USER MANUAL

Insurance Management



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1. Overview of Insurance Management App

The Insurance Management App provides a comprehensive platform to efficiently manage insurance policies, claims, agents, and associated workflows. The **Dashboard** offers an intuitive overview, displaying essential data on policies, claims, customers, agents, and categories through graphical representations, ensuring quick insights for effective decision-making.

The app enables administrators to **assign user roles** (e.g., manager or standard user), controlling access and permissions for streamlined security and management. Integration with **CRM & lead generation** features allows for seamless lead creation and client acquisition, boosting productivity and business growth.

Insurance policy details are easily accessible, encompassing coverage, terms, and conditions for clarity and transparency. **Document management** ensures efficient handling of insurance and claim-related documents, while **policy terms** can be customized to suit specific needs, including premium adjustments.

The app supports **agents and commissions** management, allowing for flexible compensation setups, whether based on fixed amounts or percentages. The **claims workflow** is simplified, from initiation to settlement, ensuring smooth processing.

Expired policy renewal is made convenient with pre-filled details, reducing manual effort. Additionally, the app provides features to **generate reports** in PDF format for easy sharing, viewing, and storage of data. **Reminder functions** ensure timely policy renewals, payments, and expirations, while **nominee details** can be added to policies, specifying relationships and entitlements.

Overall, the app offers an organized, efficient solution for insurance management, enhancing productivity and ensuring smooth policy handling.

2. Insurance Features

- Advance Dashboard (with all the stats)
 - The Dashboard provides an overview of policies, claims, customers, agents, and categories through intuitive graphical representations, offering quick insights and essential information for efficient monitoring and decision-making.
- User Roles
 - Assign roles such as manager or standard user on a per-user basis, enabling controlled access and permissions for streamlined administration and enhanced security.
- CRM & Lead Integrations
 - Generate leads directly through the insurance platform, simplifying the lead creation process for seamless and efficient client acquisition, enhancing productivity and driving business growth.
- Insurance Policy Details
 - Insurance policy details include comprehensive information such as coverage, terms, and conditions, clearly defining the specifics outlined within an insurance policy for better understanding and transparency.
- Documents Management
 - Easily manage insurance and claim-related documents, streamlining document handling for policies and claims to enhance organization, efficiency, and accessibility.
- Policy Terms
 - Effortlessly manage policy terms within insurance policies and customize premiums according to the specified terms, ensuring flexibility and alignment with client needs.
- Agents
 - Manage insurance agents and their commissions within agent contact details, streamlining the organization of agent-related information for efficient tracking and administration.

- Commissions
 - Easily manage insurance agent commissions, offering flexibility to set fixed amounts or percentages, ensuring accurate and efficient compensation handling.
- Complete claim settlement Workflow
 - Initiate claims effortlessly by stating the reason, submitting required documents, and generating settlement bills, ensuring a streamlined and efficient claims processing experience.
- Expired Policy Renew Options
 - Renew expired policies effortlessly with pre-filled details, streamlining the renewal process for enhanced convenience and efficiency while minimizing manual input.
- Insurance & Claim Reports
 - Generate insurance and claim reports in PDF format for easy sharing, viewing, and storing essential data, providing a convenient and organized way to access important information.
- Reminders
 - Set reminder days for policy renewals, payments, and expirations, ensuring timely management and helping adhere to important deadlines, preventing missed actions and ensuring smooth policy handling.
- Nominees Details
 - Add nominees to the policy, specifying their relationship to the policyholder and the percentage of entitlement, ensuring clear documentation of beneficiaries and their respective shares.

3. Dashboard

• The Dashboard provides an overview of policies, claims, customers, agents, and categories through intuitive graphical representations, offering quick insights and essential information for efficient monitoring and decision-making.



3. User Roles

• In user settings, select "Insurance Manager" to assign the appropriate role for managing insurance-related tasks and permissions.

I Settings General Settings Users & Companies Translations Technical	
New Users Users Users	Groups I access Rights Record Rules
Send Password Reset Instructions Companies	Never Connected Confirmed
Name Mitchell Admin	
Email Address ⁷ admin	
Related Partner [?] YourCompany, Mitchell Admin	
Access Rights Preferences Account Security	
MULTI COMPANIES	
Allowed Companies My Company (Chicago) × General Ins Company ×	
Default Company ? General Ins Company	
USER TYPE	
User types ? O Internal User	
 Policit Public 	
SALES	ACCUNTING
Sales ? Administrator	Invoicing ? Billing Administrator
	Bank Validate bank account
INVENTORY	MANUEACTUDINC
Inventory ? Administrator	Maintenance ? Equipment Manager
	and a france constraint.
WEBSITE	ADMINISTRATION
Website Editor and Designer	Administration Settings
User Roles: OTHER 1 Manager	
Insurance ? Manager	
Dashboard ? Admin	

5. Configurations

associated with their jobs.

5.1. Policy Categories

• Some default insurance categories are visible, providing a predefined set of options for easy categorization and management.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations		4 0	
New Policy Category •	Categories Sub Categories	•		
Name	Policy Time Periods Insurance Policy Insurance Buying For	Policy Time Periods	Category	Code
Life Insurance		Life Insurance	TLI	
Health Insurance	Document Details	Health Insurance	UHI	
Property Insurance	Insured Documents Claim Documents	Property Insurance	н	
Liability Insurance		Liability Insurance	GLI	
Disability Insurance	Nominees Relations	Disability Insurance	SDI	
Travel Insurance		Travel Insurance	MTI	
Pet Insurance		Pet Insurance	AOPI	
Business Insurance		Business Insurance	BI	
Vehicle Insurance		Vehicle Insurance	VI	

- Insurance category details include specific information such as category name, description, and associated policies for efficient organization and management.
- You can select a category, and the details for the selected category will be displayed. These details can then be modified according to the chosen category.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	
New Policy Category Life Insurance 🏠	Categories Sub Categories	
Life Insurance INSURANCE CATEGORY Category Life Insurance POLICY PROVIDER DETAILS Policy Provider General Ins Company Life Insurance Policy Details	Policy Time Periods Insurance Policy Insurance Buying For Document Details Insured Documents Claim Documents Claim Reasons Nominees Relations	CATEGORY CODE Code TLI
INSURED DETAILS		
Insured Age Between 5 to 20 Years		Death Amount \$ 152.00
		Deductible Amount \$ 25.00
Length of Coverage Terms		Health History
Engaging in high-risk hobbies or activities can also impact life insurance coverage terr activities such as skydiving, rock climbing, or scuba diving, insurers may offer shorter require higher premiums to account for the greater risk of injury or death associated	ms. If you participate in coverage terms or with these pursuits.	Life insurance companies assess an individual's health history to determine their risk level. If you have a clean bill of health with no pre-existing conditions or chronic illnesses, you may qualify for longer coverage terms at lower premiums. However, if you have a history of health issues, such as heart disease, diabetes, or cancer, insurers may offer shorter coverage terms or charge higher premiums to mitigate their risk.
Occupation and Hobbies		Family Medical History
Certain occupations are considered riskier than others, which can influence the lengtl For example, individuals working in high-risk professions such as firefighters, pilots, o face shorter coverage terms or higher premiums due to the increased likelihood of ac	h of coverage terms. or deep-sea divers may ccidents or fatalities	Family medical history plays a significant role in determining life insurance coverage terms. If you have a family history of hereditary conditions such as cancer, heart disease, or diabetes, insurers may offer shorter coverage terms or charge higher premiums to reflect the increased likelihood of developing similar health

issues.

• In the insurance categories, such as **property insurance and vehicle insurance**, you have the option to add related category images for better visualization and organization.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	
New Policy Category Property Insurance I	Categories Sub Categories	
Name Property Insurance	Policy Time Periods Insurance Policy Insurance Buying For Document Details	
INSURANCE CATEGORY Category Property Insurance POLICY PROVIDER DETAILS	Insured Documents Claim Documents Claim Reasons Nominees Relations	CATEGORY CODE
Policy Provider General Ins Company Property Insurance Policy Details Property Images You can uploa	d multiple images	
Add		

5.2. Policy Subcategories

• By default, some policy subcategories are visible below, providing predefined options for easy selection and efficient policy organization.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	
New Policy Sub Category 🌣	Categories category × Search	-
	Sub Categories	
Name	Policy Time Periods	Category
Life Insurance (3)	Insurance Policy	
	Insurance Buying For	
Personal Health Insurance	Document Details Insured Documents	Health Insurance
Family Health Insurance	Claim Documents	Health Insurance
Short-Term Health Insurance	Claim Reasons	Health Insurance
Long-Term Health Insurance	Nominees Relations	Health Insurance
Property Insurance (4)		
Liability Insurance (4)		
General Liability Insurance		Liability Insurance
Professional Liability Insurance		Liability Insurance
Product Liability Insurance		Liability Insurance
Umbrella Liability Insurance		Liability Insurance
 Disability Insurance (2) 		
 Travel Insurance (3) 		
 Pet Insurance (3) 		
Accident-Only Pet Insurance		Pet Insurance
Comprehensive Pet Insurance		Pet Insurance
Routine Care Insurance		Pet Insurance
Business Insurance (4)		
 Vehicle Insurance (3) 		
Third-Party Insurance		Vehicle Insurance
Comprehensive Insurance		Vehicle Insurance
Usage-Based Insurance		Vehicle Insurance

• You have the option to create a new subcategory, select the related category, and choose the appropriate policy provider company for better organization and management.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	± 🔍 ⁷ € ²¹
New Policy Sub Categories Personal Health Insurance Personal Health Insurance Category ⁷ Health Insurance	Categories Sub Categories Policy Time Periods Insurance Policy Insurance Buying For Document Details Insured Documents Claim Documents Claim Reasons Nominees Relations	

5.3. Policy Time Periods

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	🕵 6 🐉 General Ins Company	•
New Time Period 🌣	Categories	✓ 1-5/5 < >	
	Sub Categories		
Policy Time Period	Policy Time Periods	V Duration (Month	s)
1 Months	Insurance Policy		1
	Insurance Buying For		
3 Months (Quarterly)	Document Details		3
4 Months	Insured Documents		4
6 Months	Claim Documents		6
	Claim Reasons		
12 Months	Nominees Relations		12

• You have the option to create a policy time period and manage the insurance duration in months, ensuring flexibility in policy management and coverage.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations
New Time Periods 3 Months (Quarterly) 🌣	Categories
	Sub Categories
Policy Time Daried ?	Policy Time Periods
	Insurance Policy
3 Months (Quarterly)	Insurance Buying For
Duration (Months) ? 3	Document Details
	Insured Documents
	Claim Documents
	Claim Reasons
	Nominees Relations

5.4. Insurance Policies

Insurance Dashboard Leads Agents Insurances	Claims Customers	Configurations			髨 🧭 Caneral Ins Company 👼
New Insurance Policy 🌣		Categories Sub Categories		•	1-5/5 < >
Name	Policy Number	Policy Time Periods	olicy Category	Sub Category	Policy Provider
Life Ins Policy	L00-INS-P1	Insurance Policy Insurance Buying For	fe Insurance	Term Life Insurance	General ins Company
Personal Health Ins Policy	PH-001-Ins	Document Details	ealth Insurance	Personal Health Insurance	General Ins Company
Family Health Ins Policy	FH-001-INS	Insured Documents	ealth Insurance	Family Health Insurance	General Ins Company
Vehicle Ins Policy	V001-INS-Pol005	Claim Reasons	ehicle Insurance	Third-Party Insurance	General Ins Company
Home Ins Policy	H-001-Property	Nominees Relations	roperty Insurance	Homeowner's Insurance	General Ins Company
Family Health Ins Policy Vehicle Ins Policy Home Ins Policy	FH-001-INS V001-INS-Pol005 H-001-Property	Claim Documents Claim Reasons Nominees Relations	eatth Insurance ehicle Insurance roperty Insurance	Famity Health Insurance Third-Party Insurance Homeowner's Insurance	Ceneral Ins Company General Ins Company Ceneral Ins Company

• You can create a new insurance policy by adding a policy number, selecting a policy category, and choosing a relevant subcategory. Based on the selected category, category-specific details will appear, allowing you to fill them, add the sum assured amount, and select necessary policy and claim documents.

III Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	
New Insurance Policy Personal Health Ins Policy •	Categories Sub Categories	
Name Personal Health Ins Policy INSURANCE POLICY Policy Number PH-001-Ins Policy Category Health Insurance Sub Category Personal Health Insurance Sum Assured § 150.00 You can add in	Policy Time Periods Insurance Policy Insurance Buying For Document Details Insured Documents Claim Documents Claim Reasons Nominees Relations surance and Claim-related of	POLICY PROVIDER DETAILS Policy Provider General Ins Company Phone +1 (650) 555-0111 Address 250 Executive Park Blvd, Suite 3400 San Francisco California (US) 94134 Hocuments United States
POLICY DOCUMENT Policy Documents Birth Certificate Voter ID card X PAN Card X Health Insurance Policy Details Policy Pricelist Policy Descriptions Te	rms & Conditions	Claim Documents Original Policy Certificate X IF Nomination is not valid, Atte X
Health Insured Age Between 20 to 50 Years		Coverage Type Individual O Family O Group Health Deductible \$ 250.00 Amount \$ 250.00
Out of Pocket Maximum This refers to the maximum amount an individual or family will have to pay for covere given policy period, typically a year. Once this limit is reached, the insurance company additional eligible expenses. The out-of-pocket maximum varies among plans and car deductibles, copayments, and coinsurance. Plans with lower out-of-pocket maximums premiums, while those with higher maximums may offer lower premiums.	d medical expenses in a typically covers all depend on factors like may have higher	Health History Similar to life insurance, health insurance providers assess an individual's health history to determine their risk profile. Factors such as pre-existing conditions, chronic illnesses, and past surgeries or hospitalizations may influence premiums and coverage options. Those with healthier histories may quality for lower premiums and more extensive coverage, while individuals with complex health issues might face higher costs and more limited coverage.
Prescription Drug Coverage Health insurance plans typically include coverage for prescription medications, but th coverage can vary widely. Some plans may have a formulary that lists covered drugs, more comprehensive coverage with fewer restrictions. Factors such as copayments, d coverage for brand-name versus generic drugs can affect the overall cost and accessi medications under the plan.	e extent of this while others may offer eductibles, and bility of prescription	Preferred Healthcare Provider Network Many health insurance plans have networks of healthcare providers, including doctors, hospitals, and specialists, with whom they have nepotated lower rates. Choosing healthcare providers within the network usually results in lower out-of-pocket costs for policyholders. Out-of-network care may still be covered but often at higher rates, with the possibility of increased deductibles and coinsurance. Some plans require referrals from primary care physicians to see specialists within the network.

