SIMSON Softwares

SAIBAOnline

Insurance Broking Management Software

Davendra Singh

About the Company

SIMSON Softwares

We are based at **Mohali near Chandigarh, India.**

The company was **established in the year 2001,** we come with 22 years of strong experience in **ERP implementation**, system design and software consulting in **Reinsurance**, **General Insurance**, **Health Insurance** and **Life Insurance**.

Our aim is to be **recognised as thought leaders in the sectors** we operate, and to **deliver innovative solutions** that provide **real business value** to our esteemed customers.

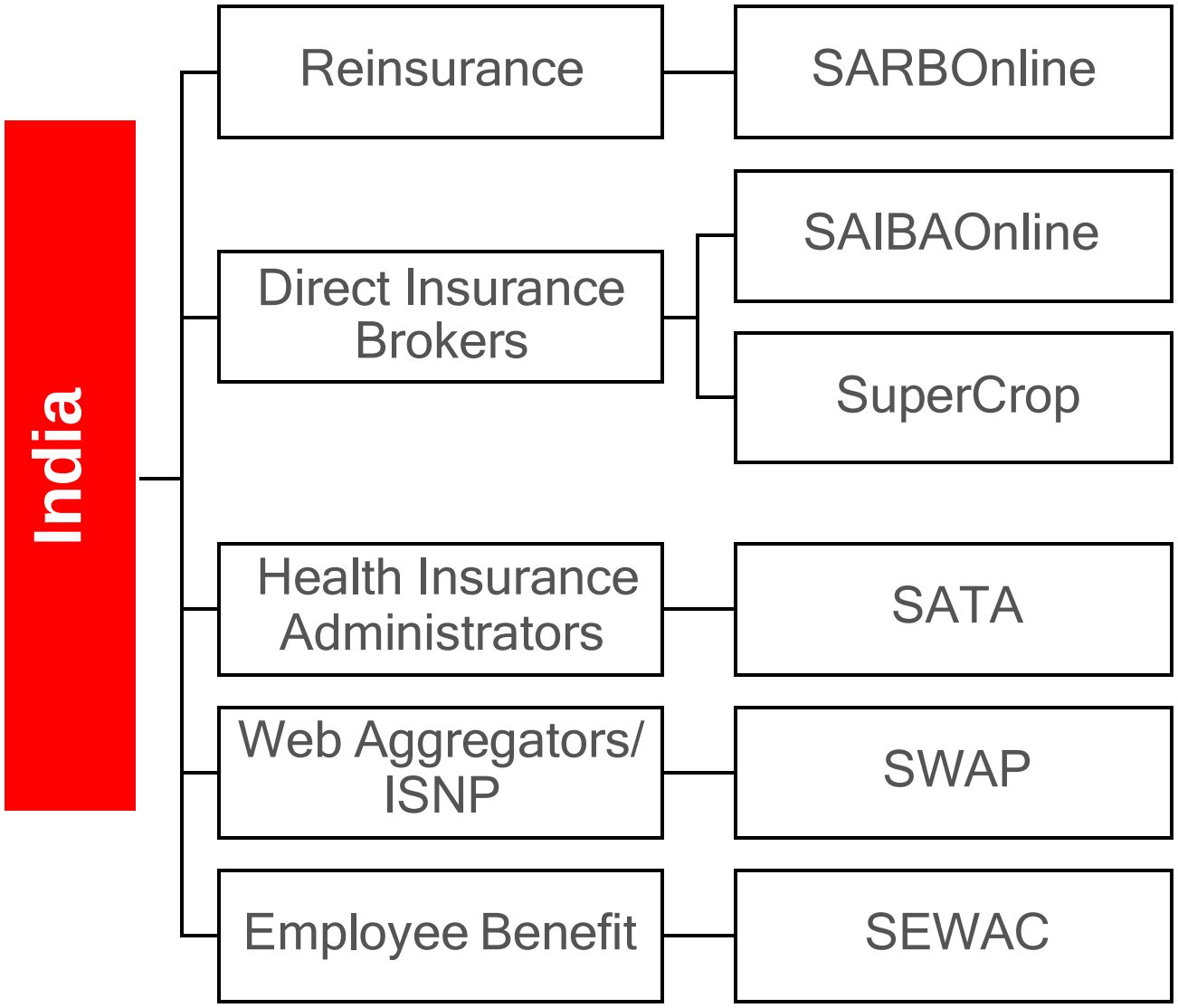
We are known for our **personal approach**, ensuring we deliver the **support and flexibility** our customers need and the **service they expect**.

