

# Previous Release, Build 5738

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Newton by Agency Systems is a dynamic system, growing with the evolution of the industry. Our development team is constantly at work creating new, customer-driven features and improvements that keep you up to date with the latest technology to manage and grow your business. This document lists some of the most significant improvements contained in the latest release of Newton. For more information or to make sure your system is on the current release, please contact our support department at (979) 260-9702, or e-mail [support@agencysystems.com](mailto:support@agencysystems.com).

## Clients Keyword search can find clients by all contacts or drivers

Search for a client in the system by typing the name, e-mail address, or phone number of any contact or driver on the client profile.

Got a voice mail from a contact leaving his or her cell phone number and don't know who they work for? No problem. Every contact can now be located from the keyword search by phone number.

Drivers created by download can be located from the keyword search as well. Never before has it been this easy to locate, service, and manage your clients and contacts.

**Generic Construction**  
1400 Sandia Pl  
Bryan, TX 77802-  
BRAZOS COUNTY  
Phone: (800)000-0001  
Fax: (979)000-0002  
Prd: [PRO] SPrd: [ ] CSR: [ ]  
User Codes: [ ] [ ] [ ]  
[Client](#)  
Regular Commercial / Active

Add New Contact

**John Doe (800)000-0001**  
John Doe [Edit](#)  
Fax (979)000-0002  
[john@generic.com](mailto:john@generic.com)

**Jane Smith (800)000-0111**  
Jane Smith [Edit](#)  
Fax (979)000-0002  
[jsmith@generic.com](mailto:jsmith@generic.com)

**Tim Smith (800)000-0111**

**Client Keyword Search**

Keywords:

Don't show inactive clients

Matches: Press "Search" to load matches.

Match Details

## Copy Certificate Holders displays originating certificate

When you copy the list of certificate holders from one form to another, the interface has been updated to show you which form each group of holders originated from.

Whether creating a certificate of insurance with several holders or several dozen, save uncountable hours of work by simply copying the list of holders from a prior certificate for this client.

Copy	Name	Date	Properties
<input type="checkbox"/> Copy All	Acord 25 seq 1 - Certificate sample description zero	11/01/2011	2 Interests
<input type="checkbox"/> 000002	Jane Ceit Holder Smith		
<input type="checkbox"/> 000001	John Additional Interest Doe		
<input checked="" type="checkbox"/> Copy All	Acord 25 seq 2 - Certificate sample description one	11/01/2011	3 Interests
<input checked="" type="checkbox"/> 000005	Sample Bank Holder		<a href="#">Edit Properties</a>
<input checked="" type="checkbox"/> 000004	Generic Construction		<a href="#">Edit Properties</a>
<input checked="" type="checkbox"/> 000003	Tim Sample Interest Smith		<a href="#">Edit Properties</a>

### View Download Risk from Policy Express

One of the most popular and useful tools for viewing information in the Client Explorer has now been added to the Policy Express interface as well.

View DL Risk displays the latest information sent by the carrier on a policy in raw format, exactly as sent by the company.

You can now access this same information from the convenience of the Policy Express window.

The screenshot shows the 'Policy Express' window for 'Sample Test Client - 1007337 - 0'. The main content area displays the following information:

- 1007337 - 0
- Homeowners written with Carrier Company
- Policy Term 04/19/2007 through 04/19/2007
- Cancellation is effective 04/19/2007
- Department Personal Lines
- Producer Agency Systems

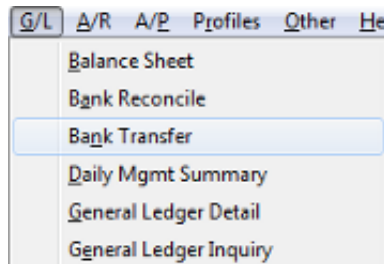
Below this, there is a section for 'Policy 1007337 - 0 for Ceb Tc14, Cancellation effective 04/19/2007' with the following details:

- Policy Number: 1007337 - 0
- Policy Term: 04/19/2007 to 04/19/2008
- Line Of Business: HOME
- NAIC: 20672
- Current Term Amount: \$953.00
- Net Change Amount: \$-953.00

There are expandable sections for 'More Transaction Details', 'First Named Insured: Ceb Tc14', 'Coverage', and 'Cancellation/Reinstatement'. A sidebar on the left contains navigation options like 'Forms', 'Claims', 'Accounting', 'Policy Transactions', 'Policy Activity', 'Memos', 'Emails', 'Attachments', 'Suspense', 'Interests', 'Policy View', and 'Downloaded Risk'. The bottom of the sidebar has 'Automated Procedures'.

