

INSURANCE-PRO

Overview

InsurancePro is the ideal brokers and agency management and accounting software, specifically designed for independent Insurance Agencies and brokers. InsurancePro is designed to be easier to use and more powerful than you ever thought possible. It has been developed by insurance professionals who truly understand what a busy agency needs to improve its work flow and boost productivity. It will automate many of the most difficult tasks an agency or broker performs and offers expansion capabilities through the growing line of other programs which seamlessly integrate with InsurancePro.

InsurancePro is unique in that it is a system tailor-made for the client's current needs and budget

The Objective

The **objective** of InsurancePro is **to remove hassles and decrease workload, while increasing efficiency and production.** Our goal is to effectively minimize confusion, efforts, and costs for your Insurance Agency, automate all common day-to-day tasks and help you manage your business in the most efficient manner possible.

InsurancePro brings quality automation to your business, at an extremely affordable price. You do not have to pay thousands of shillings in setup and recurring fees.

KEY BENEFITS OF INSURANCEPRO

- Properly Manage Information
- Provide quick Customer Service
- Become Organized and Efficient
 - Save Significant Time
 - Avoid Hassles and Frustration
 - Have a PAPERLESS Firm
- Print Computer Generated Forms
- Maximize Customer Retention
 - Send Letters to Customers
- Use the program for Follow-up Notes
- Manage work for Potential Clients
- Thoroughly Analyze your Performance
 - Track every Single Transaction
 - Pay less than other systems

INSURANCE PRO FEATURES

System maintenance

1. User rights
2. Backup to file
3. Restore from backup
4. Auto-Generating Numbers (Policies, receipts, Invoices, Payments, Clients)

Clients

1. Clients Listing
2. Clients Statements
3. Clients Aged Analysis
4. Clients search by policy sale date, status etc
5. Generation of Debit Notes
6. Generation of Risk Note

Policy Register

1. Policy Listing
2. Policy History
3. Limits of Liability

Records Tracking

1. Insurance companies
2. Suppliers/Vendors
3. Cover types
4. Policy types
5. Vehicle Models
6. Vehicle types

Forms and Reminders

1. Renewal Reminders
2. Renewed policies
3. Welcome Notes

Chart of accounts

1. Account code
2. Account Type
3. Normal Balance (Debit/Credit)
4. Account Balance

Transactions Module

1. Petty cash listing
2. Clients Debtors Invoicing
3. Clients Debtors Receipting
4. Journal Transactions

Budgeting

1. Budgets Analysis

Claims

1. Claim Types
2. Documents and Memos
3. Claims Reminders
4. Claims Register
5. Claims progress

Cash Book

1. Company Cash Banking
2. Cash Book
3. Entries in Bank not in Cashbook and Vice Versa
4. Bank Reconciliation

Payroll

1. Payroll Setup
2. Salary Scales
3. Staff Listing
4. Staff Loans
5. Process Payroll
6. Produce Pay slips
7. Income Tax Reports
8. Company Deductions

Fixed Assets

1. Asset Acquisition
2. Asset Sale and Disposal
3. Asset Revaluation
4. Asset Combine/Split
5. Assets Listing
6. Asset Categories
7. Account Sets
8. Depreciation Rules

Accounting Reports

1. Trial Balance
2. Balance Sheet
3. Profit and Loss Account
4. Cash Book Statement
5. Cash Flow Statement
6. Account Movement
7. Account Balances

Reports

a. Debtors Report

1. Commission Report
2. Client Payment Statement
3. Aged Analysis
4. Debtors Listing
5. Statement of Account
6. Renewal list

Insurers Report

7. Policy Premium Analysis
8. Client Listing
9. Withholding Tax Summary
10. Insurer Register
11. Daily/Periodic Transactions
12. Clients Policy Status Report

b. Creditors Report

13. Insurance Payment Report
14. Aged Analysis
15. Status Report

c. Brokers Report

16. Company Commission
17. Detailed Commission Report
18. Valuation Report
19. Insurance Renewal
20. Claims History Statement
21. Periodic Report

Document Management

1. File/Document attachments

Tools/Utilities

Daily/Weekly Planner