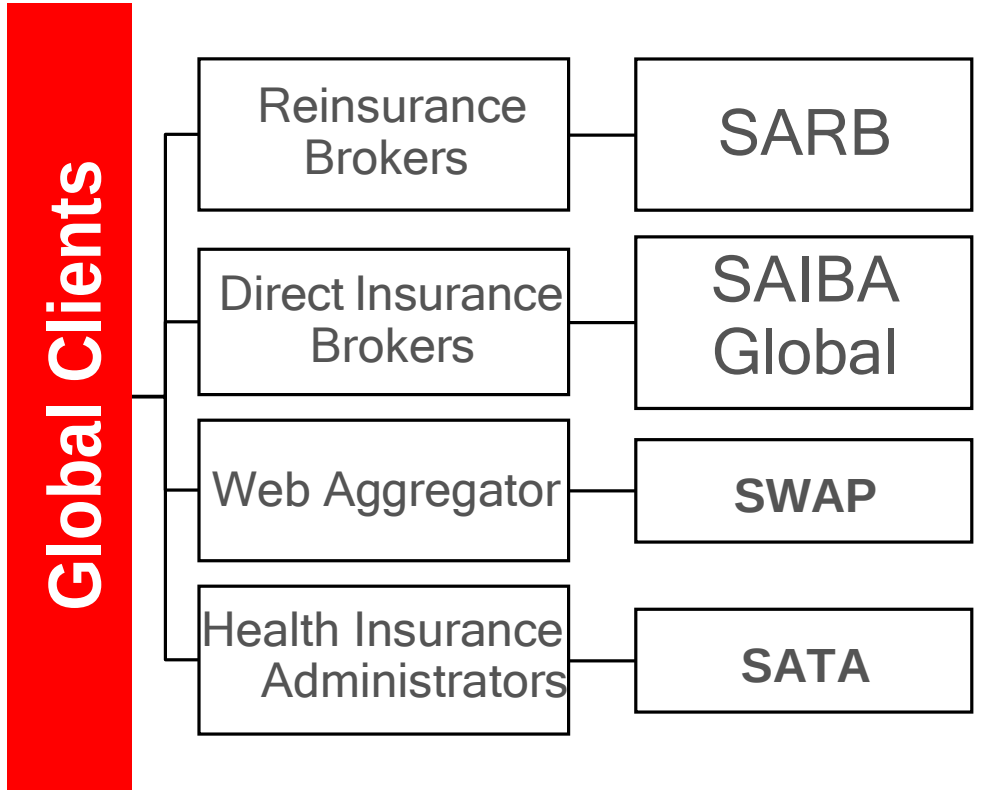
Our products are thoroughly tested and proven solutions for handling high volumes of data and user traffic, they are suitable for entries wide deployment.

We have a long and lasting relationship with our customer, and we have presence in **India, Hongkong, Singapore, Zimbabwe, Malaysia, Oman, Mauritius, Kenya, Botswana, Zambia, Papua New Guinea, Ecuador, South Africa, Philippines and UAE.**

Our Solutions

SIMSON Softwares





SAIBAOnline Salient Features

SAIBA is an ERP for Direct Insurance Brokers It is preferred choice of leading players in its category

Some of the key features

- **A single unified view of your customers,** including managing activities and opportunities
- **Full support for all type of Insurance Products – Motor, Health, Property, Engineering, Travel, Home, Life Insurance etc.**
- **Support for all sales channels including brokers, Sub Brokers, Producers, Point of Sales, Agents, Call Centers, and Direct Employees.**
- Improves **Operational, Management Information and Audit Trail processes**
- **Integrated email, SMS and electronic document management** to assist brokers in their day to day business to improve their efficiencies.
- **Integration with Online Platforms** - Leads, Prospects, Customer, Enquiries, Quotes and Policy Management tracking with automated workflows
- **Integration with Login on Customer Website** - A self-service web-based platform to better manage relationships with insurance brokers, agents, and customers.

SAIBA (Direct Insurance Brokers)

SAIBA is an ERP for Direct Insurance Brokers It is preferred choice of leading players in its category, As this is being used by 350+ brokers and corporate agents in India. There is enormous opportunity to CHOLA MS to use this platform for expanding insurance business.

Some of the key features

- **A single unified view of your customers,** including managing activities and opportunities
- **Full support for all type of Insurance Products – Motor, Health, Property, Engineering, Travel, Home, Life Insurance etc.**
- **Support for all sales channels including brokers, Point of Sales, Agents, Call Centers, and Direct Employees.**
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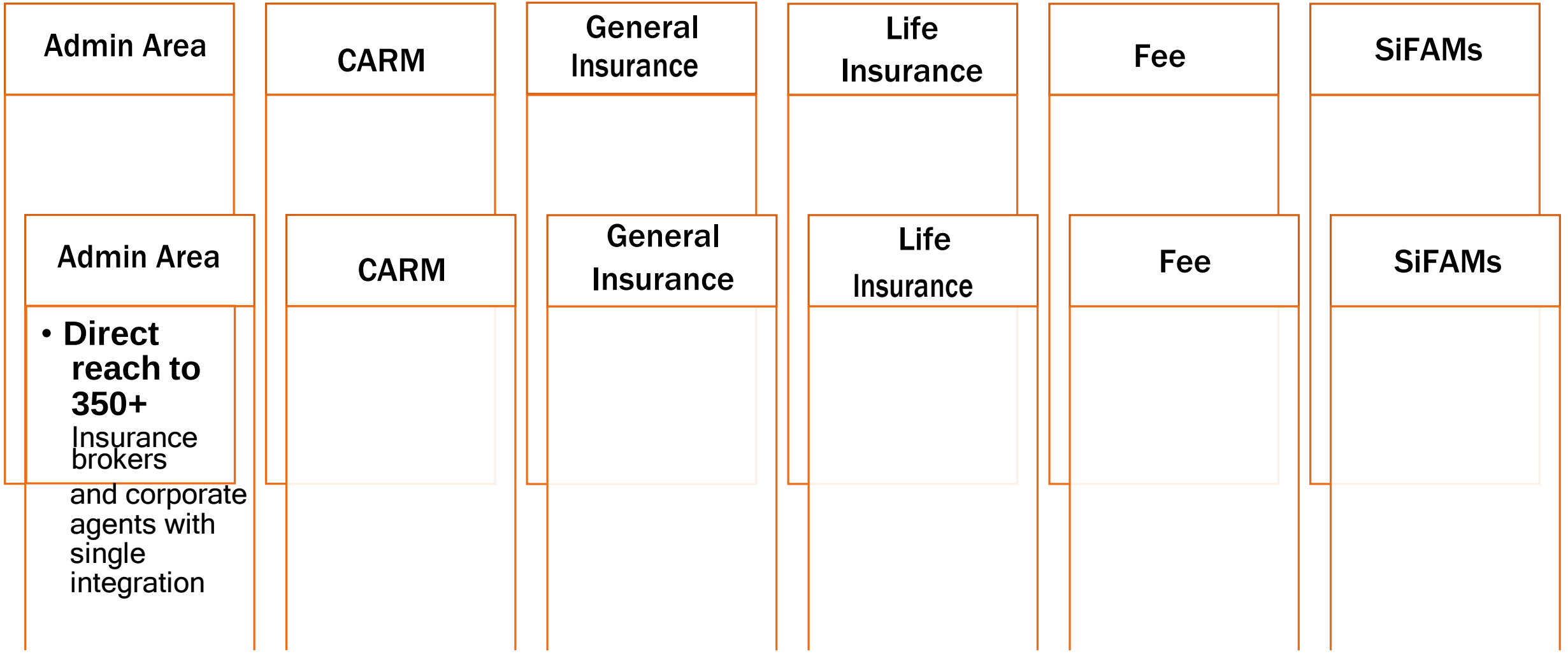
- **Integrated email, SMS and electronic document management** to assist brokers in their day to day business to improve their efficiencies.
- **Integration with Online Platforms** - Quote Management and Policy Management tracking with automated workflows
- **Integration with Login on Customer Website** - A self-service web-based platform to better manage relationships with insurance brokers, agents, and customers.

