

## Adoption guide for agency clients

1

### New top navigation bar

- Contains My Team and User Settings

2

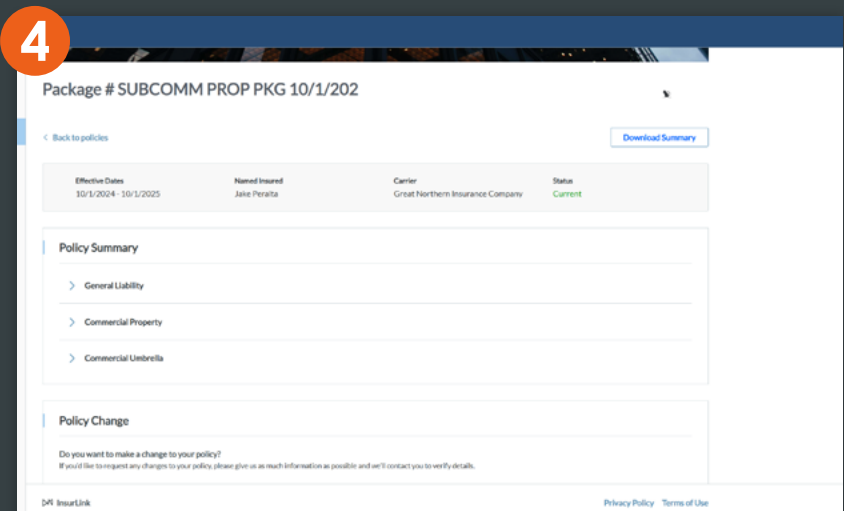
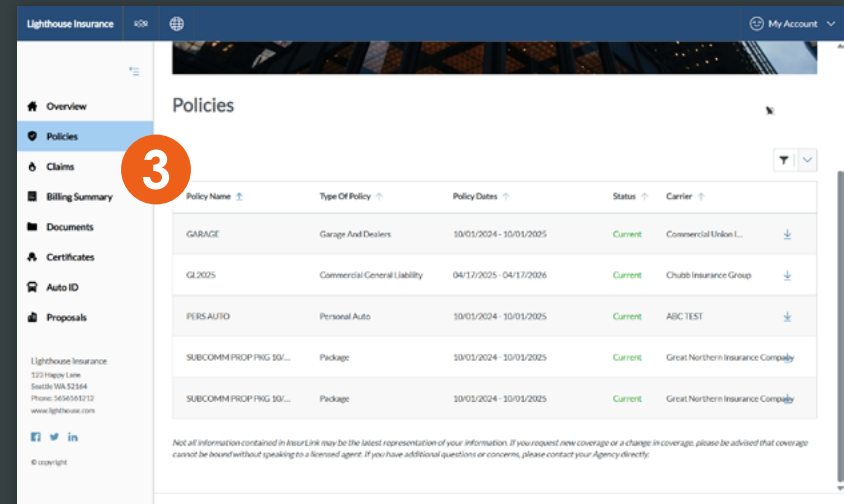
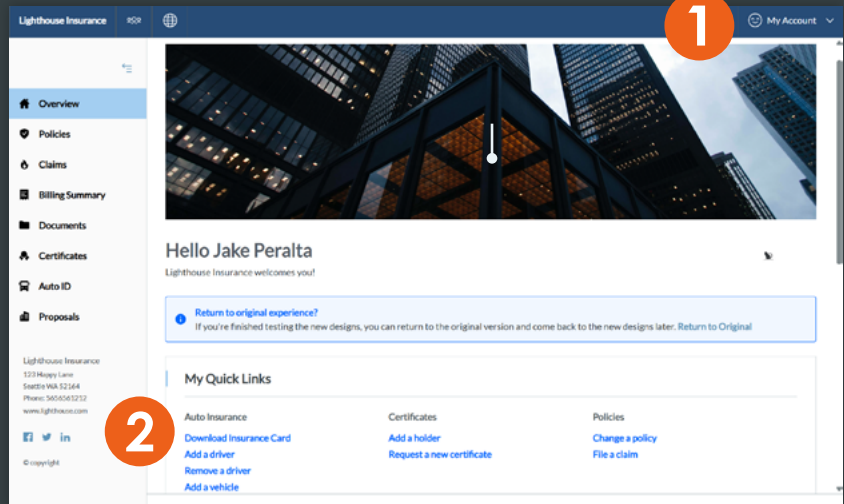
The Welcome Message, My Team, Helpful Links, and My Documents components are now stacked for a more cohesive layout, with the Welcome Message at the top for easier navigation.

