

Broker Portal Customize Table – Page Layout

Within the Broker Portal there are display options that will allow you to set a personal view preference. You can add additional columns to the page layout that will provide you visibility to helpful supporting details that by default you currently may not see within your current page layout. This tip sheet provides you directions to customize your view preferences within the portal.

Customize Table:

- The below screen is the Quote Summary page layout
- Note that within the Products section there are but a few column headings being displayed
 - o **Action|Name|Included |Created | Last Modified**
- Next to the Product Name it would be beneficial to be able to view the riders associated to the listed plans

QUOTE SUMMARY Edit Delete Copy

Quote ID: 2677	Primary: <input checked="" type="checkbox"/>
Quote Name: Customize my Page	Quote Status: Send for Approval
Description:	
Created By: Paul Harrington, 12/1/2015 3:05 PM	Last Modified By: Paul Harrington, 12/1/2015 3:06 PM

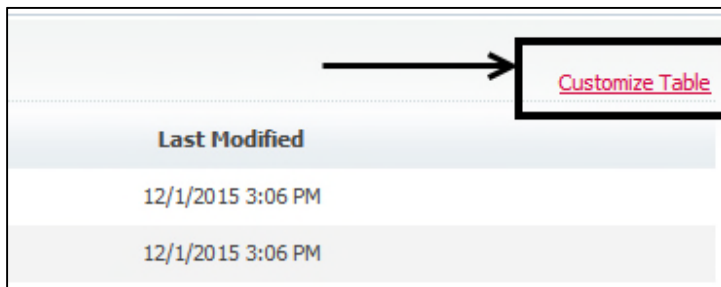
Edit Delete Copy

PRODUCTS New Compare Sort

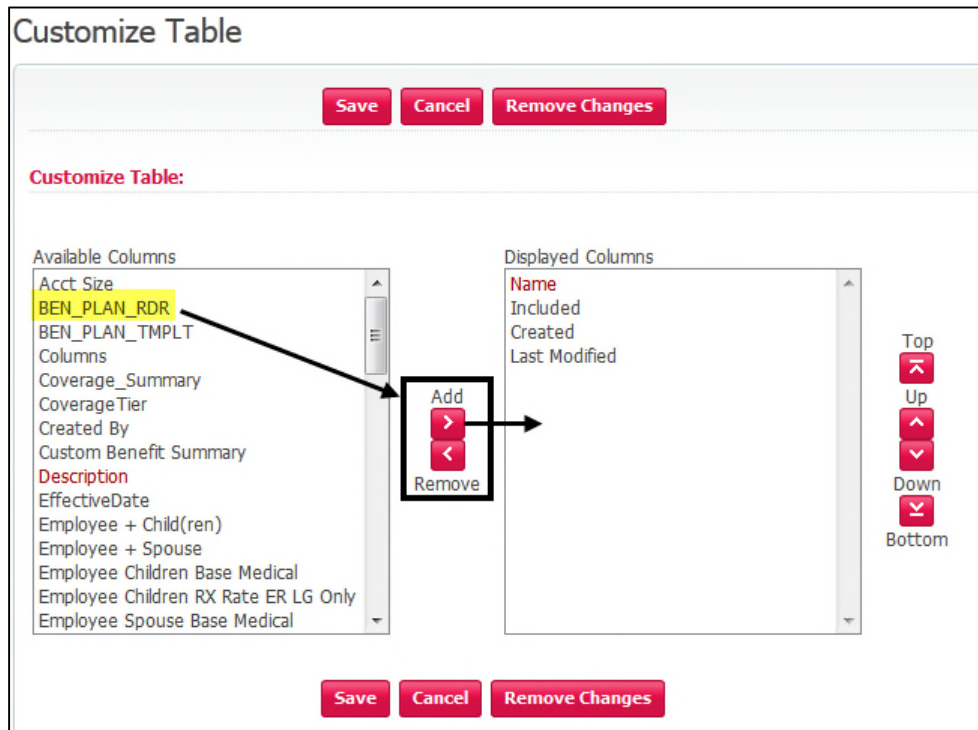
Action	Name	Included	Created	Last Modified
Edit Del Configure More	Standard Bronze	✓	12/1/2015 3:06 PM	12/1/2015 3:06 PM
Edit Del Configure More	Max Silver	✓	12/1/2015 3:06 PM	12/1/2015 3:06 PM

Adding Columns:

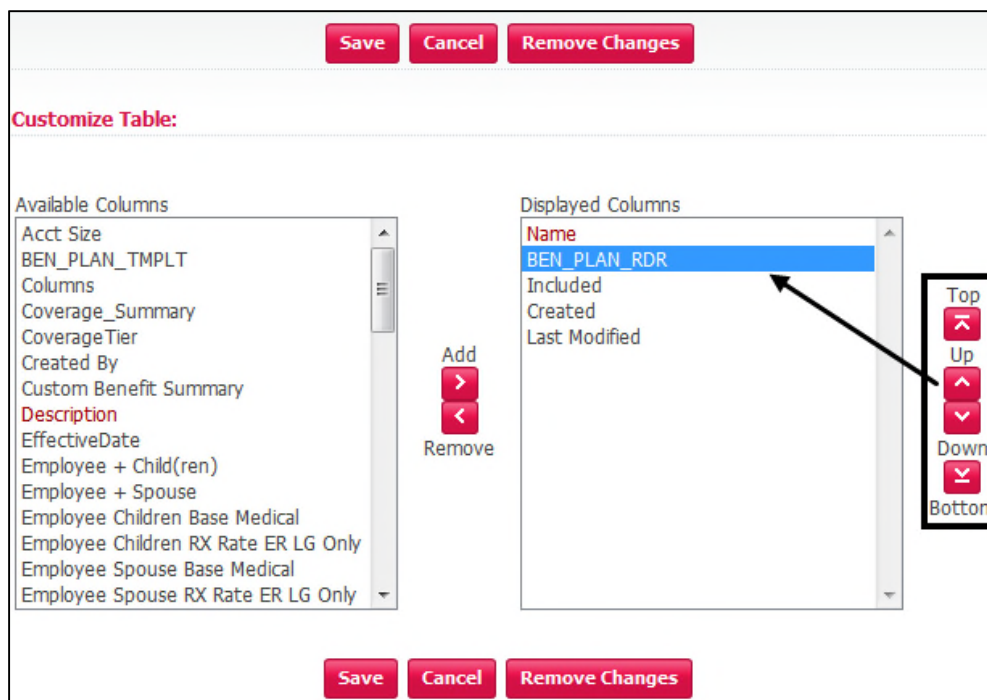
- Within the Products section of the page locate the Customize Table link to the right
- Click on the link to open



- To add the plan riders to your page layout select **BEN_PLAN_RDR** from Available Columns
- Click the **ADD** button to move to Display Columns



- To re-order the column display click on the Up/Down arrows located to the right of the page
- As complete, click **SAVE**



- BEN_PLAN_RDR column has been added to the page layout
- You now can view the plans as well as the associated riders

PRODUCTS		
		<input type="button" value="New"/> <input type="button" value="Compare"/> <input type="button" value="Sort"/>
Action	Name	BEN_PLAN_RDR
Edit Del Configure More ▼	Standard Bronze	Bronze Standard Small Group Off Exchange: Domestic Partner, SNF 365 Days
Edit Del Configure More ▼	Max Silver	Silver Max Small Group Off Exchange: Domestic Partner, SNF 365 Days

Note:

Customizing the table display is specific to your view and is a personal preference. You can add or remove any of the available selections.

Broker Portal questions or general inquires?

Email: SalesTechnology@independenthealth.com

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