▸ Some of our key clients: HDFC Sales, Marsh, Willis, Howden, JLT, Edelwiess, Way2Wealth, Mahindra, Tata, Toyota, Anviti, Alankit, Angel Broking, Bonanza, EF, JB Boda, SMC, Salasar, SREI, Unison, Beacon, Prudent, KM Dastur, Zoom, GramCover, Muthoot etc.

SAIBA Modules



SAIBA Modules: Admin Area

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Admin Area module is for IT administrator & top management of the company. Some of the key features in this section are:

- **A single unified view of your customers**, including managing activities and opportunities
- **Full support for all type of Insurance Products – Motor, Health, Property, Engineering, Travel, Home, Life Insurance etc.**
- **Support for all sales channels including brokers, Sub Brokers, Producers, Point of Sales, Agents, Call Centers, and Direct Employees.**
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- **Integrated email, SMS and electronic document management** to assist brokers in their day to day business to improve their efficiencies.
- **Integration with Online Platforms** - Leads, Prospects, Customer, Enquiries, Quotes and Policy Management tracking with automated workflows
- **Integration with Login on Customer Website** - A self-service web-based platform to better manage relationships with insurance brokers, agents, and customers.

SAIBA: Modules & Sections

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CARM: inbuilt CARM which includes integrated management of tele-calling, marketing activities, daily diary entry and appointment scheduling etc.

- ❑ CARM Admin
- ❑ Lead Master
- ❑ Work Area
- ❑ Non-Life Prospect
- ❑ Life Prospects
- ❑ QMS & Reports

General Insurance is known as "Non-Life Insurance", that cover claims, endorsements, accounts, etc. It helps you to add and manage single as well as group policies. Even SAIAB also allow you to make changes in policy of customers as per specifications. The greatest strength of this module is, its scalability and flexibility. GI gives you a facility to keep the record of multi section package products in a single module.

- ❑ Master
- ❑ Enquiries
- ❑ Nonlife Data Entry
- ❑ Claim Management
- ❑ Nonlife Reports

General Insurance

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Master: This section includes the creation and management of customers with reports, along with enquiries master management.

- ❑ Customer Management
- ❑ Customer Data Report
- ❑ Customer Group Mgmt.
- ❑ **Customer Docs Mgmt.**
- ❑ **Lead Status**
- ❑ **Additional Coverage Master**
- ❑ **Features/Benefit Master**
- ❑ **Exclusion Master**
- ❑ **Miscellaneous Master**

Enquiry Management: Comprehensive quotation management system starts from receiving enquiry to placement of business. Generate broker slips and quote comparatives in your own format through templates design by yourself.

- ❑ Lead Management
- ❑ Manage Enquiries
- ❑ ReOpen Enquiries
- ❑ Delete Enquiries
- ❑ **Lead Reports**

General Insurance

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NonLife Data Entry: Non-Life Data Entry covers comprehensive cover note management, policy, endorsement and various other system that helps you to add and manage the details of each and every policy entry of customers.

- ❑ Cover Note Management
- ❑ Motor Sticker Management
- ❑ Policy Management
- ❑ Endorsements Management
- ❑ Renew Policy
- ❑ Renewal Lost
- ❑ Monthly Declaration Entry
- ❑ View & Modify
- ❑ Delete

Claims Management: SAIBA has full featured claim management system for motor, health and other non-health policies.

- ❑ Non-Health Claims
- ❑ Health Claims
- ❑ Generate DN/CN
- ❑ ReOpen Closed Claims
- ❑ Import Claim
- ❑ View
- ❑ Attach Documents to Claim
- ❑ Modify
- ❑ Delete

General Insurance

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NonLife Reports: You are allowed to visualize each and every report of policy, customer, status and many other things related to nonlife policy, through this module. Nonlife reports contain various forms, so that you can check each report of non-life policy entries in separate form.

