543213	Policy Owner	✕ Remove	View
<div>B</div>	Bhartendra Singh	9876543213	Policy Owner	✕ Remove	View
<div>K</div>	Kumar	9876543213	Life Insurer	✕ Remove	View
<div>⌄ Load More</div>					