

UserVoice Enhancements to SalesIntegrator for February 17, 2024

Items in this section were submitted and voted on by our User Community (you!) using the UserVoice tool. UserVoice can be accessed by clicking the **Resources** menu and selecting **Enhancement Request**.

Module	Section	Enhancement
Agent Detail	Slider Tile	We have added a new Slider Tile to the Agent Detail called " Placement Ratio/Trend ". This feature can also be found on the Top Agents dashboard widget with a filter drop-down option to sort by placement ratio. In addition, two new columns, Submitted Case Count and Placement Ratio , have been added to the Canned Report Paid case count to report Agents with production in the last two years but not in the previous 6 Months. ☑
Agent Detail	Hierarchy	Start and End Dates have been added to the Hierarchy section on the Agent Detail .
Dashboards	Widgets	Save as Defaults icon has been added to three Dashboard widgets: Sales , Top Selling Products , and Top Agents . Rather than selecting a Placed Date , LOB , and Sub Category filters each time you visit the Dashboard . You can click the Save Disk icon to keep your filter options on a user-by-user basis.

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AI Administration	Roles	Users can be assigned specific Roles to limit their access in SalesIntegrator using Agency Integrator user rights.
General	Dashboard	Removed the Dashboard breadcrumb from the Dashboard screen.
General	Left Menu	Icons have been added to the left menu.
General	Sales Integrator	CRM Lite , which we all know and love, has undergone a transformation. Its new name is SalesIntegrator ! Which is now reflected in the system.
General	Sessions	You can now open multiple sessions in SalesIntegrator by right-clicking on a section hyperlink and selecting "open in new tab" or "open in new window."
General	UserVoice	The UserVoice forum name has been updated to reflect SalesIntegrator accurately instead of CRM Lite .
Marketing Lists	Create	A Tooltip has been added to the Marketing List to provide a description for both Static and Dynamic list types.

Changes to SalesIntegrator for February 17, 2024

Module	Section	Change
Dashboard	Open Activities	After creating a new Contact and Activity , the agent name did not appear on the Dashboard Open Activities . The issue has been resolved, and the agent name will now display as expected.☑