- ❑ Business Report (With Brokerage)
- ❑ Business Enquiry Report
- ❑ Daily Data Entry Report
- ❑ Attached Document Report
- ❑ Endorsement Status Report
- ❑ Policy Dispatch Report
- ❑ Active Census Report
- ❑ Insurer Report
- ❑ Customer Reports
- ❑ Policy Status Report
- ❑ Renewal Report
- ❑ Cover Note Report
- ❑ Claim Report
- ❑ Reference Report

SAIBA: Modules & Sections

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Life Insurance: A life insurance policy means providing cushion to the customer's beneficiary / nominee, when an untimely death happened. That's why SAIBA introduced life insurance module, where you can prepare reports related to life policies only. Even you can keep these reports in your records by using different forms of this module.

- Masters
  - Customer Management
  - Delete Customer
  - Customer Data Report
  - Cust Group Mgmt.
  - Manage Cust. Doc.
- Enquiries
  - Lead Management
  - Manage Enquiries
  - ReOpen Enquiries
  - Delete Enquiries
  - Lead Reports
- Standard Life Entry
  - Policy Management
  - Endorsement Entry
  - Premium Payment Entry
  - View & Modify
  - Delete

Life Insurance

- ❑ Group Life Entry
  - ❑ Group Life Policy Entry
  - ❑ Renew Group Life Policy Entry
  - ❑ Import Group Policy Insured
  - ❑ Group Life Endorsement Entry
  - ❑ Import Group Endorsement Insured
  - ❑ Group Life Policy Status Entry
  - ❑ Endorsement Status Entry
  - ❑ View Group Life Policy
  - ❑ View Group Life Endorsement
  - ❑ Modify Group Life Policy
  - ❑ Modify Group Life Endorsement
  - ❑ Delete Group Policy

- ❑ Group Life Reports
  - ❑ Business Report
  - ❑ Reference Report
  - ❑ Renewal Report
  - ❑ Claim Report

- ❑ Claims Management
  - ❑ Group Life Health Claim
  - ❑ ReOpen Claim
  - ❑ Generate DN/CN
  - ❑ Attach Documents To Claim
  - ❑ Claims Management
  - ❑ View & Modify
  - ❑ Delete

- ❑ Life Reports
  - ❑ Business Report
  - ❑ Claw Back Report
  - ❑ Nomination/Beneficiary Report
  - ❑ Credit Card Report
  - ❑ Money Back Report
  - ❑ Policy Status Report
  - ❑ Endorsement Status Report
  - ❑ Premium Due Reports
  - ❑ Renewal Reports

SAIBA: Modules & Sections

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SiFAMs: SiFAMs is a financial accounting module, that is basically designed to keep records of transactions of a business in a monetary term. This module keeps the record of values and money, that has been received or given to/by different entities or customers from time to time.

In SAIBA, you are allowed to keep and manage account details of the company, so that you can check year/month/date wise profit and loss of the company.

- Master
  - Admin Task
  - Ledger
  - Groups
  - Bank
  - VAT Master
  - Budget Master
  - Depreciation
  - Appreciation
  - Chart Of Accounts
  - Cheque Book
- Voucher Entry
  - Contra Voucher Entry
  - Journal Voucher Entry
  - Payment Entry
  - Salary Payment Entry
  - Direct Receipt Entry
  - Direct Payment Entry
  - Receipts Entry
  - Bank Reconciliation
  - Interest Calculation
  - View/Print/Delete Vouchers

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SiFAMs

- Saiba Receipts
  - Single Receipt Entry
  - Receipt Multi Policy Entry
  - Receipt Allocation Entry
  - PDC Clearance and Bounce Entry
  - Receipt ReSubmission Entry
  - Receipt Cheque Bounce Entry
  - Modify Receipt Multi Policy Entry
  - View Receipt Multi Policy Entry
  - Delete Receipt Multi Policy Entry

- Saiba Payments
  - Remittance Multi Policy Entry
  - Remittance Allocation Entry
  - Modify Remittance Multi Policy Entry
  - View Remittance Multi Policy Entry
  - Delete Remittance Multi Policy Entry

- Saiba Direct Payments
  - Single Direct Payment
  - Direct Payment Entry
  - Direct Refund Entry
  - Allocation Direct Payment Entry
  - Direct Payment Bounce
  - Direct Payment PDC Clearance Bounce
  - Direct Payment ReSubmission
  - Payment For Direct Payment
  - Brokerage Transfer
  - Brokerage Receipt Entry
  - Brokerage Allocation Entry
  - Modify Brokerage Receipt Entry
  - View Brokerage Receipt Entry
  - Delete Brokerage Receipt Entry
  - Modify Direct Payment
  - View Direct Payment
  - Delete Direct Payment

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SiFAMs

- F.A. Reports
  - Account Books
  - Cash Flow Statement
  - Balance Sheet
  - P and L A/C
  - Trail Balance
  - Group Summary
  - Group Detail
  - Account Statement
  - Ledger Monthly Summary

- Account Statement
  - Customer Account Statement
  - Insurer Account Statement
  - Reference Account Statement
  - Reference Reserve Account Statement
  - RM/TC/CSC/Other Account Statement

- S.A. Reports
  - Account Receivable Report
  - PDC Check Report
  - Unallocated Report
  - Brokerage Due Report
  - Premium Outstanding Report (Ref wise)
  - Payment Voucher
  - Fixed Assets Register
  - Invoice Report
  - Initial Commission Report
  - Claw Back Report
  - Business Status Report
  - Direct Receipt Report
  - Direct Payment Status
  - Commission Payable Report
  - Customer Cheque Dishonor Report
  - Premium Receipt Report

Mobile Apps (Android and iOS)

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SAIBA-CRM: an extension of SAIBA CARM App for marketing executives and producers to view and manage their clients and insurance portfolio.

