

## **SUB: GIC – General Insurance Management Software**

### **Required Modules of Designing & Development:**

- 1) User Master
  - a) Super Admin
  - b) Manager
  - c) Employee
  - d) Client
    - i) Common / Group Level
    - ii) Individual Member Level
    - iii) Connected Members
  - e) Sub Agent
  - f) Staff will have controls based on Role Assigned
- 2) Agency Master
  - a) Agency Nos
  - b) Agent Name
  - c) Short Agency Name
  - d) Other specific details
- 3) Client Master
  - a) Client Type = Group / Individual / Family .... Etc
  - b) Contact details & Email details – Primary For Reminder Alerts
  - c) Other Personal / Profile details (Address, etc)
  - d) KYC Document (Pan; Aadhaar; Passport; Cancel Chq; Gst; Photos)
  - e) Referred By
  - f) Health Questionnaire for profile
  - g) Import Data from LIVE
  - h) Split Clients
  - i) Merge Clients

- 4) Sub Agent Master
  - a) Name, Agent Code,
  - b) Contact details
  - c) Login to
- 5) Incentive / Commission Calculation
- 6) Insurance Companies
  - a) Full name
  - b) Short name / Abbreviation Number Tags
  - c) Basic Details
- 7) Plans / Policies Master
  - a) Type
  - b) Category / Department
  - c) Options
  - d) Sub Options
  - e) Content Details
    - i) Policy Wordings
    - ii) Document List
    - iii) Claim Forms
    - iv) Claim procedure
- 8) TPA
  - a) Name of TPA
  - b) Insurance company Link
  - c) Portals – Login Credentials
  - d) Contact Details
- 9) Premium Calculators
- 10) New Quote – Performa
  - a) Quote details with Policy wordings
  - b) Proposal Form & Mandate Letter
- 11) Policies
  - a) Creation of Policy
  - b) Policy Paper pdf (preview)
  - c) Relative Documents
  - d) Claim Process List
  - e) Further details as Per Policy Type – Marine / Fire / Health / ...etc
  - f) Split Policy
  - g) Merge Policy

TOTAL 57 Policies

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12) Endorsement Module [For Correction or Changes to the data with Policy]

- a) Forms (Change Request)
- b) Adjacent Letters
- c) Multi-level mails
- d) Report or Logs

13) Claims

- a) Claim Intimation
- b) Claim Registration & Scan Documents
- c) Claim File Nos
- d) Status of claims
- e) Claim re-address and working

14) Renewals

- a) Reminder Email with Suggestions if any
- b) Auto-mails for GMC / GPA / Marine
- c) Renew Policy – with Pulling all of previous Year's Policy Details
- d) Consider – Split or Merge of Policy

15) Commission (For Us)

- a) Date wise Logs of Policy created & commission received
- b) Pending Commission [Balance if Partial]
- c) Follow-up Mail for Commission to Company

16) Staff Pending Work

- a) Day to Day – Task Assignment
- b) Task status & Remarks
- c) Priority of Task per Employee [Can be set by Manager or Super Admin]
- d) Task Due – Notifications

17) WhatsApp Reminders

- a) For Policy Renewal to Customers
- b) API based Integration
- c) Auto Sending

18) Greeting Mails

- a) Mail – Greeting Masters to be set by Super Admin
- b) Auto Send as per Settings to customers

19) Data Backup

- a) Backup of Database
- b) Backup of Policies PDF
- c) Backup of Customer Documents

## 20) Reports

- a) Policy wise
- b) Customer Group wise
- c) Customer Single Member wise
- d) Sub-Agent wise
- e) And Others....