InsureSuite

BY TEESSEN CONSULTING

Integration

Contact Management

Financials & Collections

Commission Processing

Credit Life

Short Term

Loans

Assurance & Investments

Wills & Estates

Medical Aid

Funeral

THE BUSINESS TECHNOLOGY
SOLUTION YOU NEED

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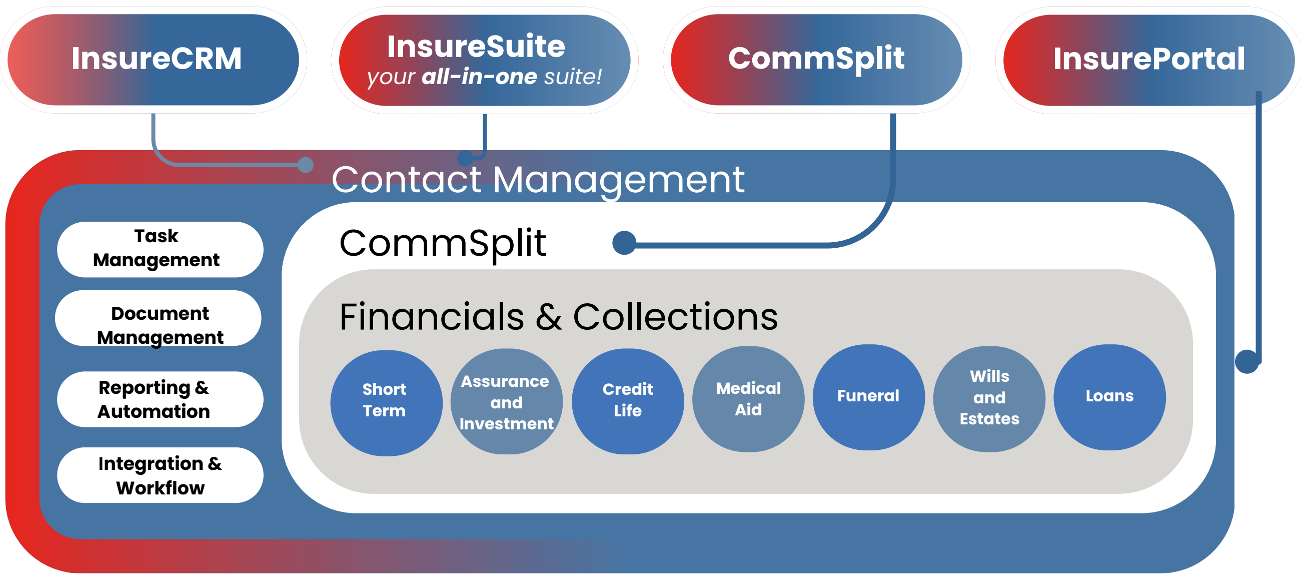
InsureSuite

Built for brokers. Trusted by teams



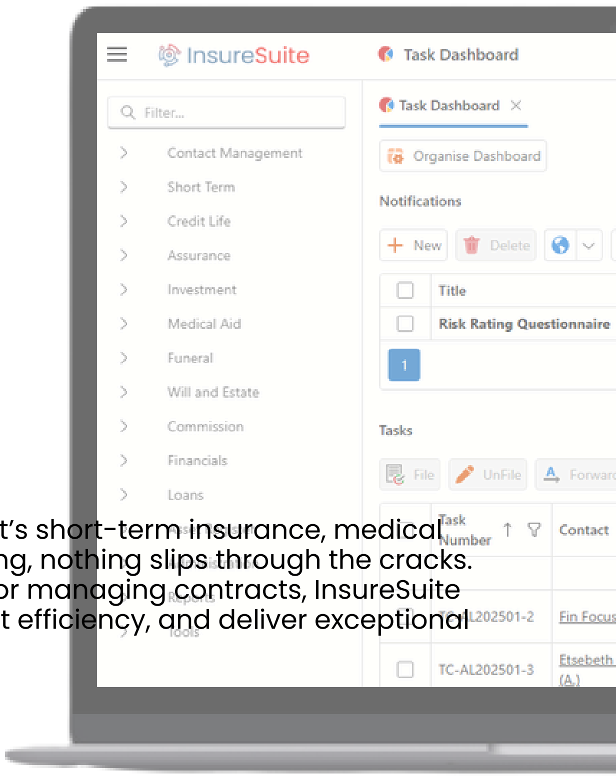
InsureSuite: Smarter Practice Management, **All in One Place**

InsureSuite is a fully integrated practice management solution designed to simplify operations and enhance client engagement. Built on a modular architecture, it gives you the flexibility to choose exactly what your business needs, while keeping everything connected in one central system.

