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INSURANCE MANAGEMENT SYSTEM

Key Solution Features

- **Access**
  - Outlook
  - Teams
  - Web
  - Mobile
- **Lead Management**
  - Create a New Lead
  - Add Lead Details
  - Qualify Lead
- **Conversion of Lead Into Policy**
  - Create and Qualify Lead
  - Conversion of Lead Into Opportunity
  - Creation of Quote
  - Conversion of Quote to Policy
  - Create Payments for Policy
- **Party Management**
  - Party - 360 Degree View
  - Party Additional Details
- **Teams and SharePoint Integration**

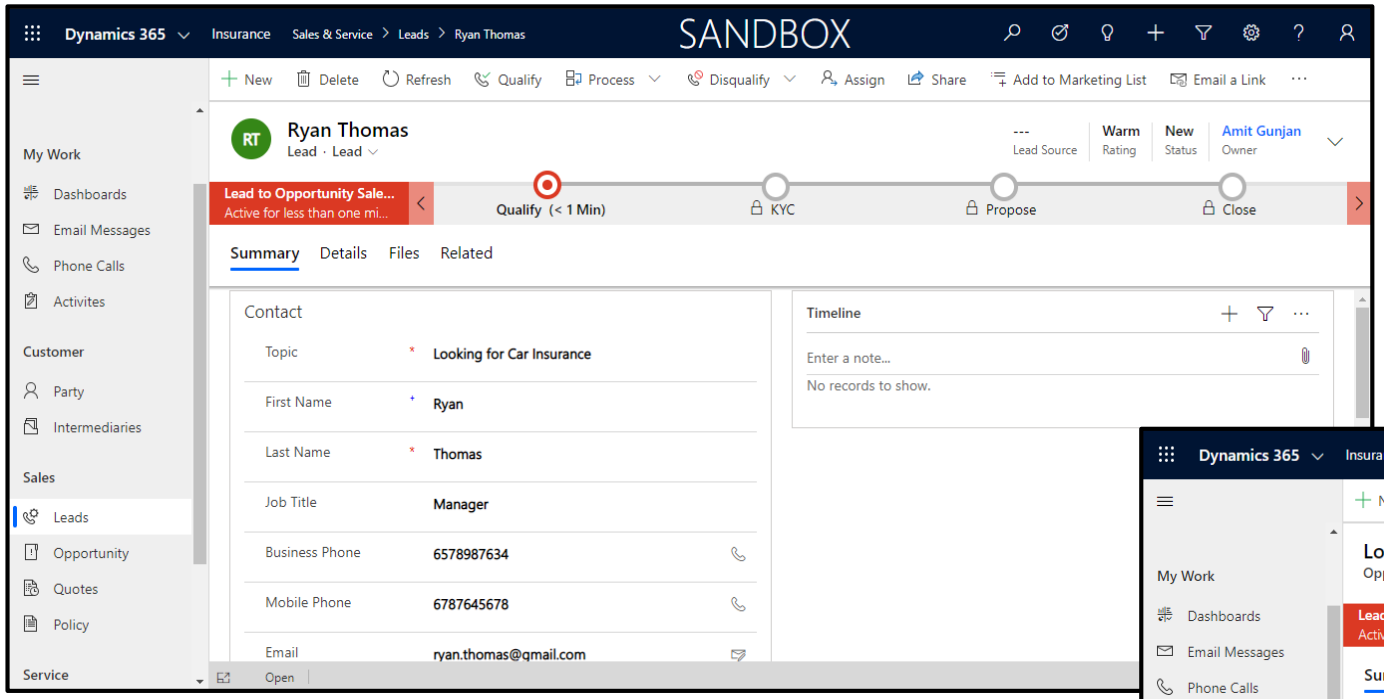
- **Intermediary Management**
  - Intermediary - 360 Degree View
  - Employee Details
  - Additional Details
  - Visit Reports
  - Sales Planning
- **Customer Service**

  Case Management
  - Auto Case Creation From Email
  - Auto Response
  - Case Creation From Email Activity
  - SLA
  - Knowledge Article(KB Article)

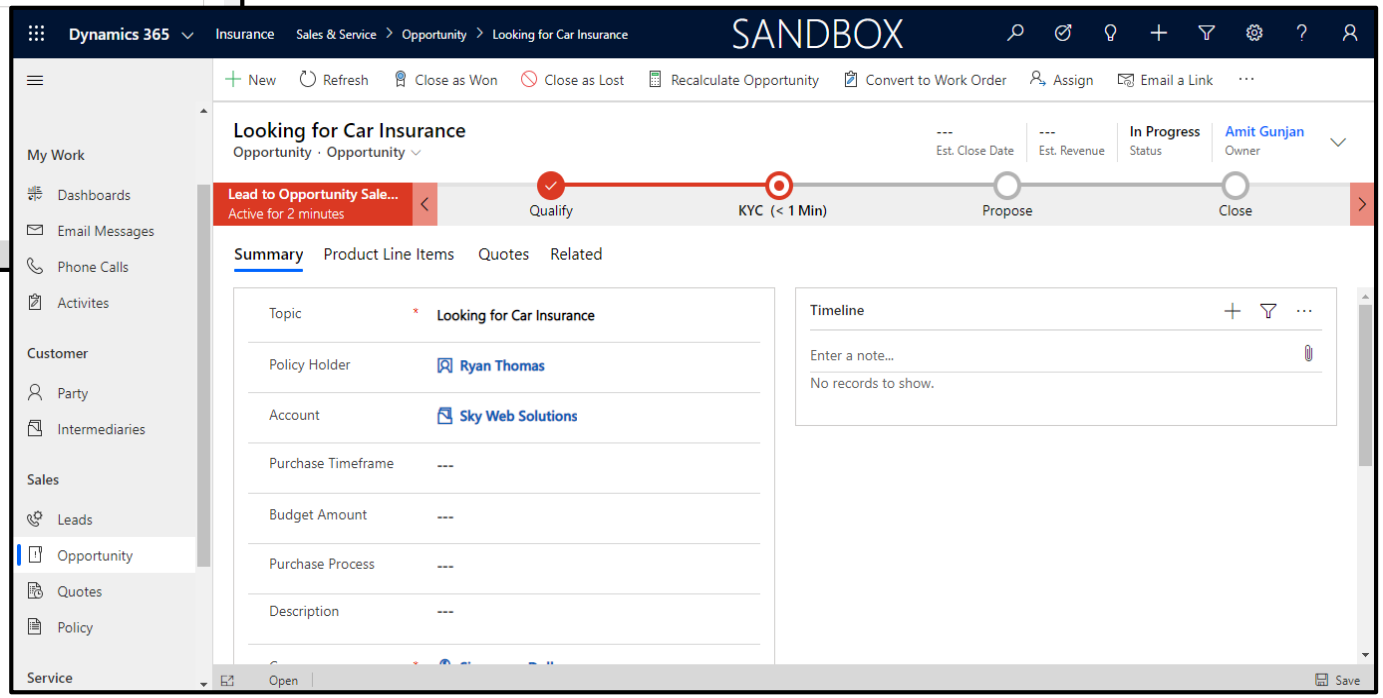
  Claim Management
  - Claim Identification
  - Validation Check
  - Coverages and Risk Objects
  - Provider Qualification

LEAD MANAGEMENT

CREATE A NEW LEAD, ADD BASIC INFORMATION AND QUALIFY LEAD

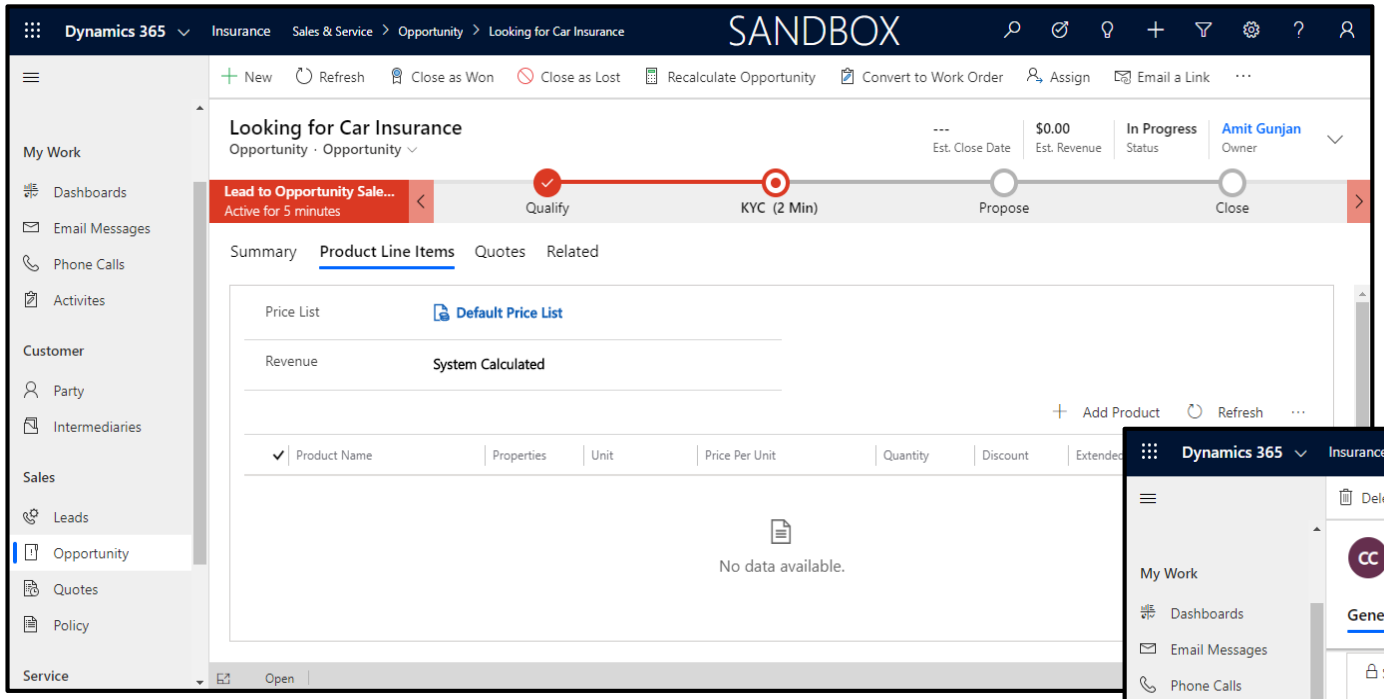


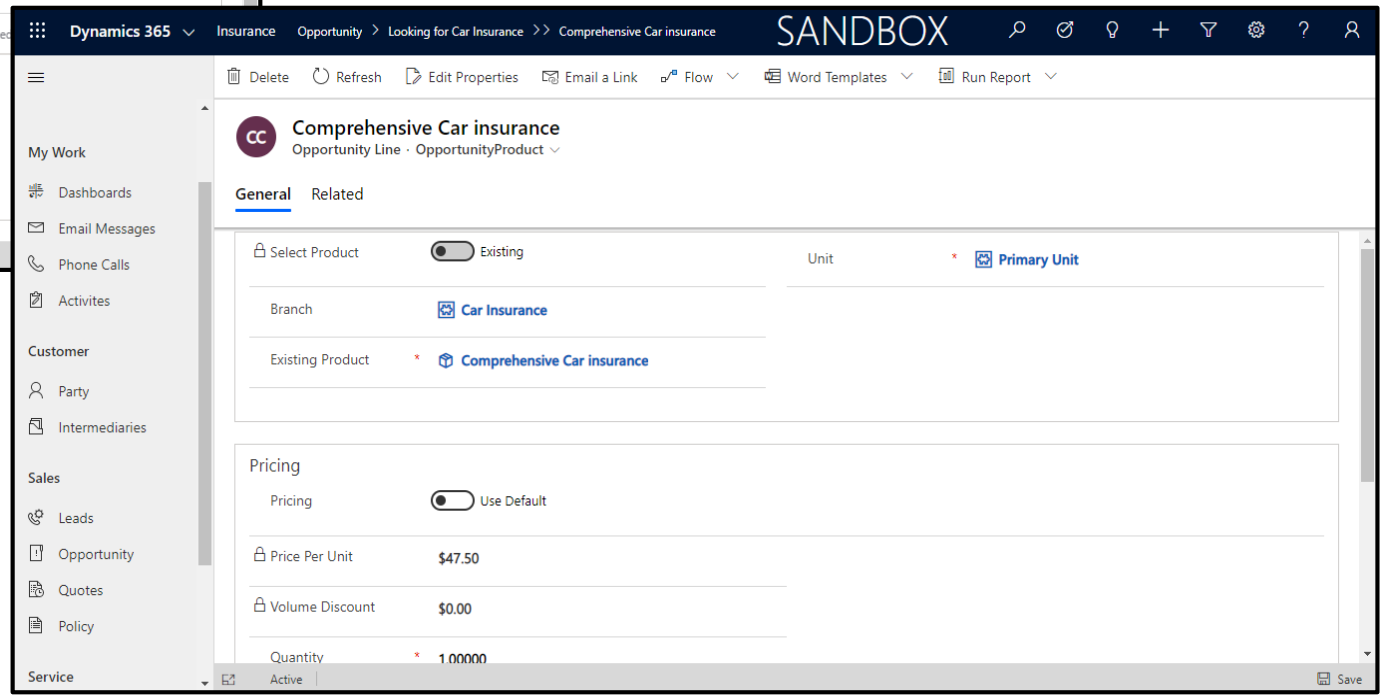
AFTER QUALIFYING LEAD AN OPPORTUNITY IS CREATED



