



Insurance

**B**rokermate



PRODUCT OVERVIEW

# What is Brokermate

Brokermate is a short term insurance software solution developed and owned by Drimkoe Solutions (Pvt) Ltd. Brokermate was designed to improve the significant business processes between insurance companies and intermediaries such as brokers and banks.

The process of managing policies, endorsements and renewal transactions is efficiently improved, while permitting users to enter basic policies and claims information, perform queries and give updates on policies and claims status according to defined user privileges.

Brokermate allows product parameters to be built-in and predefined in terms of rates, coverage terms and conditions exclusively warranties and deductibles etc.

A virtual trust account (VTA) system is implemented to separate concerns between the insurer premium and the brokers and or banks commission

# KEY FEATURES

## POLICY MANAGEMENT

- Enter & manage basic policy details
- Receive premium payments
- Customer accounts management (Statement of Account, Debit & Credit Notes, Cover Notes)
- Custom multiple product configuration
- Supports multiple insurers
- Use of VTAs to control Premium & Commission Accounts
- Notification & Alert System (SMS & Email)
- Automatic generation of Bord Statements

## CLAIMS MANAGEMENT

Report claims with real-time email notification to the insurer.

- Update claims status
- View and manage unprocessed claims
- View client claim history

### BENEFIT:

When executing policy transactions journals are automatically posted to the general ledger.

Brokermate has a complete accounts integration.

# SUPPORTING FEATURES

## ACCOUNTS INTEGRATION

Brokermate has a fully integrated accounts module which you can use to

- Define the chart of accounts
- Post and review journals
- Track accounts receivables
- View a Statement of Income & Expenditure for both VTAs and Operational Accounts.
- Generate financial statements for both VTAS and Operational accounts
- View and summarized and detailed premiums claims

## SYSTEM SECURITY

- Brokermate supports role based authentication which means you can define system roles and assign them built-in system permissions. Any user added to that role inherits all permissions in the role. A user can belong to more than one user role.
- Audit logs are used to record and keep track of system activities
- Strong password policy is enforced.

### BENEFIT:

VIRTUAL TRUST ACCOUNTS are used as control accounts to manage the insurer's premium & broker's commission. This results in accurate financial reporting.

# CUSTOM FEATURES

Additional and advanced features can be added to Brokermate at an extra affordable cost of fully meet your business requirements.

The following customization scenarios are possible:

- Drimkoe Solutions can gather a set of extra features beneficial to you as a customer and include them into the standard issue of Brokermate.
- Website integration we can integrate certain features to your websites through our windows azure cloud services.
- Mobile application we can build custom mobile clients that will compliment Brokermate as an on-premises system to benefit both employees and clients
- Integration with third party system we can integrate Brokermate with existing systems in your organization
- **NB: EXTRA COSTS MIGHT APPLY**

## BENEFIT:

Customization will ensure that Brokermate reflects your business processes and seamlessly integrates with your operational & strategic environment.  
FOCUS ON A COMPLETE SOLUTION.

# DEPLOYMENT FEATURES

- Brokermate can be deployed in a client-server architecture which means:
- With a single server infrastructure and network backbone, multiple user access is enabled for one application instance.
- The application can be easily rolled out into your infrastructure
- Few points of failure
- Effective application administration
- Scalability as you shrink or grow
- Updates can be pushed from server to client, resulting in insignificant downtime during updates

## Usability

- Brokermate can be installed on client machines as a desktop-client or browser client user familiarity with the windows environment will make it simple to use.
- User manuals and video tutorials are readily available that explain in detail how to use the application

## CONTINUITY

Continuity is key to any IT supported business process. As Drimkoe, we will offer continuity

in terms of support & maintenance in three areas:

- Corrective maintenance
- Adaptive maintenance
- Enhancive maintenance

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think

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build