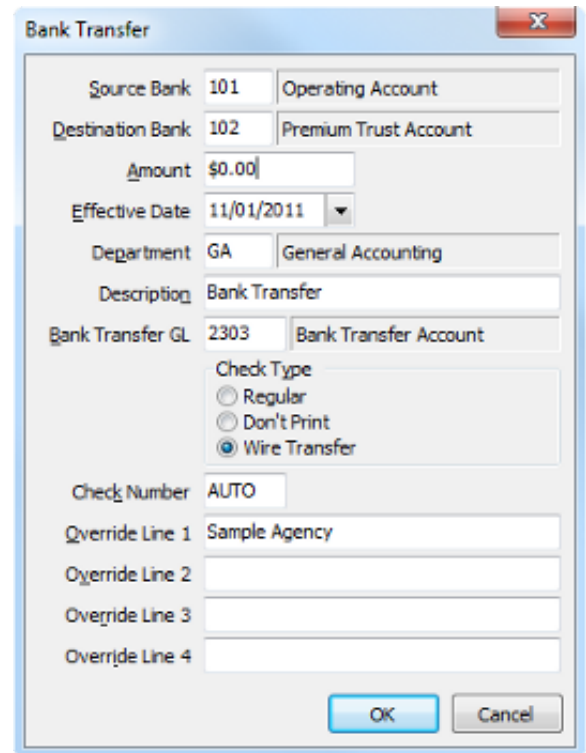
### Bank Transfer Wizard

The process of transferring money from your operating account to premium trust has never been so easy. The new bank transfer wizard simplifies the process into a single easy step.



The wizard will remember your default bank accounts, department, description of transfer, general ledger account, check type, and override payee line, saving you from the need to re-enter the information each time you transfer money.

Simply select Bank Transfer from the GL menu, enter the amount to be transferred, and the wizard automatically creates matched ingoing and outgoing transactions to and from the respective bank accounts.



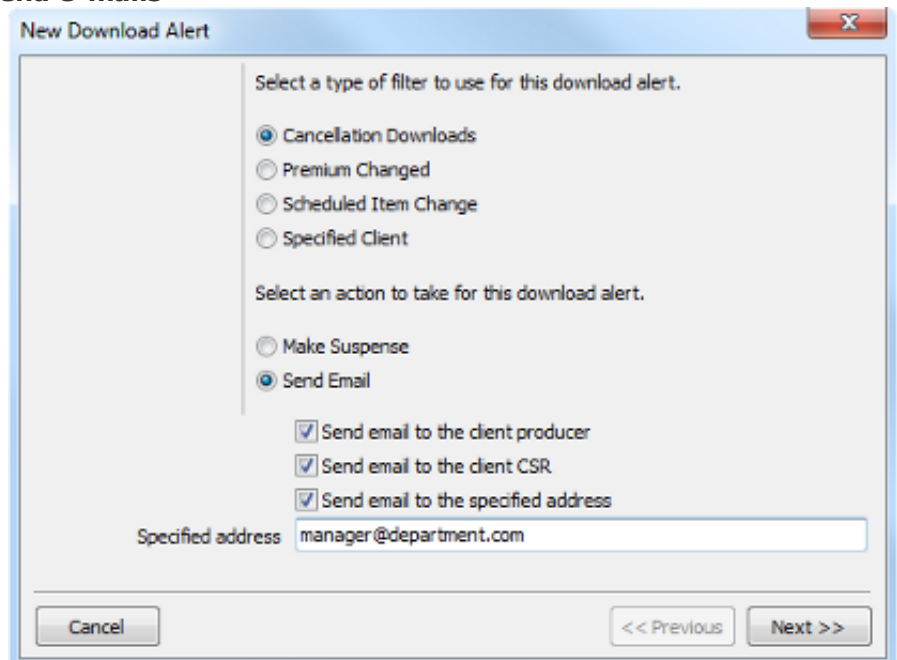
### Download Alerts can automatically send e-mails

When a significant policy change is downloaded, Newton can automatically create a To Do item or send an e-mail to a producer, CSR, or operator.

*Pro-tip: You can use this to e-mail an outside producer who does not normally log into Newton.*

This invaluable tool means nothing need ever slip through the cracks again.

- Cancellations
- Premium changes
- Changes to drivers, vehicles, properties, or equipment
- Any download for a VIP client



### New Acord forms added/updated:

Acord 125	Commercial Insurance Application	(09/2011)
Acord 127	Business Auto Section	(05/2010)
Acord 129	Vehicle Schedule	(11/2009)
Acord 137TX	Commercial Auto	(08/2011)
Acord 27	Evidence of Property Insurance	(12/2009)
Acord 90CA	Personal Automobile Application	(12/2010)

### Miscellaneous changes:

Choose Certificate Holders alphabetical sort no longer puts all capital letters first.

Company tab attachments are now sorted by newest first.

Download transaction type for Non Renewal added.

Download option to ignore Non Renewal transactions added.

User specified report filters included with header of GL detail and GL Inquiry.

Added security for removing attachments. User must have policy delete access.

Removed inactive producers from Management tab.

Client keyword search scores client name matches higher than contacts matches.

Prior versions of the ACORD 24, 25, 27, and 50TX can be independently hidden from the create form list.

Additional **Policy View** carriers available.

**Published in** [Release Notes](#)

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