



INSURANCE BUSINESS APPLICATIONS
THE PROVEN, NEXT-GENERATION CLOUD INSURANCE PLATFORM

IBSuite features - Basic Training



Introduction

- Welcome to the IBSuite Basic Training
- Who are we
- Who are you
 - 1. Knowledge of insurance
- Training form



- Administration, log-on
- Customer
- Sale / Quotes
- Policy Administration
- Claim Administration
- Policy Finance
- Recap

What:

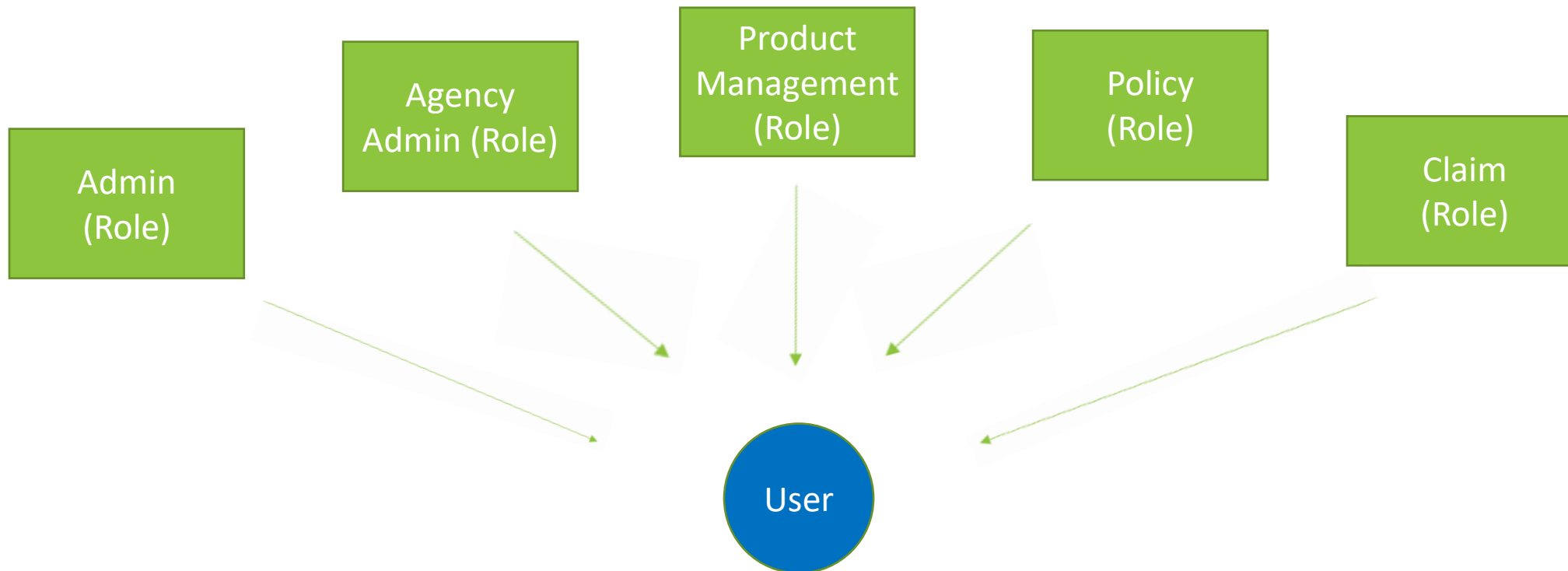
- Log on to IBSuite
- Password
- Profile & settings
- Dashboard

After this session you will:

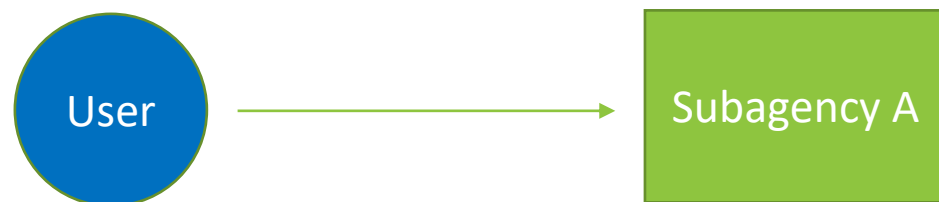
- Be able to log on to IBSuite
- Change your profile settings & password
- Organize your dashboard



