



ConceptOne™

**Enterprise Solutions for MGAs,
Brokers, Specialty Carriers
and Program Administrators.**

Policy Management

Point-in-Time coverage detail for all transactions (New, Endorsements, Renewal, Cancellation, Audits, etc.)

Accounting

Payables, Receivables,
General Ledger, Financials

Claims Management

Open, Adjust Reserves, Payments,
Recoveries, and Close.
Claim Diaries & Notes
Point in Time Loss Ratio Calculation

Open Data Access

User Defined Reports,
Excel Export, XML Engine,
Web Portal/Reporting

Document Management

File Cabinet, Document Mark-Up,
Document Extraction, Document Import

Process Control

Business Process Workflows
with Work-in-Progress Dashboard

Quick Entry

Capture the Right Data
at the Right Time
User control of Policy Data
Layout & Content

Rating

Industry Rating Integration,
Microsoft Excel™ Ratesheets and
Epic-Premier Program Specific Rating

Policy Issuance

Formsets, Auto Selection Form Rules,
PDF Merge and via Oracle Documaker

Document Delivery

Email, Fax, Print with
Multi-Document Packaging



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ConceptOne™ OVERVIEW

Avoid Duplicate Entry with a Comprehensive Solution

- Clearance
- Industry Rating Integration
- Quote
- Issuance
- Correspondence Generation & Filing
- Insurance Accounting
- General Ledger Accounting
- Claims Management
- Reporting
- Work in Progress Dashboard
- Paperless Document Management

Run Your Company with Your Style, Your Rules and Your Data

- You Can Modify System Reports to Your Specifications
- You Control Document Design and Content (Letters/ Forms)
- You Control the Invoice, Statement, and Check Formats
- You Create the Rules and Order of Work Management
- You Can Create Additional Tables to Capture Unique Information

Paperless Operations

- Replace Your Paper Checklists & Procedure Manuals with Automated Processes
- Consolidated System Enhances Accuracy and Eliminates Duplicate Entry
- Shared Electronic Files Allow Simultaneous Access by Multiple Persons
- Electronic Work Routing with Immediate Notification via E-mail
- Automated Processes Allow Personnel to Concentrate on Insurance Tasks
- Multi-Document Delivery via E-mail, Fax, or Print from the Desktop
- Secure Electronic Notes are Available Throughout the System
- Customizable Internal Reporting, or Data Export to Microsoft Excel

Technical Functionality Includes

- Microsoft Windows
- Integrates to Microsoft Word, Excel, and Outlook
- Object-Oriented Consistent User Interface
- SQL Database
- Data Replication for Disaster Recovery and Efficient Multi-site Operations
- Document Management of both Internal and External Documents
- Automated Import of Incoming Fax, E-mail, and Scanned Documents
- Web Portal Support
- Web Reporting via Power View

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