LEAD MANAGEMENT

ADD PRODUCT TO AN OPPORTUNITY





LEAD MANAGEMENT

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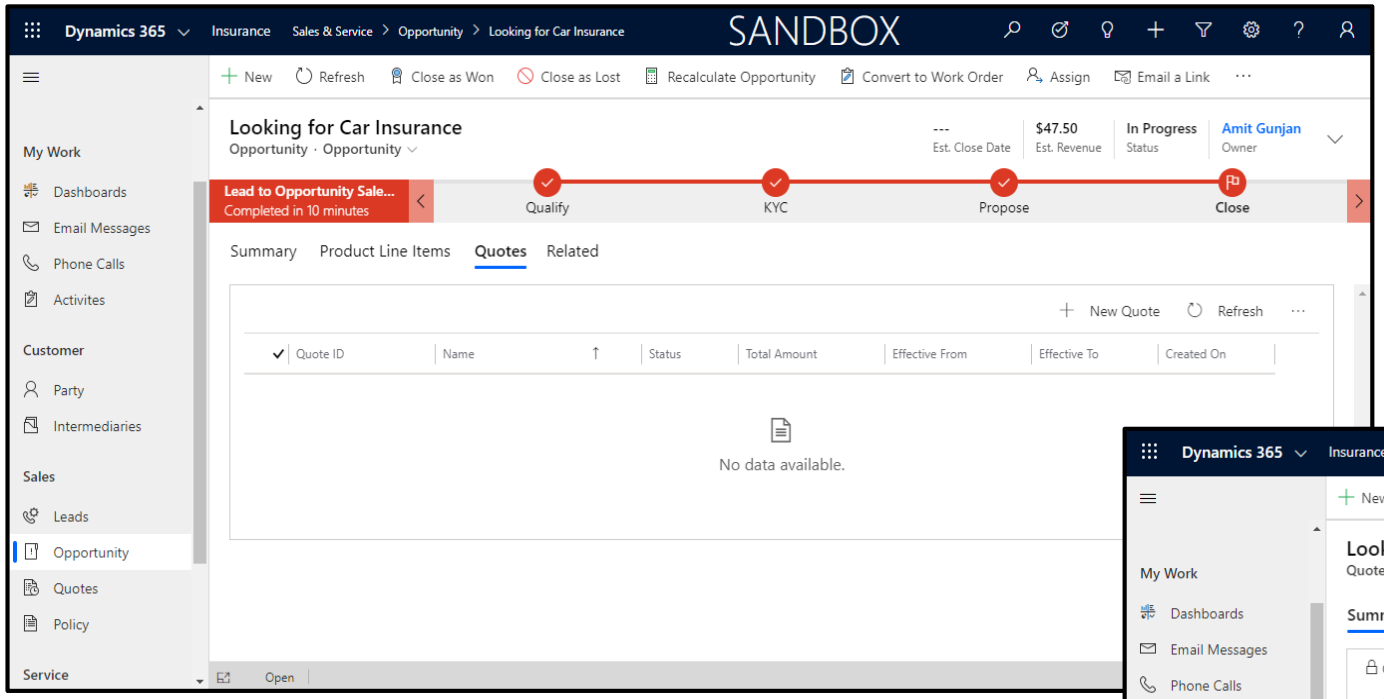
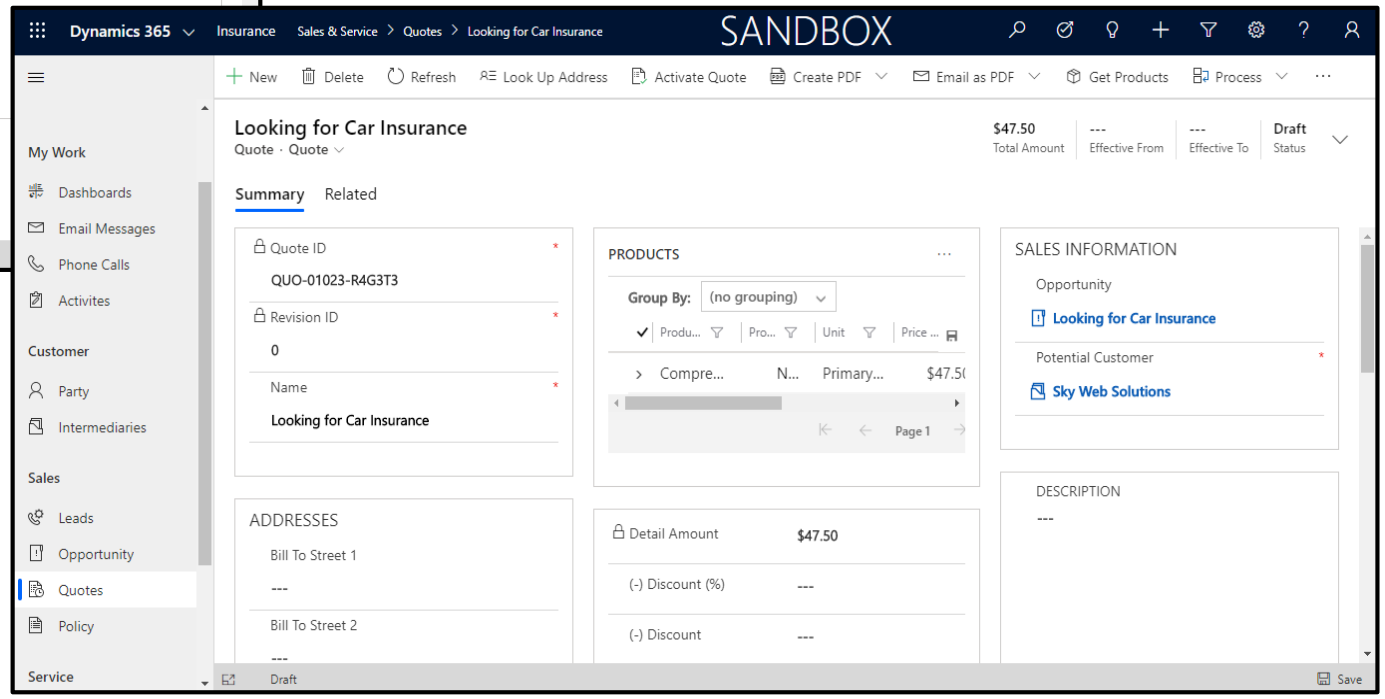
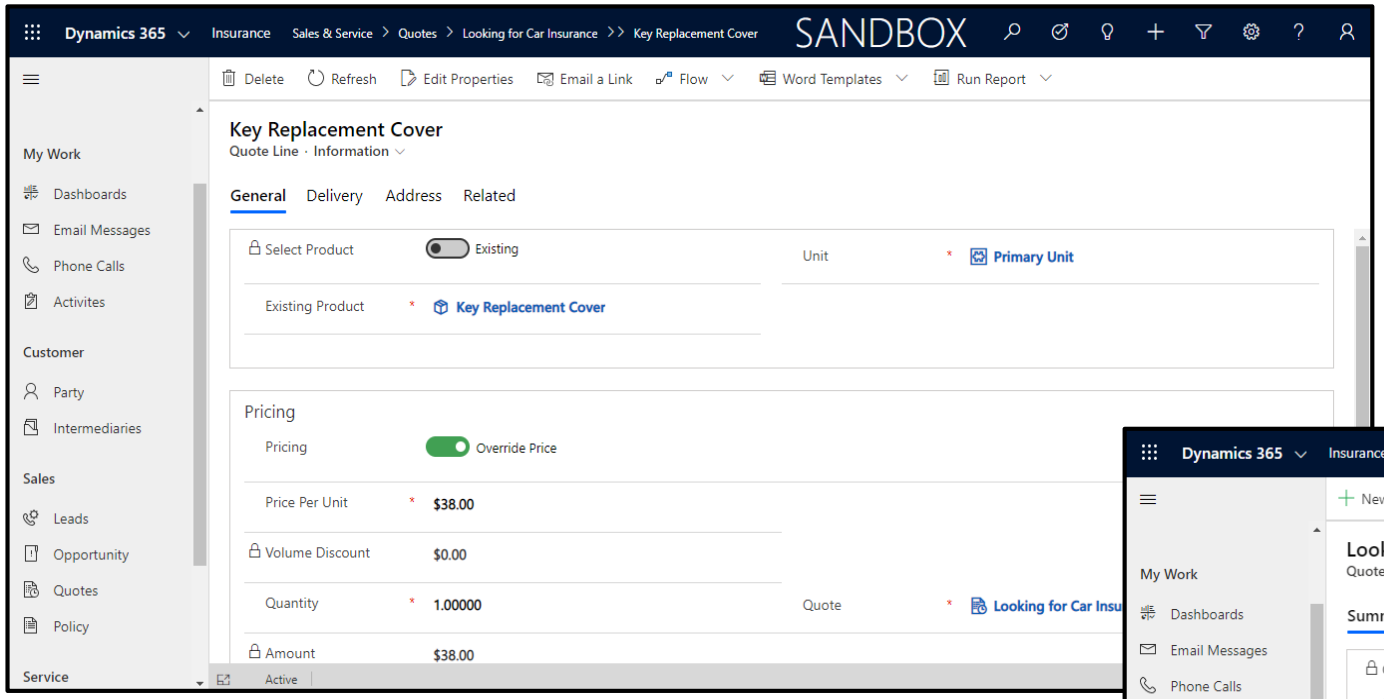
CREATE QUOTE FROM QUOTES TAB ON OPPORTUNITY FORM



