



BROKER.DESK

The single, comprehensive software solution for all aspects of customer account and insurance brokerage.

broker.desk represents a comprehensive tool for addressing the challenges of steadily increasing demands and stricter regulations by governmental supervisory authorities.



Why broker.desk?

- > All-in-one Software-Plattform, which covers the needs of a insurance broker in terms of insurances, insurance policies and clients.
- > Location independent
- > The first all-in-one platform for insurance brokerage
- > No IT infrastructure and expertise is necessary, since the platform is operated by us
- > The platform meets current requirements and trends with respect to transparency, cost reduction, and simplification and automation of procedures and processes

Advantages

- > Consolidation of policies by sectors, insurances, intermediaries and further more
- > Comprehensive MIS and analytical features for company management
- > Standard reporting in the financial services provider's CD
- > No physical storage of paper documents; automated document recognition and processing; simpler and faster document search
- > Simple, standard user interface and operation
- > Multiple languages





Brokerage

- MIS
- Contract management
- Rates
- Contract objects
- Portfolio
- Commissions
- Insurances
- Intermediaries
- Contract browser
- Analysis / Dashboard

CRM

- Contacts
- Adresses
- Contact information
- Relations
- Notes
- Contract Management
- Meeting organization
- Time registration / -control

DMS

- Document management
- Document processing
- Document recognition and workflow
- Links / Attributes
- Revisions / change history
- Archive

Task

- Todo / Task Management
- Alerting / Escalation
- Workflow management
- Configurable workflow roles

Project

- Project management
- Planning
- Monitoring
- Billing

Processing

- Process automation
- Monitoring
- Time triggered activation
- Alerting
- Logging



This solution is designed to be a professional, integrated tool set for financial institutions and insurance brokers, offered at a reasonable price.

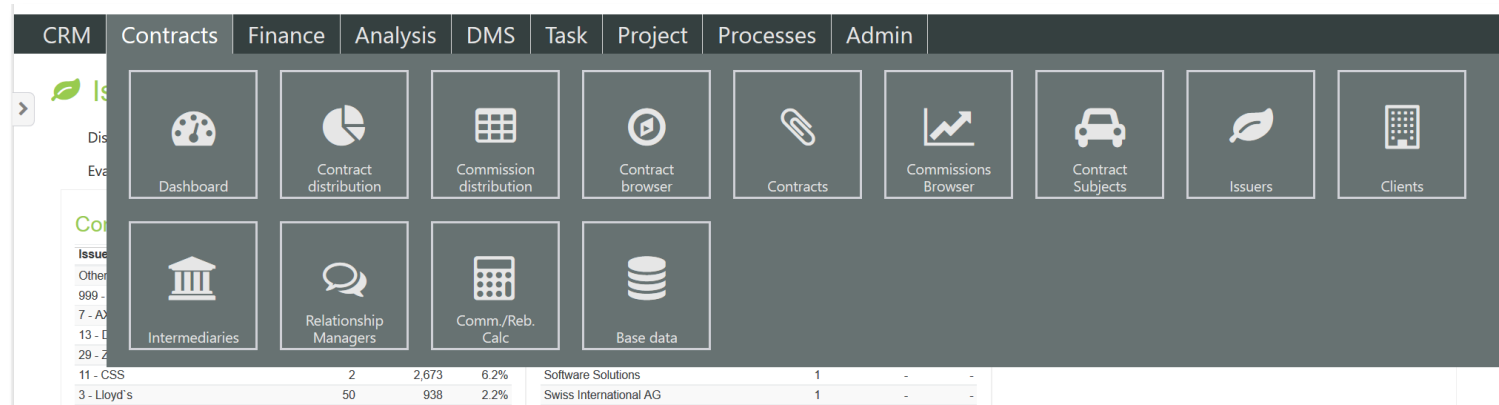
Core functions:

- > Contract-/Policy management
- > Contracts subjects administration
- > Retrocession and intermediary management and calculation
- > Distribution of sectors and retrocessions
- > Communication with clients and insurances (Templates, Emails etc.)
- > CRM (customer history, address and contact information management, meeting coordination)
- > Electronic document archiving and processing
- > MIS and analytical features, including Drill-Down
- > Customer reporting
- > Dashboards and Widgets for monitoring and controlling the company



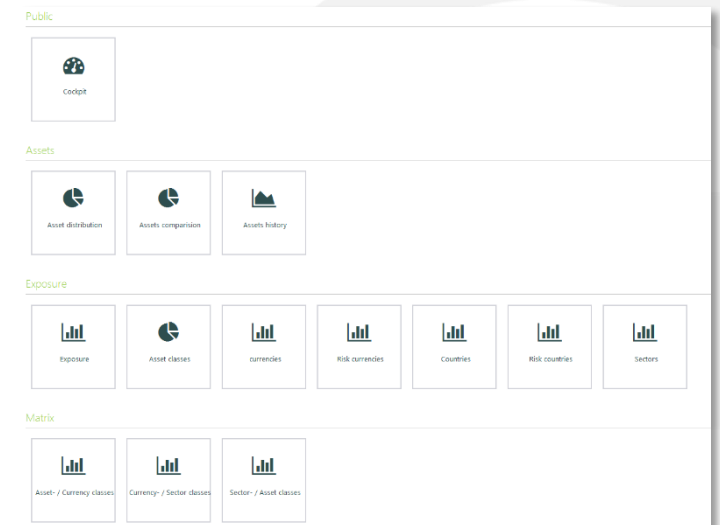


Look and Feel



The browser-based solution based on leading-edge technology offers convenient operation on mobile devices, as well.

It can be ideally customized to individual needs, and it can connect with third-party systems.





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