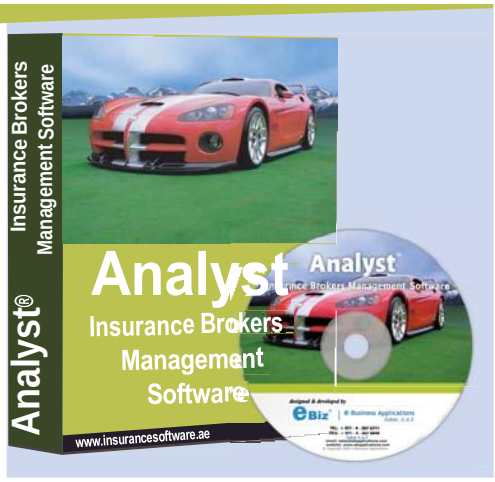
Analyst®

Integrated Insurance Brokerage and Financial Accounting Management Software



Covers extensively all types of insurance like general, motor, medical and life

"Analyst" is an integrated package of Insurance brokerage activities & financial accounting. It makes your business almost paperless office and helps to streamline and facilitate smooth functioning of the business activity. The aim of this software is to reduce paper and paper work, thus increasing the productivity and functionality of the staff. It gives the business a dynamic environment to function in all areas of business and will have a full and optimal control of all the business activities. This software will increase the efficiency of the staff and makes them to concentrate more in business activity and development. It generates complicated useful reports with one click, which in absence of the system need to be prepared by highly paid skilled professionals.

Business Operations:

It covers all 4 major types of insurance (General, motor, medical and life). You can create 'n' number of policy plans (class of business) under the above said types. Each plan will have its own template defined by you. Customer details, insurance company details, producer details, commission % class wise, enquiry registration, enquiry follow up, enquiry alerts, enquiry slip to insurance companies with cover letter, quotation slip to customer, placing slip to insurance companies, policy materialization, policy from insurance company, policy details (Perils/clauses/conditions/warranties/ exclusions/ extensions), issuing debit note (Customer copy & office copy), receipt from customer, payment to insurance company, commission booking, salesperson commission, policy amendments , policy extensions, policy cancellations, issuing credit note (Customer copy & office copy), refund to customers, consultancy debit note and credit note, policy renewal alerts, lapsed policies, cancelled policies, claims module, claims debit note and credit note, customer claim history and policy life cycle / history / tracking. In depth sales analysis by business type, by class, by insurance company, by producer, by customer, by date range etc. These reports helps in various business decision making.

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Integrated financial accounting:

This module is perfectly integrated with business operations module. Accounting will be done automatically when you are doing your business operations. chart of accounts tree and its drill down (Assets, liabilities, equity, income and expenses). Customers, insurance companies, producers, accounts payable, receivable, statement of account, outstanding statement, ageing analysis, payment voucher, receipt voucher, journal voucher, purchase voucher, sales voucher, petty cash voucher, debit note, credit note, post dated cheques (PDC) management, fixed asset management, automatic depreciation posting, cash & bank statements, bank reconciliation statement, trial balance, profit & loss, balance sheet, accounts initialization, financial year closing, flexible financial period, various alerts and audit trial.

Security and administration:

- Multi-level security and access permissions
- View, Add, edit and delete permissions
- New user creation (Login & Password)
- Data backup & recovery
- Recording of user name with date and time for each transaction.

Integrated Accounting

Health Insurance

Motor Insurance

Life Insurance

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