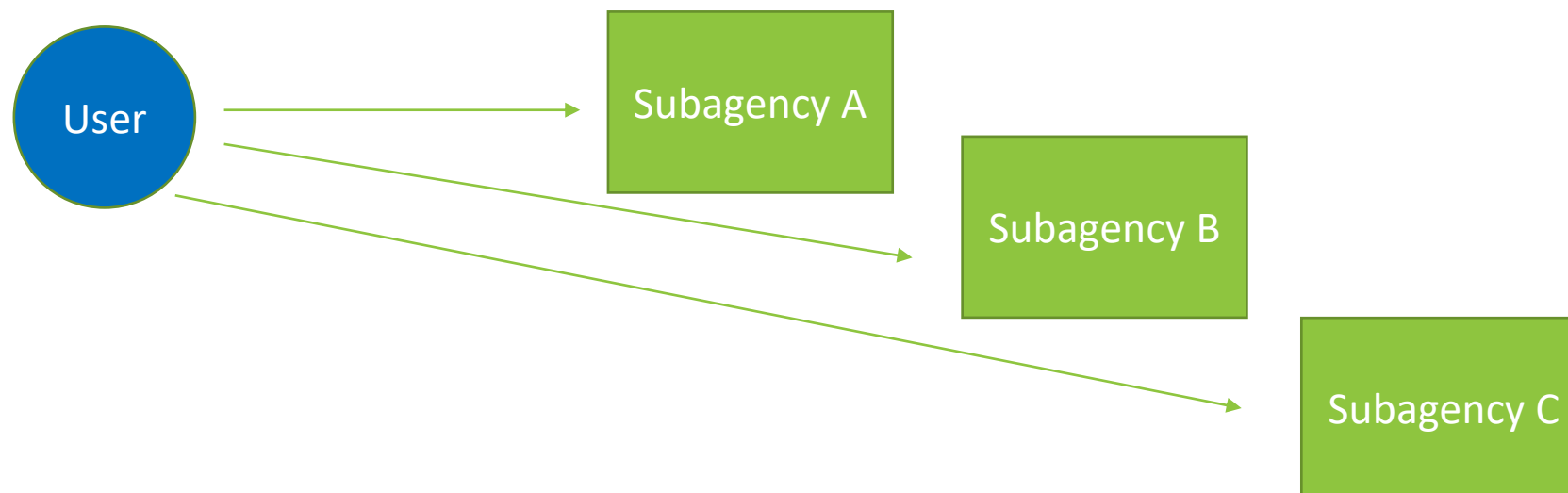
- A **User** is an entity with role-based authorization to various parts of the system. To access different modules and specific functionality, multiple roles can be mapped to a **User**.
- Different access channels can also be allowed to a particular User.
- To manage the users, there is few special users like System, and Super User.



Restricted Sub-agency



Subagency (not restricted)



Dashboard

- Remove Widgets
- Add Widgets
- Move around the Widgets

Search

- Add Widget 'Find Customer'
- Search for phone number 12345678

My profile

- Open My profile and go to User - Preferences
 - Change Language
 - Try own choice of changes

What:

- Customer
- Notes & Cases

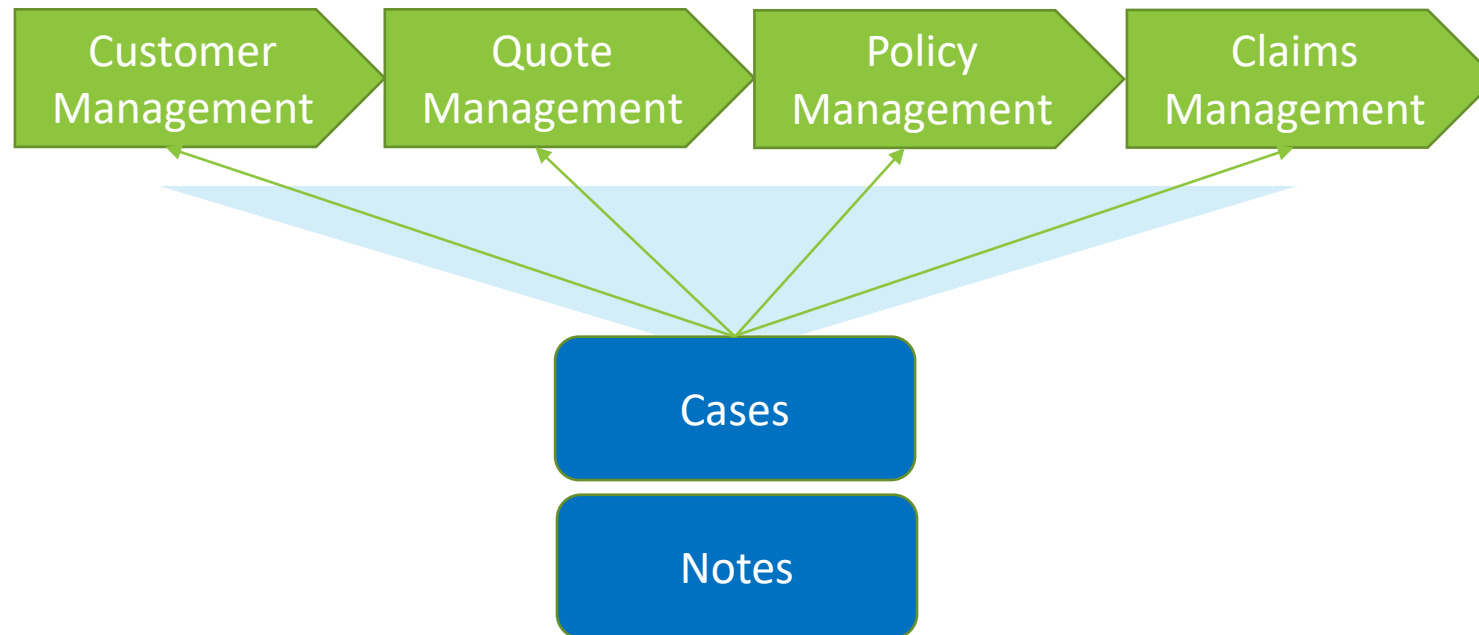
After this session you will:

- Be able to create customer
- Be able to create Notes & Cases



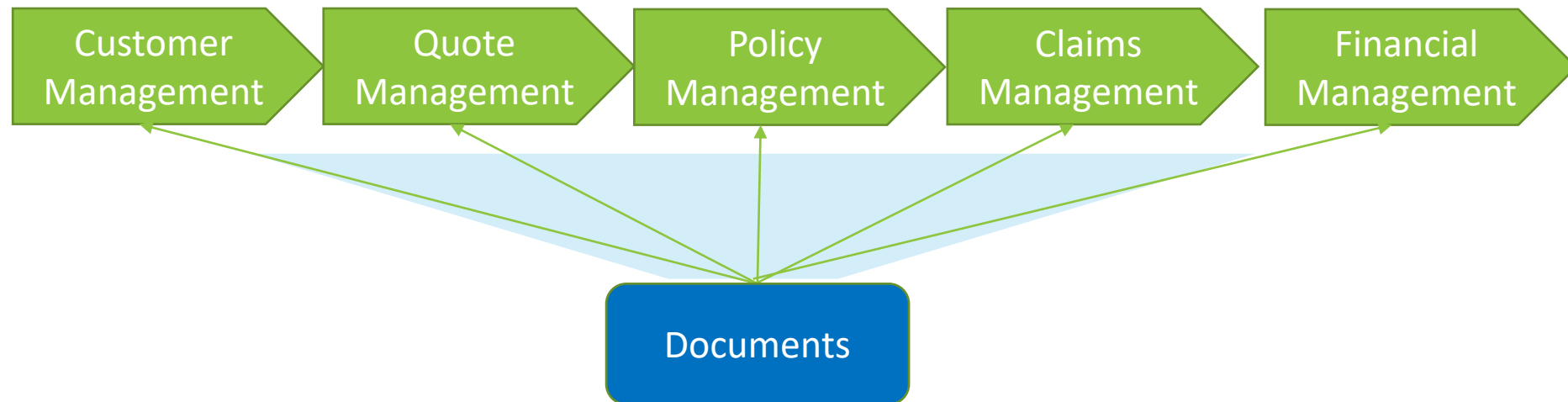
Cases are created both manually and automatically in various business scenarios, and setups can be created and modified. Cases can be created for various entities such as Customers, Quotes, Policies, and Claims.

Notes are also available in the mentioned business scenarios.



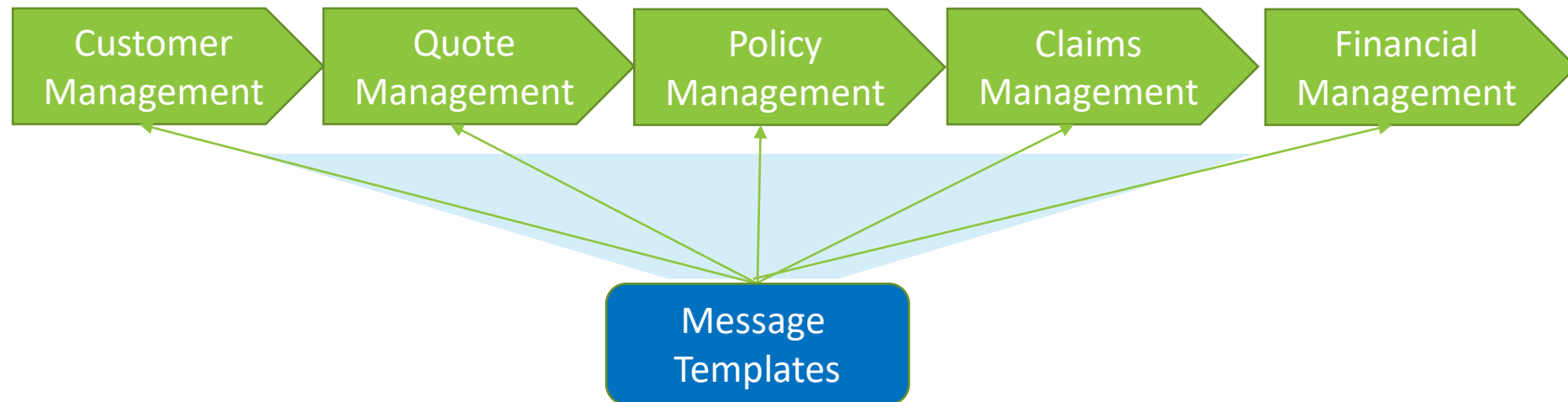
Document generation is used to generate PDFs for quotes, policies, claims, and customers in IBSuite. Document templates are in docx format and the xml files contains / fetches data from IBSuite for a corresponding entity.

Documents can be uploaded to IBSuite. Various business events can trigger a document generation on entities and send them out to customers.



Message Templates

Message Templates are a template format to configure Email and SMS for quotes, policies, claims, and customers in IBSuite. These can be modified using html and CSS. E-mails and SMS are used to communicate with customers.