• In the policy price list tab, you can select different policy time periods and add the corresponding premium amounts, allowing for flexible pricing based on the chosen duration and ensuring accurate premium calculation for each policy term.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations				
New Insurance Policy Personal Health Ins Policy 🏟	Categories Sub Categories				
Name Personal Health Ins Policy INSURANCE POLICY Policy Number PH-001-ins	Policy Time Periods Insurance Policy Insurance Buying For Document Details Insured Documents Claim Documents	POLICY PROVIDE Policy Provider	R DETAILS General Ins Company		
Policy Category Health Insurance Sub Category Personal Health Insurance Sum Assured \$ 150.00 POLICY DOCUMENT	Claim Reasons Nominees Relations	Phone Address	+1 (650) 555-0111 250 Executive Park Blvd, Suite 340 San Francisco United States	0 California (US)	94134
Policy Documents Birth Certificate X Voter ID card X PAN Card X Health Insurance Policy Details Policy Pricelist Policy Descriptions Ter	ms & Conditions	Claim Document	S Original Policy Certificate X	If Nomination is not valid, Atte ×	
Policy Time Period					Premium
1 Months					\$ 100.00 🍵
3 Months (Quarterly)					\$ 300.00 📋
4 Months					\$ 400.00 💼
6 Months					\$ 610.00 💼
Add a line					

• You can manage and add descriptions related to the policy, providing detailed information for better understanding and clarity.

III Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations				
New Insurance Policy Personal Health Ins Policy	Categories Sub Categories				
New Personal Health Ins Policy ● Name Personal Health Ins Policy INSURANCE POLICY Policy Number Policy Number PH-001-Ins Policy Category Health Insurance Sub Category Health Insurance Sub Category Personal Health Insurance Sub Category Personal Health Insurance Sum Assured \$ 150.00 Policy Documents Birth Certificate × Voter ID card × PAN Card × Health Insurance Policy Details Policy Descriptions Ter Policyholder: The person who owns the life insurance policy and pays the premiums. T Insured Individual: The person whose life is insured under the policy. In the event of the prevence with a Fungation offst, montane nummering and living expension:	Sub Categories Policy Time Periods Insurance Policy Insurance Buying For Document Details Insured Documents Claim Documents Claim Reasons Nominees Relations	POLICY PROVIDE Policy Provider Phone Address Claim Document the insured individua the insured individual.	Ceneral Ins Company +1 (650) 555-0111 250 Executive Park Blvd, Suite 34 San Francisco United States Coriginal Policy Certificate X I or someone else, such as a spous any pays out a death benefit to the The death benefit is specified in th	00 California (US) If Nomination is not valid, e or parent. : designated beneficiaries. e policy and can be used by	94134 Atte ×
expenses, such as funeral costs, mortgage payments, and living expenses. Premiums: The periodic payments made by the policyholder to the insurance company	y to keep the policy in force.	Premiums can be paie	d monthly, quarterly, annually, or ir	n a single lump sum, depenc	ling on the policy terms.

• You can add policy-related terms and conditions, ensuring clear documentation of the rules and guidelines associated with the policy.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations				
New Insurance Policy Personal Health Ins Policy 🌣	Categories Sub Categories				
Name Personal Health Ins Policy	Policy Time Periods Insurance Policy Insurance Buying For Document Details Insured Documents	POLICY PROVIDE	R DETAILS		
Policy Number PH-001-Ins Policy Category Health Insurance	Claim Documents Claim Reasons Nominees Relations	Policy Provider Phone	General Ins Company +1 (650) 555-0111		
Sub Category Personal Health Insurance Sum Assured \$ 150.00 POLICY DOCUMENT		Address	250 Executive Park Blvd, Suite 340 San Francisco United States	00 California (US)	94134
Policy Documents Birth Certificate × Voter ID card × PAN Card × Health Insurance Policy Details Policy Pricelist Policy Descriptions Ter	rms & Conditions	Claim Document	S Original Policy Certificate X	If Nomination is not valid, Atte 3	×
Policy Details: The policy document begins with basic information such as the policy n Coverage Details: This section outlines the specifics of the coverage provided by the p endorsements included in the policy.	number, issue date, and the national state of control of the state of control of the state of th	ames of the insured i overage (e.g., term li thly, annually), and th	ndividual and the policyholder. fe, whole life), the coverage amoun	t (death benefit), and any optional	riders or
Coverage Term: For term life insurance policies, the document details the duration of premiums are paid.	coverage, such as 10, 20, or 3	30 years. For perman	ent life insurance policies, coverage	typically lasts for the insured's ent	ire lifetime as long as
Beneficiaries: The policy outlines the process for designating beneficiaries who will re as instructions for updating beneficiary designations.	eceive the death benefit upor	n the insured individu	al's death. It may include provision	s for naming primary and continger	t beneficiaries, as well

5.5. Insurance Buying For

III Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	
New Insurance Buying For 🌣	Categories Sub Categories	•
Buying For	Policy Time Periods	Policy Category
Self	Insurance Policy Insurance Buying For	Life Insurance
Family	Document Details	Health Insurance
Individual	Insured Documents	Health Insurance
Car	Claim Reasons	Vehicle Insurance
Home	Nominees Relations	Property Insurance

• Manage insurance buying details for different categories, ensuring organized tracking and streamlined processing of purchases based on category.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations
New Insurance Buying For Family 💠	Categories Sub Categories
Buying For Family	Policy Time Periods Insurance Policy Insurance Buying For
INSURANCE CATEGORY	Document Details Insured Documents POLICY PROVIDER DETAILS
Policy Category Health Insurance	Claim Documents Policy Provider General Ins Company Claim Reasons Nominees Relations

5.6. Document Details

5.6.1. Insured Documents

• A default list of insured documents is available, and you can add additional documents as needed for comprehensive coverage.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	Q ⁶ C ⁷ Ceneral	l Ins Company 🦉
New Insured Document 🌣	Categories Sub Categories	•	1-8/8 < >
Document Type	Policy Time Periods		Color
Birth Certificate	Insurance Policy Insurance Buying For		-
Voter ID card	Document Details		
PAN Card	Insured Documents		
Aadhaar Card	Claim Documents		
Driving License	Nominees Relations		
Passport			
Recent Photograph			
Credit or Debit Card Details for Online Banking			

5.6.2. Claim Documents

• A default list of claim documents is provided, with the option to add additional documents for complete coverage and accurate processing.

III Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations		髨 🤨 General Ins Company 😽
New Claim Document 🌣	Categories Sub Categories	•	1-7/7 < >
Document Type	Policy Time Periods		Color
Original Policy Certificate	Insurance Policy Insurance Buying For		
Pass Book duly attested	Document Details		
Death Certificate	Insured Documents		
 If Nomination is not valid, Attested Copy of Legal Heirs hip Certificate 	Claim Reasons		
Third-Party Claims	Nominees Relations		
 FIR (in case of fatal injuries/accidents or third party liabilities) 			
A copy of PAN Card (if the claim amount is more than Rs. 1 Lakh)			

5.7. Claim Reasons

• Default claim reasons are available, and you can add new claim reasons based on specific requirements for better customization.

III Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations		髨 🍕 🥵
New Claim Reasons 🌣	Categories Sub Categories	· · · · · · · · · · · · · · · · · · ·	1-6/6 < >
□ Name	Policy Time Periods		Color
Maturity of the Policy	Insurance Policy Insurance Buying For		
Surrender of the Policy	Document Details		
Discounted Value in Policy	Insured Documents		
 Death of the Insured 	Claim Reasons		
Paid up of Lapsed Policy	Nominees Relations		
Other			

5.7. Nominee Relations

• A default list of nominee relations is available, and you can add new relations based on specific requirements for customization.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations
New Nominee Relation 🌣	Categories Sub Categories
□ Name	Policy Time Periods
Spouse	Insurance Policy
□ Son	Document Details
Daughter	Insured Documents
Father	Claim Reasons
Mother	Nominees Relations
Brother	
□ Sister	
Grandfather	
Grandfather	
Friend	
C Relative	
Business partner	

6. Website Quotation

- Details of a request for an insurance quote.
- Customers can login and add personal details such as name, phone, and email.
- Select date of birth, and age is automatically calculated based on it.
- Choose the policy provider, with policy categories available based on the selected provider.
- Select a category, then choose a subcategory based on the selected category.
- Add specific requirements in the notes section.
- Option to attach files is available.
- The "Terms & Conditions" option is available in the backend settings. Click 'Insurance Management' and set the 'Terms and Conditions' boolean to true.

Your Logo Home Quote Request Track Request Contact us	Q 4 +1 (650) 555-0111 Sign in Contact Us							
Insurance Quote Request								
Life Insurance Quote Request	Life Insurance Quote Request							
Personal Information								
Name Brandon Freeman	Email* brandon.freeman55@example.com							
Date of Birth* 02/05/2012	Phone* (355)-687-3262							
Gender* Male	Automatically calculate age by entering the date of birth							
Insurance Type	Notes							
Policy Provider* General Ins Company	Life insurance is a contract between an individual (the policyholder) and an insurance company, where the insurer promises to pay a designated beneficiary a							
Policy Category* Life Insurance	sum of money (the death benefit) upon the death of the insured person. In exchange, the policyholder pays premiums either regularly or as a lump sum. The							
Sub Category Term Life Insurance	purpose of life insurance is to provide financial protection and peace of mind,							
Users can select a policy and view available categories specific to each p	olicy Users can directly request an							

• Click the submit button to finalize the request.



• A unique number is generated, allowing the customer to add the "**Track Request**" by entering this number to view the submitted quotation details.

YourLogo Home Quote Request Track Request Contact us	Q & +1 (650) 555-0111 Sign in Contact Us
Track Your Quote	
FbjjNRhJ-hc Enter Your Website Reference Number	
Users can enter a reference number	

• Track request details allow customers to view the status and information of their submitted quotations using a unique tracking number.

Your Logo Home Quote Request Track Request Contact us	Q 4 +1 (650) 555-0111 Sign in Contact Us
Quote for	- Life Insurance Quote Request
Reference Number: FbjjNRhJ-hc	Draft
Personal Information	Insurance Policy Details
Name: Brandon Freeman	Policy Provider: General Ins Company
Date of Birth: 05/02/2012 Age: 12 Years	Policy Category: Life Insurance
Gender: Male	Sub Category: Term Life Insurance
Phone: (355)-687-3262	
Email: brandon.freeman55@example.com	

Additional comments or questions

Life insurance is a contract between an individual (the policyholder) and an insurance company, where the insurer promises to pay a designated beneficiary a sum of money (the death benefit) upon the death of the insured person. In exchange, the policyholder pays premiums either regularly or as a lump sum. The purpose of life insurance is to provide financial protection and peace of mind, ensuring that the beneficiaries will have financial support in the event of the policyholder's death.

Tracking

These are Estimate Tracking Details



Terms & Conditions

7. Agents



• Users can manage agents by setting the '**Agent**' boolean to true. Once enabled, the insurance tab becomes visible, showing the insurances created by the agent. Additionally, the upper smart button displays all commission bills related to the agent.

Insurance Dashboa	ard Leads Agents Insurances	Claims Customers Configurations					Q ⁶	C ⁷ General Ins Com	npany 🧧
New Agents Azure Interior, Colle	een Diaz 🌣	Ê	Meetings 🗙 Op	oportunities \$ Sales	Invoiced \$ Agen \$ 86.	t Bills 25		2/4	4 < >
💿 Individual 🔿 Compa	any					Send message Log	note Activities	Q & 8º	Follow
Colleen Diaz	:						May 12, 2024		
Azure Interior – US12345	5677	Upload Agents / Azure Interior, Colleen Diaz		Q. Searc		•		1-2	/2 < >
4557 De Silva S	St	Number	Due Date	Activitie	5	Tax Excluded	Total Payment	Status	7
Fremont	California (US)	BILL/2024/05/0004	In 46 days	0		\$-25.00	\$ -28.75 Not Paid	Posted	
United States		BILL/2024/05/0002	In 46 days	Ø		\$-50.00	\$-57.50 Not Paid	Posted	
Tax ID / US12345677									
Agent						\$ -75.00	\$-86.25		
		Trac	e.g. Mister		I				
		Tags	e.g. "B2B", "VI	IP", "Consulting",			May 10, 2024		
Insurance Details	Contacts & Addresses Sales & Pu	rchase Invoicing Internal Notes				Mitchell Admin	4 days ago		
Insurance	Policy Holder	Policy Category	Issue Date	Expiry Date	Commission Bill	Hello! This is an	n example of user comment.		
INS/NO/000001	Azure Interior, Nicole Ford	Life Insurance	05/08/2024	08/08/2024	BILL/2024/05/0002		May 9, 2024		
INS/NO/000004	Gemini Furniture, Jesse Brown	Property Insurance	05/08/2024	11/08/2024	BILL/2024/05/0004	Marc Demo - 5 da	ays ago		
						Hello! This is an	n example of incoming email.		

8. Leads

8.1. Requests

• All customer leads are visible, with the option to create leads either directly from the website or through the backend for efficient management.

