

GIC Modules

Endorsement

- Master formats
 - Purpose or Title
 - Letter Format each

Data To Collect from Rikin Sir

Endorsement

sr no	group name	policy holder	department	Type of policy	Policy Number	Date from	Date To	Sum insured	Premium	Commission	Policy PDF	company name	
											PENDING -- if no document		

Action to create endorsement

Select Purpose of endorsement

→ If same purpose is selected for the policy; ask to view & edit;

Also option to create new for same policy with same purpose

AutoLoad Letter And Form Fields (Can be multiple)

Respective Input fields for the form

File Input – as document if required to endorse

Endorsed Pdf Upload

On Submit Generate the Letter → Save as Pdf & Also Button to Print

Endorsement Automation

- If filed by Staff / Admin
 - Send email to Client & Company
- If filed by Client
 - Send email to Admin & Company
- For Sending to company – Also in reminders
 - Send auto reminder – until New Endorsed Policy PDF not received
 - Interval for Reminder = Every 10 days