3

Tables have been updated to include filtering and pagination to allow for reduced scrolling and speed up time to navigate around InsurLink.

4

Detailed policy view has been updated to a consolidated and intuitive layout.



5

Drag-and-drop upload added to the top of the page.

6

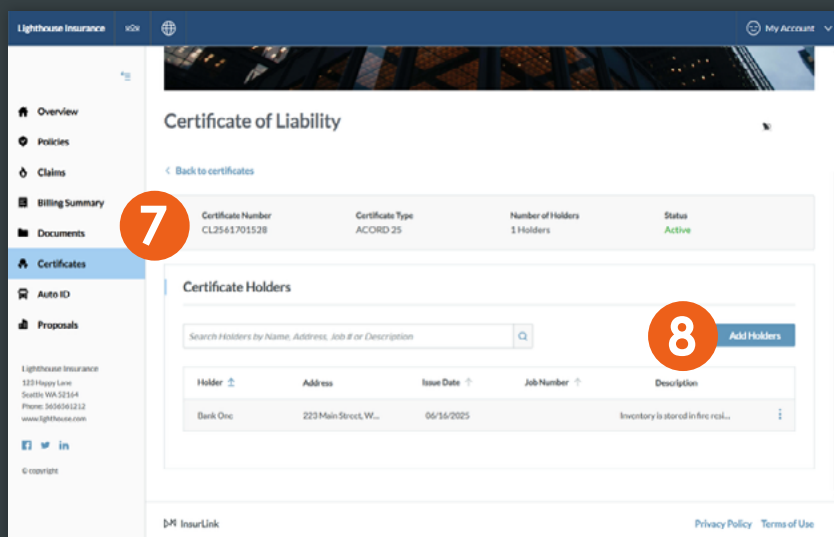
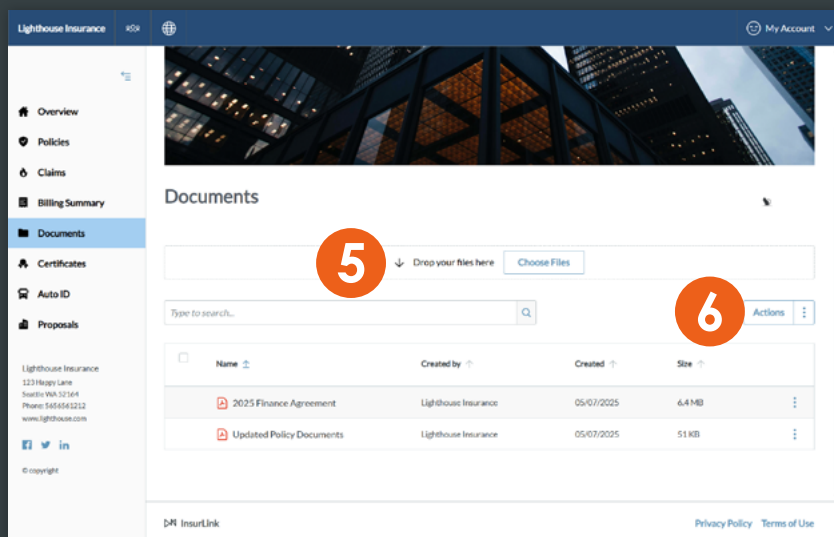
Consolidated action menus and improved search visibility.

7

Streamlined layout with separated certificate and holder details.

8

Updated buttons for requesting certificates and adding holders.



## Key Updates:

- Streamlined navigation - A new top navigation bar and simplified menus.
- Enhanced overview page - Updated quick links, branded layout, and faster access to key actions.
- Improved search & sorting - Easier-to-use search bars, sortable columns, and better filtering across policies, documents, and certificates.
- Simplified workflows - Drag-and-drop for documents, updated action buttons, and intuitive page layouts.
- Pagination - New pagination features to reduce scrolling and speed up navigation throughout InsurLink.