Insurance Dashboard Leads Agents Insurance	s Claims Customers Confi	gurations				髨 6 🥙 General Ins Company 👹
New Generate Leads Lei Requests		Q Search		-	1-13/13 <	
Lead	Email		City	Country	Salesperson	Sales Team 📫
Modernize old offices	fseiller1@theglobeandmail.c	m	Wurigelebur	Indonesia		
Furnitures for new location	ngrabert2@dailymail.co.uk		Tokyo	Japan		
 Need a price: urgent 	ikirvell3@gnu.org		Dahu Satu	Indonesia		
Custom Desks (100 pieces)	credford4@salon.com		Odoyev	Russian Federation	🐻 Mitchell Admin	Sales
Cleaning subscription	eespinazo5@reuters.com		Amsterdam	Netherlands		
 Need info about pricing 	aakreda@theglobeandmail.c	mc	London	Greece		
Recurring delivery contract	max123@itconsult.com		Milan	Italy		
 Acadia College Furnitures 	GastonRochon@example.com	n	Brussels	France		
Club Office More Desks	jdunagan@leclub.example.co	m	Paris	France		
Product Catalog	logan_expert@gmail.exampl	e.com	London	United Kingdom	😽 Mitchell Admin	Sales
Design Software	md@oilcompany.fr		Bordeaux	France	😸 Mitchell Admin	Sales
Club Office Furnitures	jdunagan@leclub.example.co	m	Paris	France	S Mitchell Admin	Sales
Life Insurance Quote Request	brandon.freeman55@examp	e.com				

- Lead request details provide information on customer inquiries, including contact information, requirements, and source, helping to track and manage potential sales opportunities effectively.
- If a lead is created directly from the website, a unique website reference number will be provided, allowing for easy tracking and reference to monitor the lead's progress and status throughout the process.
- When a quote request is created from the website, the customer will be notified via email with the request details, including the next steps, ensuring clear communication and guidance throughout the process.
- In the Insurance Details tab, there are three stages: Draft, In Progress, and Completed, to track the status of the insurance process.

Insurance Dashboard Leads Agents Insurances Claims Customers C		髨 6 🧟 7 General Ins Company 👹
New Leads Life Insurance Quote Requests Pipeline	Similar Lead	13/13 < >
Convert to Opportunity Lost		Send message Log note Activities Q % A ⁰ Follow
Life Insurance Quote Request		Today
Probability If a lead is created directly from the website, a w 42.96 % reference number will be available for tracking a	ebste di reference.	Coord Coord Contract age Lead Enrichment (based on email address) No company data found based on the email address or email address is one of an email provider. No credit was consumed.
Customer ? Company Name ? Address Street	Email brandon. Freemans Sole example.com Email cc Uhite a quote request is created from the website, notify the customer via email with the details and next steps.	Info@yourcompany.com - 6 minutes ago Subject: Quote Reference Number : FbjjNRh.J-hc Yuu Cm lead
Street 2 City State ZIP Country Webdite ? on bitter//www.edeo.com	Phone (355)-687-3262 Mobile	Life Insurance Quote Request
Sales Team	Priority 合合合 Tags ?	I hope this email finds you well. I am writing to provide you with the details of the quotation you requester email, you will find comprehensive information regarding the quotation.
Internal Notes Insurance Details Extra Info	Draft In Progress Completed	Quore exercitade realization of the comment of the
Website Ref No FbijNRhJ-hc Date of Birth 05/02/2012 Age 12 Years Gender Male		Should you require any clarification or have any questions regarding the hesitate to contact us. Our team is readily available to assist you and add may have. Thank you for considering. We appreciate the opportunity to serve you a possibility of working together. <u>View Details</u>
Policy Category Life Insurance Sub Category Term Life Insurance Lead Tracking Details	Policy Provider General Ins Company Insurance Policy Buying For	
Date Description		
05/15/2024 Quotation request for Life Insurance Quote Request succes Add a line	sfully submitted	

8.2. Convert to Opportunity

• "**Convert to Opportunity**" allows transforming a lead or quote into a sales opportunity, advancing it for further follow-up and action.



- "Create Insurance Direct From Lead" enables users to generate insurance policies directly from a lead, streamlining the conversion process.
- Once the lead is marked as '**Won**', the '**Create Insurance**' button becomes visible, allowing users to generate insurance from the lead.
- Click the '**Create Insurance**' button to automatically populate basic details. You can then add the issue date, select the policy, choose the time period, view corresponding policy and claims amounts, and finally click '**Create Insurance**' to generate the record.

III Insurance Dashboard Leads Agents Insurances Claims Customers Config	jurations		🛋 🔆 🖓 🖓
New Pipeline Life Insurance Quote Request Ø	Insurance Details		×
New Quotation Lost Create Insurance			Q
Life Insurance Quote Request Expected Revenue Probability S0.00 at 100.00	LEAD DETAILS Lead Life insurance Quote Request POLICY HOLDER DETAILS	INSURANCE ISSUE DATE Issue Date 05/09/2024	
Customer ⁷ Brandon Freeman Sa Email brandon freeman5S@example.com Ex Phone (355)-667-3202 Ta	Policy Holder Brandon Freeman Gender Male Date of Birth 02/05/2012 Age 12 Years	Email brandon.freeman55@example.com Phone (355)-687-3262	r email add
Internal Notes Insurance Details Extra Information POLICY HOLDER DETAILS	Policy Category Life Insurance Sub Category Term Life Insurance Insurance Policy Life Ins Policy	Policy Provider General ins Company Policy Time Period 3 Months (Quarterly) Policy Amount \$ 300.00 Child Survey \$ 500.00	
Website Ref No W_w_d_pE_K3Q Date of Birth 02/05/2012 Age 12 Years Gender Male	Basic details are auto-populat Create Insurance Cancel as time parted, and signs corre	Lemin Anisouri 5 150:00 Manager Mitchell Admin ed: you can add the issue date. servets a policy, choose soportion and the issue date. servets a solicy.	quotation
POLICY DETAILS Policy Category Life Insurance Po Sub Category Term Life Insurance In	olicy Provider General ins Company surance Policy Life ins Policy	Quote Reference Number: Iw_d_pE_K30 Name: Brandon Freeman Email: brandon Freeman	garding the
Bu Lead Tracking Details	uying For Self	Phone: (355)-687-3262 	e any questions i

9. Insurances

Insurance Dashb	oard Leads Agents Insurances Claims	Customers Configurations					📢 🛃 Ger	ieral Ins Company 🛛 🝯
New Insurance 🌣		Q șea	rch		•		1-7/7 < >	
Insurance	Policy Holder	Policy Category	Sub Category	Insurance Policy	Policy Time Period	Issue Date	Expiry Date	Status
INS/NO/000001	Azure Interior, Nicole Ford	Life Insurance	Term Life Insurance	Life Ins Policy	3 Months (Quarterly)	05/08/2024	08/08/2024	Expired
INS/NO/000002	Deco Addict, Floyd Steward	Health Insurance	Personal Health Insurance	Personal Health Ins Policy	4 Months	05/09/2024	09/09/2024	Expired
INS/NO/000004	Gemini Furniture, Jesse Brown	Property Insurance	Homeowner's Insurance	Home Ins Policy	6 Months	05/08/2024	11/08/2024	Confirmed
INS/NO/000005	Gemini Furniture, Edwin Hansen	Life Insurance	Term Life Insurance	Life Ins Policy	3 Months (Quarterly)	05/01/2024	08/01/2024	Running
INS/NO/000006	Azure Interior, Nicole Ford	Life Insurance	Term Life Insurance	Life Ins Policy	3 Months (Quarterly)	05/08/2024	08/08/2024	New
INS/NO/000007	Deco Addict, Floyd Steward	Health Insurance	Personal Health Insurance	Personal Health Ins Policy	3 Months (Quarterly)	05/08/2024	08/08/2024	New
INS/NO/000010	Brandon Freeman	Life Insurance	Term Life Insurance	Life Ins Policy	3 Months (Quarterly)	05/09/2024	08/09/2024	New

- If an agent is required, select the agent and access their details, with agent bill authorization available. If no agent is needed, the agent details section remains hidden.
- Agent commission offers two options: '**Fixed**' or '**Percentage**'. The commission type selected determines how the bill is generated, either based on a fixed amount or a percentage of the policy.
- If the agent is set to true, the "Create Agent Commission Bill" option becomes visible for commission processing.
- Policy details are automatically populated based on the lead record. If not, you can create insurance manually, select the policy category, choose the relevant subcategory, and then select the policy. Subcategory-wise policy details will be available for further customization.
- If you select health insurance, you can choose personal health insurance, where insured details are available for you to fill in. Alternatively, selecting family health insurance allows you to add multiple insured details for each family member.
- In payment details, the customer has the option to choose between fixed (one-time) payment or installment-based payment, providing flexibility in how the insurance premium is paid.
- If fixed, the total policy amount is paid in one lump sum. If installment-based, the policy amount is divided equally based on the policy time period, with each installment reflecting a portion of the total amount.

Insurance Dashboard Leads Agents Insurances Claims Customers Co	nfigurations
New Insurance A C	$\blacksquare_0^{\text{Documents}} \equiv_0^{\text{Claims}}$
Confirm Create Agent Commission Bill	New Confirmed Running Expired
New	
POLICY HOLDER DETAILS	Email addison alson 20@ayampla.com
Gender Male	Phone (223)-399-7637
Date of Birth 05/09/1956 Age 68 Years	Address 77 Santa Barbara Rd
	Street 2 Pleasant Hill California (US) 94523 United States
POLICY DETAILS	
Policy Category Health Insurance	Issue Date 05/16/2024
Sub Category Personal Health Insurance	Expiry Date 08/16/2024 Policy Time Period 3 Months (Quarterly)
Buving For Family	Policy Amount \$ 300.00
Policy Provider General Ins Company	Manager 🛛 🛃 Mitchell Admin
If an agent is needed, select one and access their details; agent bill AGENT DETAILS authorisation is available. Otherwise, agent details remain hidden.	AGENT COMMISSION DETAILS
Agent Required	Commission Type 💿 Fixed 🔿 Percentage
Agent Azure Interior, Colleen Diaz	Fixed Amount \$ 50.00
Phone (255)-595-8393	
If you choose health insurance and personal insurance, the insured details become visible	
Insured Deco Addict, Addison Olson	Blood Group B-
Gender Male	Height(cm) 145
Date of Birth 05/09/2012 Age 12 Years	Weight(kg) 45
Marital Status Single	Birthmark Black circle
HEALTH INSURANCE POLICY DETAILS	
Coverage Type Individual	Deductible Amount \$ 150.00
Insured Age Between 5 to 20 Years	Co-pay Amount \$ 50.00
Out of Pocket Maximum This refers to the maximum amount an individual or family will have to pay for covered medical expenses in a given policy period, typically a year. Once this limit is reached, the insurance company typically covers all additional eligible expenses. The out-of-pocket maximum varies among plans and can depend on factors like deductibles, copayments, and coinsurance. Plans with lower out-of-pocket maximums may have higher premiums, while those with higher maximums may offer lower premiums.	Prescription Drug Coverage Health insurance plans typically include coverage for prescription medications, but the extent of this coverage can vary widely. Some plans may have a formulary that lists covered drugs, while others may offer more comprehensive coverage with fewer restrictions. Factors such as copayments, deductibles, and coverage for brand-name versus generic drugs can affect the overall cost and accessibility of prescription medications under the plan.
Health History of Insured Similar to life insurance, health insurance providers assess an individual's health	Preferred Healthcare Provider Network Many health insurance plans have networks of healthcare providers. including
history to determine their risk profile. Factors such as pre-existing conditions, chronic illnesses, and past surgeries or hospitalizations may influence premiums and coverage options. Those with healthier histories may qualify for lower premiums and more extensive coverage, while individuals with complex health issues might face higher costs and more limited coverage.	doctors, hospitals, and specialists, with whom they have negotiated lower rates. Choosing healthcare providers within the network usually results in lower out-of- pocket costs for policyholders. Out-of-network care may still be covered but often at higher rates, with the possibility of increased deductibles and coinsurance. Some plans require referrals from primary care physicians to see specialists within the network.
Payment Details Policy Descriptions Terms & Conditions Insurance Nomin	20
TYPES OF PAYMENTS	PAYMENT DETAILS
Premium Type O Fixed O Installment	Total Policy Amount \$350.00 Monthly Instalments \$116.67
	Claim Amount \$ 150.00
If you choose instalment premium type, the insurance amount is calculated based on the policy's time period,	

- Select family or group insurance and add multiple insured persons as needed.
- If a fixed premium type is selected, the insurance amount remains constant.

