

Partner XE™ Search Navigation

When every day is a race to get things done, efficiencies mean a lot.

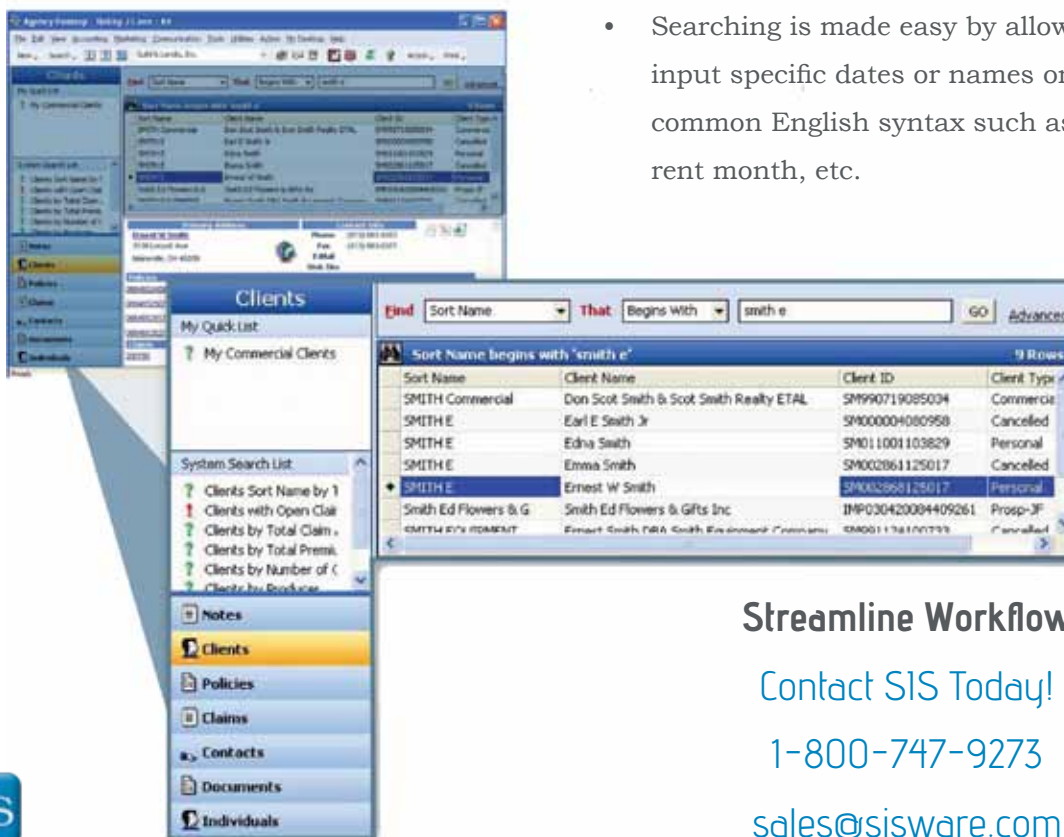
The Search feature allows you to easily locate information for Clients, Notes, Policies, Claims, Contacts, Documents and Individuals within your agency management system. There are four different search methods within the Search feature that allow you to target the specific information you want. These search methods include:

- Basic Search
- Advanced Search
- System Search List
- My Quick List

Easy Navigation, Quick Carrier Connections & Best in the Business Outlook Integration

Simplified Search:

- The **System Search List** includes both preset lists and lists that allow you to enter variables for the criteria you are searching.
- For easy access, each employee can save his or her own frequently used lists in the MY QUICK LISTS area (*For example, a birthday list that is run each month.*)
- Searching is made easy by allowing you to input specific dates or names or simply using common English syntax such as from, to, current month, etc.



Streamline Workflow

Contact SIS Today!

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