Customers

1. Search in the Customer List
 1. Try New look
 2. Search for customer Tina Smith
 3. Try own choice of filtering
2. Create a new customer (SSN look up is not active on Training)
3. Create a note on your customer
4. Create a case on your customer

Cases

1. Find your customer from previous exercise
2. Find case for customer 1011350000001949
3. Create a case on your customer – assign yourself
4. Now assign your case to a colleague
5. Add attachment to the case
6. Close the case

Exercises – Sales process and quotes

What:

- Sales & quotes
- Quotes & quote entries
- Quotes, Follow Up

After this session you will:

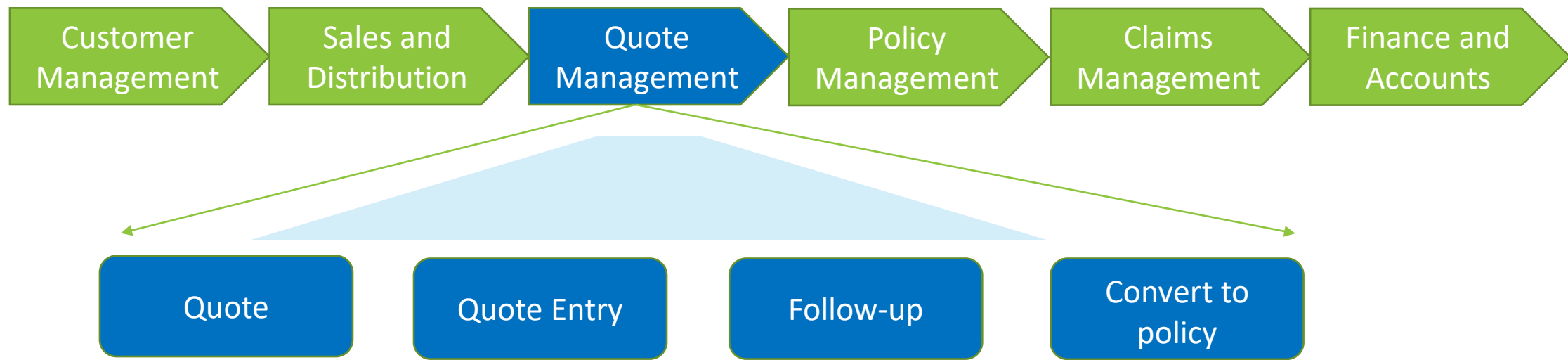
- Understand how quotes & quote entries works in IBSuite



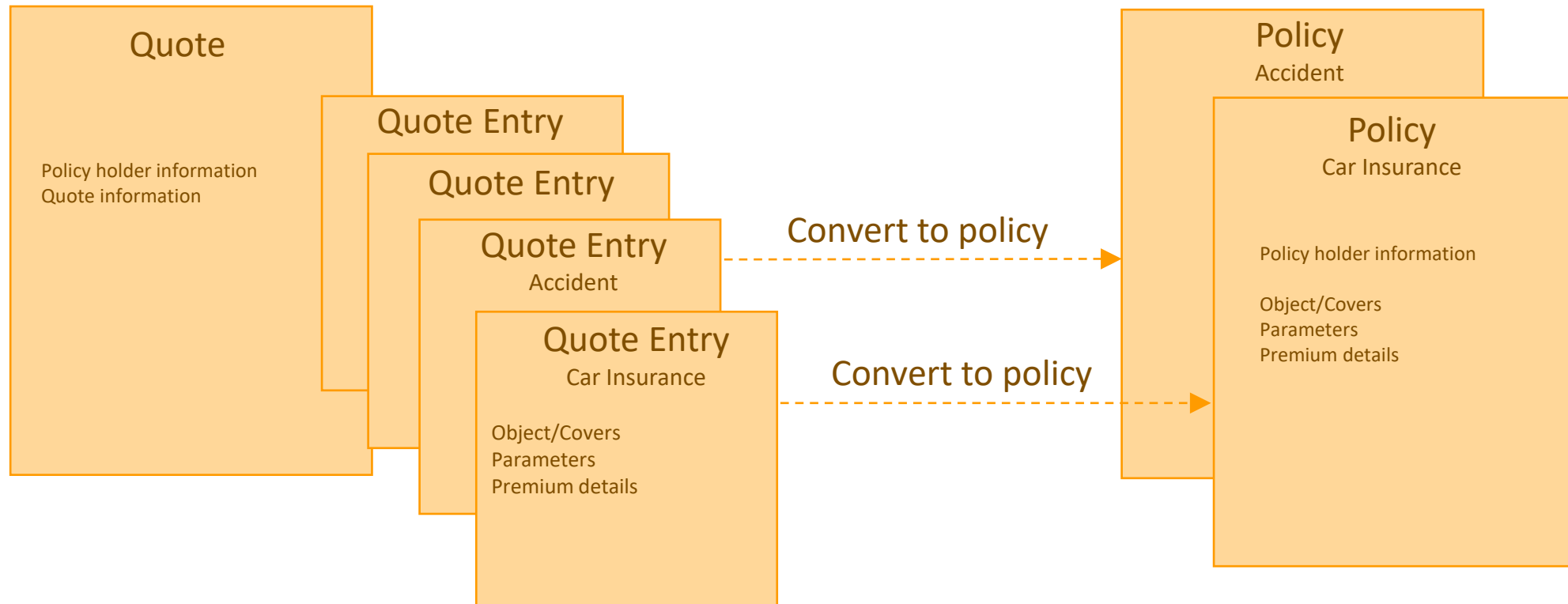
Quote Management

A **quote** is an offer from the Insurance company to the insured and insurer. If the offer/quote is accepted by the insured, it can be converted from a quote to a policy.

