

CONVERTIFY

APPLYING IN BUSINESS



CONVERTIFY

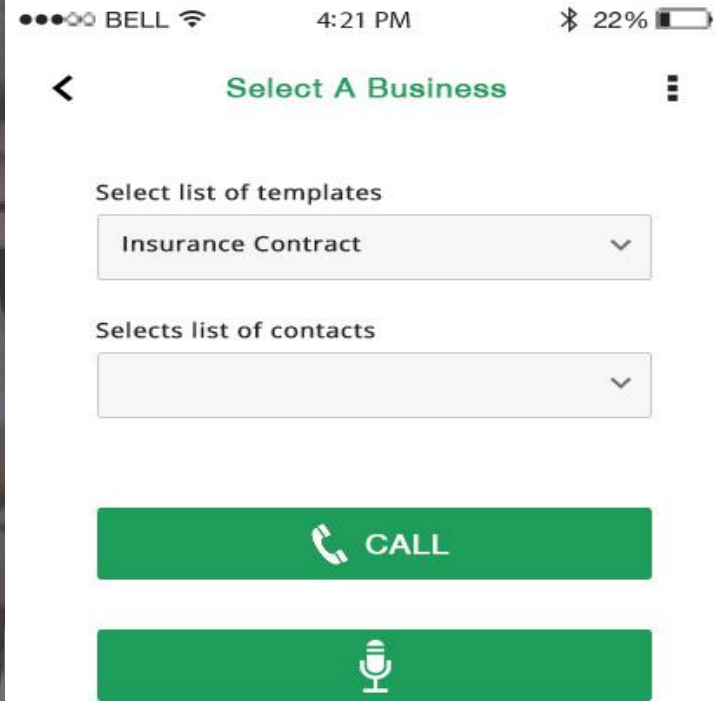
BUSINESS

Choose the business template and select the “insurance contract” template.

DEAL

You can choose to make a call conversation to discuss about this business. If it's a call, you may also select contacts from your phone list.

In this case it's a face meeting discussion, you may proceed with recording button.





BUSINESS DEAL

Select a business for insurance contract and record the convo.

RECORDING

Business Deal.
(Insurance Person)

Client: would like to re-new my current health insurance policy

Me: would you like to move on to a better policy for you and your family?

Client: how does it works?

Me: "go healthy policy" fees will be 500/month. which can cover up to 7 family members and relatives. Travel coverage of delay and lost baggage up to \$5000, hospital consult, stay, operations claim up to \$50 000, clinic consult claim up to \$200, car claim up to \$10 000.

Client: sounds great, i'm taking this policy. Thanks.

Me: Sure! Give me a min while generating the contract!

BELL

4:21 PM

22%

● Recording...



6:20:11

Uploading in progress...



