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InsureWays *Non Life*

***POLICIES PORTFOLIO MANAGEMENT SOFTWARE
FOR
AGENTS, D.O. & BROKERS***

InsureWays is the complete policy portfolio management software that manages all policies in an efficient manner. It manages the complete details of all types of policies of various insurance companies. The Key Features of the software are:

- ✓ Manages Policies of all Insurance Company.
- ✓ Can also maintain Insurance Company's Branch wise Login.
- ✓ Manages Policy Type wise Data i.e. Fire, Motor, Marine etc.
- ✓ Can also maintain Sub Type of Policy i.e. Simple Risk, Ind./Mfg. Risk etc. in case of Fire.
- ✓ Searching of any Policies on Insured Name, Policy No., Cover Note No., Vehicle No. etc.
- ✓ Manages details of Commission & Incentives and gives Insurance Company wise Receivable, Received and Pending Commission.
- ✓ Can Manage Sub Agent wise Policies.
- ✓ Calculate Commission & Incentive of Sug Agents and keep the track of Payable, Given and Pending Commission.
- ✓ Can Create Client Group & Sub Group and maintain Client's Group Wise Portfolio.
- ✓ Manages Cover Note Control Book received from Insurance Company and automatic maintain details of each cover note issued.
- ✓ Manages Endorsement History of each policy and maintain the Endorsement Register.
- ✓ Manages Renewal History of all policy and maintain the Renewal Register.
- ✓ Manages Claim Details of each policy and maintain Claim Status wise Register.
- ✓ Maintains Addresses of Clients and other contacts and gives the complete Address Book Management.
- ✓ Address Book can also be maintained for Marketing Purpose by creating various Categories & Groups and adding new contacts.
- ✓ Reminder of Agency Expiry before specified days.

These are some of the basic features of the Software Application. The main thing about software is Management Information System (MIS). There are many Reports generated by Software, some of the reports are:

- ❖ **Brokerage Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise Detailed and Summurize Report that shows the Receivable Commission From Insurance Company.
- ❖ **Pending Brokerage Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise Detailed and Summurize Report that shows the Pending Commission that is Receivable From Insurance Company.
- ❖ **Received Brokerage Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise Detailed and Summurize Report that shows the Received Commission From Insurance Company.
- ❖ **Commission Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise, DMA / Sub Agents Wise Detailed and Summurized Report that shows the Payable Commission To DMA / Sub Agents.
- ❖ **Pending Commission Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise, DMA / Sub Agents Wise Detailed and Summurized Report that shows the Pending Commission that is Payable to DMA / Sub Agents.
- ❖ **Given Commission Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise, DMA / Sub Agents Wise Detailed and Summurized Report that shows the Commission Given to DMA / Sub Agents.
- ❖ **Brokerage - Commission Status Report** : This will show Policy wise Status of Brokerage Received or Not and Commission Given To DMA / Sub Agent or Not. This Report can also be generated Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise, DMA / Sub Agents Wise. Additionally you can also generate like Brokerage Received and Commission Pending or vice versa.
- ❖ **Premium Collection Report** : This will shows Total Premium Collected. This report can generated Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise, DMA / Sub Agents Wise.
- ❖ **Policy List Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Date Range wise, DMA / Sub Agents Wise Detailed and Summurized Report that shows the complete details of each policy.

- ❖ **Putup Date wise Report** : This will generate Insurance Company wise, Branch Wise, Policy Type wise, Putup Date Range wise, DMA / Sub Agents Wise Detailed and Summurized Report that shows the complete details of each policy.
- ❖ **Claim Status Report** : This will show the complete details of Claim. This report can be generated Insurance Company wise, Branch Wise, Policy Type wise, Range of Date of Loss wise, DMA / Sub Agents Wise, Claim Status wise.
- ❖ **Cover Note Control Book Report** : This will generate Insurance Company wise, Range of Received Date wise, Motor / Non Motor Book Type wise Report that shows the List of Cover Note Control Book Received From Insurance Company.
- ❖ **Cover Note Control Book Status** : This will generate Insurance Company wise, Range of Received wise, Motor / Non Motor Book Type wise that shows the complete details of Cover Note Control Book like Issued to whom, Date of Issue, Policy Type, Total Premium etc. of each Cover Note of Cover Note Control Book.
- ❖ **Policy Renewal Letter** : This will generate Renewal Letter to Clients that includes Policy Details and Last Date for Renewals. This Report can be generated Range of Expiry Date wise, Individual Policy Selection wise.
- ❖ **Summary Report** : This report show the Summary of Policy Type wise Premium Collected, Basic Premium, Add On Premium, Service Tax, Total Premium, Brokerage, Commision etc.
- ❖ **Insurance Company wise Summary Report** : This report is generated by Insurance Company and details are same as Summary Report.
- ❖ **Agency Wise Summary Report** : This report is generated Agency Wise and details are same as Summary Report.
- ❖ **Claim Ration Summary Report** : This Report Show the Insurance Company Wise, Policy Type wise Percentage Ratio of Claim Done, Pending, Setteled, Repudiated.