SAIBA-Live: An extension of SAIBA for customers to access their own portfolio with Brokers using SAIBA.

SAIBA-Point: an extension of SAIBA for Point of Sale to access their portfolio and business management.

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SAIBA Screens

SIMSON Software

- Admin Area
- Reports
- CARM
- Fee
- General Insurance
- Life Insurance
- Office Management
- Sifams
- ARPA

Welcome to Simson

Welcome : Ridhima

Current Task

No Task for Today

Appointment/Meetings

No appointment or meeting aligned for the day

QMS Task

Enq_Code	CustName	PolicyType	Type	Status	ToDoOn
100	kamal chopra	Workmen	N	Enquiry Initiated	16-11-2019
101	ABHAY	Industrial All risks	N	Enquiry Initiated	16-11-2019
103	R2S	Third Party	N	Enquiry Initiated	17-11-2019
104	AAROHI	Marine Cargo	N	Enquiry Initiated	16-11-2019

Customer KYC Document Expiry Details(30 Days)

No Customer KYC Document Expiry Details In Coming 30 Days From Today

Home | Master | Enquiries | NonLife Data Entry | Claims Management | NonLife Reports | Help

List of Non-Life Policies which are going to expire within 10 days

				Control No	Name	Exp Date	Address	Phone	Policy Type	Policy No	Net Premium	Insurer	RM Name	Referred By
View	Renew Now	Renewed	Lost	21900007	Simran	16-09-2020	#London		Boat	6578tu67tu7	1000.000	Arcedian Insurance Company	Default	Default
View	Renew Now	Renewed	Lost	21900733	ANJALI	16-09-2020	PHASE4		Engineering	0	4000.000	Arcadian Insurance company	Default	Default
View	Renew Now	Renewed	Lost	21900704	ANJALI	16-09-2020	PHASE4		Individual medical	0	21000.000	Bajaj Insurer Pvt. Ltd.	Default	Default
View	Renew Now	Renewed	Lost	21900550	ANJALI	16-09-2020	PHASE4		Engineering	366322	1000.000	Arcedian Insurance Company	Default	Default
View	Renew Now	Renewed	Lost	21900461	ANJALI	16-09-2020	PHASE4		Engineering	0	1000.000	Bajaj Insurer Pvt. Ltd.	Default	Default

1 2 3 4 5 6 7 8 9 10 ...

List of Non-Life Policies which are going to expire within 11 to 30 days

				Control No	Name	Exp Date	Address	Phone	Policy Type	Policy No	Net Premium	Insurer
View	Renew Now	Renewed	Lost	22002326	Saeed Al Zaabi General Transportation	26-09-2020			Motor Comprehensive Policy	813/C/429739	2055.000	Berns Brett Masaood Insu
View	Renew Now	Renewed	Lost	21900276	sneha	27-09-2020	fbd	45789632	Engineering	478562	100.000	jedin Insurance Company
View	Renew Now	Renewed	Lost	22002291	Nikhel Rajan Lall	28-09-2020			Motor Comprehensive Policy	0102010101414956000000	3975.000	Berns Brett Masaood Insu
View	Renew Now	Renewed	Lost	22002315	Randhir Kumar Jha Ramdeo	28-09-2020			Motor Comprehensive Policy	5/95/2019/1/1/0	1060.000	Berns Brett Masaood Insu
View	Renew Now	Renewed	Lost	22002287	Muayadbellah S S Almassri	28-09-2020			Motor Comprehensive Policy	813/C/430726	1300.000	Berns Brett Masaood Insu

