



TEESSEN CONSULTING

## Client Portal



THE BUSINESS TECHNOLOGY  
**SOLUTION YOU NEED**

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# CLIENT PORTAL

Client Portal is designed to act as a secured and direct channel between your business and your clients; providing a digital platform for your clients to access their portfolio and to streamline the administration process. Your clients will be able to access the Client Portal from any digital device using the login details provided to them, making it very user friendly. Our Client Portal product is used via our InsureSuite product.

## **YOUR CLIENT HAS THE ABILITY TO:**

- Access their personal details
- Get an overview of their product portfolio
- Monitor and submit queries
- View stored documents
- Perform certain actions
- Attach supporting documents directly

This **channel of communication** is determined **and controlled** by **your business only**. You can apply specific business rules and processes to control how interaction with the client is interpreted and actioned within your business.

## **FEATURES:**

- View personal information
- Product Portfolio
- Monitor Queries
- View and add Documents

## **CUSTOMISED ACTIONS:**

- Update contact details
- Request a quote
- Submit a query
- and more...



## **TEESSEN CONSULTING PROVIDES A TOTAL END-TO-END SOLUTION**

*Streamline your communication with ease! Our Client Portal keeps customer information current and accessible anytime, anywhere.*

Contact us for more information on any of our products or services

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