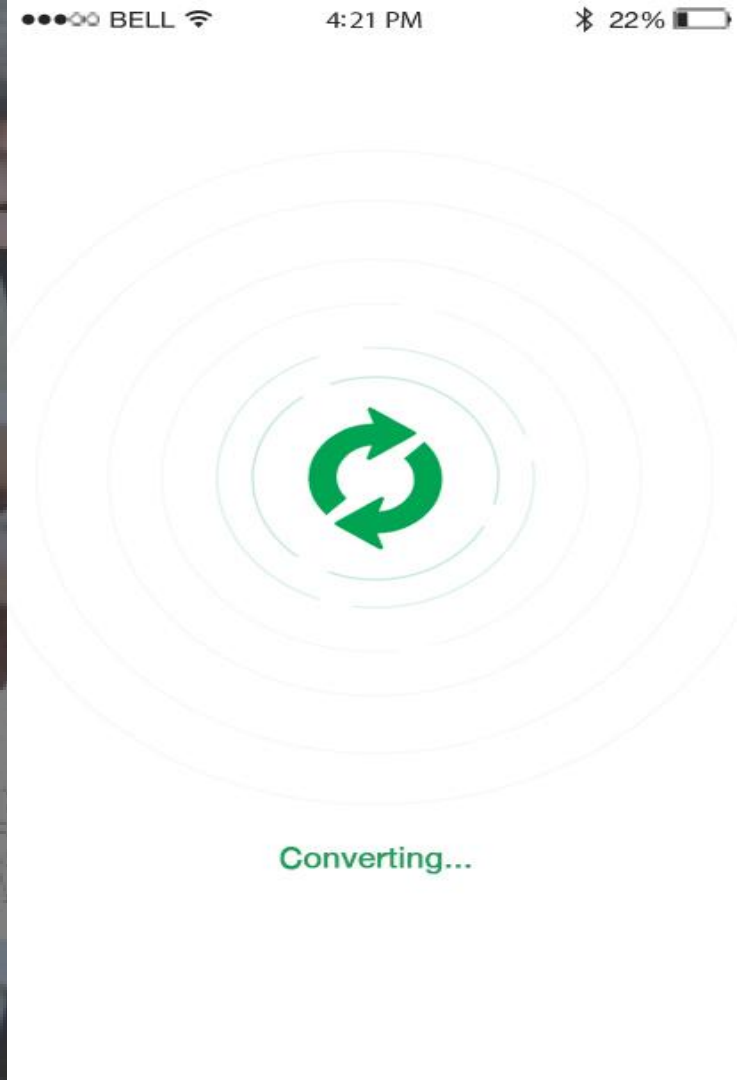
RECORDING

Two parties recording business
regarding insurance

COVERTING

Once you click the stop button, the system will automatically switch into converting mode.

System is summarizing the convo into a draft overview





CONVERTING

System is converting the
convo into a draft overview

DRAFT VIEW

This is a page that can also be edit manually.

This page will be reflected right after recording the convo.

Captured the location, time, date & who is involved. Client name and also insurance agent name.

And also the details. Right after the confirming it will generate into the actual contract/ agreement.

BELL

4:21 PM

22%

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Recordings

Health Insurance Contract

Date: 16 Nov 2016

Time: 11:30 AM

Location: 38 Bishan Walk #02-238

Contact Person: Mr Jone

Insurance Person

Mrs Katharine

Mrs Joana


Mr Jame


- Remarks


To re-new my current health insurance policy

- Details

"go healthy policy" fees will be \$500 per month which can cover up to 7 family members and relatives. Travel coverage of delay and lost baggage up to \$5000,hospital consult,stay, operations claim up to \$50,000. Clinic consult claim up to \$200, Car claim up to \$10,000.









DRAFT

Draft overview and this draft
can be edit manually.

CONTRACT OVERVIEW

Records and generates into PDF.

Amended points into set of latest instructions and details into standard operation procedures updated agreement letter/ business contract/ professional contract and customer sign on the spot on the agreed and correspondence.

BELL

4:21 PM

22%

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Recordings

CONVERTIFY

Health Insurance Contract

October 27 2016
2:34PM

- Address

38 Bishan Walk #02-238

Scheduled :

08 Nov 3pm

Contact Person :

Mr. Jone

Payable Plan

Budget Payable

Insurance Person

☒ Higher

100 per month

Lopremip suase

☐ Normal

Lopremip suase

☐ Same

Lopremip suase

- Details

Lorem Ipsum is simply dummy text of the printing and type setting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type.

All the details and amendments will be reflect in the agreement with signature below.



OVERVIEW

Records and generates into
set of latest instructions.

PRINTOUT OVERVIEW

- Final hard copy after printing out.
- both parties can go through and sign the contract on the spot.

Health Insurance Policy

ABC Co.,Ltd.

38 Bishan Walk #02-238

18 Nov 2016

Scheduled : 08 Nov 3pm

Contact Person : Mr Jone

Insurance Person : Mrs Katharine , Mrs Joana, Mr Jame

Payable Plan : Higher Budget Payable :

"go healthy policy" fees will be \$500 per month which can cover up to 7 family members and relatives. Travel coverage of delay and lost baggage up to \$5000, Hospital consult, stay, operations claim up to \$50,000. Clinic consult claim up to \$200, Car claim up to \$10,000.

The signature of this Assignment is a warranty that I am legally capable of executing this Assignment and that no proceedings of insolvency or bankruptcy have been instituted by or against me.

All the details and amendments will be reflect in the agreement with signature below.



A handwritten signature in black ink, appearing to be 'WEE', is written over a horizontal line.



PRINTOUT

Hard copy printout overview

PRINTOUT

With the contract final printout, both party can deal on the spot.