	Dashboard Lea	ads Agents Ir	isurances Claims	Customers Co	onfigurations				
New New 🌣 🕻	Ca						ocuments E Claims		
Confirm Create	e Agent Commis	sion Bill					New Confirmed	Running	Expired
New									
POLICY HOLDER D		lison Olson			Email addison	alcon20@avample			
Gender	Vale				Phone (223)-39	.00501128@exampte			
Date of Birth	15/09/1956	Age 6	8 Years		Address 77 Sant	a Barbara Rd			
	.5,05,1550	Age o			Street 2				
					Pleasan	t Hill	California (US)	94523	
					United S	States			
POLICY DETAILS									
Policy Category	Health Insurar	nce	7		Issue Date	05/16/2024			
Sub Category	Family Health	Insurance			Expiry Date	11/16/2024	-		
Insurance Policy	Family Health	Ins Policy	\mathbf{N}		Policy Time Period	6 Months			
Buying For	Family		\neg		Policy Amount	\$ 600.00			
Policy Provider	General Ins Co	mpany	$\langle \rangle$		Manager	For age	min nts with a percentage-	based commiss	ion, comr
AGENT DETAILS					AGENT COMMISSIO	amount N DETAILS	s are automatically cal	culated based o	n policy a
Agent Required				\backslash	Commission Type	Fixed O Pero	entage		
Agent	Azure Interior,	Colleen Diaz		\mathbf{X}	Commission	25.00			
Phone	(255)-595-8393	If you select	t family or group ins d multiple insured p	surance, ersons	Total	\$ 150.00			
INSURED DETAILS		you our au	a manapio moarea p						
Insured	Date of	Age	Gender	Blood Group	Height(cm)	Weight(kg)	Birthmark	Marital Status	
Azure Interior,.	05/14/2012	12 Years	Male	A+	145	25	non	Single	ê
Azure Interior,	05/14/1999	25 Years	Female	B-	132	48	Black Til	Married	ê
Deco Addict, A.	05/09/1956	68 Years	Male	AB+	138	56	Non	Married	ê
Add a line									
HEALTH INSURAN	CE POLICY DETA				Deductible Amoun	t \$ 150.00			
	Tunity	_			Co-pay Amount	\$ 50.00			
and the set of the set						COVERAGE			
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This refers to the covered medical of reached, the insu	laximum maximum amou expenses in a giv rance company l	unt an individual o ven policy period, typically covers all	r family will have to p typically a year. Once additional eligible e	oay for e this limit is xpenses.	Health insurance p the extent of this o lists covered drugs	lans typically inclue coverage can vary v , while others mav	le coverage for prescrip videly. Some plans may h offer more comprehens	tion medications have a formulary ive coverage wit	, but that h
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This refers to the covered medical of reached, the insu The out-of-pocket deductibles, copa maximums may h offer lower prem	taximum maximum amou expenses in a giv rance company l t maximum varie ayments, and coi ave higher prem iums.	unt an individual o ven policy period, cypically covers all es among plans an nsurance. Plans w iums, while those	r family will have to p typically a year. Once additional eligible e d can depend on fact ith lower out-of-pock with higher maximu	oay for e this limit is xpenses. tors like ket ms may	Prescription Drug Health insurance p the extent of this c lists covered drugs fewer restrictions. brand-name versus prescription medic	lans typically inclue coverage can vary v , while others may Factors such as cop generic drugs can ations under the p	le coverage for prescrip videly. Some plans may h offer more comprehens vayments, deductibles, a affect the overall cost a an.	tion medications have a formulary ive coverage wit and coverage for and accessibility o	, but that h of
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This refers to the covered medical a reached, the insu The out-of-pocked deductibles, copa maximums may h offer lower prem Health History to determ History to determ chronic illnesses, and coverage opt premiums and me issues might face	taximum maximum amot expenses in a gin rance company I t maximum varie gyments, and coi ave higher prem iums. of insured urance, health in ine their risk pru- and past surger cions. Those with or extensive coi higher costs and lis Policy De: NTS	Int an individual o ven policy period, cypically covers all sa among plans an nsurance. Plans w iums, while those surance providers offile. Factors such les or hospitalizat healthier historie werage, while indi d more limited cov scriptions Ter	r family will have to p typically a year. Once additional eligible e d can depend on fact th lower out-of-pock with higher maximu assess an individual as pre-existing cond ons may influence p s may qualify for low riduals with complex rerage.	pay for e this limit is xpenses. tors like ket ms may 's health itions, remiums ver : health Insurance Nomir	Prescription Drug Health insurance p the extent of this c lists covered drugs fewer restrictions. brand-name versus prescription medic Preferred Health Many health insur doctors, hospitals, Choosing healthca pocket costs for po at higher rates, wi plans require refer network.	lans typically inclu coverage can vary v , while others may Factors such as cop ; generic drugs can ations under the pi care Provider Ne and specialists, wil re providers within blicyholders. Out-o rals from primary o	de coverage for prescrip ridely. Some plans may lo offer more comprehens ayments, deductibles, a affect the overall cost a an. twork tworks of healthcare pro- h whom they have nego the network usually res increased deductibles a are physicians to see sp	tion medications have a formulary ive coverage wit and coverage for and accessibility of bitated lower rate sults in lower out be covered but to and coinsurance. ecialists within th	s, but that h of es. -of- ften Some ne
This refers to the covered medical a reached, the insu The out-of-pocked deductibles, copa maximums may h offer lower prem Health History of Similar to life insu history to determ chronic illnesses, and coverage opt premiums and me issues might face Payment Detail TYPES OF PAYMEP Premium Type	taximum maximum amou expenses in a giv rance company l t maximum varie yaments, and coi ave higher prem jums. of finsured urance, health in hine their risk pre and past surgeri- cions. Those with ore extensive co higher costs and so policy Dei yrs Fixed Ins	Int an individual o ren policy period, cypically covers all sa among plans an nsurance. Plans w iums, while those surance providers offie. Factors such les or hospitalizat healthier historie werage, while indi d more limited cov scriptions Ter tallment	r family will have to p typically a year. Once additional eligible e d can depend on fact th lower out-of-pock with higher maximu assess an individual as pre-existing cond ons may influence p s may qualify for low iduals with complex rerage.	bay for e this limit is xpenses. tors like ket ms may 's health litions, remiums ver . health Insurance Nomir	Prescription Drug Health insurance p the extent of this c lists covered drugs fewer restrictions. brand-name versus prescription medic Preferred Health Many health insur. doctors, hospitals, Choosing healthca pocket costs for p at higher rates, will plans require refer network.	alas typically inclu coverage can vary v , while others may Factors such as cop ; generic drugs can ations under the pi care Provider Ne and specialists, wit re providers within olicyholders. Out- olicyholders. Out- olicyholders. Out- nals from primary o	de coverage for prescrip ridely. Some plans may lo offer more comprehens agments, deductibles, a affect the overall cost a an. twork tworks of healthcare pro h whom they have nego the network usually res 5-network care may still increased deductibles a are physicians to see sp	tion medications have a formulary will coverage with and coverage for and accessibility of triated lower rate sults in lower out be covered but oo to covered but oo hot coinsurance. ecialists within th	;, but that h of es. -of- ften Some ne
This refers to the covered medical reached, the insu The out-of-pocked deductibles, copa maximums may h offer lower prem Health History of Similar to life insu history to determ chronic illnesses, and coverage opt premiums and mc issues might face Payment Detail	taximum maximum amot expenses in a gin rance company l t maximum varie yave higher prem jums. yave higher prem jums. pri nsured urance, health in inie their risk pri and past surgeri and past surgeri and past surgeri ions. Those with ore extensive co higher costs and ls Policy De: wrs is in the past of the past fixed in the past surgeries of the past	unt an individual o ven policy period, cypically covers all es among plans an nsurance. Plans w iums, while those surance providers ofile. Factors such healthier historie verage, while indi d more limited cov scriptions Ter tallment	r family will have to p typically a year. Once additional eligible e d can depend on fact th lower out-of-pock with higher maximu assess an individual as pre-existing cond ons may influence p is may qualify for low viduals with complex rerage. ms & Conditions	pay for e this limit is xpenses. tors like ket ms may 's health itions, remiums ver . health Insurance Nomir	Prescription Drug Health insurance p the extent of this c lists covered drugs fewer restrictions. brand-name versus prescription medic Preferred Health Many health insur doctors, hospitals, Choosing healthca pocket costs for p at higher rates, with plans require refer network. PAYMENT DETAILS Total Policy Amour Claim Amount	alas typically inclu coverage can vary v , while others may Factors such as cop ; generic drugs can ations under the pi care Provider Met and specialists, wit re providers within olicyholders. Out-ol h the possibility of rals from primary of the special state of the second state of the	de coverage for prescrip ridely. Some plans may l offer more comprehens bayments, deductibles, a affect the overall cost a an. twork tworks of healthcare pro h whom they have nego the network usually res -network care may still increased deductibles a are physicians to see sp	tion medications have a formulary will coverage with and coverage for and accessibility of triated lower rate sults in lower out be covered but o and coinsurance. ecialists within th	;, but that h of es. -of- ften Some ne

• If the insurance type is set to vehicle insurance, vehicle-related details become visible, allowing you to fill in the required information.

🔜 Insurance	Dashboard	Leads A	Agents	Insurances	Claims	Customers	Configura	ations						
New Insurance INS/NO/00	00013 🌣									a ==	Docume 0	nts E Claims		
Confirm Creat	te Agent Com	mission Bil	u								Nev	V Confirmed	Running	Expired
	00001	3												
Policy Holder	Comini Euroit	uro Eduio	Upprop				Em	ail	adwia baas	an[0@avama	la com			
Conder		ure, cowin	nansen				Dha		edwin.nanse	ensowexamp	le.com			
Gender	Male						Pho	one	(943)-352-2					
Date of Birth	05/08/1988		Age	36 Years			Ado	iress	317 Fairchile	d Dr				
									Fairfield		Ca	alifornia (US)	94535	
									United State	es				
POLICY DETAILS			_									1		
Policy Category	Vehicle Ins	surance					Poli	icy/Cer	tificate No	CA5445700	1			
Sub Category	Third-Party	y Insurance					Pre	vious P	olicy No	CDIKJH6587	7			
Insurance Policy	Vehicle Ins	Policy					lssu	ie Date		05/09/2024				
Buying For	Car						Exp	iry Dat	e	09/09/2024				
Policy Provider	General In	s Company					Pol		e Period	4 Months				
							Pol	icy Amo	ount	\$ 400.00				
							Mai	nager		Mitchel 🍯	l Admin			
AGENT DETAILS							AGE	ENT COI		ETAILS				
Agent Required							Con	nmissio	n Type 👩	Fixed O Pe	rcentao	e		
Agent	Azure Inter	rior, Colleer	n Diaz				Fixe	od Amo	unt co	25.00				
Phone	(255)-595-8	393							une șz	25.00				
Payment Deta	ils Vehicl	e Insurance	e Policy I	Details V	ehicle Ima	ages Polic	y Descripti	ons	Terms & Co	onditions	Insuran	ce Nominee		
TYPES OF PAYME	ENTS						PAY	MENT [DETAILS					
Premium Type	○ Fixed ○	Installmen	nt				Tot	al Polic	y Amount	\$425.00 M	onthly	Instalments \$ 10	06.25	
							Clai	im Amo	unt	\$ 150.00				

- Vehicle insurance policy details include information about the insured vehicle, coverage, terms, conditions, and associated premiums.
- When a policy is selected, the required document list becomes automatically available. You can upload the necessary documents through the document smart button. Once all documents are uploaded and verified, click '**Confirm**'; otherwise, a warning message appears.

Insurance Da											🖅 🛛 General Ins Company 🧧	3
New Insurance INS/NO/0000	After clicking the "co	onfirm" button, required docu ad and verify documents; ot	ments for the selected policy ar herwise, a warning message	C Docume	ents						1/1 < 0	>
	appears, halting the	process.			and and	Duralas	Furthered	contamo a	toronte Astubios		O @ 01 Fellend	
Confirm				Ne	w Confirmed	Running	Expired	Send message	Log note Activities		Q 🔌 🖂 ' Followi	лg
INS/NO/0	00013		New Insurance / INS/NO/000013 Documents O		c	Search			•			1
POLICY HOLDER DE	ETAILS		Insured No	Policy Holder			Docume	nt Type	Document	Status		
Policy Holder Ge	emini Furniture, Edwin Hanse	n	INS/NO/000013	Gemini Furniture, Edwin Har	nsen		Aadhaa	Card		Verified		
Gender Ma	ale		INS/NO/000013	Gemini Furniture, Edwin Hai	nsen		Driving	icense	▲ 02_c_policy3.png	Rejected	Resubmit	
Date of Birth 05	5/08/1988 Age	a 36 Years	INS/NO/000013	Gemini Furniture, Edwin Har	nsen		Recent	hotograph	▲ 04_agent2.png	Draft	Verified Rejected	
POLICY DETAILS												
Policy Category	Vehicle Insurance											_
Sub Category	Third-Party Insurance		Previous Policy P	CDIKJH6587								
Insurance Policy	Vehicle Ins Policy		Issue Date	05/09/2024								
Buying For	Car	\backslash	Expiry Date	09/09/2024								
Policy Provider	General Ins Company	\mathbf{X}	Policy Time Perio	od 4 Months								
When	n selecting a vehicle-related	insurance policy, you can co	Policy Amount	\$ 400.00								
for you	our specific vehicle.	aans, ensuring accurate cove	Manager	Mitchell Admir	1							
AGENT DETAILS			AGENT COMMISS	ION DETAILS								
Agent Required	0		Commission Type	e 🗿 Fixed 🔿 Percentad	le							
Agent A	Azure Interior, Colleen Diaz		Fixed Amount	\$ 25.00								
Phone ((255)-595-8393		Commission Bill	BILL/2024/05/0007								
Payment Details	Vehicle Insurance Policy	/ Details Vehicle Images	Policy Descriptions Term	ns & Conditions Insurar	nce Nominee							
	DETAILS											
Vehicle	Levus		VIN No	LIIVSDES457								
Model	PY .		Registration No	DC 2514 JK								
Year of MEG	2005		Place of Registra									
Cubic Capacity	2 540		Usage of Vehicle	Personal Co	mmercial							
Seating Capacity	2,540		Gauge of Venicle		minerciat							
Seating Capacity	5		Coverage Type	comprehensive								
VEHICLE INSURED D	DECLARED VALUES											
For the Vehicle	\$ 152.00		Electric Accessor	ries \$ 25.00								
For Trailer	\$ 0.00		Value of CNG/LP	G Kit \$ 35.00								
Non Electric	\$ 20.00		Total IDV Value	\$ 232.00								
Accessories												
SCHEDULE OF PREN	MIUMS											
OWN DAMAGE PREP	MIOM		THIRD PARTY LIA	BILITT PREMIUM								
Basic OD	\$ 5.00		Basic TP Liability	\$ 32.00								
Package Premium	\$ 12.00		PA Cover for Ow Driver	ner- \$ 25.00								
Service Tax	\$ 8.00		Package Premiu	m \$ 45.00								
Special Discount (-)	\$ 5.00		Service Tax	\$ 8.00								
Final Premium	\$ 20.00		Total Premium	\$ 110.00								
Limitation as to U	Jse											
Vehicle insurance p	policies often come with spe	cific limitations regarding how	v the insured vehicle can be used.	. For example, policies may	restrict commercial	use, limit the						
distance for comm	uting, or exclude certain acti	vities like										
Limits of Liability	,											
Liability coverage is	, is a fundamental component	of vehicle insurance and provi	ides financial protection in the ev	ent the insured driver is fo	und responsible for	causing injury	or					
property damage b	to others. Limits of liability re	fer to the maximum amount										
Deductibles Unde	er Section											
Deductibles are the	e out-of-pocket expenses that	t the policyholder must pay b	efore the insurance coverage kid	ks in. Deductibles can vary	depending on the t	/pe of coverag	e and					
the insurance comp	pany. For example, collision a	ind comprehensive coverage										
Special Condition	ns											
Vehicle insurance	policies may include special o	conditions or endorsements th	hat modify coverage based on spe	ecific circumstances or need	ds. These condition:	can vary wide	ły					
depending on facto	ors such as the type of vehicl	e, usage patterns,										
Driving History												
Insurers often con	nsider the driving history of th	he insured individual when det	termining premiums and coverag	e eligibility. Factors such as	past accidents, trai	fic violations,	and					
claims history can i	impact insurance rates. Drive	is with a clean record										

• You can upload multiple images related to vehicle insurance for better documentation and detailed record-keeping.