IBSuite provides support for the entire process from customer has been created to a policy life cycle. The life cycle of a quote is typically short, as the quote will have an expiry date.



Quote → Quote Entry → Convert Quote Entry to policy



Sales

1. Create a Quote and add a follow-up date
2. Add quote entry – choose 'Gadget'
3. Fill out parameters and add Coverage – choose 'Laptop'
4. Calculate & Save
5. Covert Quote to Policy
6. Look after Quote in 'Quotes, Follow Up'
7. In Quote List search for Tina Smith
8. Add a case to quote
9. Close case

Exercises – Policy administration

What:

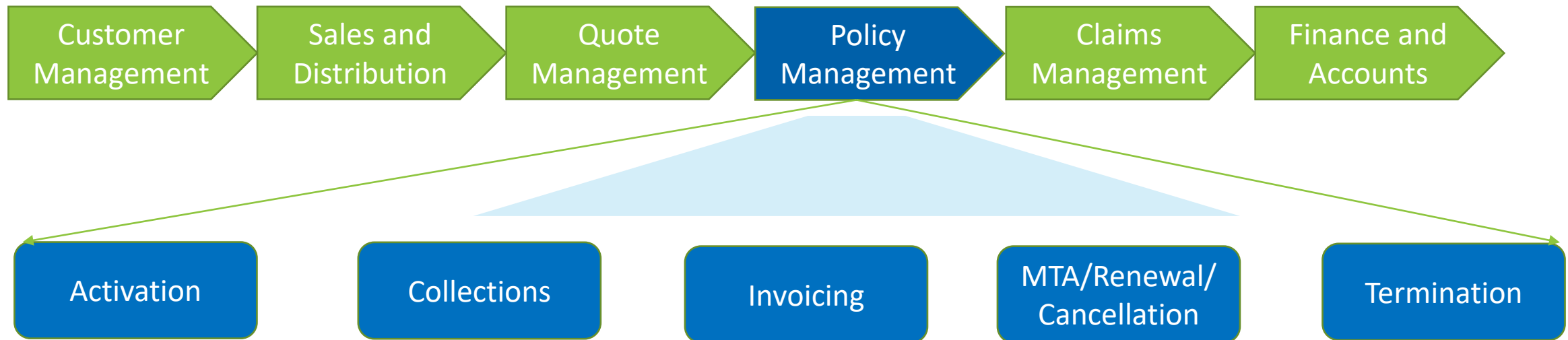
- Convert quotes to policy
- Calculate & activate policy
- MTA (mid-term-adjustment)

After this session you will:

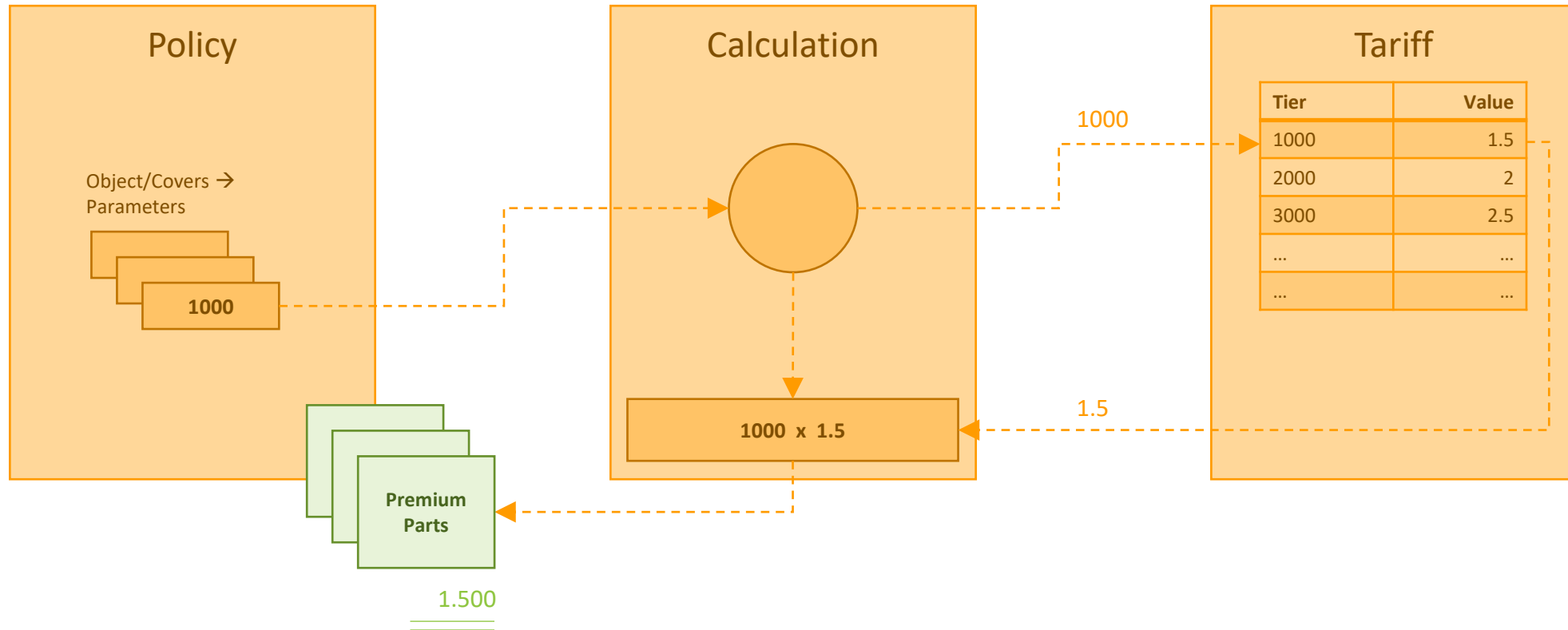
- Convert quote and activate policy
- How to work with policies
- Understand MTA