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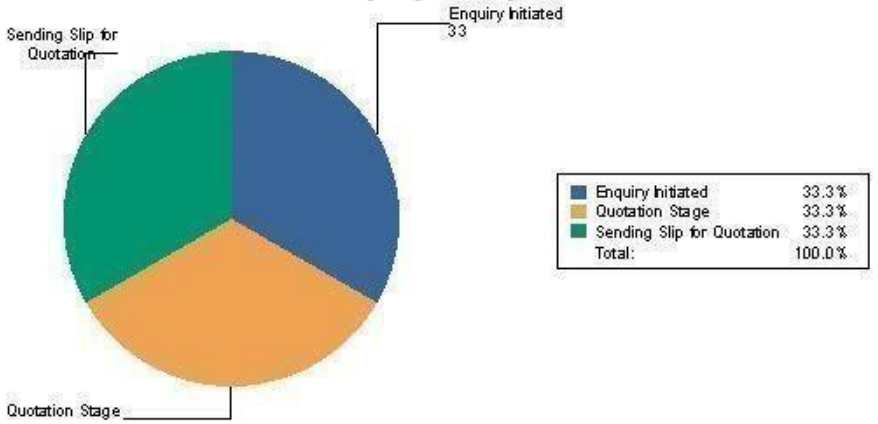
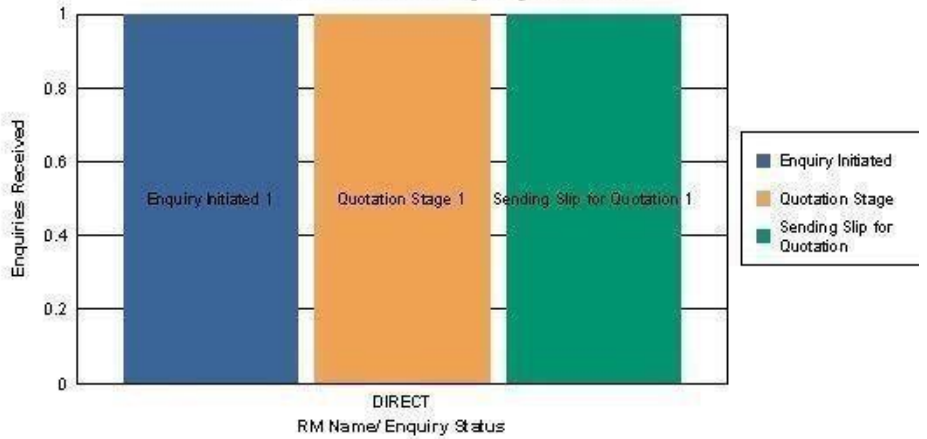
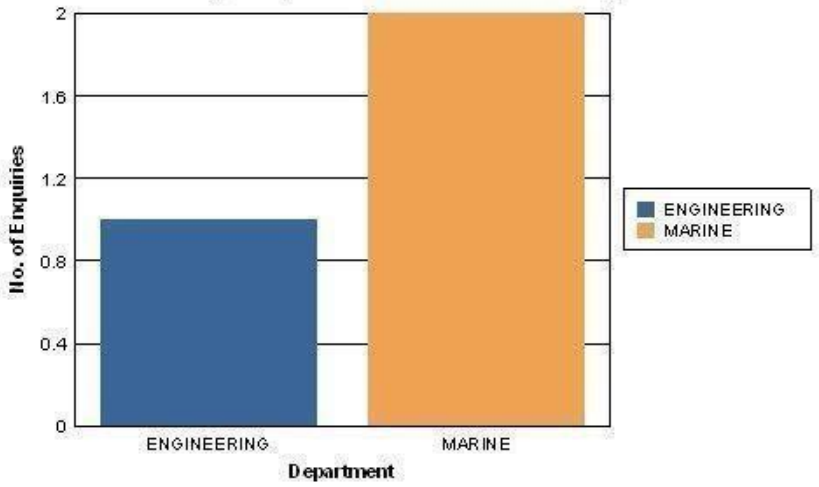
Enquiry Analysis