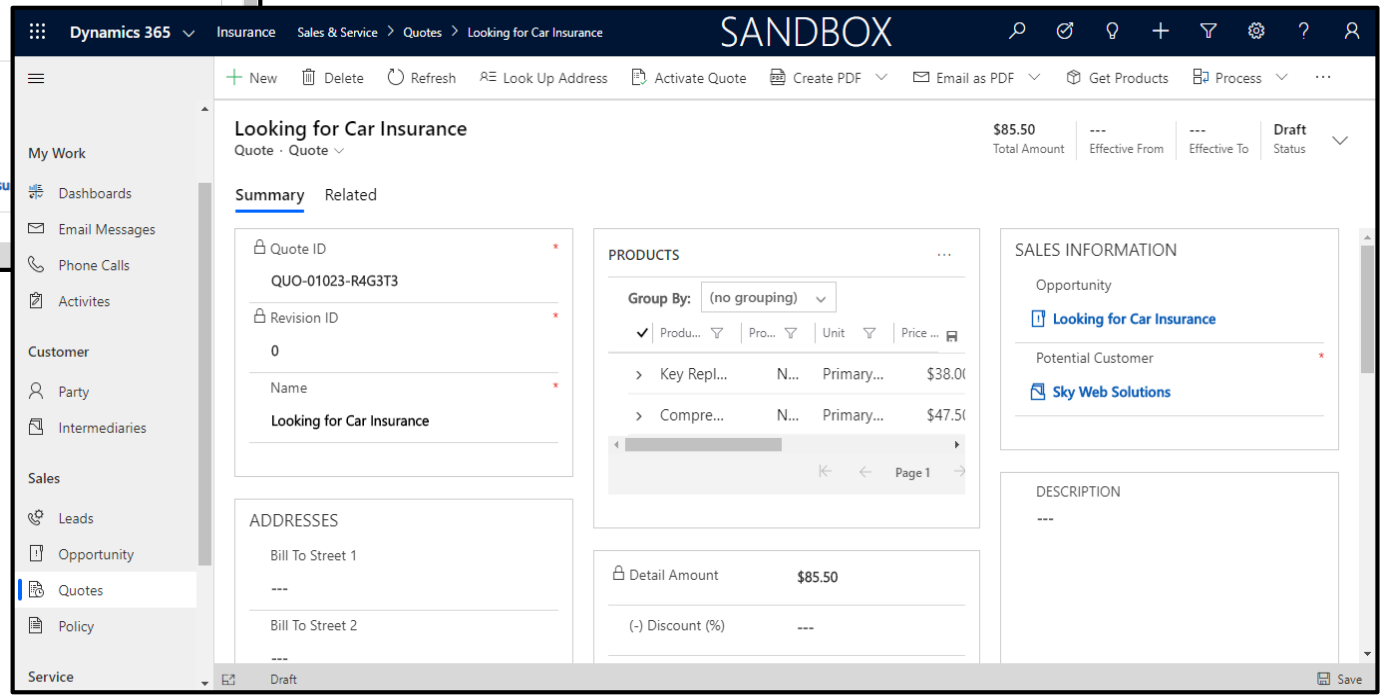


LEAD MANAGEMENT

ADD ADDITIONAL PRODUCT TO QUOTE FROM PRODUCTS GRID

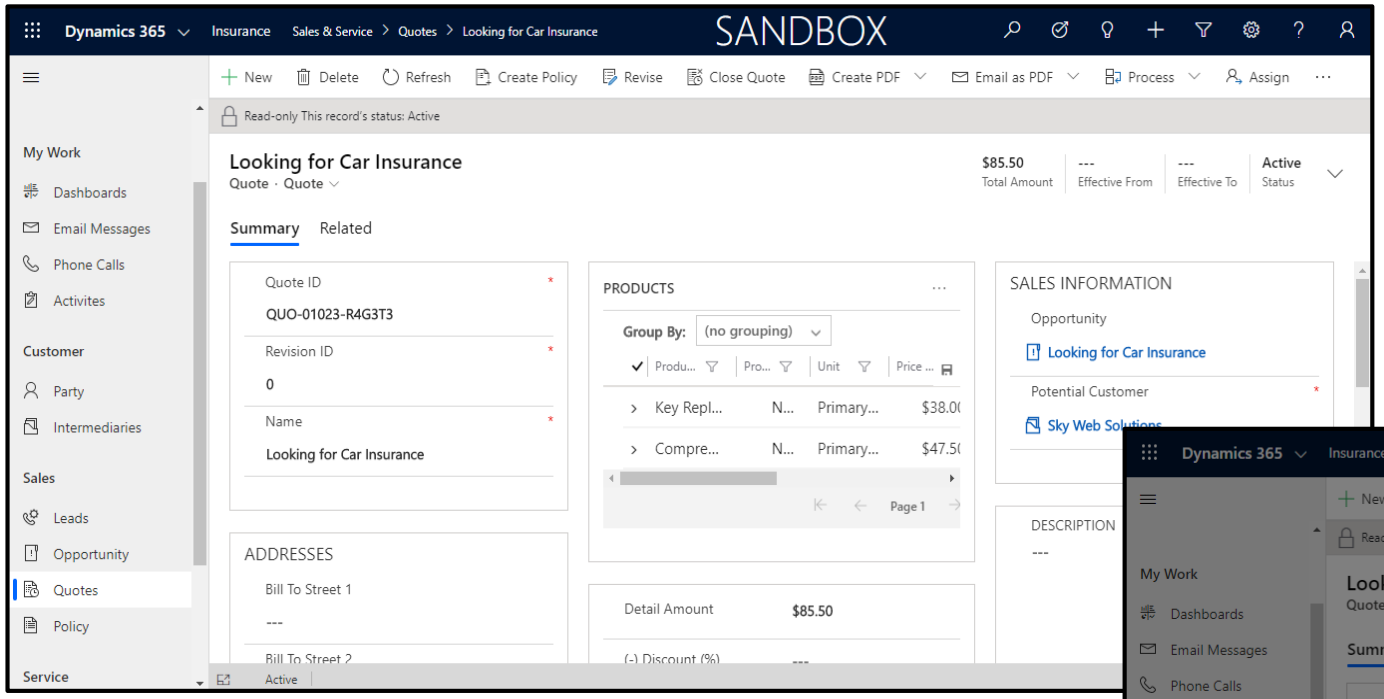


ACTIVATE QUOTE

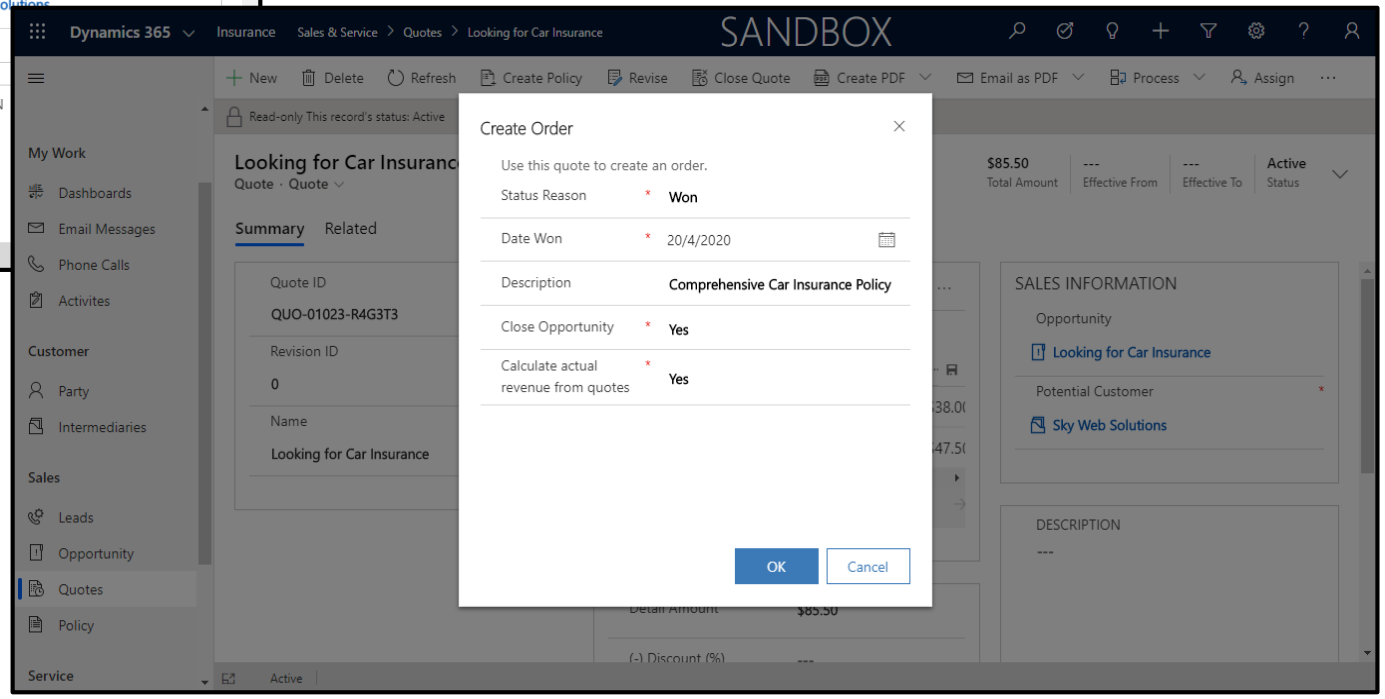


Lead Management

Total Amount of Quote is Displayed

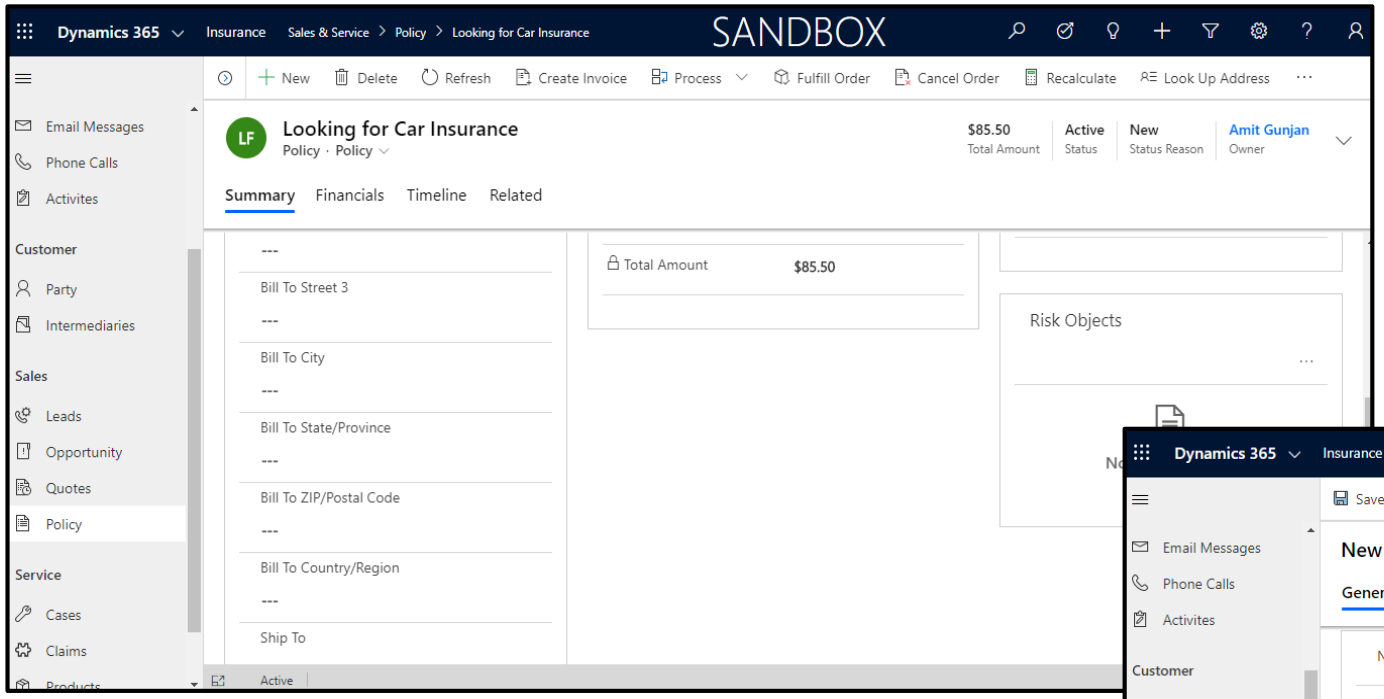


Create a Policy

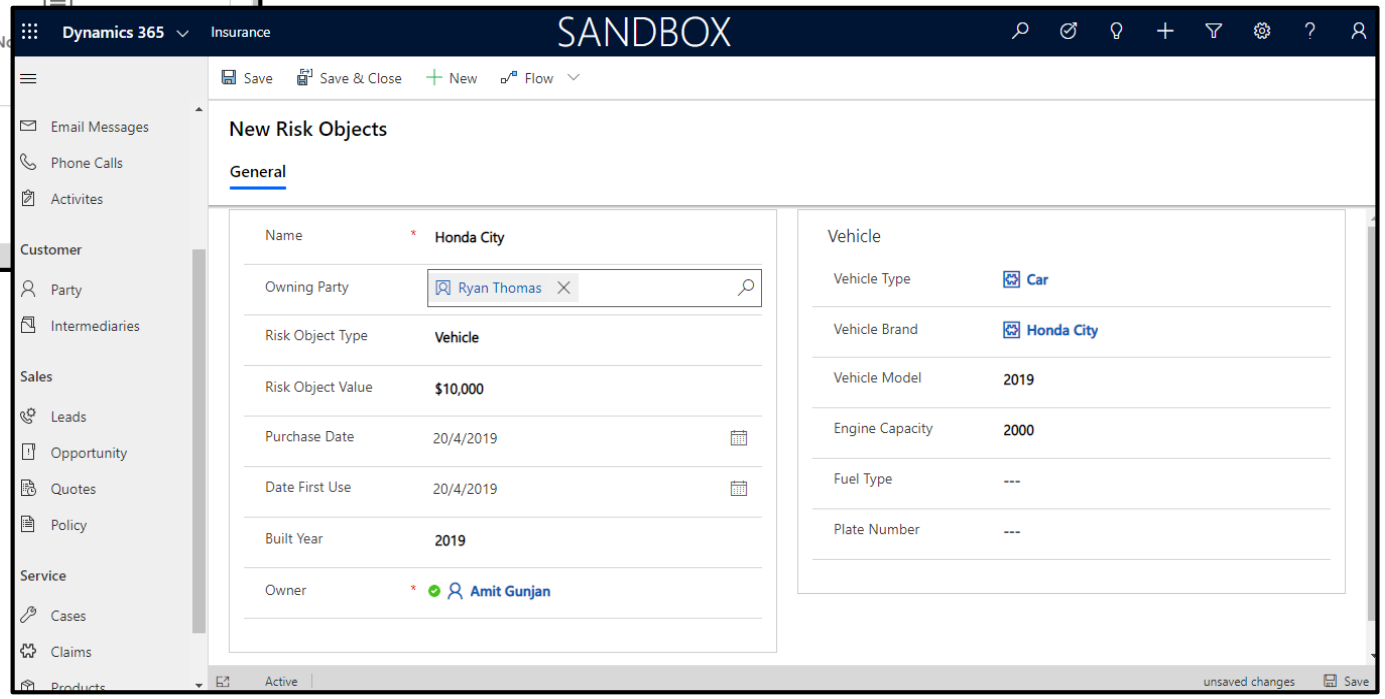


LEAD MANAGEMENT

CREATE A RISK OBJECT FOR A POLICY

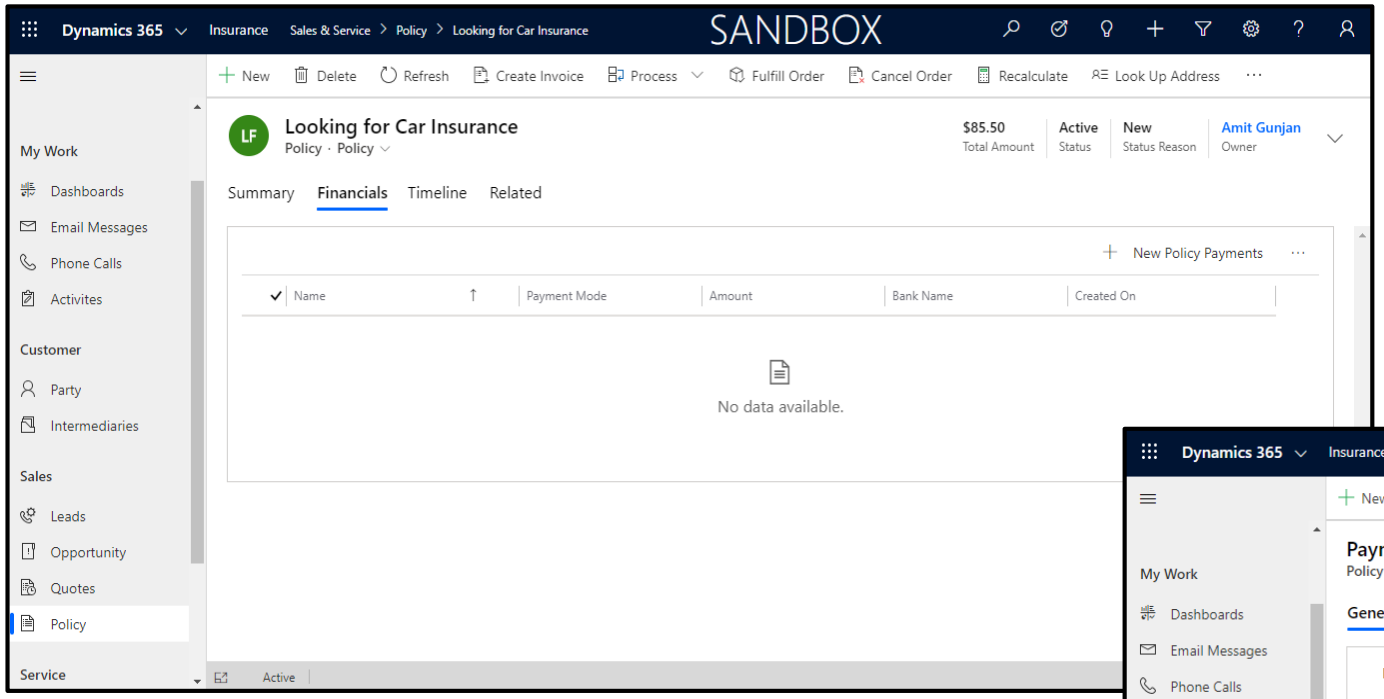


ENTER ALL THE DETAILS OF A RISK OBJECT

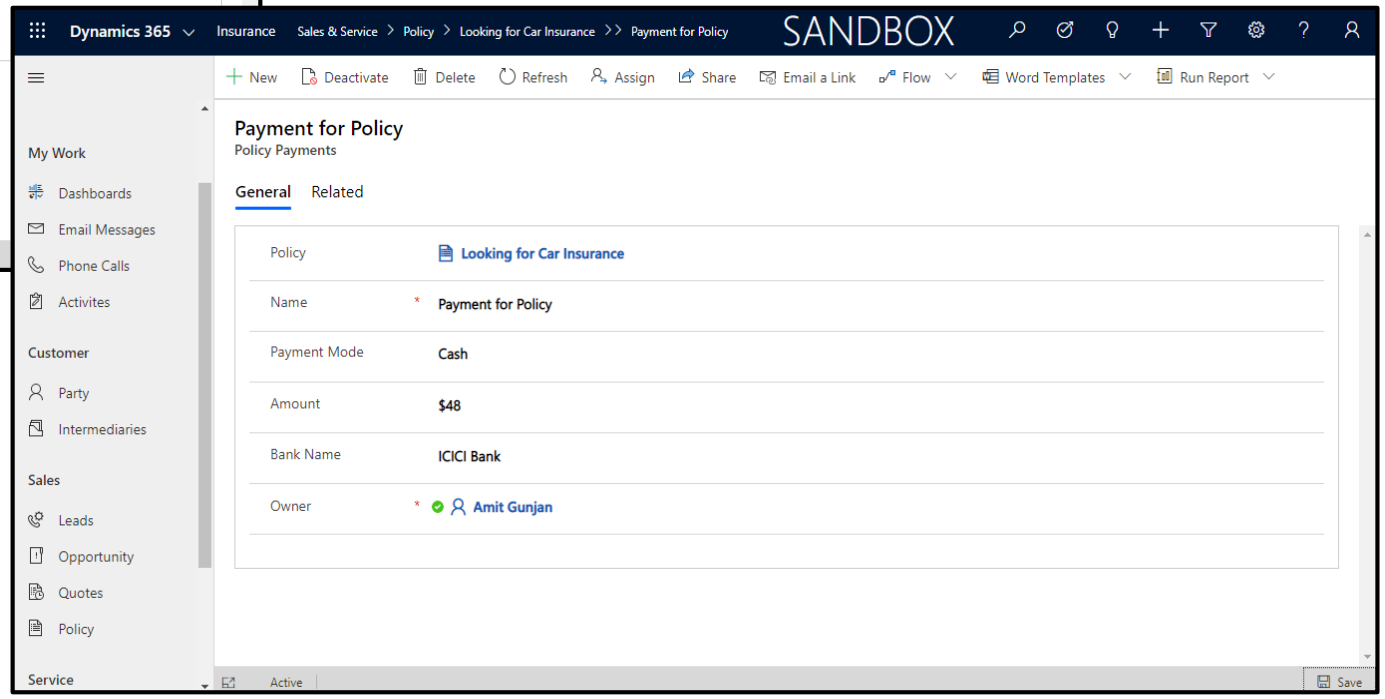


LEAD MANAGEMENT