- For installment premium types, payments are generated based on the policy terms. Click the '**Create Installment**' button to generate installments, ensuring the premium is divided and scheduled according to the selected policy duration.
- Policy-specific descriptions are automatically populated, providing detailed information relevant to the selected policy.

III Insurance Dashboard Leads Agents Insurances Claims Customers Co	nfigurations
New Insurance INS/NO/000013 🏟	$ = \frac{1}{3} Documents = \frac{1}{0} Claims $
Create Installments Cancel	New Confirmed Running Expired
INS/NO/000013	
POLICY HOLDER DETAILS	
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com
Gender Male	Phone (943)-352-2555
Date of Birth 05/08/1988 Age 36 Years	Address 317 Fairchild Dr
	United States
POLICY DETAILS	
Policy Category Vehicle Insurance	Policy/Certificate No CA54457001
Sub Category Third-Party Insurance	Previous Policy No CDIKJH6587
Insurance Policy Vehicle Ins Policy	Issue Date 05/09/2024
Buying For Car	Expiry Date 09/09/2024
Policy Provider General Ins Company	Policy Time Period 4 Months
	Policy Amount \$ 400.00
policy terms. Click the "Create Instalment" button to initiate instalment creation.	Manager Mitchell Admin
AGENT DETAILS	AGENT COMMISSION DETAILS
Agent Required 🕑	Commission Type O Fixed O Percentage
Agent Azure Interior, Colleen Diaz	Fixed Amount \$25.00
Phone (255)-599-8393 Policy-specific descriptions are automatically populated	Commission Bill BILL/2024/05/0007
Payment Details Vehicle Insurance Policy Details Vehicle Images Policy De	scriptions Terms & Conditions Insurance Nominee
Coverage: Third-party insurance covers the insured individual's legal liability for bodily inju	ry, death, or property damage caused to a third party due to an accident involving the
insured venice. This includes compensation for medical expenses, venice repairs, property	y damage, and tegat expenses incurred by the third party.
Legal Requirement: in many jurisdictions, third-party insurance is a legal requirement for ve compensation for their losses, regardless of the financial situation of the at-fault driver.	enicle owners, it ensures that victims or accidents involving the insured vehicle receive
Exclusions: Third-party insurance typically does not cover damage to the insured vehicle or Vehicle owners may need to purchase additional coverage, such as comprehensive insurance	injuries sustained by the insured driver. It only covers liability towards third parties. ce or collision insurance, to protect their own vehicle against damage or theft.
Limits of Liability: Third-party insurance policies come with predetermined limits of liability claims. Policyholders can choose the coverage limits based on their financial assets and pol	y, which represent the maximum amount the insurance company will pay for covered tential exposure to liability risks.
Premiums: The cost of third-party insurance premiums depends on various factors, includin selected coverage limits. Generally, third-party insurance tends to be more affordable thar	ng the insured vehicle's make and model, the driver's age and driving history, and the n comprehensive insurance since it offers limited coverage.
Claim Process: In the event of an accident, the third party affected by the insured vehicle of insurance company investigates the claim and, if found valid, pays out the appropriate and	an file a claim with the insurance company to seek compensation for their losses. The unt up to the policy's coverage limits.
Renewal: Third-party insurance policies typically need to be renewed annually. Policyholde result in the vehicle being uninsured, which may lead to legal consequences and financial li	rs must pay the renewal premium to maintain coverage. Failure to renew the policy can abilities in the event of an accident.
Additional Coverage Options: While third-party insurance provides essential liability covera These options may include personal accident cover for the driver, roadside assistance, and	age, vehicle owners may opt for additional coverage options to enhance their protection. legal expenses cover.

• Installments are generated per policy terms. Starting a policy without the first installment triggers a warning message.

Insurance Dashboard Leads Agents Insurances Claims Customers Co		🕵 6 🧭 General Ins Company
New INS/NO/00013 🗘		Please create 1st Installment
Start Policy Cancel Instalments are generated based on policy term and a without creation the first instalment promote a warning	mount. Clicking "Start Policy" New Confirmed Running Expired	Send message Log note Activities Q 🗞 👌 Followin
INS/NO/000013	These algo	Today
POLICY HOLDER DETAILS		Insurance Information created
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com	
Gender Male	Phone (943)-352-2555	
Date of Birth 05/08/1988 Age 36 Years	Address 317 Fairchild Dr Fairfield Califòrnia (US) 94535 United States	
POLICY DETAILS		
Policy Category Vehicle Insurance	Policy/Certificate No CA54457001	
Sub Category Third-Party Insurance	Previous Policy No CDIKJH6587	
Insurance Policy Vehicle Ins Policy	Issue Date 05/09/2024	
Buying For Car	Expiry Date 09/09/2024	
Policy Provider General Ins Company	Policy Time Period 4 Months Policy Amount \$ 400.00	
	Manager Stock Admin	
AGENT DETAILS	AGENT COMMISSION DETAILS	
Agent Required 🛛 😨	Commission Type 💿 Fixed 🔿 Percentage	
Agent Azure Interior, Colleen Diaz	Fixed Amount \$25.00	
Phone (255)-595-8393	Commission Bill BILL/2024/05/0007	
Payment Details Vehicle Insurance Policy Details Vehicle Images Policy De	scriptions Terms & Conditions Insurance Nominee	
TYPES OF PAYMENTS	PAYMENT DETAILS	
Premium Type 📀 Fixed 🧿 Installment	Total Policy Amount \$425.00 Monthly Instalments \$106.25	
	Claim Amount \$ 150.00	
Name Installment Date Installme	nt Amount Invoice Invoice Status	
Installment 1 05/09/2024	\$ 106.25 Create Invoice	
Installment 2 06/09/2024	\$ 106.25 Create Invoice	
Installment 3 07/09/2024	\$ 106.25 Create Invoice	
Installment 4 08/09/2024	\$ 106.25 Create Invoice	
	\$ 425.00	

- If the invoice is not created, an installment invoice is automatically generated based on the reminder days and sent via email, notifying the customer to ensure timely payment and adherence to the policy schedule.
- In settings, click '**Insurance Management**' to configure the installment reminder days, ensuring timely notifications for customers about upcoming payments.

Insurance Das	hboard Leads Agents Insurances Claims (Customers Configurations				🕵 🤄 General Ins Co	ompany 😽
New Insurance INS/NO/00001	3 0 -		Documents Claims			1,	/1 < >
Create Claim Expi	Cancel		New Confirmed	Running Expired	Send message Log note Activit	ies Q 🗞 👌 1	Following
INS/NO/00	00013					Today	
					OdooBot - now	,	
POLICY HOLDER DET	AILS				Subject: Reminder: Upcoming In:	surance Installment Invoice	
Policy Holder Gem	ini Furniture, Edwin Hansen	Email edwin.hansen58@	example.com		Dear,		
Gender Male		Phone (943)-352-2555			Edwin Hansen		
Date of Birth 05/0	8/1988 Age 36 Years	Address 317 Fairchild Dr Fairfield United States	California (US)	94535	We hope this email finds you w attention that your next insura be issued soon. It's important t policy payments to ensure cont	ell. We would like to bring to your nce installment invoice is scheduled to o us that you stay informed about your inuous coverage.	
POLICY DETAILS					Here are the key details of yo	our upcoming installment:	
Policy Category Ve	hicle Insurance	Policy/Certificate No CA54	457001		Policy Number: Policy:	INS/NO/000013 Vehicle Ins Policy	
Sub Category Th	hird-Party Insurance	Previous Policy No CDIK.	JH6587		Installment Date:	2024-05-17	
Insurance Policy Ve	chicle Ins Policy	Issue Date 05/09	9/2024		Installment Amount:	\$ 106.25	
Buying For Ca	ir -	Expiry Date 09/05	1/2024		Please be prepared to make the	e payment by the due date to avoid any	
Policy Provider Ge	eneral Ins Company	Policy Amount \$ 400	.00		crucial for your protection and	peace of mind.	
		Manager 🦉 N	Mitchell Admin		If you have any questions regar please feel free to reach out to 555-0111 . We are here to assis	ding your policy or payment options, our customer service team at +1 (650) t you and address any concerns you may	
AGENT DETAILS		AGENT COMMISSION DETAILS	5		Thank you for choosing Genera	los Company We appreciate your	
Agent Required 🔤		Commission Type 💿 Fixed	O Percentage		trust in us and look forward to	continuing to serve your insurance	
Agent Az	ure Interior, Colleen Diaz	Fixed Amount \$ 25.00					
Phone (2	55)-595-8393	Commission Bill BILL/202	4/05/0007		Best regards, Mitchell Admin		
Payment Details	Vehicle Insurance Policy Details Vehicle Image	s Policy Descriptions Terms & Conditio	ns Insurance Nominee				
				III Settings General:	Settings Users & Companies Translations Technical		
TYPES OF PAYMENTS		PAYMENT DETAILS		Save Discard Setti	ings	Q Search	
Premium Type 🛛 i	Fixed 🗿 Installment	Total Policy Amount \$425.	00 Monthly Instalments \$ 10	6.25 General Settings	Installment Reminder Days		
		Claim Amount \$ 150.	00	Sales	Days Reminder days for Creating Installments Inv	roice	
Insurance Emi Detail	If the invoice is not created, an instalment invoi	ce is automatically generated	/	> 31 Calendar	2		
				S Websa	Automated insurance cancellation policy.		
Name	Installment Date Installment Date	itallment Amount Invoice	Invoice Status	Maintenance	Auto Cancellation	Days	
Installment 1	05/09/2024	\$106.25 INV/2024/00008	Not Paid	Invoicing	Insurance Policy cancellation	Reminder Days for Insurance	e Expiry
Installment 2	05/17/2024	\$ 106.25 Draft Invoice (* 38)	Not Paid	Insurance Management	2	£	
Installment 3	07/09/2024	\$ 106.25	Create	e Invoice	Insurance Website		
Installment 4	08/09/2024	\$ 106.25	Create	e Invoice	Terms and Conditions Insurance Terms and Conditions	URL Terms and Conditions URL	
		\$ 425.00				#	

• During the running stage, claims can be created directly from the insurance, streamlining the claims process.

Insurance Dashboard Leads Agents Insurances Cl			🧟 🧔 General Ins Company 💈	5
New Insurance INS/NO/000013 Ø	am Docur	nents EClaims	1/1 < .:	
Create Claim Expired Cancel	New	Confirmed Running Expired	Send message Log note Activities Q % & Tollowing	l
INS/NO/000013 POLICY HOLDER DETAILS Policy Holder Gemini Furniture, Edwin Hansen Gender Male	Email edwin.hansen58@example.com Phone (941)-352-2555		Today Coose - 5 minutes ago Subject: Reminder: Upcoming Insurance Installment Invoice Dear, Edwin Hansen	
Date of Birth 05/08/1988 Age 36 Years	Insurance Claim During the running stage, you can di	rectly create a claim from the insurance	Ands you well. We would like to bring to your ext insurance installment invoice is scheduled to noortant to us that you stay informed about your nsure continuous coverage.	
Policy Category Vehicle Insurance Sub Category Third-Party Insurance Insurance Policy Vehicle Ins Policy	Insurance INS/NO/000013 Done Cancel	Date 05/24/2024	talls of your upcoming installment: inst/proj/pool 000 3 Vehicle ins Policy 2024:05-17 z \$100.25	
Buying For Car Policy Provider Ceneral Ins Company	Policy Time Period 4 Months Policy Amount \$ 400.00 Manager 📷 Mitchell Admin		Please be prepared to make the payment by the due date to avoid any interruption in your coverage. Ensuring your policy remains active is crucial for your protection and peace of mind. If you have any questions regarding your policy or payment options, please felre to reach out to our customer service team at et (550)	
AGENT DETAILS	AGENT COMMISSION DETAILS		555-0111 . We are here to assist you and address any concerns you may have.	
Agent Required 🔄 Agent Azure Interior, Colleen Diaz	Commission Type O Fixed O Percentag		Thank you for choosing General Ins Company . We appreciate your trust in us and look forward to continuing to serve your insurance needs.	
Phone (255)-595-8393 Payment Details Vehicle Insurance Policy Details Vehice	Commission Bill BILL/2024/05/0007	ance Nominee	Best regards, Mitchell Admin	

- After creating a claim, you can be redirected to the corresponding claim page for further management and tracking.
- Basic details are automatically populated based on the selected insurance, streamlining the process and reducing manual entry.
- After adding reasons for the claim, click 'Submit'; otherwise, a warning message will be displayed.

Insurance Dashboard Leads Agents Insurances Claims Customers Com	figurations
Insurance / INS/NO/000013 CLM/NO/000006 🏟	
Submit After creating a claim, you're red to the corresponding claim page	New Submit Approved
CLM/NO/000006	
INSURANCE POLICY NUMBER	CLAIM APPROVAL DATE
Insurance INS/NO/000013 Basic details are automatically filled in based on the insurance	Date 05/24/2024
POLICY HOLDER DETAILS	
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com
Gender Male	Phone (943)-352-2555
Date of Birth 05/08/1988 Age 36 Years	Address 317 Fairchild Dr
After adding reasons for the claim, click	United States
"Submit"; otherwise, a warning message appears	
POLICY DETAILS	
Policy Category Vehicle Insurance	Insurance Policy Vehicle Ins Policy
Sub Category Third-Party Insurance	Policy Time Period 4 Months
AGENT DETAILS	POLICY PROVIDER
Agent Required 🕑	Policy Provider General Ins Company
Agent Azure Interior, Colleen Diaz	Manager 🛛 🐻 Mitchell Admin
Policy Amount \$ 425.00	
Remaining Amount \$ 150.00	
Reason For Claim Application Claim Documents Claim Images Insurance No	ominee Terms & Conditions
REASON FOR FILING THE CLAIM APPLICATION	
Claim Reasons	

• Clicking the 'Approve' button automatically adds the policy-wise claim documents, including uploaded and verified documents, for processing and approval.