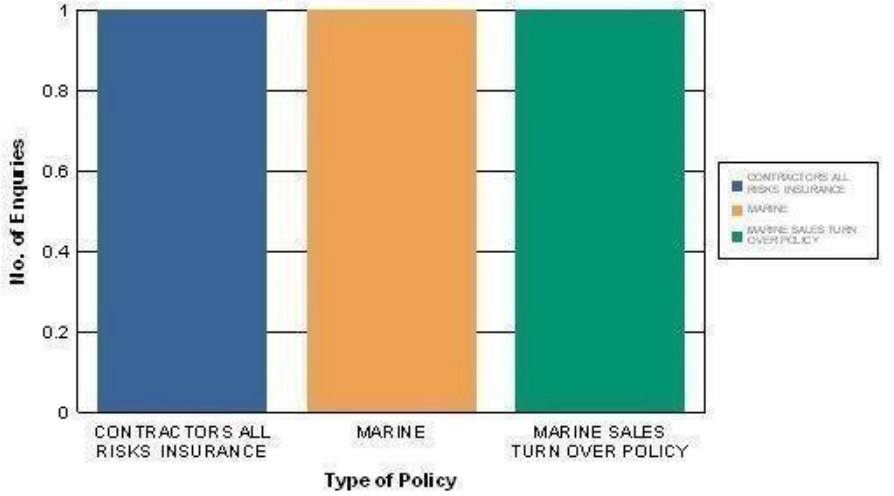
RM Wise Enquiry Status

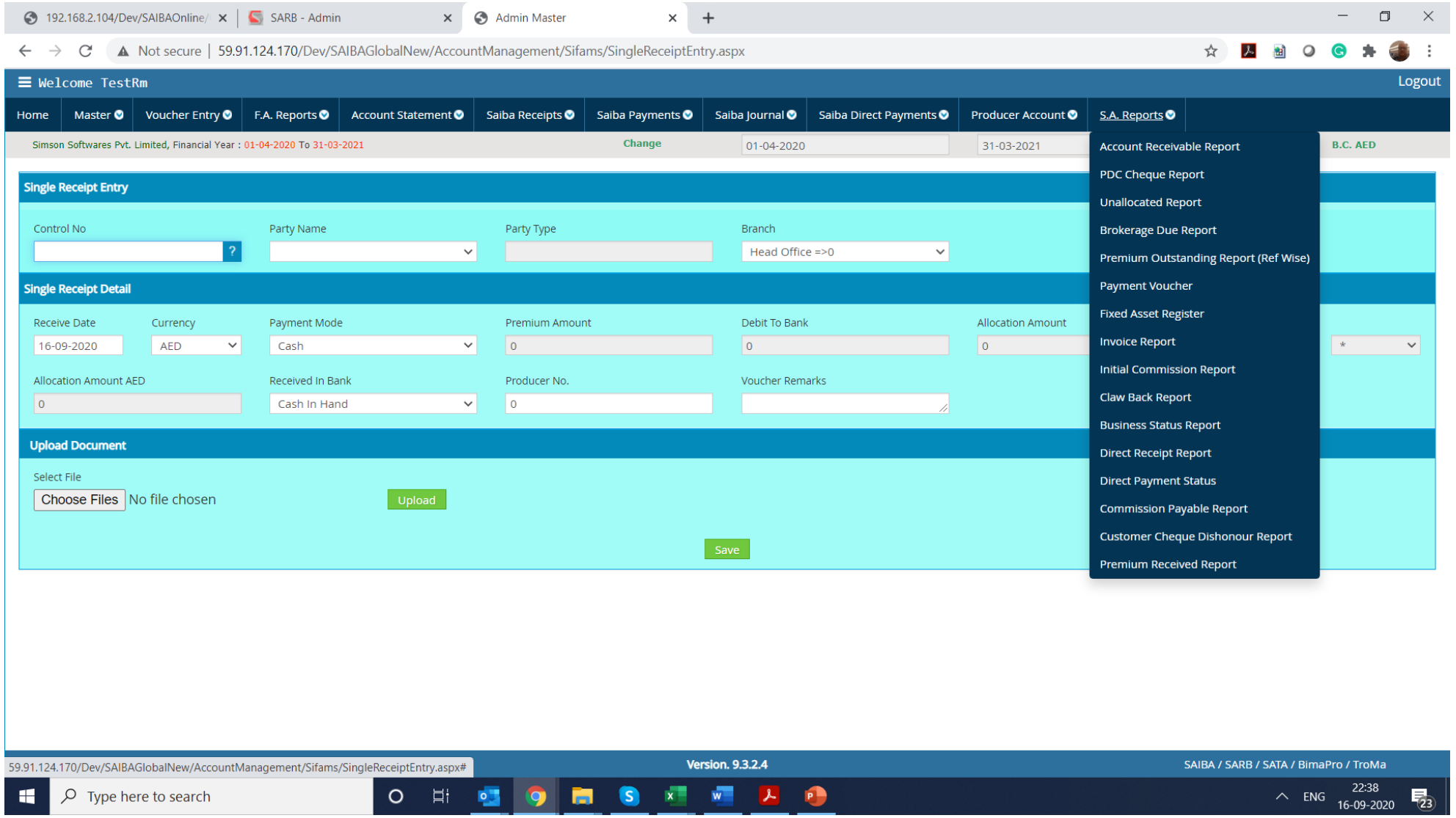


Policy Department Wise Analysis



Policy Wise Enquiry Analysis




192.168.2.104/Dev/SAIBAOnline/
SARB - Admin
Admin Master
Not secure | 59.91.124.170/Dev/SAIBAGlobalNew/AccountManagement/Sifams/SingleReceiptEntry.aspx
Welcome TestRm
Logout
Home
Master
Voucher Entry
F.A. Reports
Account Statement
Saiba Receipts
Saiba Payments
Saiba Journal
Saiba Direct Payments
Producer Account
S.A. Reports
Simson Softwares Pvt. Limited, Financial Year : 01-04-2020 To 31-03-2021
Change
01-04-2020
31-03-2021
B.C. AED
Account Receivable Report
PDC Cheque Report
Unallocated Report
Brokerage Due Report
Premium Outstanding Report (Ref Wise)
Payment Voucher
Fixed Asset Register
Invoice Report
Initial Commission Report
Claw Back Report
Business Status Report
Direct Receipt Report
Direct Payment Status
Commission Payable Report
Customer Cheque Dishonour Report
Premium Received Report
Single Receipt Entry
Control No
Party Name
Party Type
Branch
Head Office =>0
Single Receipt Detail
Receive Date
16-09-2020
Currency
AED
Payment Mode
Cash
Premium Amount
0
Debit To Bank
0
Allocation Amount
0
Allocation Amount AED
0
Received In Bank
Cash In Hand
Producer No.
0
Voucher Remarks
Upload Document
Select File
Choose Files
No file chosen
Upload
Save
59.91.124.170/Dev/SAIBAGlobalNew/AccountManagement/Sifams/SingleReceiptEntry.aspx#
Version. 9.3.2.4
SAIBA / SARB / SATA / BimaPro / TroMa
Type here to search
ENG
22:38
16-09-2020

Receipt Allocation

- Receipt Multi Policy Entry
- Receipt Allocation Entry
- PDC Clearance and Bounce Entry
- Receipt ReSubmission Entry
- Receipt Cheque Bounce Entry
- Modify Receipt Multi Policy Entry
- View Receipt Multi Policy Entry
- Delete Receipt Multi Policy Entry

Party Code: 90001 ?

Party Name: Simran (90001)

Allocation Date: 16-09-2020

(•) Un-Allocated Items ( ) Allocated Items ( ) Both

Select	TranId	AllocationId	Jv ID	Voucher Date	Mode	Remarks			ount	Allocated Amount	Balance	Received Bank	TypeOfEntry	Voucher No.	PDF	Receipt PDF	Email
✔	2753	2916	0	13-08-2020	Cheque				00.000	0.000	7200.000	Vijaya USD	Receipt	RV-1899			
✔	2753	2917	0	13-08-2020	Cheque				00.000	0.000	2500.000	Vijaya USD	Receipt	RV-1899			
✔	2753	2918	0	13-08-2020	Cheque				00.000	0.000	5000.000	Vijaya USD	Receipt	RV-1899			
✔	2748	2911	0	07-08-2020	Cheque		r	AED	100000.000	0.000	100000.000	Yes bank	Receipt	RV-1892			
✔	2743	2906	0	30-07-2020	Cash		r	AED	10000.000	0.000	10000.000	Cash In Hand	Receipt	RV-1887			
✔	2736	2897	0	27-07-2020	Cheque		Davendra	AED	10000.000	0.000	10000.000	Yes bank	Receipt	RV-1884			
✔	2735	2895	0	27-07-2020	Cheque		Davendra	GBP	5000.000	0.000	5000.000	Yes bank	Receipt	RV-1883			
✔	2735	2896	0	27-07-2020	Cheque		Davendra	AED	50000.000	0.000	50000.000	Yes bank	Receipt	RV-1883			
✔	2733	2893	0	26-07-2020	Cheque		Davendra	AED	100000.000	0.000	100000.000	Yes bank	Receipt	RV-1880			
✔	2698	2858	132	17-07-2020	Cash		kamal chopra	AED	1000.000	0.000	1000.000		Journal	JVCR-2360			
✔	2696	2856	132	17-07-2020	Cash		kamal chopra	AED	1000.000	0.000	1000.000		Journal	JVCR-2360			