ADD A PAYMENT FOR POLICY IN FINANCIALS TAB

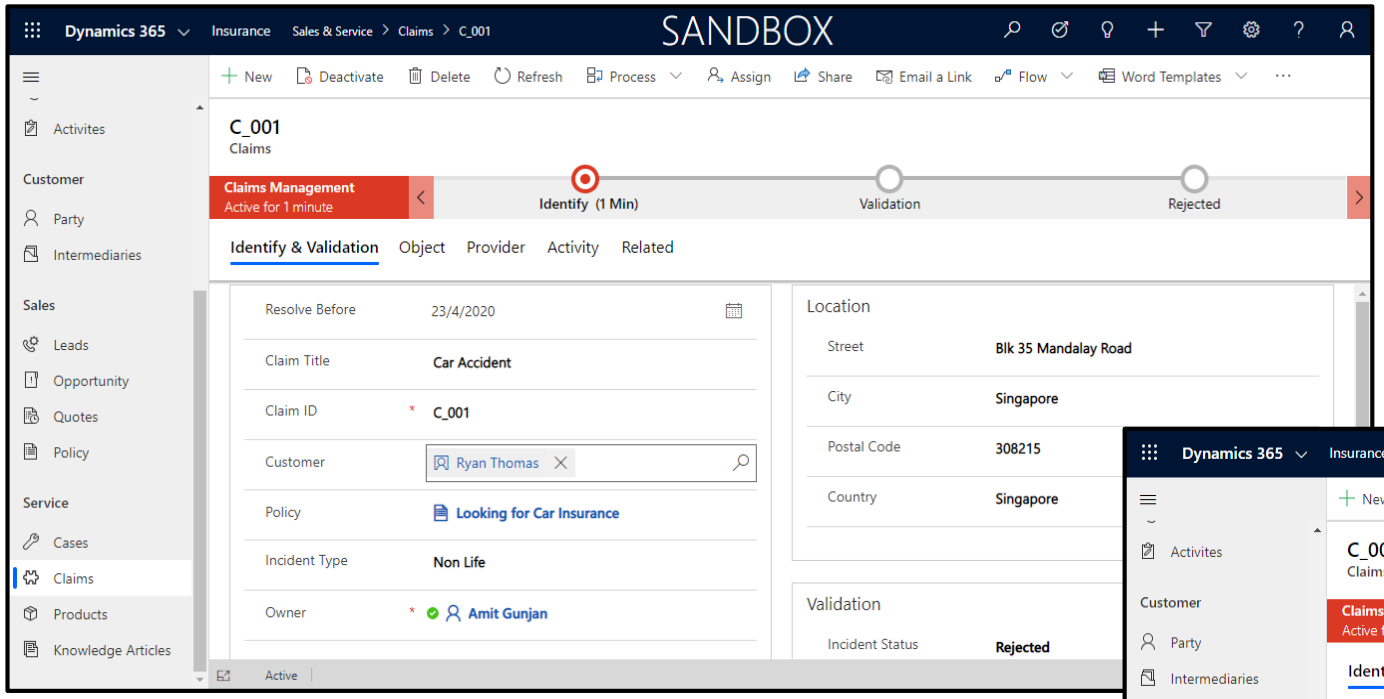


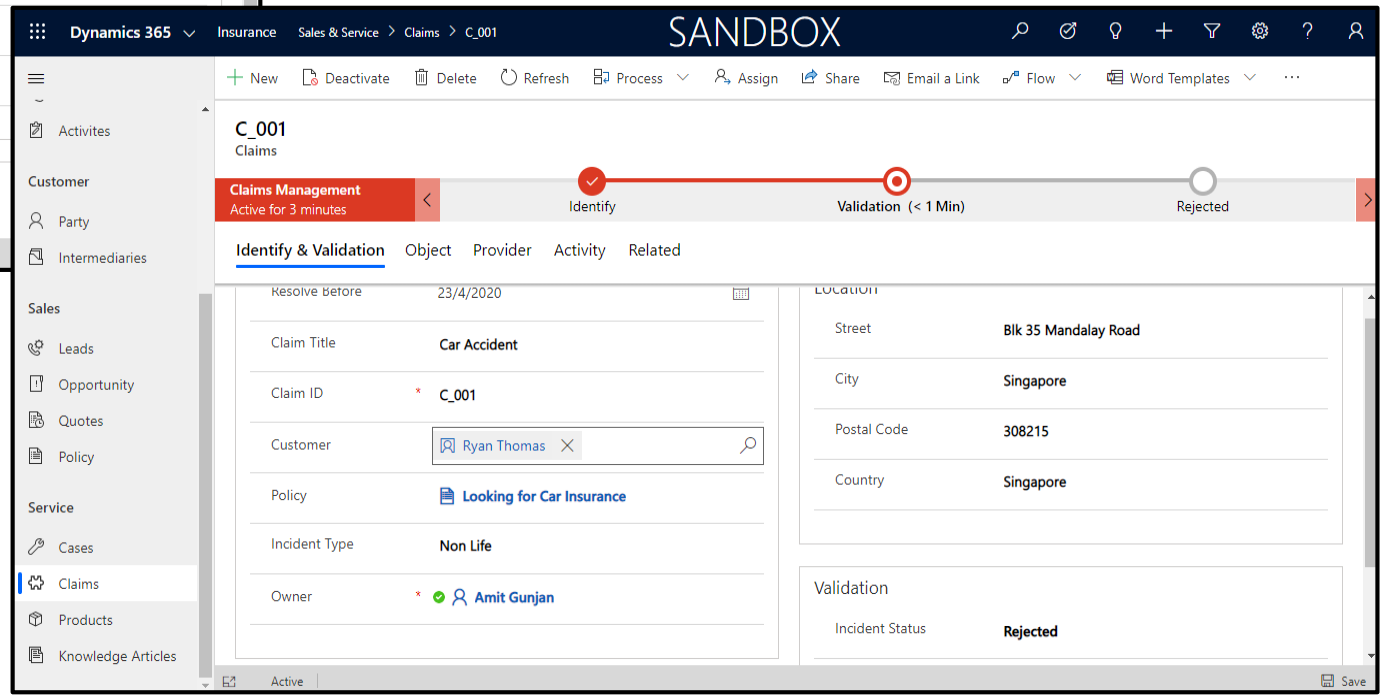
ADD A NEW POLICY PAYMENT



CLAIM MANAGEMENT

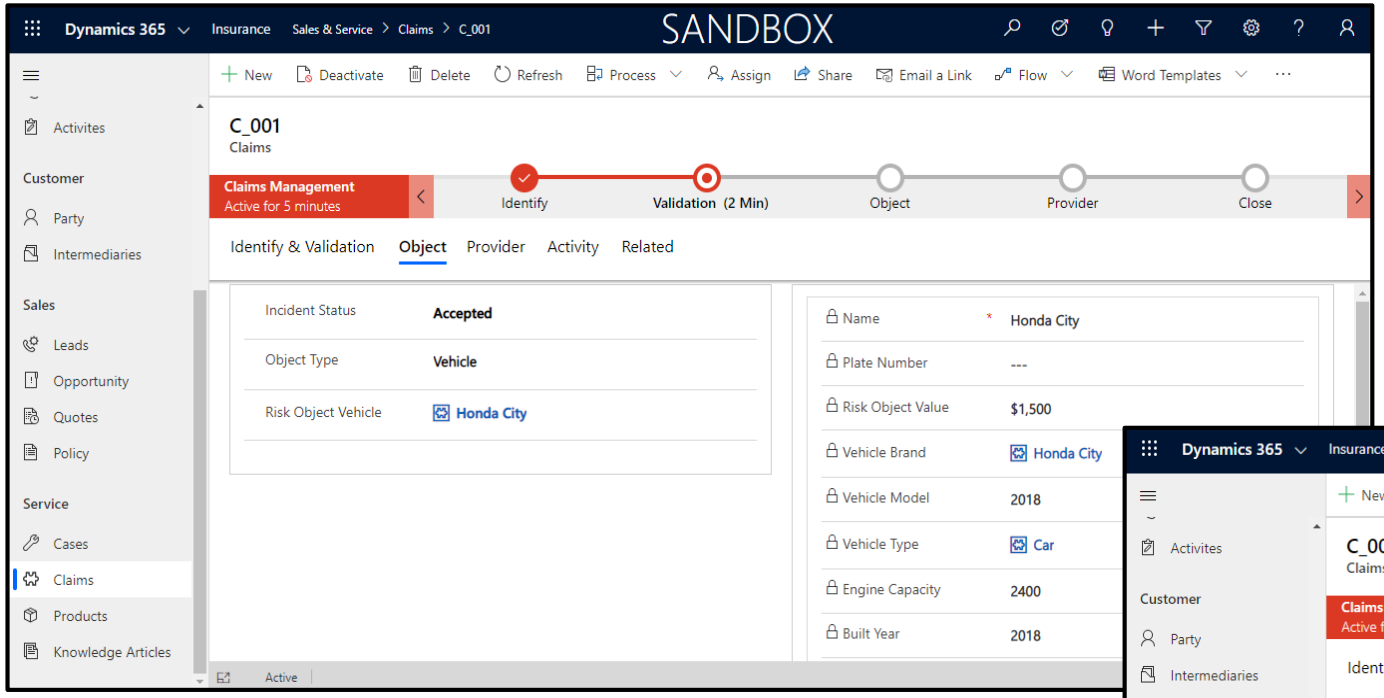
CREATE A NEW CLAIM, ENTER ALL THE DETAILS



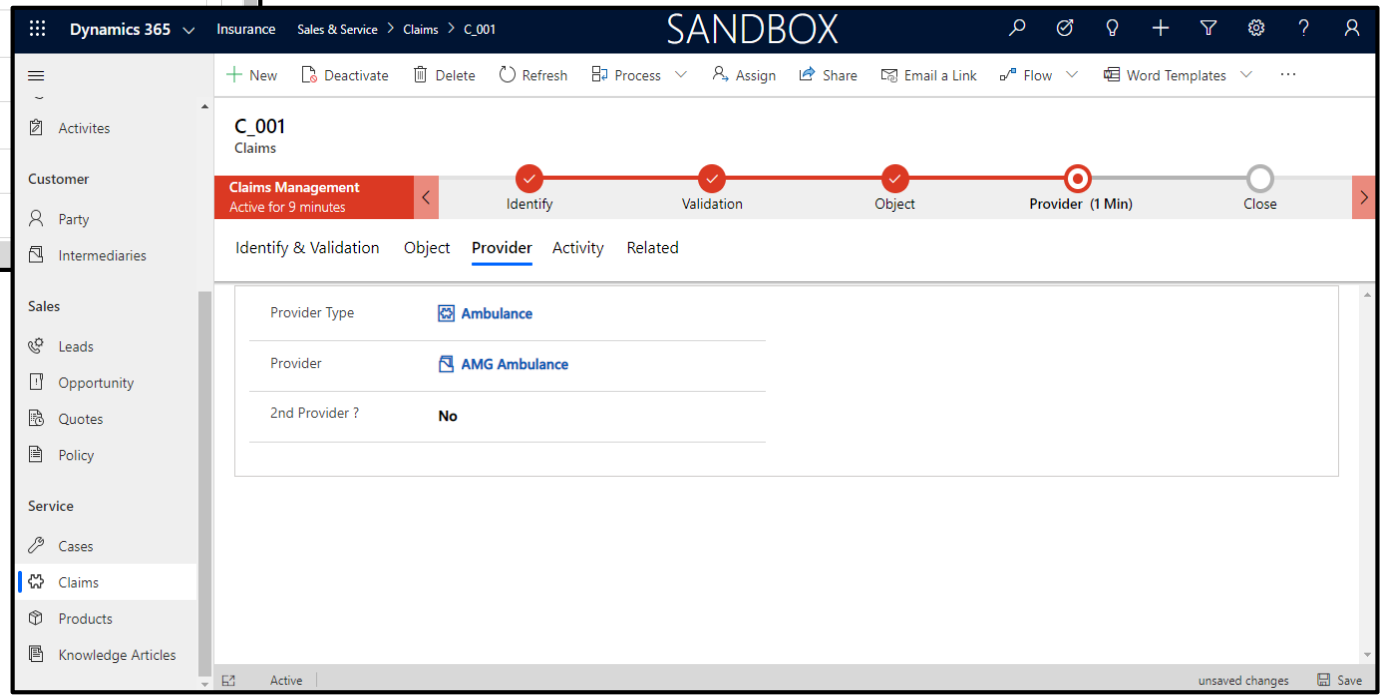


Claim Management

Change Incident Status to Accepted, Select Object Type as Vehicle, Risk Object Vehicle from Object Tab



Add Provider Details From Provider Tab



CLAIM MANAGEMENT

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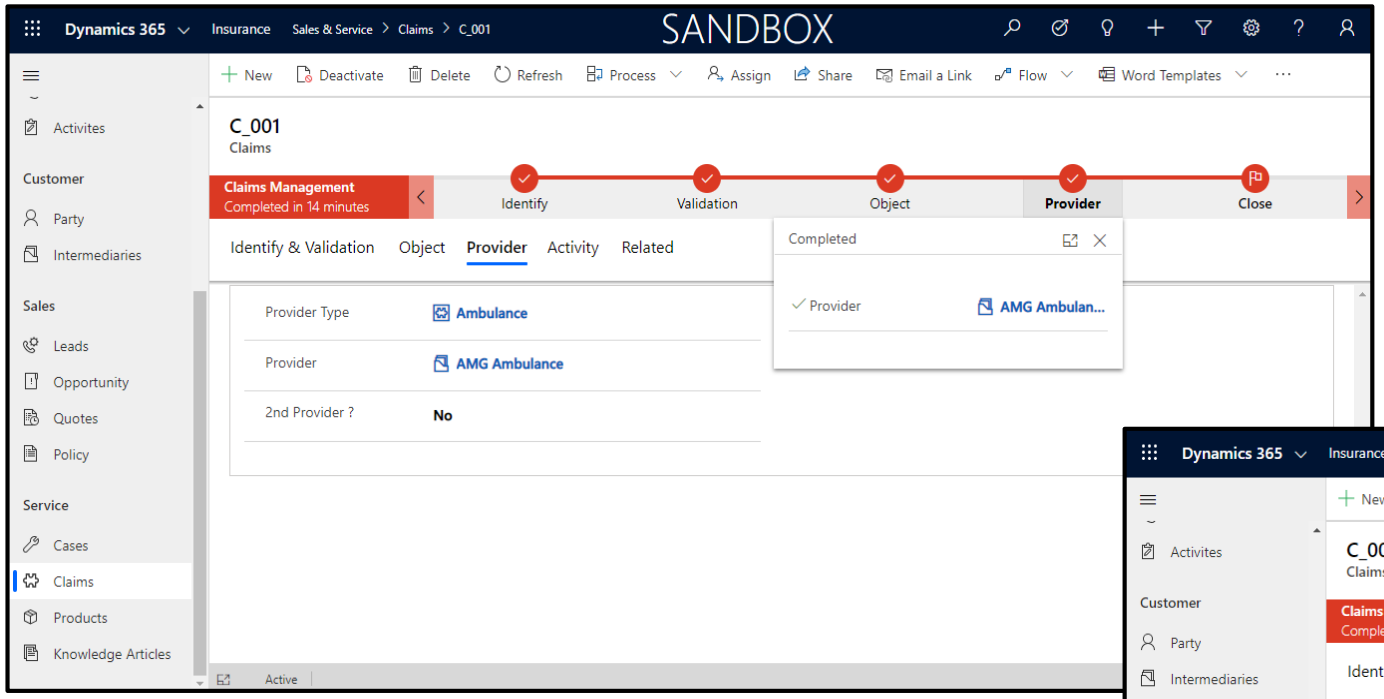

