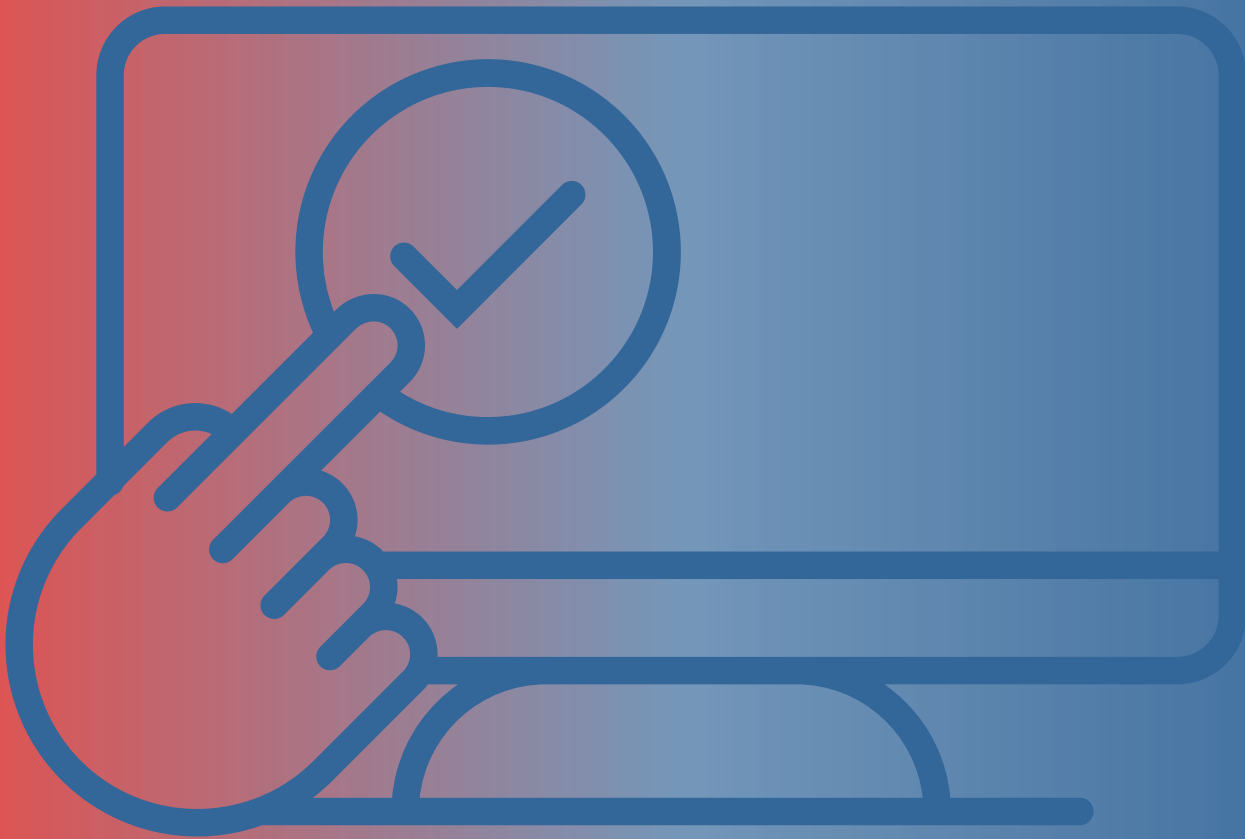




TEESSEN CONSULTING

Online Forms



THE BUSINESS TECHNOLOGY
SOLUTION YOU NEED

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ONLINE FORMS

Online forms allow for electronic data to be integrated directly with your practice management, line of business or CRM system. (Note that our Insure-IV suite of applications are tailored for our online forms, thus using them together is the preferred method.)

Easily send a link to your client to access an Online form, which can be completed on any device i.e. cell phone, tablet, computer and be submitted directly back to your system. Include one or more of our automation options to automatically send specific documents or information to your clients.

INTEGRATION WITH INSURE-IV

The integration with Insure-IV enables forms to be pre-populated with existing data, saving you time and increase accuracy of your data. Enrich forms with lookup data, rating scales and file uploads for a better user experience. You also have the option to complete only certain sections of a form and then forward the form to the client to complete the rest.

CLOUD SERVICE

Our online cloud service ensures that your forms are always available even if your local application or internet connection is offline. Your management tool pulls the data from the service when available and process the data based on your business processes.

CORPORATE IMAGE

All forms can be white labelled according to your corporate image and embedded directly on your website.

COMMUNICATION

Both you and the client will receive a notification of all form submissions keeping you informed at all times.

WORKFLOW

Create workflows that will facilitate collaboration between parties based on any criteria



Our team of skilled consultants are ready to assist you to automate your business processes with online forms.

CREATE A BETTER CUSTOMER EXPERIENCE AND IMPROVE YOUR BUSINESS PROCESSES WITH ONLINE FORMS.

USE CASE SCENARIOS:

- Get your client's consent electronically.
- Obtain electronic broker note from your client.
- Online quote forms
- Register a short-term claim directly from your cellphone
- Update of address- and contact details and include required documents
- Determine your client's needs using an online survey
- Online service request forms
- Expense claim process
- Field surveys
- Order processes with payment

FEATURES:

- More Accurate Client Data
- Data Capturing minimized
- Auto Populate Data
- Automation of processes
- Workflows and Approvals
- Electronic signatures



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

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