Allocation So For

Search DN/CN Allocation

Search By

Type here to search

ENG 22:39 16-09-2020

Why SAIBA

SIMSON Softwares

- We have the team of core professionals in insurance to help us in building up core insurance applications.
- A simple & user-friendly application to save the time with single click to get all the reports.
- It is ready to use for all Insurance authority reports and a single platform for complete office management.
- A clean track record of service to almost half of Insurance Broking Industry in India.
- This includes pre sales, operations, claims, fee, accounts. basically, it is all in one solution.
- We used latest technologies to create desktop & mobile apps.
- Our customer satisfaction level and our positive approach to customer is key to our business.

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Some of our key clients

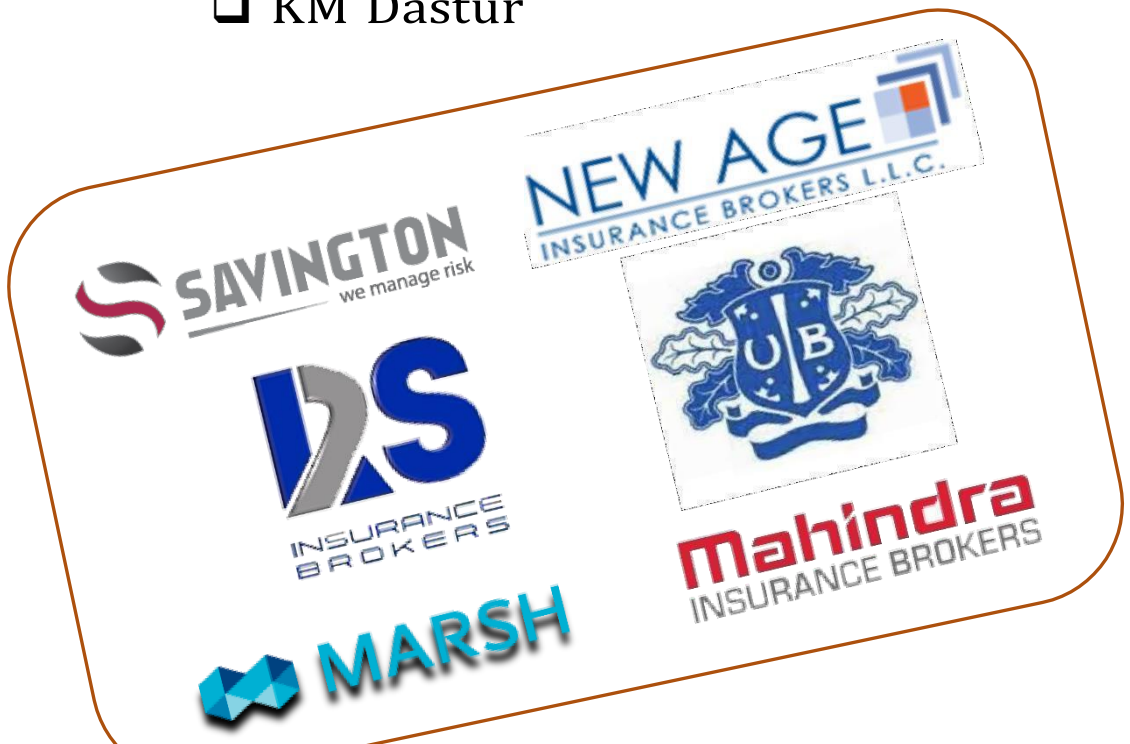
- Marsh
- Willis
- Howden
- Mahindra
- Toyota

- Anvity
- Bonanza
- JB Boda
- SMC
- Salsar

- Salasar
- SREI
- Unison
- Prudent
- KM Dastur

- Premier
- BBI/BBM
- New Age
- UIB
- R2S

- FISCO
- Savington
- Canopy
- Armchair
- Turtle



Technology

SIMSON Softwares

Being Microsoft Gold Partner, we are using **Microsoft technologies**.

AngularJS, asp.net using C#, are key technologies used in SAIBAOnline

Microsoft SQL Server is being used as database in all our applications, which is one of the most trusted database in the world.

SAP Crystal Report 2016 is being used for reporting in our applications which helps in making applications more versatile reports for user.

SAIBA Data Security

SAIBA is complied with OWASP VAPT security norms. This is being scanned quarterly at code level as well application level by HCL App Scan Standard & Burp Suite for security vulnerabilities with zero medium & high-risk tolerance policy.

Some of the key features

- Password and important data keys encrypted using SHA2 encryption technology
- Electronic documents stored in software are encrypted using AES 128 encryption method
- Disc encryption support
- TLS1.2 cryptographic layer between database and application
- Tested by various clients also during VAPT audit.

- **SAIBA is browser-based application, so no client installation required.**

SIMSON Softwares

Let's discuss

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Please do visit us at: https://www.simsononline.com

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THANK YOU!