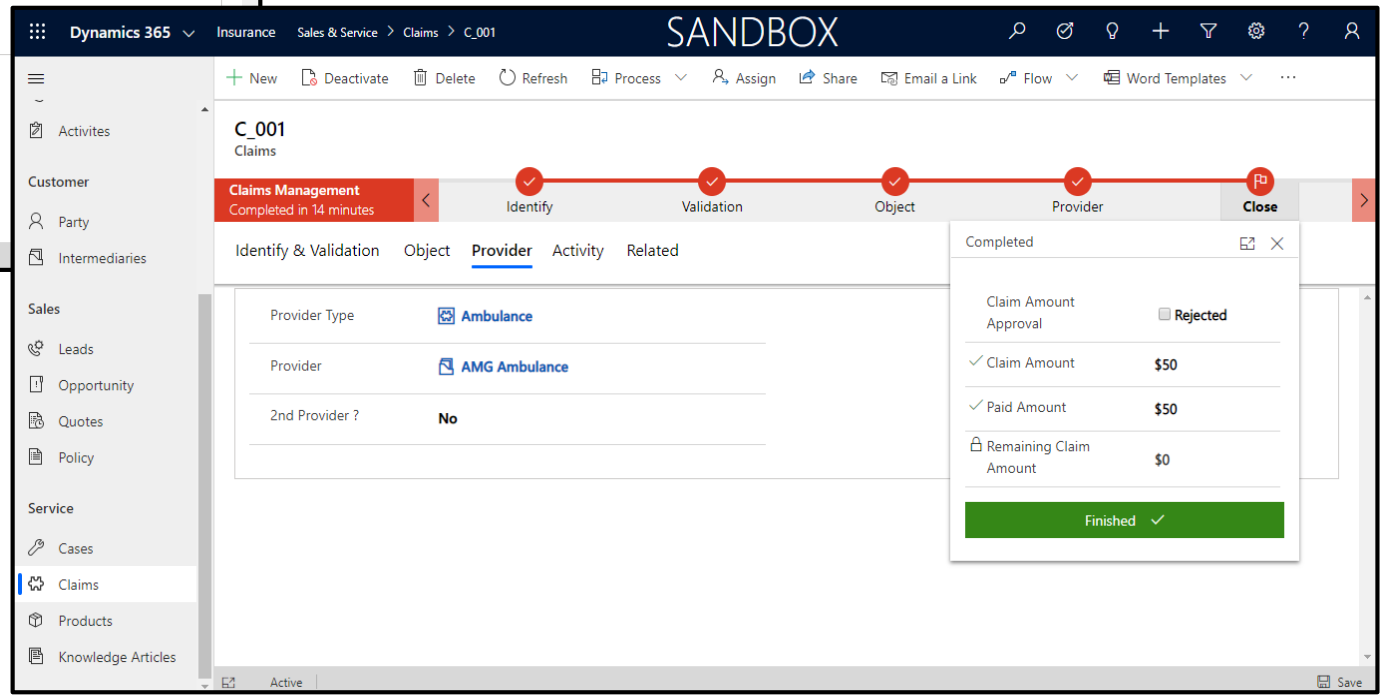

PARTY MANAGEMENT

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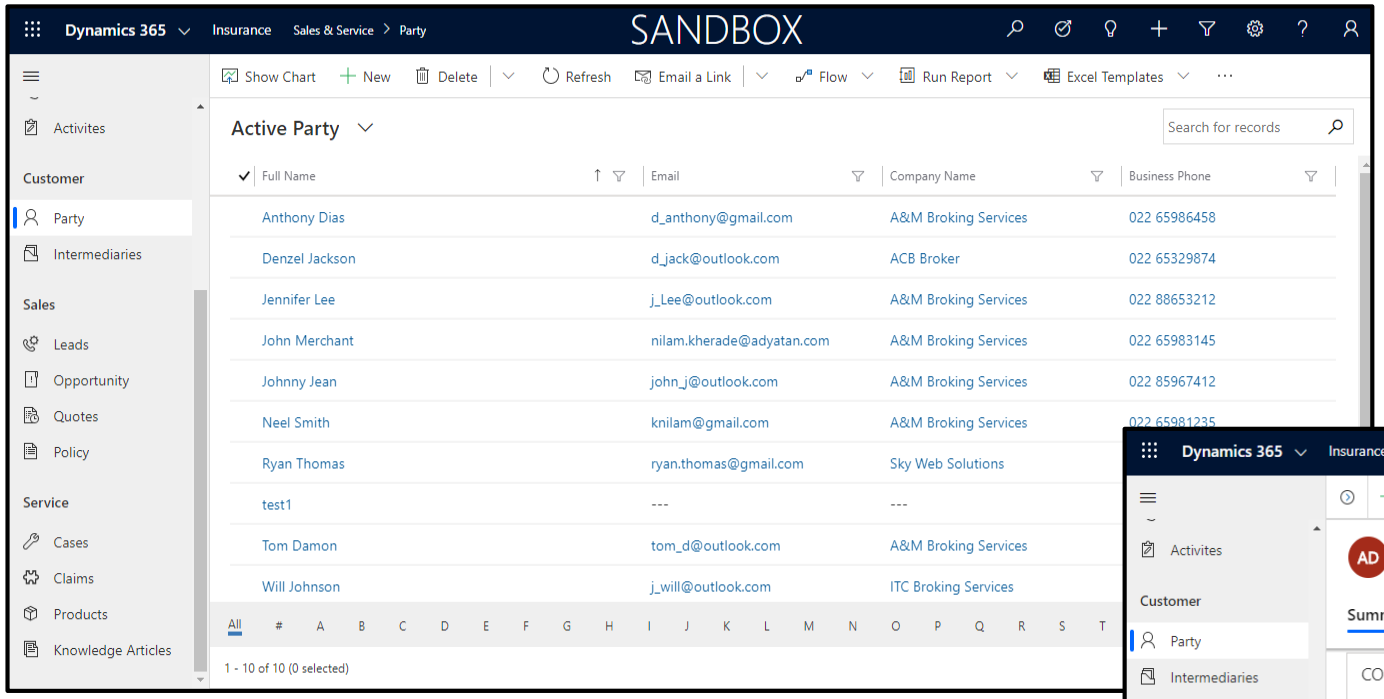
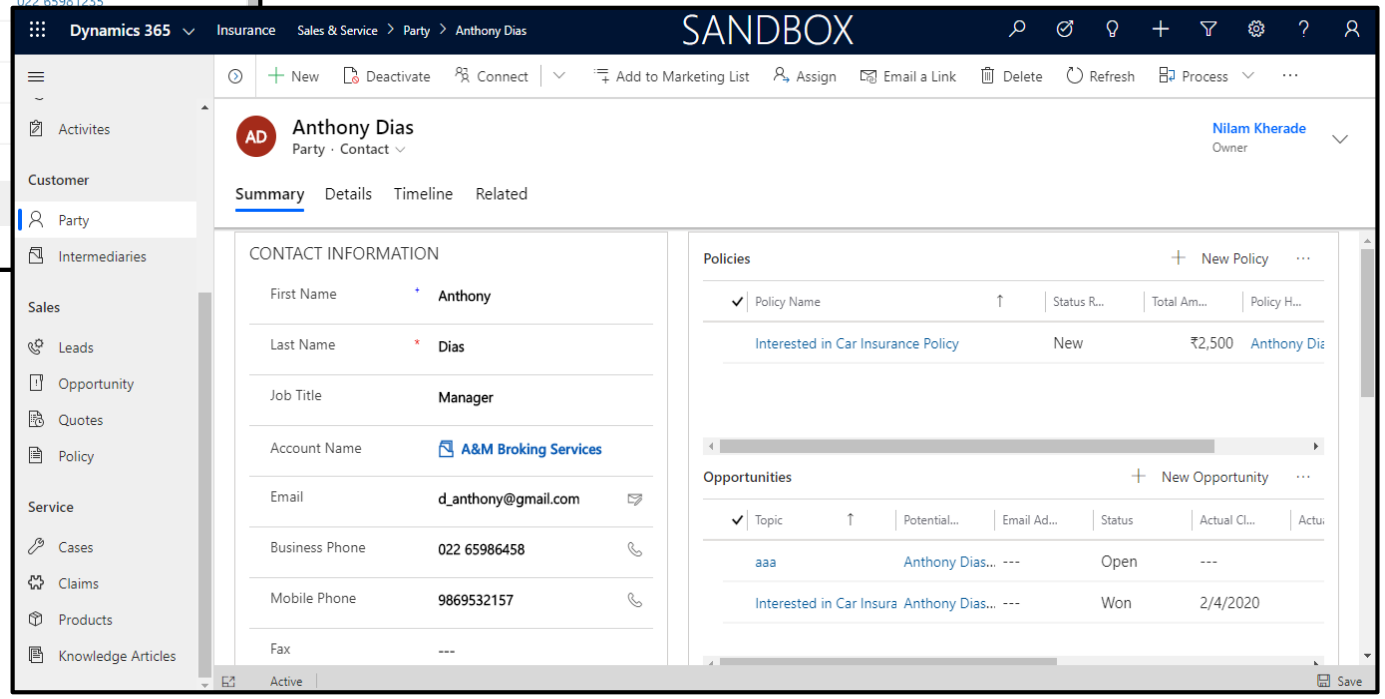
LIST OF ALL THE PARTIES