Insurance Dashboard Leads Agents Insurances Claims Customers				🔍 🎱 🥙 General Ins Company 🔤
Insurance / INS/NO/000013 CLM/NO/000005 🕏				1/1 < >
Approved Rejected	New S	ubmit Approved	Send message Log note Activities	Q % ⊖ ¹ Following
CLM/NO/000006			Today	
INSURANCE POLICY NUMBER	CLAIM APPROVAL DATE		Claim Information created	
Insurance INS/NO000013	Date 05/24/2024			
POLICY HOLDER DETAILS				
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com			
Gender Male	Address 317 Fairchild Dr			
	Fairfield California (US) United States	94535		
POLICY DETAILS				
Policy Category Vehicle Insurance	Insurance Policy Vehicle Ins Policy			
Sub Category Third-Party Insurance	Policy Time Period 4 Months			
AGENT DETAILS	POLICY PROVIDER			
Agent Required 🔤	Policy Provider General Ins Company			
Agent Azure Interior, Colleen Diaz	Manager 🤯 Mitchell Admin			
Clicking the "Approve" button automatically adds INSURANCE CLAIM DETAILS documents; upload and verify documents for pro-	policy-wise claim-related sessing and approval.			
Policy Amount \$ 425.00	Claim Amount \$ 50.00			
Remaining Amount \$ 150.00				
Reason For Claim Application Claim Documents Claim Images Insurance	Nominee Terms & Conditions			
Document Type ^ Description Document	Status			
Add a line				

• Once the document is verified, clicking 'Approve' automatically triggers an email to notify the customer of the claim approval, ensuring clear communication and timely updates on the claim status.

III Insurance Dashboard Leads Agents Insurances Claims Customers				🕵 6 C ⁷ General Ins Company
CLM/NO/000006 🌣				1/1 <
INSURANCE POLICY NUMBER	CLAIM APPROVAL DATE		^	Send message Log note Activities Q & A ¹ Follo
Insurance INS/NO/000013	Date 05/24/2024			
	Once all documents an automatic email to	are verified, clicking "A o notify the customer of	pprove" triggers claim approval.	Today
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com			Mitchell Admin - 2 minutes ago
Gender Male	Phone (943)-352-2555			Subject congratulations, four manance rolling claim has been approved
Date of Birth 05/08/1988 Age 36 Years	Address 317 Fairchild Dr			Dear Customer, Edwin Hansen
	Fairfield Calii United States	fornia (US) 94	4535	Your insurance claim has been approved after careful evaluation. It meets the eligibility criteria outlined in your policy. We understand the
POLICY DETAILS				importance of a timely resolution and are committed to facilitating a smooth claims process. Here are the key details regarding your approved
Policy Category Vehicle Insurance	Insurance Policy Vehicle Ins Policy			claim.
Sub Category Third-Party Insurance	Policy Time Period 4 Months			Claim Reference Number: CLM/NO/000006
				Policy Number: INS/NO/000013
AGENT DETAILS	POLICY PROVIDER			Policy Category: Vehicle Insurance
Agent Required 🛛	Policy Provider General Ins Company			Policy Sub Category: Third-Party Insurance
Agent Azure Interior, Colleen Diaz	Manager 🤯 Mitchell Admin			Claim Amount: \$50.00
INSURANCE CLAIM DETAILS				Please review the provided details for accuracy. Should you have any
Policy Amount \$425.00	Claim Amount \$ 50.00			concerns, kindly contact our customer support team at +1 (650) 555-0111 or reply to this email. Our representatives are ready to assist you.
Remaining Amount \$150.00				Next steps in the claims process will vary based on your specific claim. Our
Reason For Claim Application Claim Documents Claim Images Insurance	e Nominee Terms & Conditions			team will contact you shortly to discuss further actions. Any additional requirements will be clearly communicated.
Document Type	^ Description	Document	Status	Congratulations on your approved insurance claim. We value your
Third-Party Claims	Third party claim document add	🛓 05_ins7.png	Verified	seamless settlement process.
A copy of PAN Card (if the claim amount is more than Rs. 1 Lakh)	pan card added	▲ 05_ins8.png	Verified	Thank you for choosing General Ins Company . We value your trust and are committed to providing exceptional service and experiences.
				Sincerely, Mitchell Admin
				General Ins Company
				+1 (650) 555-0111
				http://bharti-axagi.co.in
				Mitchell Admin - 12 minutes ago Claim Information created

• Clicking the 'Claim Settlement Amount' button generates a draft claim bill, providing an overview of the settlement amount for review before final approval and processing.

Insurance Dashboard Leads Agents Insurances Claims Custom	ers Configurations	Q ⁰ Coneral Ins Company
CLM/NO/000006 🌣		1/1 <
Claim Settlement Amount	N	lew Submit Approved Send message Log note Activities Q & A ¹ Following
CLM/NO/000006	ent Amount" button generates a draft claim bill	Control (Control (Contro) (Control (Contro) (Contro) (Contro) (Contro) (Contro) (Contro)
INSURANCE POLICY NUMBER	CLAIM APPROVAL DATE Date 05/24/2024	Vender Bill Draft Vender 17 Fandhallor Anzending Date 64/15/2014
Oblicy Holder Cemini Furniture, Edwin Hansen Gender Male Date of Birth 05/08/1988 Age 36 Years	Email edwin.hansen58@example.com (943)-352-2555 Address 317 Fairchild Dr Fairfield California (US) United States	Bit Reference Targentic Reference Calin CLAN-RODO0004 Pose Date 01/15/2024 of Payment Terms Calin CLAN-RODO004 Date Date 01/15/2024 of Payment Terms Invoice Later Other Info Date Date 01/15/2024 of Payment Terms Prodect Label Questitive Proce Taxes Tax end. 2" It Calin Schlement Annout 1.0 50.00 \$ 50.00
Policy Category Vehicle Insurance Sub Category Third-Party Insurance	Insurance Policy Vehicle Ins Policy Policy Time Period 4 Months	Term and Conditions
AGENT DETAILS Agent Required Azure Interior, Colleen Diaz	POLICY PROVIDER Policy Provider General Ins Company Manager Sitchell Admin	seamless settlement process. Thank you for choosing General Ins Company . We value your trust and are committed to providing exceptional service and experiences. Signeraty, Sticket Admin
INSURANCE CLAIM DETAILS Policy Amount \$ 425.00 Remaining Amount \$ 150.00	Claim Amount 5 50.00	General Ins Company 41 (650) 555-0111

• You can create claims if there is a remaining claim amount. However, once the amount reaches zero, no additional claims can be made for that policy.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations		You can crea	ate claims if there's remaining c zero, you can't create an extra	laim amount, 🔍 🧐	General Ins C	ompany 🧧
New CLM/NO/000007 INS/NO/000013 🏟	Docum 3	nents Claims Remain Amon	unts			1	/1 < >
Create Claim Expired Cancel		New Confirmed Runn	ning Expired Sene	nd message Log note Acti	vities	Q 🗞 👌	Following
INS/NO/000013	CLM/N0/000007 / INS/N0/000013 Claims 👁	Q. Search		¥		1	3/3 < >
	Claim Insurance Date	Policy Holder Policy Category	Sub Category Insurance Policy	Policy Amount Remaining Amount	Claim Amount Claim Status	Claim Bill Pay	nent Status 🛫
POLICY HOLDER DETAILS	CLM/NO/000006 INS/NO/000013 05/24/2024	Gemini Furniture, Edwin Hansen Vehicle Insurance	Third-Party Insurance Vehicle Ins Policy	\$ 425.00 \$ 150.00	\$ 50.00 Approved	Draft Bill (* 39) No	Paid
Policy Holder Gemini Furniture, Edwin Hansen	CLM/NO/000007 INS/NO/000013 05/16/2024	Gemini Furniture, Edwin Hansen Vehicle Insurance	Third-Party Insurance Vehicle Ins Policy	\$ 425.00 \$ 100.00	\$ 32.00 Approved	BILL/2024/05/0008	Paid
Gender Male	CLM/NO/000008 INS/NO/000013 05/22/2024	Gemini Furniture, Edwin Hansen Vehicle Insurance	Third-Party Insurance Vehicle Ins Policy	\$ 425.00 \$ 68.00	\$ 25.00 Approved	BILL/2024/05/0009	
Date of Birth 05/08/1988 Age 36 Years							
	rannero United States	California (OS) 34		attention that your next insu be issued soon. It's importan policy payments to ensure co	trance instattment involu t to us that you stay info ontinuous coverage.	ce is scheduled to ormed about your	
POLICY DETAILS				Here are the key details of	your upcoming install	ment:	
Policy Category Vehicle Insurance	Policy/Certificate No CA5445	7001		Policy Number:	INS/NO/000013		
Sub Category Third-Party Insurance	Previous Policy No CDIKJH	6587		Policy: Installment Date:	Vehicle Ins Policy 2024-05-17		
Insurance Policy Vehicle Ins Policy	Issue Date 05/09/2	024		Installment Amount:	\$ 106.25		
Buying For Car	Expiry Date 09/09/2	024		Disco ha second ha males			
Policy Provider - General Ins Company	Policy Time Period 4 Month	hs		interruption in your coverage	e. Ensuring your policy r	emains active is	
Company	Policy Amount \$400.00	D		crucial for your protection ar	nd peace of mind.		
	Manager 😽 Mit	chell Admin		If you have any questions reg please feel free to reach out 555-0111. We are here to as	parding your policy or pa to our customer service sist you and address an	ayment options, e team at +1 (650) y concerns you may	
AGENT DETAILS	AGENT COMMISSION DETAILS			have.			
Agent Required 😰	Commission Type O Fixed) Percentage		Thank you for choosing Gene trust in us and look forward I	eral Ins Company . We a to continuing to serve y	appreciate your our insurance	
Agent Azure Interior, Colleen Diaz	Fixed Amount \$25.00			needs.			
Phone (255)-595-8393	Commission Bill BILL/2024/0	05/0007		Best regards, Mitchell Admin			
Payment Details Vehicle Insurance Policy Details Vehicle Images Pol	y Descriptions Terms & Conditions	Insurance Nominee					
Payment Details Venice marance Policy Details Venice mages Policy Description I Intraface Nominee Coverage scope: The policy document will clearly define the scope of coverage provided by the third-party insurance. It specifies that the coverage extends to liability for bodily lightly, death, or property damage caused to third parties by the insured vehicle. Units of Liability The policy outlines the maximum amount the insurance company will pay for covered claims, known as the limits of liability. These limits may vary depending on factors such as the type of vehicle, the insured individual's driving history, and the jurisdiction's regulations. Exclusions: The terms and conditions list circumstances or events in which the insurance company may deep coverage or withhold benefits. Common exclusions may include intentional acts, racing, driving under the influence of alcohol or drugs, and using the which for Illegal purposes. Premiums: The document specifies the amount of the premiums and the frequency of payment (e.g., monthly, annually). It may also include information on any discounts or surcharses suplet to the premiums based on factors such as the insure for investigation. Claims Process: The terms and conditions outline the procedures for filing and processing claims. This includes notifying the insurance company of an accident, providing necessary documentation (e.g., police reports, medical records), and cooperating with the insurer's investigation.							

• Once all claims are created and the claim amount reaches zero, the 'create claim' button become invisible, indicating no further claims can be made

Insurance Dashboard Leads									4		Company 😽
New Insurance INS/NO/000013 �				Documents	Claims 4						9/9 < >
Expired Cancel				New	Confirmed Runn	ing Expired	Send messa	ge Log note	Activities	Q & 81	Following
INS/NO/000013	Insurance / INS/# Claims &	IO/000013		Q Search				•	עבחחז		1-4/4 < >
POLICY HOLDER DETAILS	Claim	Insurance	Date Policy Holder	Policy Category	Sub Category	Insurance Policy	Policy Amount	Remaining Amount	Claim Amount Claim Status	Claim Bill	Payment Status 😅
Policy Holder Gemini Furniture, Edwi	n Hansen CLM/NO/000	006 INS/NO/000013	05/24/2024 Gemini Furniture, Edwin Ha	nsen Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 150.00	\$ 50.00 Approved	Draft Bill (* 39)	Not Paid
Gender Male	CLM/NO/000	007 INS/NO/000013	05/16/2024 Gemini Furniture, Edwin Ha	nsen Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 100.00	\$ 32.00 Approved	BILL/2024/05/0008	Not Paid
Date of Birth 05/08/1988	Age CLM/NO/000	008 INS/NO/000013	05/22/2024 Gemini Furniture, Edwin Ha	nsen Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 68.00	\$25.00 Approved	BILL/2024/05/0009	Paid
	CLM/NO/000	009 INS/NO/000013	05/23/2024 Gemini Furniture, Edwin Ha	nsen Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 43.00	\$43.00 Approved	BILL/2024/05/0010	Not Paid
			button becomes invisible, india	ating no further clain	ns can be made.	reate Claim			\$ 150.00		
POLICY DETAILS					/		Her	e are the key deta	ails of your upcoming insta	llment:	
Policy Category Vehicle Insurance			Policy/Certificate No CA54	1457001			Poli	cy Number:	INS/NO/000013		
Sub Category Third-Party Insurance	e		Previous Policy No CDIK	JH6587			Inst	allment Date:	2024-05-17		
Insurance Policy Vehicle Ins Policy			Issue Date 05/0	9/2024			Inst	allment Amount:	\$ 106.25		
Buying For Car			Expiry Date 09/0	9/2024			Pleas	se be prepared to	make the payment by the d	ue date to avoid any	
Policy Provider General Ins Company	у		Policy Time Period 4 Mo	nths			inter	ruption in your co al for your protect	verage. Ensuring your policy tion and peace of mind.	remains active is	
			Policy Amount \$ 400	0.00			If you	u have any questic	ins regarding your policy or	payment options.	
			Manager	Mitchell Admin			pleas	se feel free to rea	th out to our customer servi	ce team at +1 (650)	
AGENT DETAILS			AGENT COMMISSION DETAIL	s			have		e to assist you and address o	iny concerns you may	
Agent Required 🛛			Commission Type 💿 Fixed	I 🔿 Percentage			Than trust	k you for choosing in us and look for	General Ins Company . We ward to continuing to serve	e appreciate your your insurance	
Agent Azure Interior, Collec	en Diaz		Fixed Amount \$ 25.00				need	s.			
Phone (255)-595-8393			Commission Bill BILL/202	24/05/0007			Best	regards,			
	and the prototion of the	la la seconda de la seconda	- The second state		. /		Mitch	ell Admin			
Payment Details Vehicle Insuran	ice Policy Details Vehic	te Images Policy	y Descriptions Terms & Condition	ons Insurance Nor	ninee						-
TYPES OF PAYMENTS			PAYMENT DETAILS								
Premium Type O Fixed O Installm	ent		Total Policy Amount \$ 425	.00 Monthly Instalr	nents \$ 106.25						
			Claim Amount \$ 150	.00							
Insurance Emi Details											
Name Installm	nent Date		Installment Amount Invoice	4/00009	Invoice Status						
Installment 2 05/09/2	024		\$ 106.25 INV/202	4/00011	Paid	8					
Installment 3 07/09/2	024		\$ 106.25 INV/202	4/0009	Paid						
Installment 4 08/09/2	024		\$ 106.25 INV/202	4/00010	Paid	*					
00/07/2			¢ 435.00								
			ş 423.00								