A **policy** is a contract between insured and insurer. It can be converted from a quote or created directly. IBSuite provides support for the entire policy life cycle (Activation, Collections, Invoicing, Mid-Term Adjustments, Renewals, Cancellations, Undo Policy Contracts, Undo Activation, Undo Cancellations, and Termination).



Policy / Params → Calculation → Tariff → Premium Parts

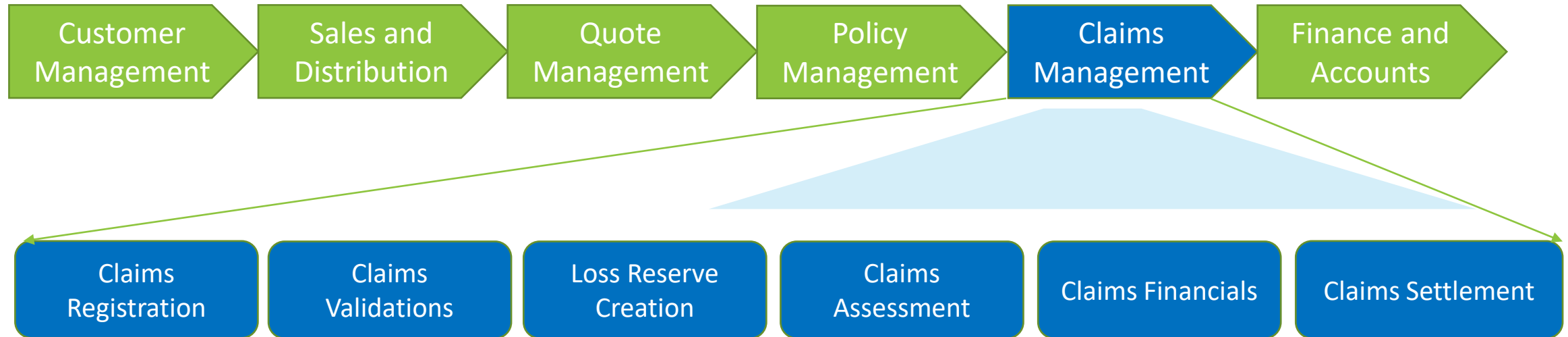


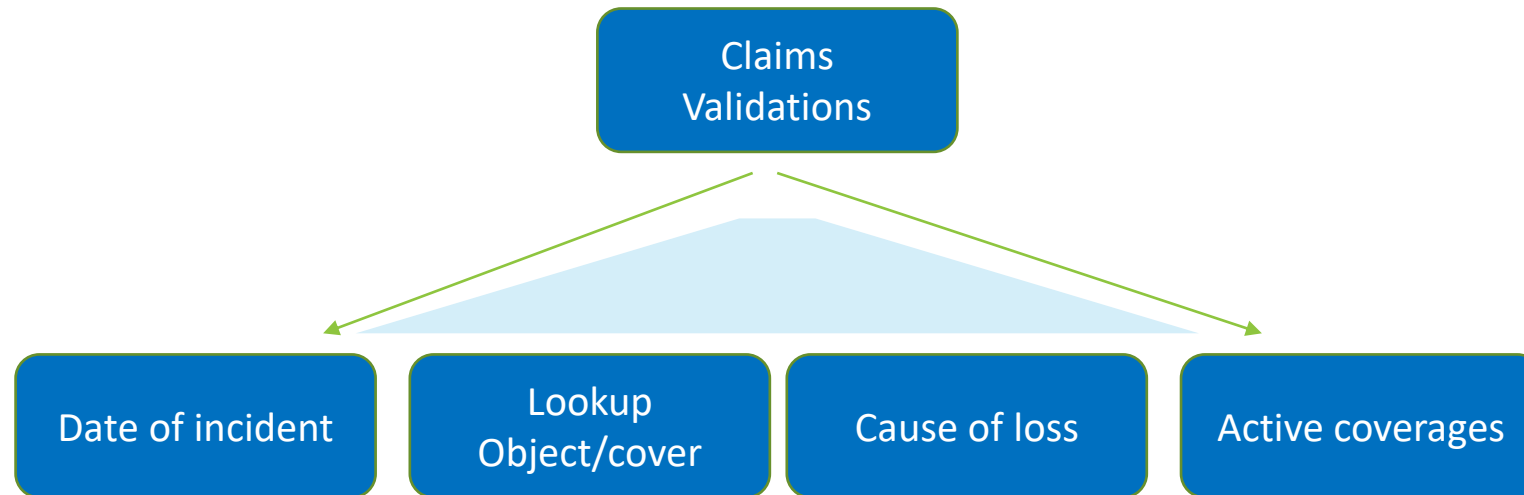
Exercises – Policy Administration

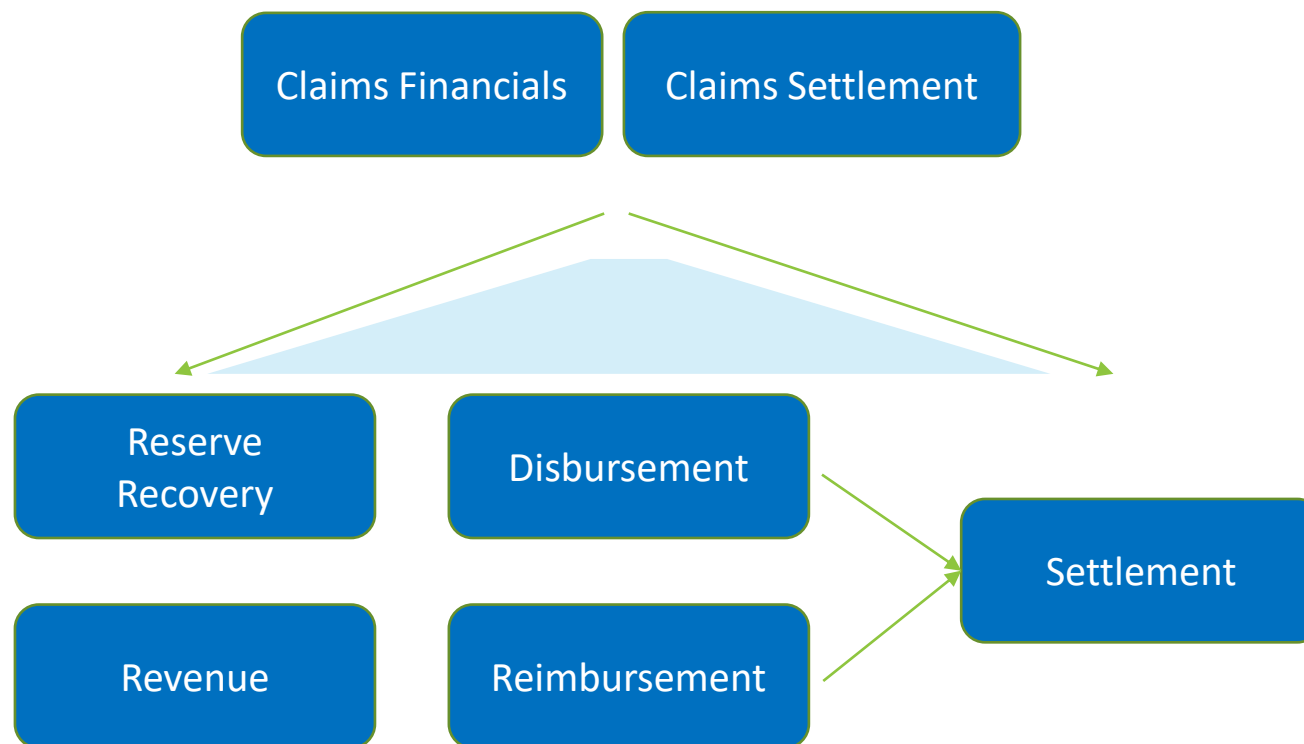
1. Create a Policy (Gadget) with start date 1.10.2020 and main decay 1.1
2. Add coverage and choose Laptop, fill out all the object parameters
3. 'Calculate', 'Activate' and 'Collect'
4. Make a change on the policy (price on Laptop or age)
5. Adjust (MTA) pr. 1.12.2020
6. 'Collect', check Financial Overview and contracts
7. 'Renew' and 'Collect'
8. Check contracts tab
9. Cancel the policy with effective date 1.2.2021

IBSuite has a **claim** module for creating claims, making claim disbursements/reimbursements, tracking of claim related financial transactions, settling claims, creating claim notes/cases/documents.

The claims will always be referring to a policy in IBSuite.



