

TEESSEN CONSULTING

Contact Management

Task
Management

Document
Management

Reporting
&
Automation

Integration
&
Workflow

FEATURES

- TASK DASHBOARDS
- CLIENT NETWORKS
- TASK MANAGEMENT
- DOCUMENT MANAGEMENT
- COMPLIANCE AND QUESTIONNAIRES
- REPORTING & AUTOMATION
- INTEGRATION & WORKFLOW
- DISTRIBUTION LISTS
- E-MAIL SERVICES
- SMS—SEND AND RECEIVE
- NOTIFICATIONS
- OUTLOOK INTEGRATION

REPORTING

- ALL OUR REPORTS INCLUDE A POWERFUL REPORT WRITER AND ANALYSIS TOOL ALLOWING BUSINESS TO BUILD THEIR OWN REPORTS AND CREATE POWERFUL MANAGEMENT REPORTS.
- WE PROVIDE PROFESSIONAL SERVICES TO TRAIN AND ASSIST IN REPORT WRITING.

CONTACT

- FOR MORE INFORMATION ON ANY OF OUR PRODUCTS OR SERVICES:
 - 27 (87) 550 1427
 - www.tconsult.co.za

flexible solutions for your business needs

TEESSEN CONSULTING PROVIDES A TOTAL END-TO-END SOLUTION

CONTACT MANAGEMENT (CRM)

A central customer database shared by all the modules to provide you with a single view of your client. Whether you need to manage a short term policy, an assurance policy or even administer a medical aid policy, your client data is stored in a central database shared by these line-of-business modules. There will be no duplication of the all important client information.

Add to the above centralized tracking of all tasks performed by your staff for a client; from capturing a new policy or logging a claim, sending an e-mail or a SMS, making a phone call or just sending a letter. Tasks are standardized and automated for improved efficiency and excellent customer service.

- Centralized view of client portfolio
- Microsoft Outlook integration
- Store all client documents in a central repository with easy access
- Send E-Mail, SMS or make a phone call directly from the system
- Create your own reports based on any data in the system

Automate your own business processes, from sending a standard welcome letter to advanced mail merge letters. Send them directly to a client or create a distribution list.

Use our add-in for Microsoft Outlook to create tasks directly from an email onto the system and thus ensure that client emails are always addressed.



FLEXIBLE IMPLEMENTATION

We offer a selection of application modules. Our Consultants will gladly discuss your specific requirements for a customized solution that meets your business requirements.

INFRASTRUCTURE

We provide you with the choice of a local Windows client-server based implementation or a Web application or both. We can advise you on the most suitable solution for your business.

TRAINING & SUPPORT

Effective product training can be arranged at your premises on the data already familiar to your team. Our support team is available to assist you when needed. We also offer real time online support.

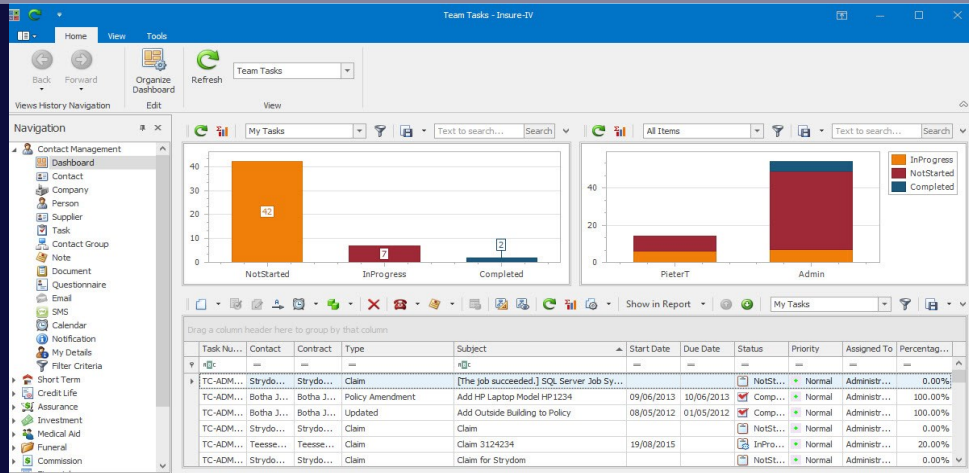
MINIMUM REQUIREMENTS

Server

- Windows Server 2019 STD
- 4 x Xeon® CPU E5 2.6GHz
- 16GB RAM
- 2x1TB SATA Hard drives
- SQL Server 2019 Express/STD

Workstation

- Windows 10 or higher
- CPU i5
- 8GB RAM
- 500MB free disk space



TASK MANAGEMENT

Clear your desk from sticky notes and paper and create tasks linked to specific clients, their policies and product providers. Forward these tasks to the relevant persons and track task progress. Access to tasks and progress logs empower everyone in your office to service a client. Use defined templates to pre-populate the process and steps for a specific task type. Remember, if you can measure it, you can manage it.

DOCUMENT MANAGEMENT

Are you still drowning in paper or finding it difficult to locate a document when you need it? Then you should start to store and manage these client data documents. References, key-words and documents linked to the client record, allow you to easily track and find what you are looking for. Store e-mails, documents, images, etc. in the database along with the client data.

REPORTING & AUTOMATION

Use the Analysis tool to quickly and easily query data required for management information in order to make informed decisions, e.g. client demographic information, task progress or overall business performance.

The Reporting tool allows you to build standard reports generated on any data and to export or electronically send these reports to the clients. Reports can be automated within a standardized process.

INTEGRATION & WORKFLOW

At Teessen Consulting we understand the importance of the flow of data between systems in order to provide a holistic end-to-end business process. Our array of interfaces and services caters for 3rd party integration into and out of our systems and provide various automation options.

Contact us to discuss your specific integration requirements.

