| GIC – General Insurance Management System | | |
|---|---|---|
| **Modules** | **Remarks** | **Status** |
| 1. User Master | | |
| a. Super Admin | | |
| b. Manager | | ready |
| c. Employee | | |
| d. Client | | |
|     i. Common / Group Level | | |
|     ii. Individual Member Level | | wip |
|     iii. Connected Members | | |
| e. Sub Agent | | |
| f. Staff will have controls based on Role Assigned | | ready |
| 2. Agency Master | | |
| a. Agency Nos | | |
| b. Agent Name | | ready |
| c. Short Agency Name | | |
| d. Other specific details | | |
| 3. Client Master | | |
| a. Client Type = Group / Individual / Family | | wip |
| b. Contact details & Email details – Primary For Reminder Alerts | | |
| c. Other Personal / Profile details (Address, etc) | | |
| d. KYC Document (Pan; Aadhar; Passport; Cancel Chq; Gst; Photos) | | ready |
| e. Referred By | | |
| f. Health Questionaire for profile | | |
| g. Import Data from LIVE | | |
| h. Split Cients | | pending |
| i. Merge Clients | | |
| 4. Sub Agent Master | | |
| a. Name, Agent Code, | | |
| b. Contact details | | ready |
| c. Login to OurSite | | |
| Incentive / Commission Calculation | | |
| 5. Insurance Companies | | |
| a. Full name | | |
| b. Short name / Abbreviation Number Tags | | ready |
| c. Basic Details | | |
| 6. Plans / Policies Master | | |
| a. Type | | |
| b. Category / Department | | |
| c. Options | | |

| | | Status |
|---|---|---|
| d. Sub Options | | ready |
| e. Content Details | | |
|     i. Policy Wordings | | |
|     ii. Document List | | |
|     iii. Claim Forms | | |
|     iv. Claim procedure | | |
| 7. TPA | | |
| a. Name of TPA | | |
| b. Insurance company Link | | ready |
| c. Portals – Login Credentials | | |
| d. Contact Details | | |
| 8. Premium Calculators | | wip |
| 9. New Quote – Performa | | |
| a. Quote details with Policy wordings | | wip |
| b. Proposal Form & Mandate Letter | | |
| 10. Policies | | |
| a. Creation of Policy | | |
| b. Policy Paper – pdf (preview) | | **work is made but** |
| c. Relative Documents | | **into** |
| d. Claim Process List | | **modifications** |
| e. Further details as Per Policy Type – Marine / Fire / Health / …etc | | |
| f. Split Policy | | pending |
| g. Merge Policy | | |
| 11. Endorsement Module [For Correction or Changes to the data with Policy] | | |
| a. Forms (Change Request) | | pending |
| b. Adjacent Letters | | |
| c. Multi-level mails | | |
| d. Report or Logs | | |
| 12. Claims | | |
| a. Claim Intimation | | |
| b. Claim Registration & Scan Documents | | wip (less than half made) |
| c. Claim File Nos | | |
| d. Status of claims | | |
| e. Claim re-address and working | | |
| 13. Renewals | | |
| a. Reminder Email with Suggestions if any | | |
| b. Auto-mails for GMC / GPA / Marine | | ready |
| c. Renew Policy – with Pulling all of previous Year's Policy Details | | |
| d. Consider – Split or Merge of Policy | | pending |

| | | |
|---|---|---|
| 14. Commission (For Us)<br>a. Date wise Logs of Policy created & commission received<br>b. Pending Commission [Balance if Partial]<br>c. Follow-up Mail for Commission to Company | | ready |
| 15. Staff Pending Work<br>a. Day to Day – Task Assignment<br>b. Task status & Remarks<br>c. Priority of Task per Employee [Can be set by Manager or Super Admin]<br>d. Task Due – Notifications | | ready |
| 16. TO DO LIST<br>a. Banking<br>b. Investments<br>c. Mutual Funds<br>d. Property<br>e. Gallery (for photos & video) data storing<br>f. Personal Document Data<br>g. OTHER basic (official / unofficial data) | | pending |
| 17. WhatsApp Reminders<br>a. For Policy Renewal to Customers<br>b. API based Integration<br>c. Auto Sending | | pending |
| 18. Greeting Mails<br>a. Mail – Greeting Masters to be set by Super Admin<br>b. Auto Send as per Settings to customers | | pending |
| 19. Reports<br>a. Policy wise<br>b. Customer Group wise<br>c. Customer Single Member wise<br>d. Sub-Agent wise<br>e. And Others…. | | wip |
| 20. Data Backup<br>a. Backup of Database<br>b. Backup of Policies PDF<br>c. Backup of Customer Documents | | pending |
| | | |