• If the auto-cancellation policy is activated and the expiry date is today, a scheduler automatically runs, changing the stage from "Running" to "Expired" and sends an email notification to the policyholder.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	髨 🥙 🥵
New Insurance INS/NO/000013 🏟		1/1 < >
Expired Cancel	New Confirmed Running Expired Send r	nessage Log note Activities Q 🗞 👌 ¹ Following
INS/NO/000013	If auto-cancellation policy is activated and the expiry date is today, a scheduler runs automatically, changing the stage from running to expired and notifying	Today
POLICY HOLDER DETAILS	the policyholder via email.	Subject: Reminder: Upcoming Insurance Installment Invoice
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com	Dear, Edwin Hansen
Gender Male	Phone (943)-352-2555	
Date of Birth 05/08/1988 Age 36 Years	Address 317 Fairchild Dr	We hope this email finds you well. We would like to bring to your
	United States	attention that your next insurance installment invoice is scheduled to
	num Disease Children	
POLICY DETAILS	Save Distand Settings	Q Seath
Policy Category Vehicle Insurance	Policy/Certificate No CA54457001 General Settings Installment Reminde	Days
Sub Category Third-Party Insurance	Previous Policy No CDIKJH6587 CRM Days Reminder days	for Creating Installments Invoice
Insurance Policy Vehicle Ins Policy	Issue Date 01/15/2024 31 Calendar 2	
Buying For Car	Expiry Date 05/15/2024	
Policy Provider General Ins Company	Policy Time Period 4 Months Automated insurance	cancellation policy.
	Policy Amount \$ 400.00 Policy Amount 4 400.00 Policy Amount 4 400 Cancella	Ion Days we cancellation Demoider Daws for Incurrence Explore
	Manager Mitchell Admin	2
AGENT DETAILS	AGENT COMMISSION DETAILS	
Anathening a	Insurance Website	
Agent Required	Commission Type O Fixed O Percentage	ditions URL
Agent Azure Interior, Colleen Diaz	Fixed Amount \$25.00	#
Phone (255)-595-8393	Commission Bill BILL/2024/05/0007	<u>-</u>
Payment Details Vehicle Insurance Policy Details Vehicle Images Policy	Descriptions Terms & Conditions Insurance Nominee	
Name Relation with policy holder	Date of Birth Age Percentage including	dd nominee-related details, their percentage allocation
Azure Interior, Nicole Ford Daughter	05/07/2012 12 Years 25 %	
Deco Addict, Douglas Fletcher Brother	05/07/2015 9 Years 25 %	
Deco Addict, Douglas Fletcher Father	05/07/2014 10 Years 12 %	
Gemini Furniture, Edwin Hansen Son	05/08/2012 12 Years 38 %	
	100.00	

- If today is the expiry date, a scheduler automatically triggers, changing the stage from "**Running**" to "**Expired**", and notifies the policyholder via email about the policy status update.
- If renewal isn't completed within the reminder days, the policy auto-cancels. Renewing within the cancellation reminder days keeps the policy active; otherwise, the policy is automatically canceled.

Insurance Dashboard Leads Agents Insurances Claims Customers C	Configurations	🕵 🥑 🛃 General Ins Company
New Insurance INS/NO/000013 🏘		1/1 < >
Renew	New Confirmed Running Expired	Send message Log note Activities Q 🗞 👌 Following
INS/NO/000013		Today
		OdooBot - 2 minutes ago
POLICY HOLDER DETAILS		Subject: Important Update: Information Regarding Your Insurance Policy
Policy Holder Gemini Furniture, Edwin Hansen	Email edwin.hansen58@example.com	Dear,
Gender Male	Phone (943)-352-2555	
Date of Birth 05/08/1988 Age 36 Years	Address 317 Fairchild Dr Fairfield California (US) 94535 United States If today is the expiry date, a scheduler triggers automatic change from running to expired, and notifies the policyhol	We hope this email finds you well. We are writing to provide you with important information related to your insurance policy with General Ins Company der We want to keep you informed about the status of your insurance policy
POLICY DETAILS	via email.	and ensure that you have all the necessary details readily available. Our
Policy Category Vehicle Insurance	Policy/Certificate No CA54457001	pertaining to your policy.
Sub Category Third-Party Insurance	Previous Policy No CDIKJH6587	Please find below the key details related to your insurance policy:
Insurance Policy Vehicle Ins Policy	Issue Date 01/15/2024	Policy Number: INS/NO/000013
Buying For Car	Expiry Date 05/15/2024	Policy: Vehicle Ins Policy Policy Category: Vehicle Insurance
Policy Provider General Ins Company	Policy Time Period 4 Months	Policy Sub Category: Third-Party Insurance
	Policy Amount \$ 400.00	Coverage Start Date: 2024-01-15
	Manager 🛛 🛃 Mitchell Admin	Coverage End Date: 2024-05-15 Premium Amount: \$ 425.00
AGENT DETAILS		
Agent Required 💿	Commission Type 💿 Fixed 🔿 Percentage	It is crucial to review the above information carefully to ensure its accuracy. If you have any questions or concerns regarding the policy details, please reach out to our dedicated customer support team at +1
Agent Azure Interior, Colleen Diaz	Fixed Amount \$ 25.00	(650) 555-0111 or reply to this email. Our team will be happy to assist you.
Phone (255)-595-8393	Commission Bill BILL/2024/05/0007	We strive to provide you with comprehensive coverage and exceptional service. Should you require any updates or modifications to your policy,
		please inform us at your earliest convenience. We will work diligently to
Settings General Settings Users & Companies Translations Technica		with your evolving needs.
Save Discard Settings	Q Search	At General Ins Company we value your trust and are committed to your
General Settings Installment Reminder Days		satisfaction. We appreciate your continued support and look forward to serving you as your trusted insurance provider.
CRM Days	If renewal isn't done within reminder days, policy auto-cancels, Renew	Thank you for your attention to this matter.
sales Reminder days for Creating Installmen	within cancellation reminder days to keep the policy active; otherwise,	
31 Calendar 2	it cancels automatically.	Note: Please be reminded that your insurance policy is due for renewal from expiry date 2024-05-15 to cancellation date 2024-05-18 between 2
Website Automated insurance cancellation policy.		days. Failure to renew may result in policy cancellation. Act now to ensure uninterrupted coverage
Inventory		character option contrage.
Maintenance Auto Cancellation Insurance Policy cancellation	Days Reminder Days for Insurance Expiry	Sincerey, Mitchell Admin
Insurance Management	2	
insurance management		General Ins Company
Insurance Website		+1 (650) 555-0111
Terms and Conditions Insurance Terms and Conditions	URL Terms and Conditions URL	http://bharti-axagi.co.in

• Failure to renew insurance within the reminder days results in automatic policy cancellation, with an email notification sent to inform the policyholder about the cancellation and the status of their insurance.

Insurance Dashboard Leads Agents Insurances Claims Customers C	ionfigurations	🔍 6 🥑 7 General ins Company 🦉
New Insurance INS/NO/000013 🕏	$\boxed{\texttt{ADD}}_{3}^{\text{Documents}}$ \equiv $\frac{\text{Claims}}{4}$	1/1 < >
	New Confirmed Running Expired Cancel	d message Log note Activities Q 🗞 👌 Following
INS/NO/000013	Failure to renew insurance within reminder days results in automatic policy	Today
POLICY HOLDER DETAILS	cancellation, accompanied by an email notification to inform the policyholder.	Subject: Notice of Insurance Policy Cancellation Due to Inability to Renew
Policy Holder Gemini Furniture, Edwin Hansen Gender Male Date of Birth 05/08/1988 Age 36 Years	Email edwin.hansen38@example.com Phone (943)-352-2555 Address 317 Fairchild Dr Fairfield California (US) 94535 United States	Dear, Edwin Hansen We regret to inform you that your insurance policy with General Ins Company policy number INS/NO/000013 will be canceled due to our Inability to renew it.
POLICY DETAILS		Effective 2024-05-18 your coverage will be terminated, and you will not be insured under our policies thereafter.
Policy Category Vehicle Insurance Sub Category Third-Party Insurance Insurance Policy Vehicle Ins Policy	Policy/Certificate No CA54457001 Previous Policy No CDIK:H6587 Issue Date 01/12/2024	For further assistance or inquiries, please contact our customer service team at +1 (650) 555-0111 or reply to this email. Thank you for your understanding.
Buying For Car Policy Provider General Ins Company	Expiry Date 05/12/2024 Policy Time Period 4 Months	Sincerely, Mitzhell Admin
Stillings Generaldings Unit Gravess Narolds Norbal See See See See See See See See See Se	Policy Amount \$ 400.00 Manager Si Mitchell Admin	General Ins Company +1 (650) 555-0111 info@vourcompany.com
Selis S	AGENT COMMISSION DETAILS	http://bharti-axagi.co.in OdooBot - 24 minutes ago
Pretty Pretty	Fixed Amount \$ 25.00 Commission Bill BiLL/2024/05/0007	Subject: Important Update: Information Regarding Your Insurance Policy Dear, Edwin Hansen
Insurance Website Themself Conditions Themself Conditions INFL Insurance Terms and Conditions URL	scriptions Terms & Conditions Insurance Nominee	We hone this email finds you well. We are writing to provide you with

• You have the option to print both an insurance report and a vehicle insurance report, providing detailed documentation for policy and vehicle coverage.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations
New Insurance INS/NO/000013 🏟	$\blacksquare_{3}^{\text{Documents}} \equiv _{4}^{\text{Claims}}$
	New Confirmed Running Expired Cancel
POLICY HOLDER DETAILS	
Policy Holder Gemini Furniture, Edwin Hansen Gender Male Date of Birth 05/08/1988 Age 36 Years	Email edwin.hansen58@example.com Phone (943)-352-2555 Address 317 Fairchild Dr Fairfield California (US) 94535 United States
POLICY DETAILS	
Policy CategoryVehicle InsuranceSub CategoryThird-Party InsuranceInsurance PolicyVehicle Ins PolicyBuying ForCarPolicy ProviderGeneral Ins Company	Policy/Certificate NoCA54457001Previous Policy NoCDIKJH6587Issue Date01/12/2024Expiry Date05/12/2024Policy Time Period4 MonthsPolicy Amount\$ 400.00ManagerSitchell Admin
AGENT DETAILS	AGENT COMMISSION DETAILS
Agent Required 🕑	Commission Type 💿 Fixed 🔿 Percentage
Agent Azure Interior, Colleen Diaz	Fixed Amount \$25.00
Payment Details Vehicle Insurance Policy Details Vehicle Images Policy	Descriptions Terms & Conditions Insurance Nominee

• The insurance report provides detailed information about policies.



General Ins Company 250 Executive Park Blvd, Suite 3400 San Francisco CA 94134 United States

Insurance Report

Insurance Number: INS/NO/000013

Policy Holder Details

Policy Holder: Gemini Furniture, Edwin Hansen Gender: Male Date of Birth: 05/08/1988 Age: 36 Years Email: edwin.hansen58@example.com Phone: (943)-352-2555 Address: 317 Fairchild Dr,

Fairfield California (US) 94535 United States

Issue Date: 01/12/2024

Expiry Date: 05/12/2024

Policy Time Period: 4 Months

Monthly Installment: \$ 106.25

Policy Provider: General Ins Company

Policy Details

Policy Category: Vehicle Insurance Sub Category: Third-Party Insurance Insurance Policy: Vehicle Ins Policy Buying For: Car Premium Type: Installment Manager: Mitchell Admin

Agent Details

Agent: Azure Interior, Colleen Diaz Phone: (255)-595-8393 Commission Type: Fixed Fixed Commission: \$ 25.00 BILL/2024/05/0007

Monthly Installment					
Name	Installment Date	Installment Amount	Invoice		
Installment 1	05/09/2024	\$ 106.25	INV/2024/00008		
Installment 2	05/17/2024	\$ 106.25	INV/2024/00011		
Installment 3	07/09/2024	\$ 106.25	INV/2024/00009		
Installment 4	08/09/2024	\$ 106.25	INV/2024/00010		

Insurance Nominee						
Name	Relation with policy holder	Date of Birth	Age	Percentage		
Azure Interior, Nicole Ford	Daughter	05/07/2012	12 Years	25.0		
Deco Addict, Douglas Fletcher	Brother	05/07/2015	9 Years	25.0		
Deco Addict, Douglas Fletcher	Father	05/07/2014	10 Years	12.0		
Gemini Furniture, Edwin Hansen	Son	05/08/2012	12 Years	38.0		

➤ Policy Descriptions



General Ins Company 250 Executive Park Blvd, Suite 3400 San Francisco CA 94134 United States

Coverage: Third-party insurance covers the insured individual's legal liability for bodily injury, death, or property damage caused to a third party due to an accident involving the insured vehicle. This includes compensation for medical expenses, vehicle repairs, property damage, and legal expenses incurred by the third party.