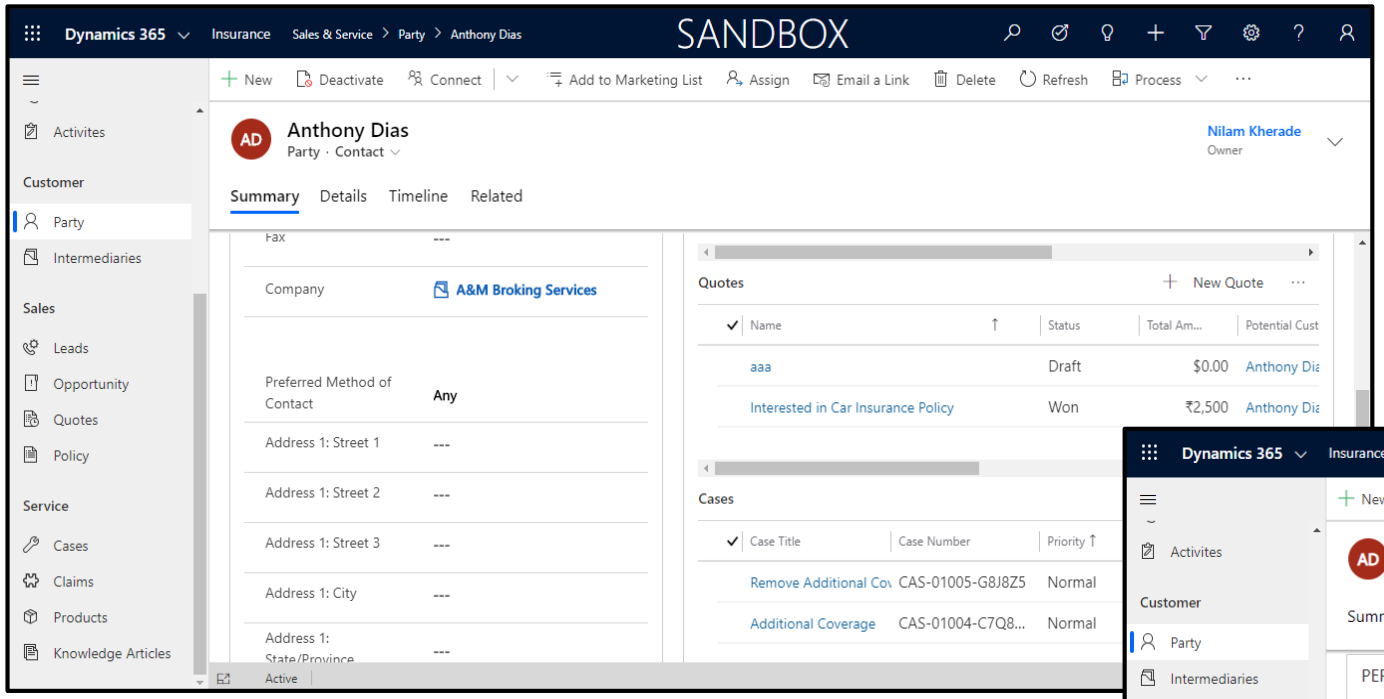


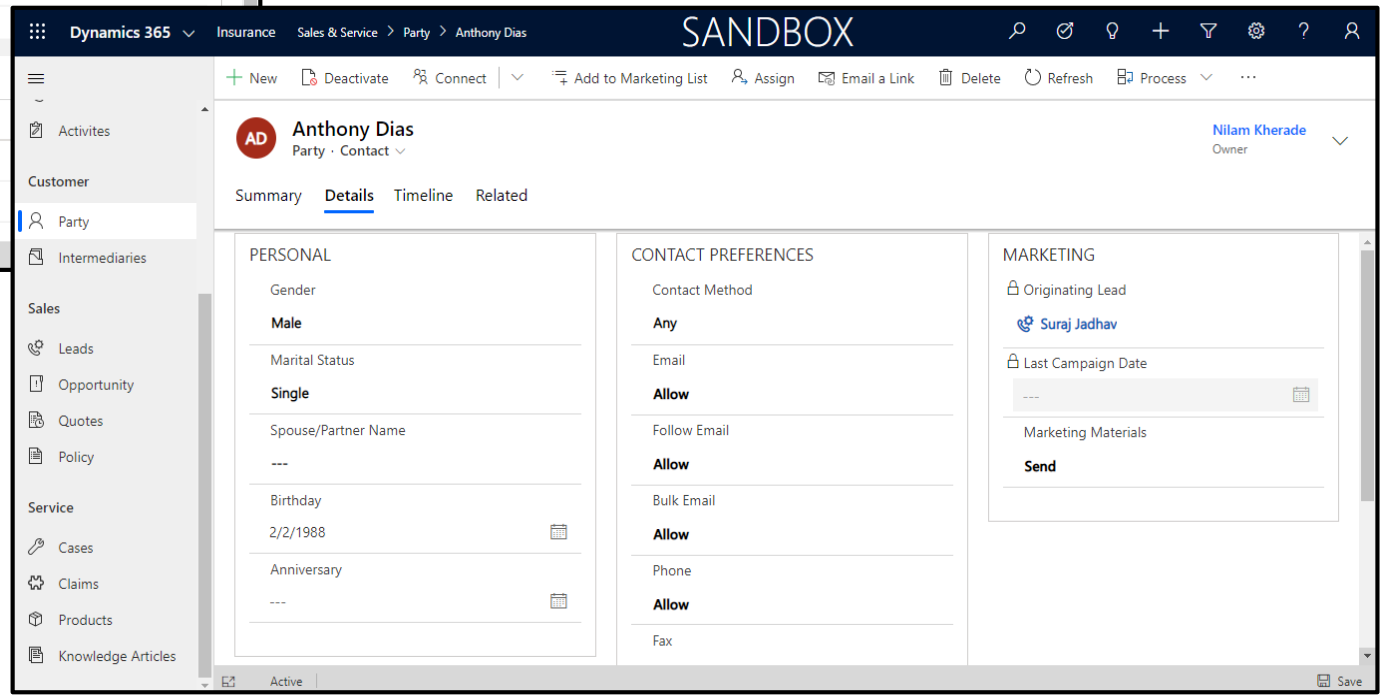
DETAILS OF A PARTY



Party Management

Details of a Party





INTERMEDIARY MANAGEMENT

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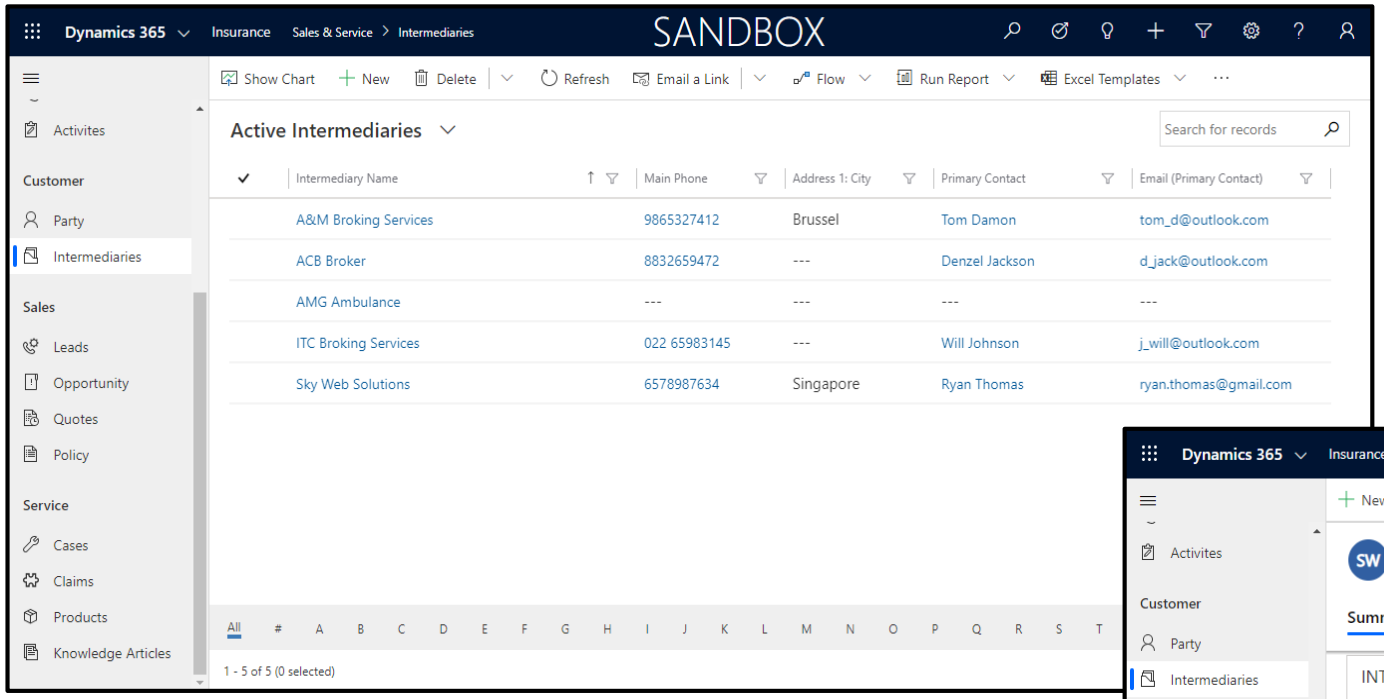
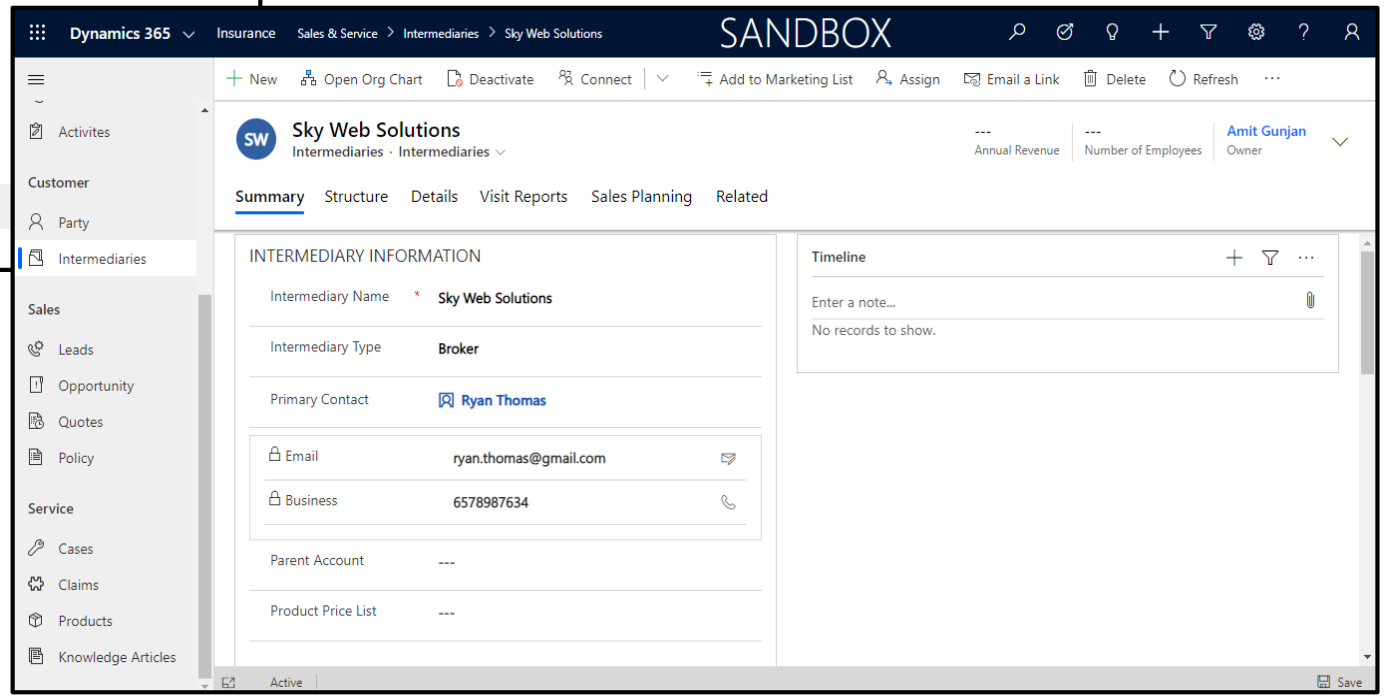
LIST OF ALL THE INTERMEDIARIES

