INSURE-IV SUITE

BY TEESSEN CONSULTING

Short Term

Contact Management

Financials & Collections

Assurance & Investments

Credit Life

Commission Processing

Wills & Estates

Integration

Funeral

Medical Aid

THE BUSINESS TECHNOLOGY
SOLUTION YOU NEED

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INSURE-IV SUITE

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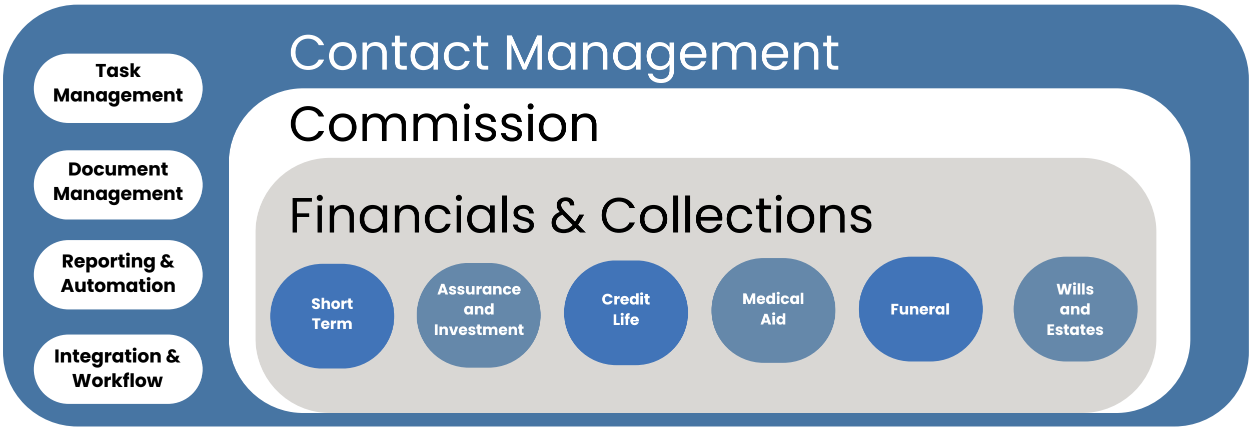

Insure-IV Suite is a **complete practice management solution** and consists of a **selection of modules.** Insure-IV Suite **includes Microsoft Outlook integration, SMS services** and **Contact Management** to cater for flexibility and integration. The product offers powerful reporting and workflow services.

Modular Architecture:
- Contact Management
- Task Management
- Document Management
- Reporting & Automation
- Integration & Workflow
- Dashboards
- Compliance
- Commission Processing
- Short Term
- Assurance & Investments
- Credit Life
- Medical Aid
- Funeral
- Wills & Estates

Easily manage your client's data and keep it stored in a central database; whether it is a short-term-, assurance- or medical aid policy or any contract related to the line-of-business modules.

With the centralised tracking of tasks, there will be no duplication of important client information; from capturing a new lead, contact, customer, contract or sending an e-mail, SMS or a letter. Tasks are standardised and automated for improved efficiency and excellent customer service.

FEATURES INCLUDE:
- Centralised view of client portfolio
- Microsoft Outlook integration
- Storage of 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 from data in the system

TEESSEN CONSULTING PROVIDES A TOTAL END-TO-END SOLUTION

Contact Management is a central customer database
shared by all the modules to provide you with a single view of your client.

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OUR PRODUCT MODULES

SHORT TERM
This solution allows you to create and manage a complete short term brokerage for both personal and commercial lines of business. Use the **financials and collections** modules to **collect premiums** and **manage accounts**. Store all policy documents in a central repository and manage all aspects of a short term claim with tasks and templates.

ASSURANCE, INVESTMENT, CREDIT LIFE
Complete your client's portfolio with data for their assurance, investments and credit life policies. Send visually appealing policy schedules and portfolio packs to both client and product provider.

INTEGRATION & WORKFLOW
Use a variety of import- and export functions to easily populate the data or use the rich set of API's and web services to integrate to existing systems. Create system workflows to perform a variety of background tasks based on your specific business processes.

MEDICAL AID & FUNERAL
Keep record of your client's medical aid plan with member data and reward programs. Administer large scale Group Schemes or individual plans with the integrated Funeral module.

WILLS & ESTATES
Talk to us about the automation of the full Will and Estate process starting from initial invitation from adviser to client up until successful creation of the will.

COMMISSION PROCESSING
The Insure-IV suite now includes all the functionalities of a comprehensive **commission management system.** Underpinning all the line-of-business modules, it allows you to specify commission rules from a short-term policy to a funeral plan. The powerful analysis- and reporting tools provide you with a complete picture of your commission and fee income and adds to better decision making. **Flexible mapping tools allow integration** to a vast number of commission file- and statement formats. We currently import commission data from most of the product providers in the financial services sector to provide you with a **consolidated view of commission and fee transactions** per policy, broker and product. You can then process and share this commission with multiple parties based on flexible, time-based sharing rules.

- Calculate commission on various levels using user specific criteria
- Split commission to multiple parties
- Import commission data from Excel and CSV files
- Send recipient commission statement directly to them or provide them access to an online portal
- Create powerful management reports
- Integrate to payroll and payment systems
- Include all CRM functionality
- Online access for Recipients to their commission statements

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WHAT DO YOU RECEIVE!

CONSULTING

TRAINING

DEVELOPMENT

CONSULTING
Our skilled consultants can help you with planning, implementation and project management. Also contact us for any custom branding on your reports or applications in general.

TRAINING & SUPPORT
Effective product training can be arranged at your premises on the data familiar to your team. Our support team is available to assist you when needed.

DEVELOPMENT

- Report development. Let us build customized business reports, including your specific layout and branding.
- Workflow and integration. Our skilled team will develop workflow processes and integrate them to existing business systems for an end-to-end solution.
- We also provide development resources for your specific application needs.

The **Teessen Consulting** team prides itself on its **quality of service** and we are always ready to provide our customers with **effective product training** and **support** on the various modules and will also advise on the **best solution for your business.**

Talk to us about our products & services:

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