Legal Requirement: In many jurisdictions, third-party insurance is a legal requirement for vehicle owners. It ensures that victims of accidents involving the insured vehicle receive compensation for their losses, regardless of the financial situation of the at-fault driver.

Exclusions: Third-party insurance typically does not cover damage to the insured vehicle or injuries sustained by the insured driver. It only covers liability towards third parties. Vehicle owners may need to purchase additional coverage, such as comprehensive insurance or collision insurance, to protect their own vehicle against damage or theft.

Limits of Liability: Third-party insurance policies come with predetermined limits of liability, which represent the maximum amount the insurance company will pay for covered claims. Policyholders can choose the coverage limits based on their financial assets and potential exposure to liability risks.

Premiums: The cost of third-party insurance premiums depends on various factors, including the insured vehicle's make and model, the driver's age and driving history, and the selected coverage limits. Generally, third-party insurance tends to be more affordable than comprehensive insurance since it offers limited coverage.

Claim Process: In the event of an accident, the third party affected by the insured vehicle can file a claim with the insurance company to seek compensation for their losses. The insurance company investigates the claim and, if found valid, pays out the appropriate amount up to the policy's coverage limits.

Renewal: Third-party insurance policies typically need to be renewed annually. Policyholders must pay the renewal premium to maintain coverage. Failure to renew the policy can result in the vehicle being uninsured, which may lead to legal consequences and financial liabilities in the event of an accident.

Additional Coverage Options: While third-party insurance provides essential liability coverage, vehicle owners may opt for additional coverage options to enhance their protection. These options may include personal accident cover for the driver, roadside assistance, and legal expenses cover.

➤ Terms & Conditions

Coverage Scope: The policy document will clearly define the scope of coverage provided by the third-party insurance. It specifies that the coverage extends to liability for bodily injury, death, or property damage caused to third parties by the insured vehicle.

Limits of Liability: The policy outlines the maximum amount the insurance company will pay for covered claims, known as the limits of liability. These limits may vary depending on factors such as the type of vehicle, the insured individual's driving history, and the jurisdiction's regulations.

Exclusions: The terms and conditions list circumstances or events in which the insurance company may deny coverage or withhold benefits. Common exclusions may include intentional acts, racing, driving under the influence of alcohol or drugs, and using the vehicle for illegal purposes.

Premiums: The document specifies the amount of the premiums and the frequency of payment (e.g., monthly, annually). It may also include information on any discounts or surcharges applied to the premiums based on factors such as the insured individual's age, driving record, and the type of vehicle insured.

Claims Process: The terms and conditions outline the procedures for filing and processing claims. This includes notifying the insurance company of an accident, providing necessary documentation (e.g., police reports, medical records), and cooperating with the insurer's investigation.

• The vehicle insurance report includes details on vehicle coverage, claims, and premiums.

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General Ins Company 250 Executive Park Blvd, Suite 3400 San Francisco CA 94134 United States

Vehicle Insurance Report		
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Insurance Policy Details Insurance Number: INS/NO/000013 Policy Category: Vehicle Insurance	Policy	/Certificate No: CA54457 ous Policy No: CDIKJH658	001 7
Sub Category: Third-Party Insurance	Policy	Time Period	
Insurance Policy: Vehicle Ins Policy	Insura	ance Policy Time Duration:	01/12/2024 - 05/12/2024
Buying For: Car	Policy	Amount: \$ 400.00	
Agent Details	Policy	Holder Details	
Agent: Azure Interior, Colleen Diaz	Policy	Holder: Gemini Furniture,	Edwin Hansen
Phone: (255)-595-8393	Date	of Birth: 05/08/1988	
Fixed Commission: \$25.00 BILL/2024/05/0007	Age: 3	36 Years	
	Gend	er: Male	
Payment Details			
Premium Type: Installment	Mont	hly Installment: \$ 106.25	
	Vehicle Insura	nce Policy Details	
➤ Insured Vehicle Details			
Vehicle: Lexus - RX	Year of MFG: 2005		VIN No: UIYSDF5457
Registration No: DC 2514 JK	Place of Registration: U	SA	Usage of Vehicle: Personal
Cubic Capacity: 2,540	Seating Capacity: 5		Coverage Type: Comprehensive
➤ Vehicle Insured Declared Values			
For the Vehicle: \$ 152.00	Electric Accessories: \$2	25.00	Value of CNG/LPG Kit: \$35.00
For Trailer: \$ 0.00	Non-Electric Accessorie	es: \$ 20.00	Total IDV Value: \$ 232.00
	Schedule	of Premiums	
➤ Own Damage Premium		➤ Third Party Liabil	ity Premium
Basic OD: \$ 5.00		Basic TP Liability: \$ 32.0	0

basic 00. \$ 5.00	basic IF clability, \$ 52.00
Package Premium: \$ 12.00	PA Cover for Owner-Driver: \$ 25.00
Service Tax: \$ 8.00	Package Premium: \$45.00
Special Discount: \$ 5.00	Liability Service Tax: \$ 8.00
Final Premium: \$ 20.00	Total Premium: \$ 110.00

Insurance Nominee								
Name	Relation with policy holder	Date of Birth	Age	Percentage				
Azure Interior, Nicole Ford	Daughter	05/07/2012	12 Years	25.0				
Deco Addict, Douglas Fletcher	Brother	05/07/2015	9 Years	25.0				
Deco Addict, Douglas Fletcher	Father	05/07/2014	10 Years	12.0				
Gemini Furniture, Edwin Hansen	Son	05/08/2012	12 Years	38.0				

	Monthly Installment		
Name	Installment Date	Installment Amount Inv	voice



General Ins Company 250 Executive Park Blvd, Suite 3400 San Francisco CA 94134 United States



• Insurance different views provide various perspectives

Insurance Dashboard Leads Agents	Insurances Claims Customers Config	urations			<mark>≪</mark> ⁶ € ⁷ Gene	eral Ins Company 🛛 😽
New Insurance 🌣		Q 🛢 P0	olicy Category 🗙 Search	*		■ ■ 0
Life Insurance +	Health Insurance	+	Property Insurance +	Vehicle Insurance	+ Policy Category	
INS/NO/000001 Insurance Policy: Life Ins Policy Policy Holder: Azure Interior, Nicole Ford	INS/NO/000002 Insurance Policy: Personal Health Ins Po Policy Holder: Deco Addict, Floyd Stewa	licy rd	INS/NO/000004 Insurance Policy: Home Ins Policy Policy Holder: Gemini Furniture, Jesse Brown	INS/NO/000013 Insurance Policy: Vehicle Ins Policy Policy Holder: Gemini Furniture, Edwin Hansen		
05/08/2024 - 08/08/2024 Expired	05/09/2024 - 09/09/2024	Expired	05/08/2024 - 11/08/2024 Confirmed	01/12/2024 - 05/12/2024 Cancel		
INS/NO/000005 Insurance Policy: Life Ins Policy Policy Holder: Gemini Furniture, Edwin Hansen	INS/NO/000007 Insurance Policy: Personal Health Ins Po Policy Holder: Deco Addict, Floyd Stewa	licy rd				
02/15/2024 - 05/15/2024 Expired	05/08/2024 - 08/08/2024	New				
INS/NO/000006 Insurance Policy: Life Ins Policy Policy Holder: Azure Interior, Nicole Ford	INS/NO/000012 Insurance Policy: Family Health Ins Polic Policy Holder: Deco Addict, Addison Ols	y on				
05/08/2024 - 08/08/2024 New	05/09/2024 - 11/09/2024	New				
INS/NO/000010 Insurance Policy: Life Ins Policy Policy Holder: Brandon Freeman						
05/09/2024 - 08/09/2024 New						

Insur	🗰 Insurance Dashboard Leads Agents Insurances Claims Customers Configurations 🧟 🤇 C Peneral Ins Company 👼									
Insurance	2		Q Sear	rch	•		■ ■ 0			
← →	Month - Today	May 2024				1				
18	SUN 28	MON 29	TUE 30	WED 1	INS/NO/000004 × May 8, 2024 Insurance INS/NO/00004 Policy Category Property Insurance Such Category Homeseume's Insurance	SAT 4	May 2024 C > 5 M T W T F S 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25			
19	5	6	7	8 INS/NG/00001 INS/NO/000004 INS/NO/000006 INS/NO/000007	Insurance Policy Home Ins Policy Policy Time Period 6 Months Policy Holder Gemini Furniture, Jesse Brown	11	26 27 28 29 30 31 1 2 3 4 5 6 7 8 2 Policy Category -			
20	12	13	14	0	Gender Male Status Confirmed Edit Delete	18	 Frederingsbare Life Insurance Property Insurance 			
21	19	20	21	22		25				

Insurance Dashboard Leads A	gents Insurances Claims Customers Co	onfigurations			🕵 🤨 General Ins Company	5
Insurance		Q Search		•	1-3/3 < > 🔳 🏴 🛍	0
	Email	Call	Meeting	To-Do	Upload Document	-
	1	1	1	1		-
INS/NO/000004			5/15/2024			
INS/NO/000007	5/15/2024	5/17/2024				
INS/NO/000001				5/20/2024		
+ Schedule activity						

10. Claims

• Claims different views provide various perspectives

🗰 Insurance Dashboard Leads Agents Insurances Claims Customers Configurations 🔍 😍									eral Ins Company 🛛 🝯		
Claim 🌣				Q Search				•		1-9/9 < >	■ ■ @ 0
Claim	Insurance	Date	Policy Holder	Policy Category	Sub Category	Insurance Policy	Policy Amount	Remaining Amount	Claim Amount Claim Status	Claim Bill	Payment Status 📑
CLM/NO/000001	INS/NO/000001	05/21/2024	Azure Interior, Nicole Ford	Life Insurance	Term Life Insurance	Life Ins Policy	\$ 350.00	\$ 150.00	\$ 0.00 New		
CLM/NO/000002	INS/NO/000005	05/23/2024	Gemini Furniture, Edwin Hansen	Life Insurance	Term Life Insurance	Life Ins Policy	\$ 300.00	\$ 150.00	\$ 120.00 Approved	BILL/2024/05/0006	Paid
CLM/NO/000003	INS/NO/000005	05/16/2024	Gemini Furniture, Edwin Hansen	Life Insurance	Term Life Insurance	Life Ins Policy	\$ 300.00	\$ 30.00	\$ 0.00 Submit		
CLM/NO/000004	INS/NO/000005	05/16/2024	Gemini Furniture, Edwin Hansen	Life Insurance	Term Life Insurance	Life Ins Policy	\$ 300.00	\$ 30.00	\$ 0.00 Rejected		
CLM/NO/000005	INS/NO/000005	05/29/2024	Gemini Furniture, Edwin Hansen	Life Insurance	Term Life Insurance	Life Ins Policy	\$ 300.00	\$ 30.00	\$ 12.00 Approved		
CLM/NO/000006	INS/NO/000013	05/24/2024	Gemini Furniture, Edwin Hansen	Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 150.00	\$ 50.00 Approved	Draft Bill (* 39)	Not Paid
CLM/NO/000007	INS/NO/000013	05/16/2024	Gemini Furniture, Edwin Hansen	Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 100.00	\$ 32.00 Approved	BILL/2024/05/0008	Not Paid
CLM/NO/000008	INS/NO/000013	05/22/2024	Gemini Furniture, Edwin Hansen	Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 68.00	\$ 25.00 Approved	BILL/2024/05/0009	Paid
CLM/NO/000009	INS/NO/000013	05/23/2024	Gemini Furniture, Edwin Hansen	Vehicle Insurance	Third-Party Insurance	Vehicle Ins Policy	\$ 425.00	\$ 43.00	\$ 43.00 Approved	BILL/2024/05/0010	Not Paid
									\$ 282.00		



🌐 Insurance Dashboard Leeds Agents Insurances Colligurations 🔹 🔍 Ceneral Ins. Company 🤓											
Claim			Q. Searc	ch		-		= = • • •			
← →	← → Month Today May 2024										
18	SUN 28	MON 29	TUE 30	WED 1	тни 2	PRI 3	SAT 4	May 2024 K S S M T W T F S 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 TS 16 17 18			
19	5	6	7	8	9	10	11	19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 ⊘ Policy Category			
20	12	13	14	1	CLM/NO/000008 May 22, 2024 Claim CLM/NO/000008	×	18	 Ure insurance Vehicle insurance 			
21	19	20	21 CLM/NO/000001	22 CLM/NO/000008	Insurance INS/NO/000013 Policy Category Vehicle Insurance Insurance Policy Vehicle Ins Police	ce Cy	25				
22	26	27	28	29 CLM/NG/000005	Edit Delete						

Insurance Dashboard Leads Ag	gents Insurances Claims Customers Co	nfigurations			髨 🐠 General Ins Company 🦉	5
Claim		Q Search		•	1-3/3 < > 🔳 🏴 🛍 🤇	Э
	Email	Call	Meeting	To-Do	Upload Document	ŧ
CLM/NO/000007	5/15/2024				5/20/2024	
CLM/NO/000004			5/15/2024			
CLM/NO/000003				5/20/2024		
+ Schedule activity						

11. Customers



• All insurance policies and claims related to a customer are visible in the smart button for easy access and management.

Insurance Dashboard Leads Agents Insurances Claims Customers	Configurations	
New Contacts Azure Interior, Nicole Ford	Meetings to Opportunities Sales Invoiced Stills of Law Chain	ns
• Individual Company Nicole Ford Azure Interior – US12345677		Send message
4557 De Silva St	Job Position Director	
Fremont California (US) 94538 United States	Phone (946)-638-6034	
Tax ID 7 US12345677	Mobile	
Agent	Email nicole.ford75@example.com	
	Website e.g. https://www.odoo.com	
	Title e.g. Mister	
	Tags e.g. "B2B", "VIP", "Consulting",	
Contacts & Addresses Sales & Purchase Invoicing Internal Notes		
Add		