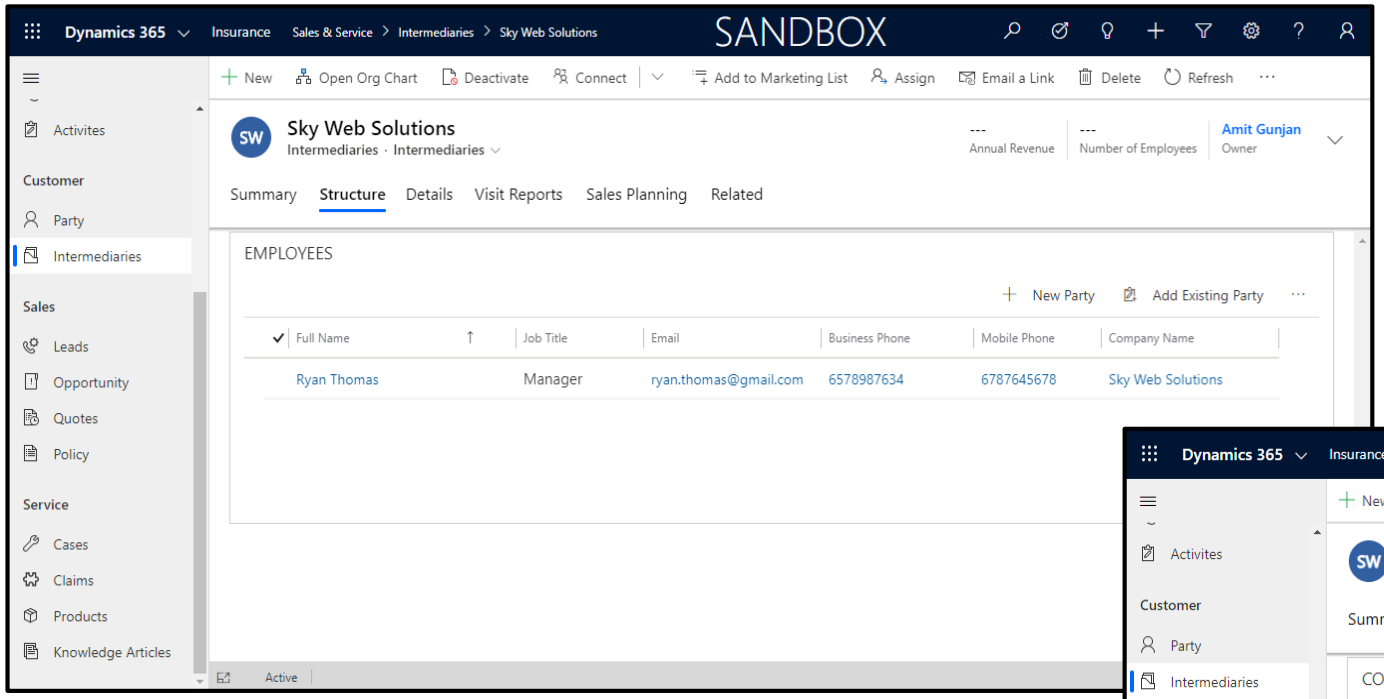


SUMMARY OF A INTERMEDIARY

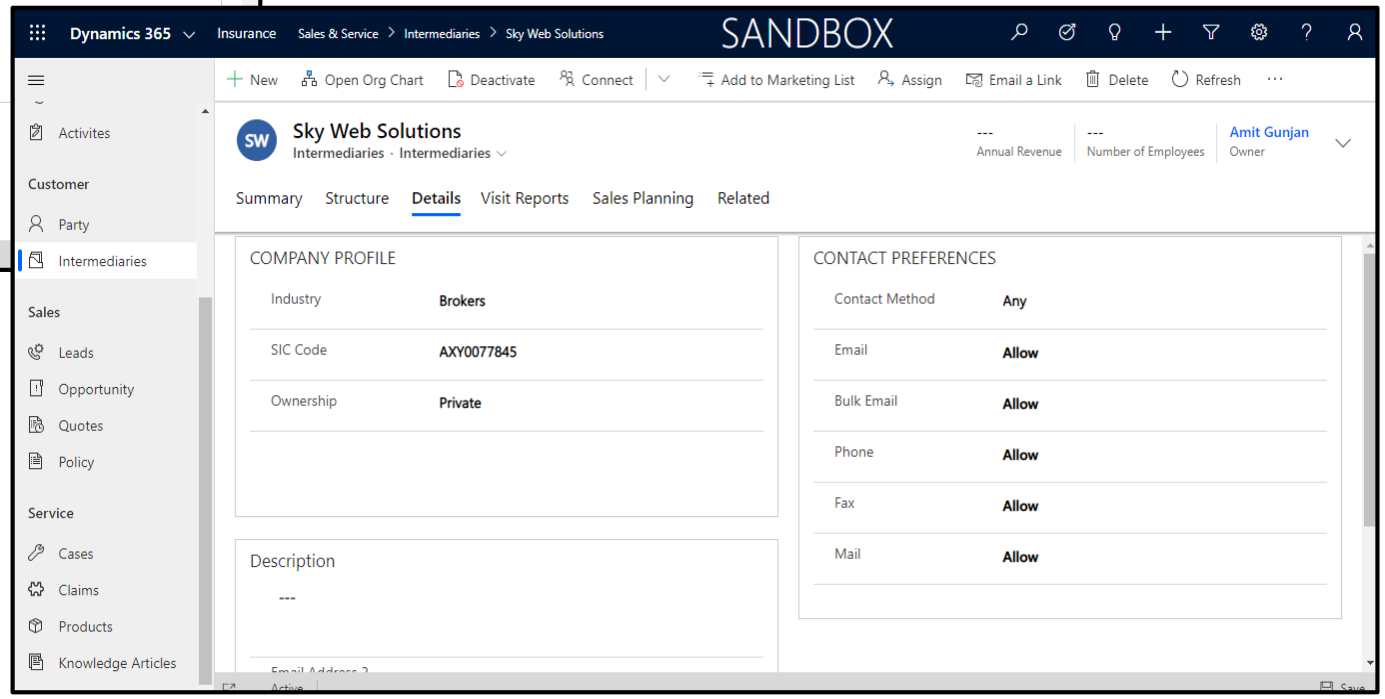


INTERMEDIARY

STRUCTURE OF A INTERMEDIARY

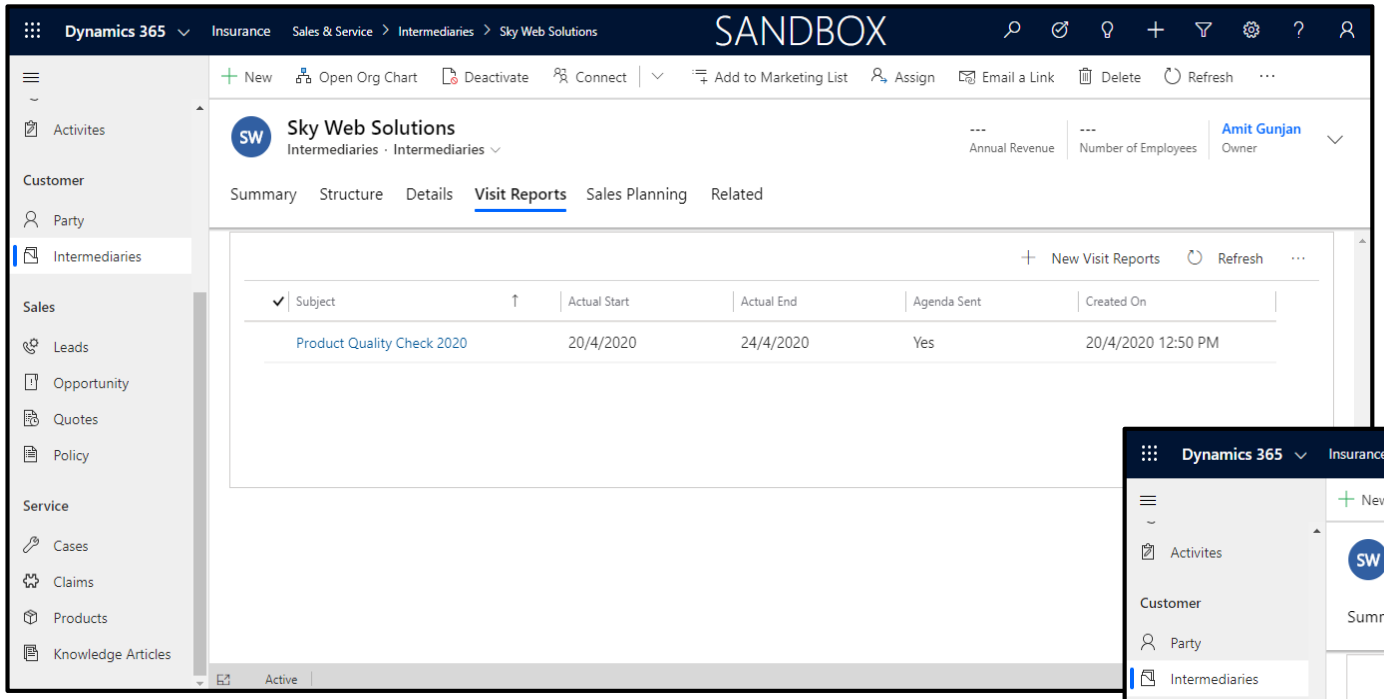


DETAILS OF A INTERMEDIARY

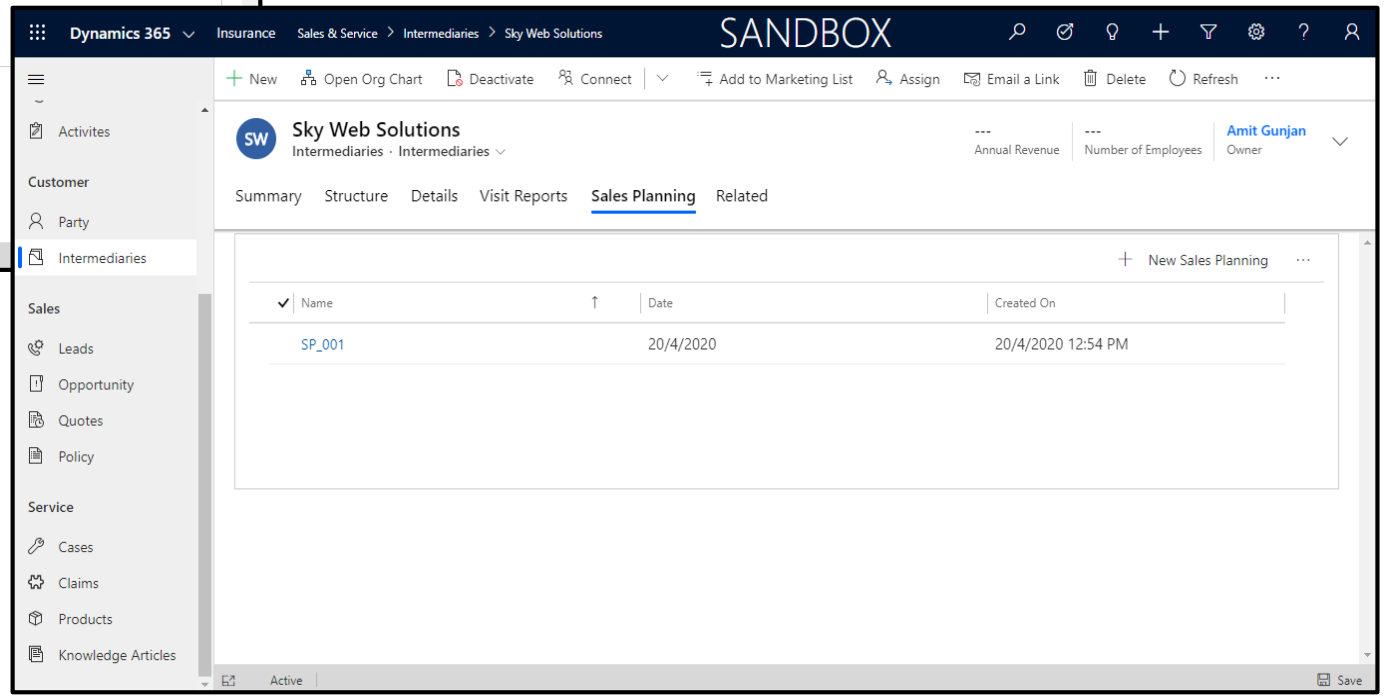


INTERMEDIARY

VISIT REPORTS OF A INTERMEDIARY

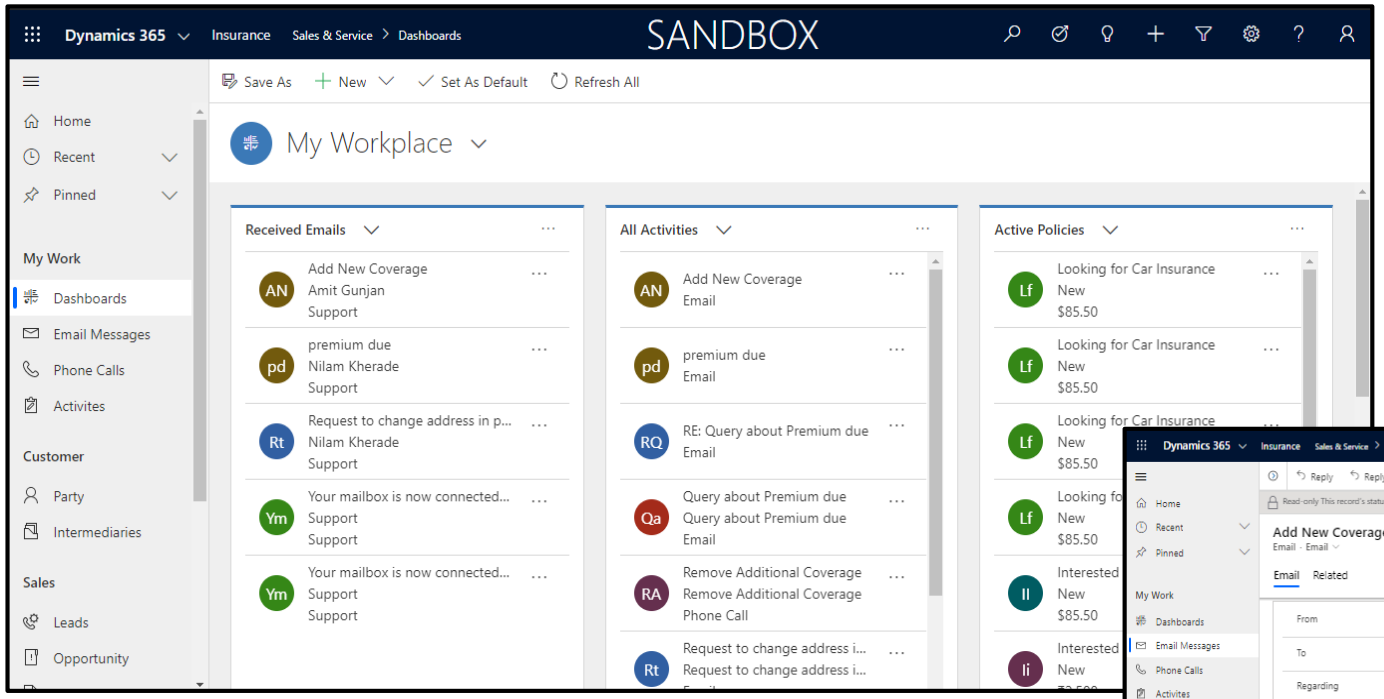


SALES PLANNING OF A INTERMEDIARY

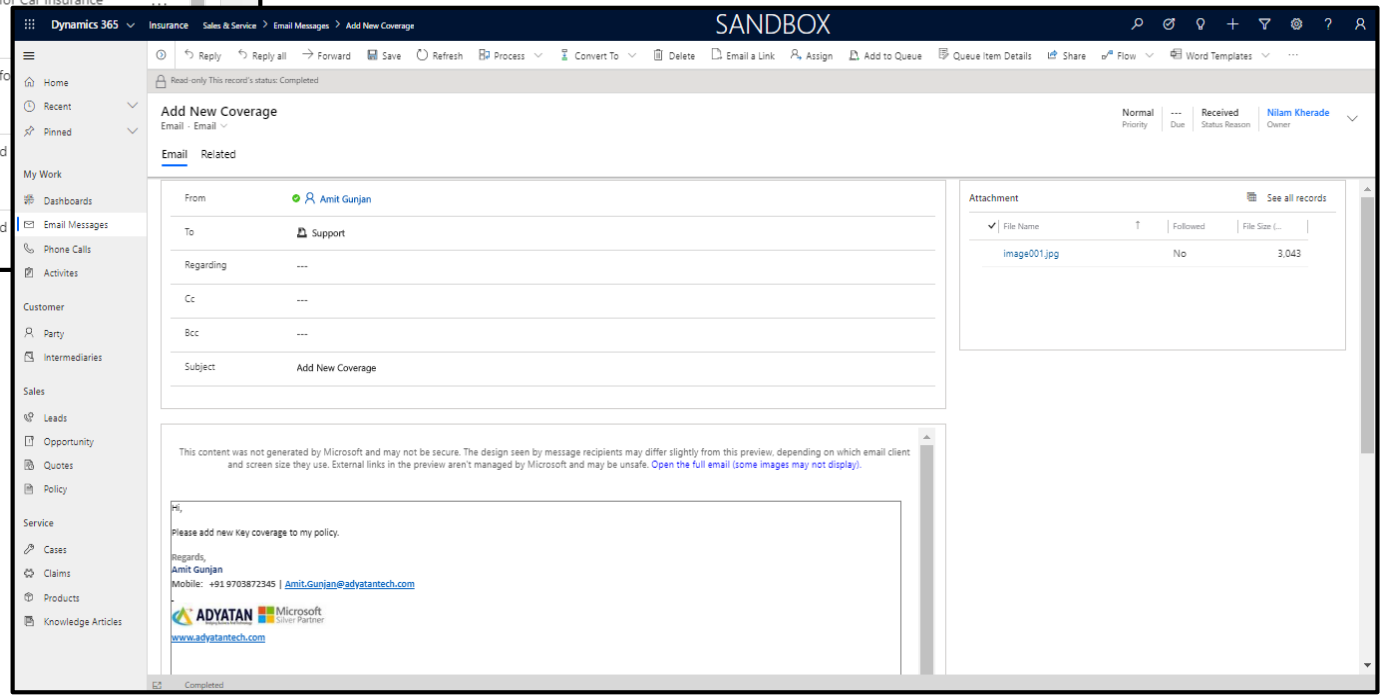


Customer Service

Received mail in My Workspace Dashboard



Details Of The Email



CUSTOMER SERVICE

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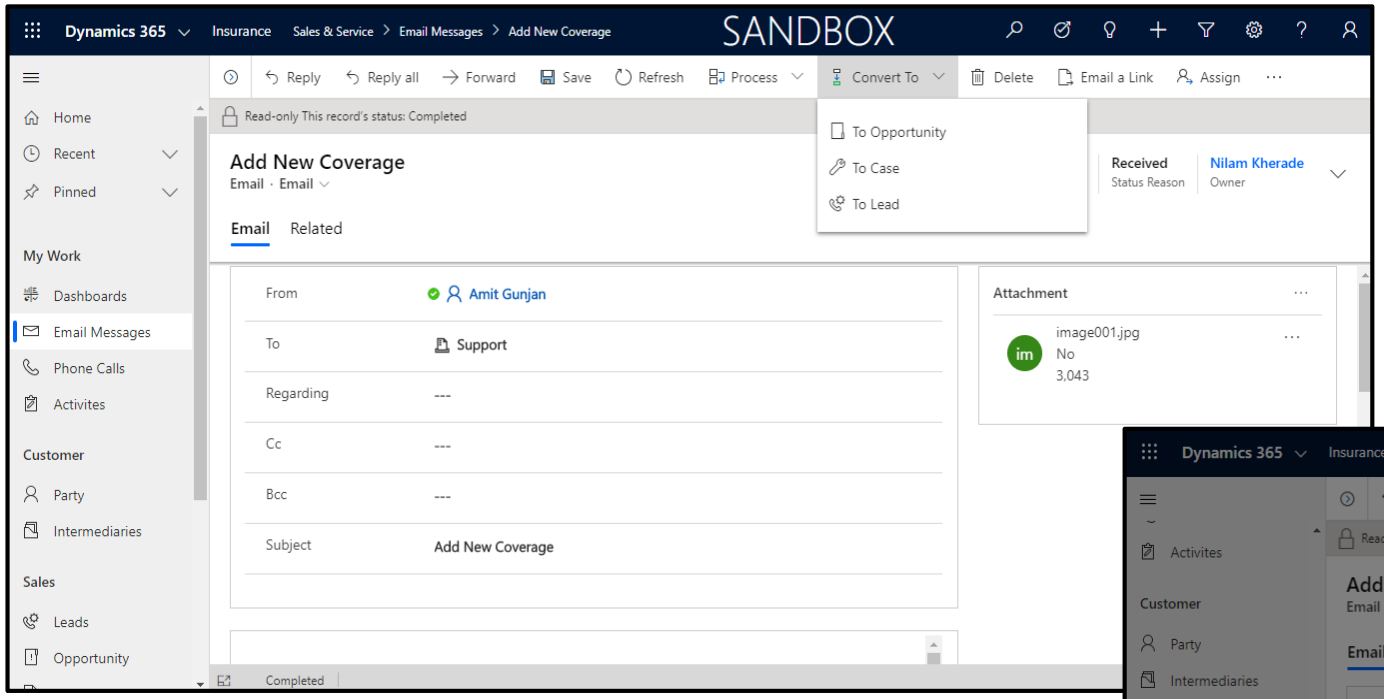
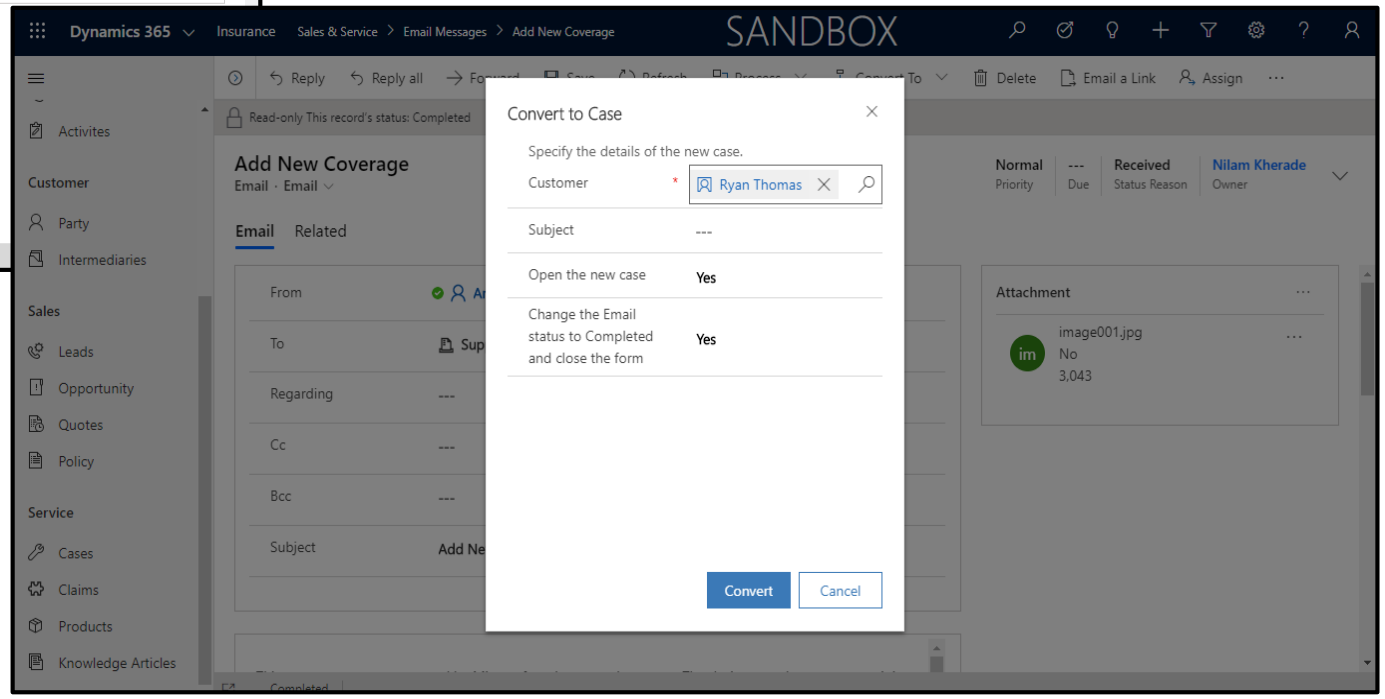
CLICK ON THE CONVERT TO CASE TO CREATE A NEW CASE