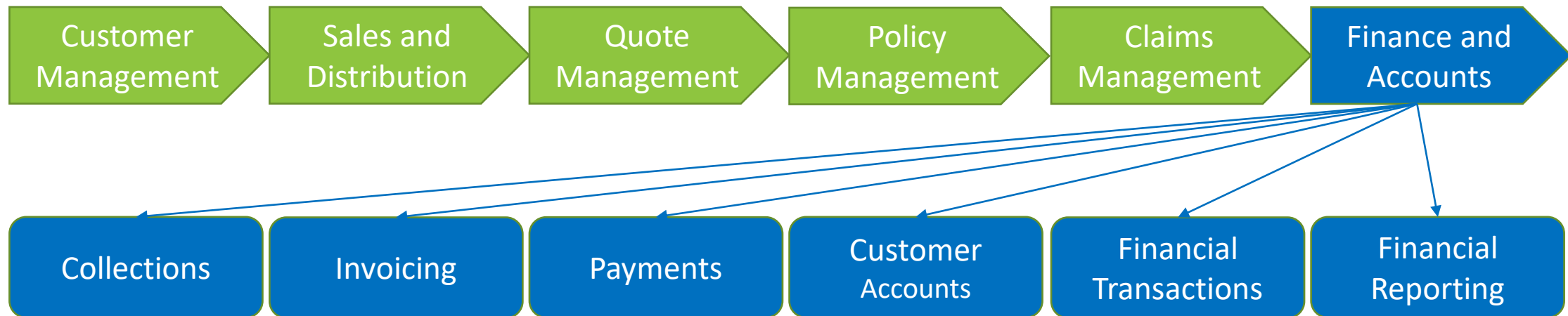




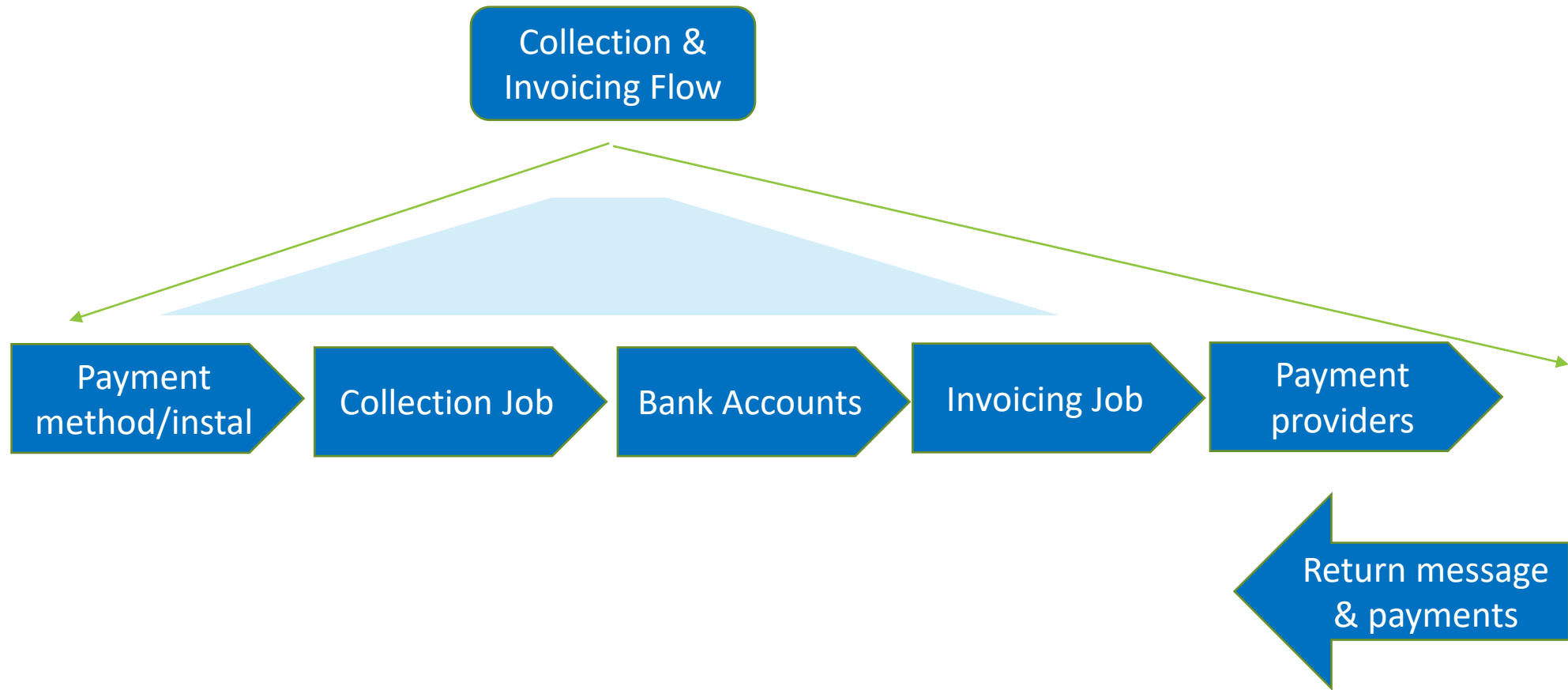
1. Use your own policy
2. Add a claim
3. Fill out information as shown and 'Save'
4. Add a reserve on 'Claim Entry'
5. Add a deductible on 'Claim Entry'
6. Make a disbursement from reserve
7. Make a reimbursement of deductible
8. Settle claim
9. Check Financial Overview

Financial Transactions

The **Financial Management** module in IBSuite helps tracking financial transactions and makes it possible for users to perform financial activities.



Collection & Invoicing Flow





INSURANCE BUSINESS APPLICATIONS

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<https://ibapplications.com> - info@ibapplications.com
<https://www.linkedin.com/company/insurance-business-applications>