With seamless Microsoft Outlook integration, SMS services, WhatsApp Integration, and powerful contact management tools, **InsureSuite** streamlines communication, reporting, and workflow automation, so you can focus on growing relationships, not managing admin.

Modular Architecture:

- Contact Management
- Task Management
- Document Management
- Reporting & Automation
- Integration & Workflow
- Dashboards
- Compliance
- Commission Processing
- Short Term Insurance
- Assurance & Investments
- Credit Life
- Medical Aid
- Funeral
- Wills & Estates
- Loans Module
- InsurePortal



Why InsureSuite?

Manage all your client data in one secure database—whether it's short-term insurance, medical aid, assurance, or any other policy. With centralised task tracking, nothing slips through the cracks. From capturing a new lead to sending emails, SMS messages, or managing contracts, InsureSuite standardises and automates tasks to reduce duplication, boost efficiency, and deliver exceptional customer service.

Key Features:

- Unified view of every client portfolio
- Seamless Microsoft Outlook integration
- Centralised document storage with quick access
- Communicate directly via email, SMS, or phone from the system
- Customisable reporting for actionable insights

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Our Product Modules

Short-Term Insurance:
Build and manage a complete short-term brokerage for both personal and commercial lines. With integrated financial and collections modules, you can efficiently manage premiums, payments, and accounts. Store every policy document in one central repository and streamline claims handling with standardised tasks and templates—ensuring faster resolutions and improved client satisfaction.

Assurance, Investments & Credit Life:
Round out your clients' financial portfolios by capturing assurance, investment, and credit life policies in one place. Generate professional, visually branded policy schedules and portfolio packs that can be shared seamlessly with clients and product providers.

Loans Module:
Expand your offering with the Loans module, designed to manage personal and business lending products. Track applications, approvals, repayments, and outstanding balances within the same centralised system. With built-in compliance and reporting, you can deliver a seamless lending experience for clients while maintaining full oversight of financial performance.

Medical Aid & Funeral:
Easily manage client medical aid plans, including member details and reward programs. For larger organisations, administer Group Schemes with confidence—or manage individual plans with the fully integrated Funeral module.

Wills & Estates:
Simplify and automate the entire Will and Estate process—from the adviser's first invitation to the client, through to the successful creation of the will. Ensure every step is efficient, compliant, and client-friendly.

Integration & Workflow:
InsureSuite fits into your ecosystem with ease. Import and export data effortlessly or use robust APIs and web services to integrate with existing systems. Customisable workflows allow you to automate background tasks, aligning the platform with your unique business processes.

InsurePortal:
Give your clients direct access to their insurance portfolio through the secure, user-friendly **InsurePortal**. From downloading policy documents to updating personal details and tracking claims, InsurePortal empowers clients with self-service capabilities—reducing admin while improving client engagement and satisfaction.

CommSplit
InsureSuite includes a complete, end-to-end commission management system that works seamlessly across all line-of-business modules. From short-term policies to funeral plans, you can define flexible commission rules and automate calculations to save time and reduce errors.
Powerful analysis and reporting tools provide a clear, consolidated view of all commission and fee income—by policy, broker, or product—helping you make smarter business decisions. With broad integration capabilities, InsureSuite supports commission file and statement formats from most product providers in the financial services sector.
Easily process, split, and distribute commission to multiple parties with configurable, time-based rules, while ensuring full transparency for all stakeholders.

Key Features
- Import commission data from Excel, CSV, or directly from product providers
- Calculate commission at multiple levels using user-defined criteria
- Automate commission splits across brokers, advisers, or other recipients
- Provide online access for recipients to securely view their commission statements
- Generate recipient statements automatically or send them directly from the system
- Build detailed management reports for deeper insights
- Integrate seamlessly with payroll and payment systems
- Includes all CRM functionality for a unified experience

What do you receive?

Consulting

Training

Development

Training & Support

We're committed to ensuring you get the most value from InsureSuite. Our training, development, and consulting services are designed to empower your team, optimise your workflows, and support your long-term success.

Training

Hands-on product training can be arranged at your premises, using your own data for maximum relevance. Our support team is always available to provide assistance whenever you need it.

Development

- Custom Reports: Let us design and deliver tailored business reports that reflect your unique layout, branding, and insights.
- Workflow & Integration: Our skilled team can develop workflow processes and integrate them seamlessly with your existing business systems—providing a true end-to-end solution.
- Application Development: Access our development expertise for any specialised application requirements unique to your business.

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

Talk to us about our products & services:

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