ENTER DETAILS FOR THE CASE



CUSTOMER SERVICE

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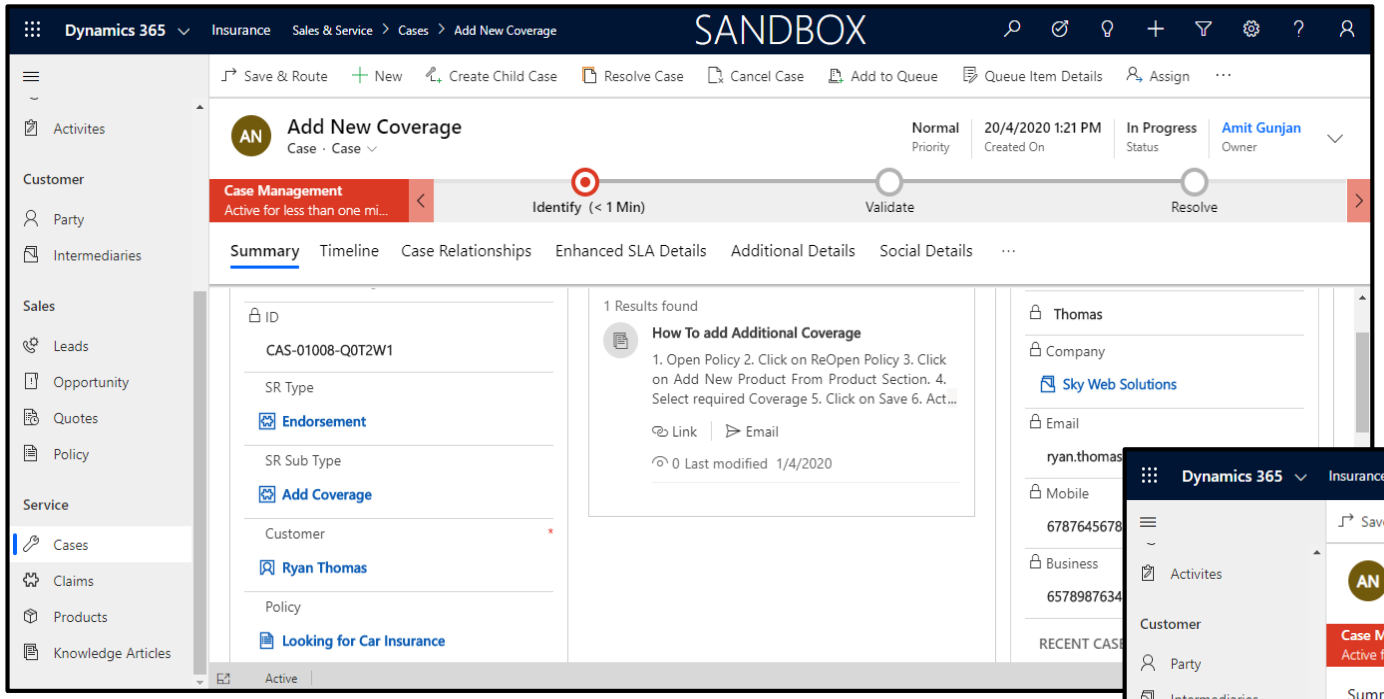
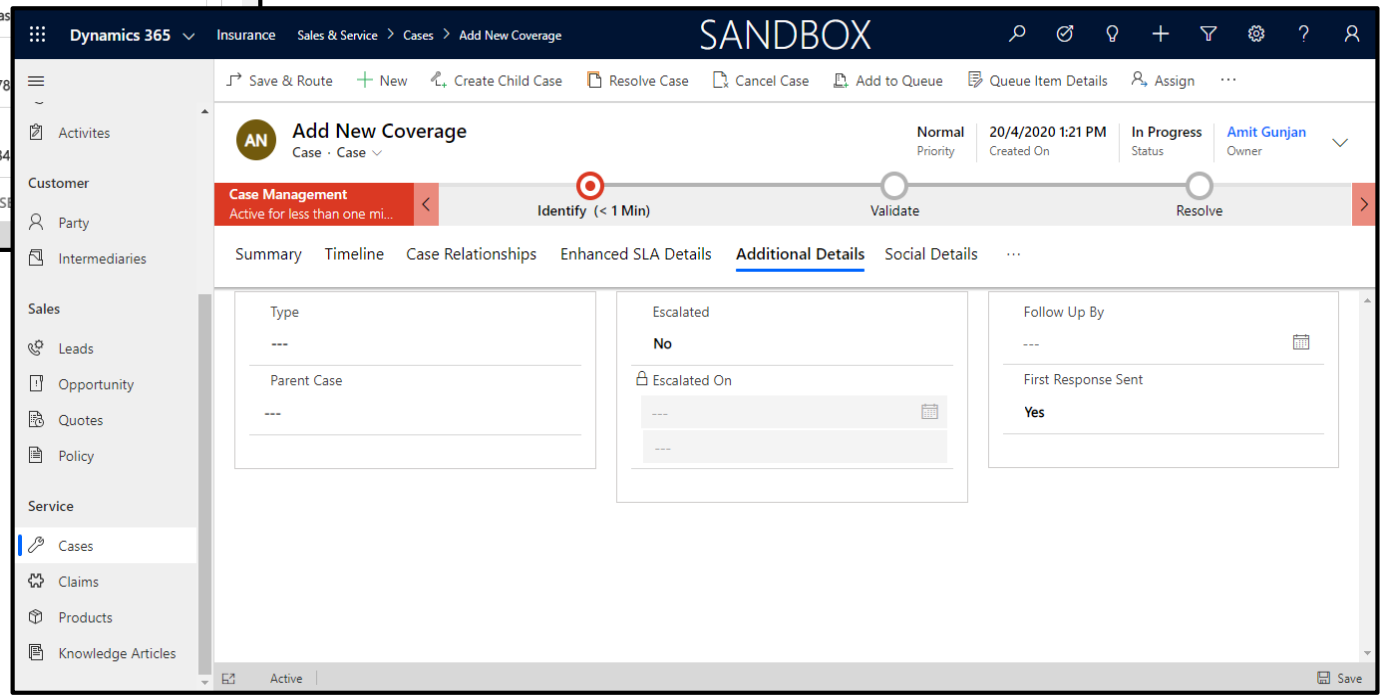
ENTER SR TYPE, SR SUBTYPE



GO TO ADDITIONAL DETAILS AND SET FIRST RESPONSE SENT AS YES



CUSTOMER SERVICE

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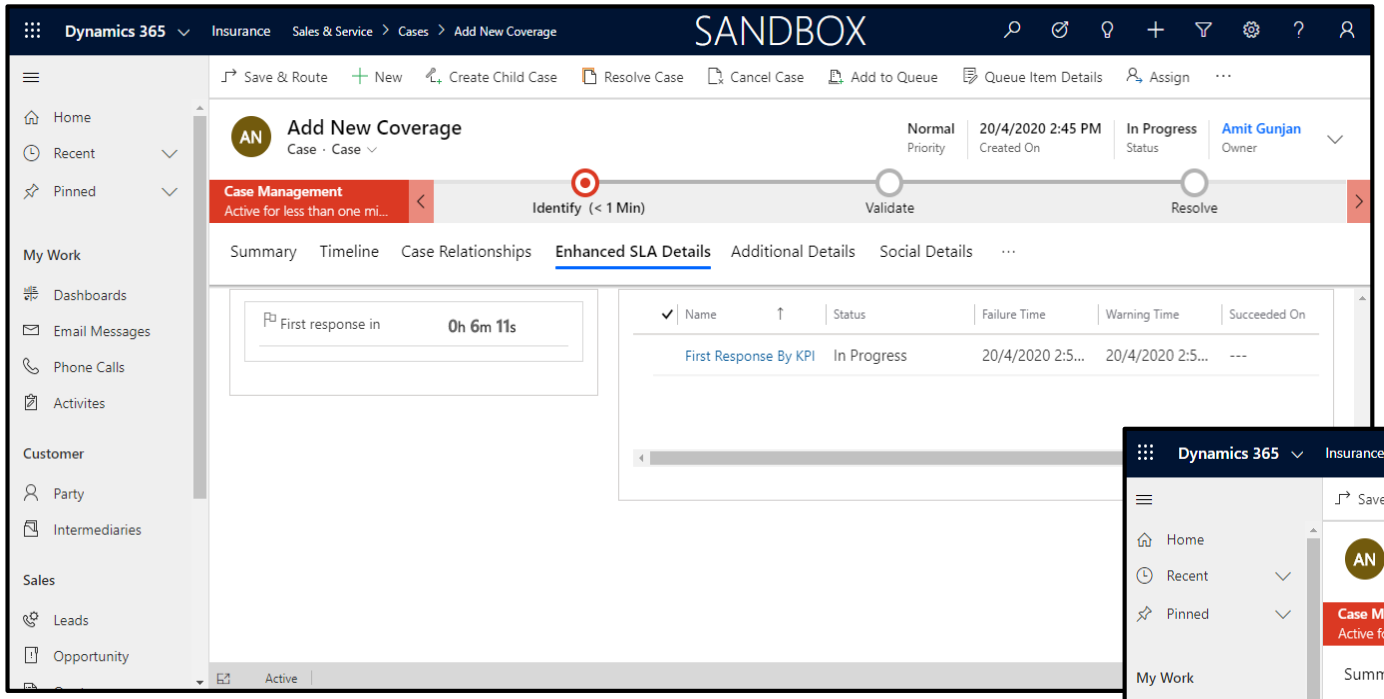
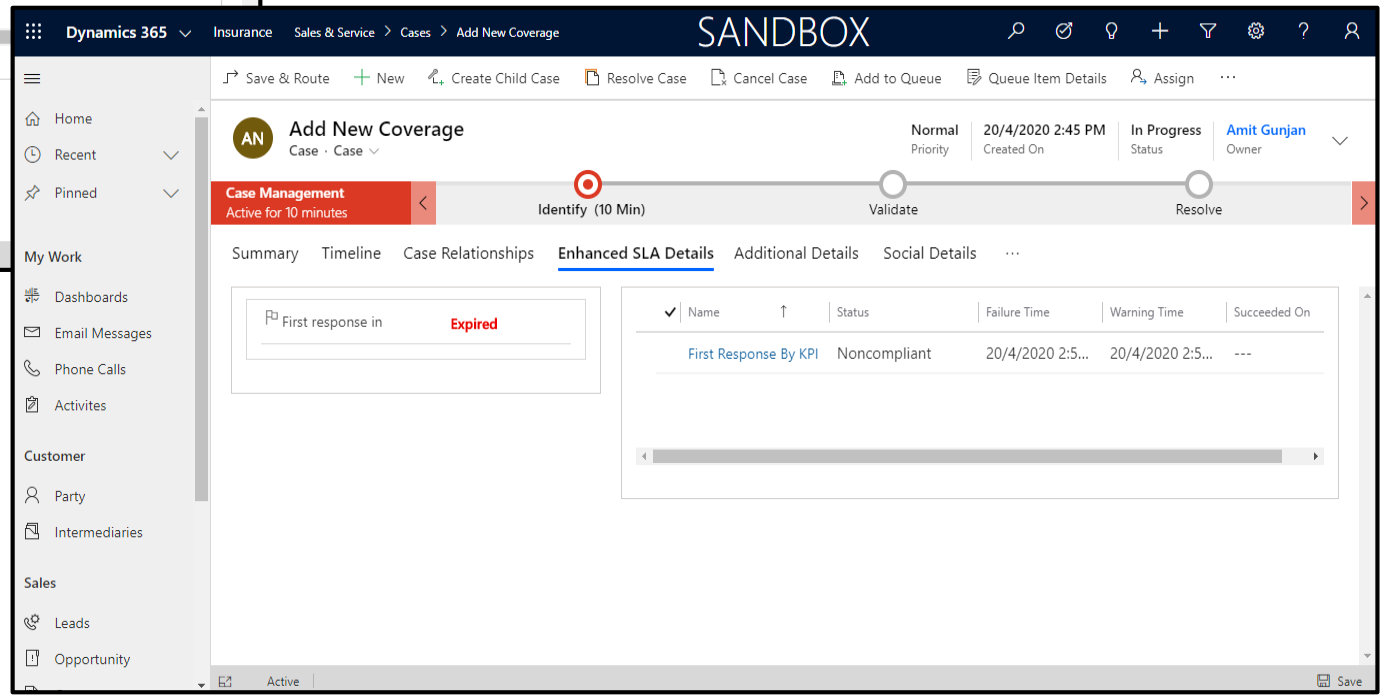
GET ALL THE SLA DETAILS IN ENHANCED SLA DETAILS TAB





CUSTOMER SERVICE

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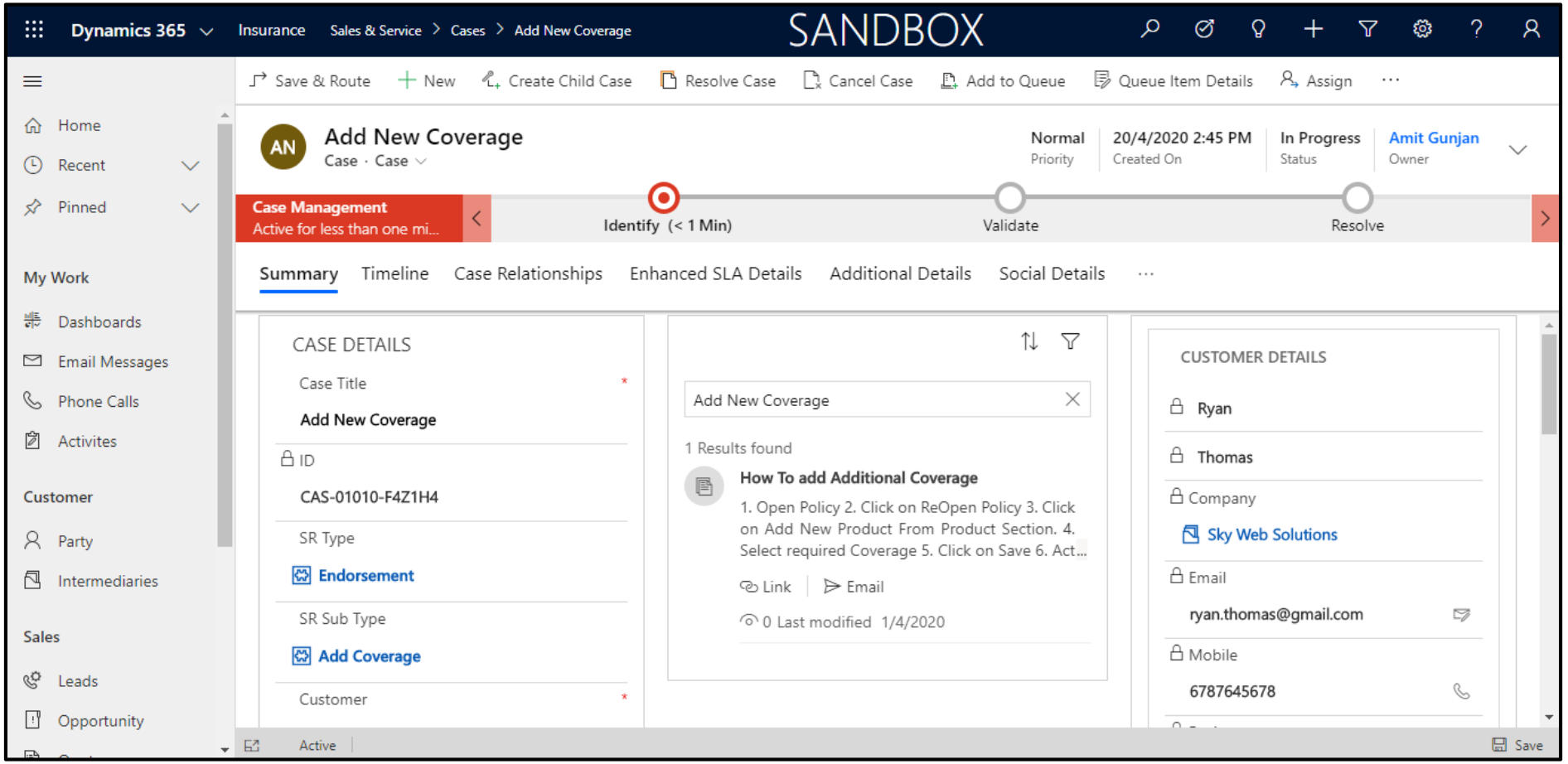
KB ARTICLE IS INTEGRATED WITH CASE



THANK YOU