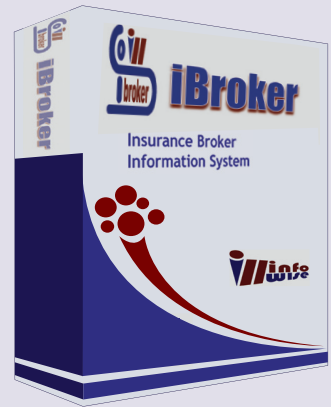




iBroker

Insurance Broker
Information System



*Do More Business...
Confidently!*



www.ibroker.co.tz / info@ibroker.co.tz



Motor
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Third-Party

Contractors All
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Compensation



Office
Combined

Business
Interruption

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Burglary

***...and many more
policy classes***

1. Background

Being an insurance broker or agent has traditionally mandated filling of paper-based forms to submit to insurers and serve client with his/her copies. The process is time-consuming and information is not easily retrievable and concurrently sharable within organization. Summarizing the information from paper-based forms into accounting, management and statutory reports is also time-consuming and error-prone. As your business grows keeping track of individual business details and overall business overview can become overwhelming.

2. iBroker to Rescue

InfoWise has developed “iBroker”, an information system to help insurance brokers and agents to manage information associated with the business they are handling.

- ◉ Information is entered as business is transacted.
- ◉ **Clients and insurers** are all served with copies of printed document directly from the system.
- ◉ The **Management** is served with their periodic reports which are a click away.
- ◉ The report to the **Commissioner of Insurance** can be prepared timely with a click of a button
- ◉ The System sends automatically generated text messages (SMS) and emails alerts to notify/remind customers of expiring/expired policies
- ◉ Other accounting tasks and reporting are performed separately in QuickBooks (accounting package) with business data synchronized from iBroker

iBroker lets broker/agents staff serve customers, insurer, and authorities with confidence, speed and smile that modern business environment require to survive the throat-cutting competition. It increases speed but retains the needed control in serving the customer and growing your business. It is priceless tool to transform your insurance brokerage/agency into an agile and fast-moving in responding to customer inquiries, offering services and hence ***Do More Business... Confidently!***

2.1. About InfoWise iBroker

InfoWise iBroker is a comprehensive insurance information management system for recording, printing-out documents, tracking and summarizing insurance information.

iBroker has the following modules:

- **Underwriting Module:** which has the following sub-modules:
 - ◉ **Customers:** Recording of customer details and printing

- statement of all policies of the customer
- ◉ **Policies:** Recording of insurance policy details and associated schedule (cover-note) details and printing of quotations, risk-notes and/or policy schedules from the system
- ◉ **Invoicing:** Recording and printing of invoices from the system
- ◉ **Endorsements:** Recording of endorsements (changes to ongoing policies and associated cover note details) and printing credit notes and invoices
- ◉ **Renewals:** Recording renewals of existing policies
- ◉ **Claims:** Recording of claims details, documents and actions
- **Accounting Module:** which has the following sub-modules:
 - ◉ **Receipts:** Recording and printing of receipts from the system
 - ◉ **Refunds:** Recording of refunds from authorised credit notes, policies cancellations
 - ◉ **Deposits:** Recording of deposits of collections to trust bank account
 - ◉ **Remittances:** Recording of premium remittances to insurers
 - ◉ **Other Bank Transaction:** Recording of additional bank transactions like service charges and other payments
- **Business Reports:** the following reports can be user-generated for internal use:
 - ◉ **Business Summary:** summary of total business transacted, cash and invoiced, which can be filtered by insurer, policy class, date, currency etc
 - ◉ **Debtors:** summary of invoiced business, which has not been fully paid, that can be filtered by insurer, policy class, date, currency etc
 - ◉ **Debtors' Aging Analysis:** summary of debtors by age of their debt, 1-30 days, 31-60, 61-90, etc, that can be filtered by insurer, policy class, date, currency etc
 - ◉ **Receipt Summary:** summary of payments against the invoices issued which can be filtered by insurer, policy class, date, etc
 - ◉ **Renewal Letters:** printable renewal letter to be mailed/posted which can be filter by date of expiry, insurer, class of policy, etc
 - ◉ **Renewal List:** report of policies due for renewal in the specified time interval
 - ◉ **Lapsed Policies:** report of expired policies which have not been renewed intime
- **Commissioner's Reports:** the following reports can be generated from the system and submitted to Commissioner of Insurance:
 - ◉ **Annual Filling:** Premium Booked (C1 & C2), Commission Income (F)

- ◉ **Quarterly Filling:** Premium Booked (B.1 & B.2), Payables Outstanding to Insurers (C), Premium Collections (D.1), Premium Deposited (D.2), Premium Remittances to Insurers (D.3), Other Withdrawals (D.4), Trust Account Summary (D.5)

2.2 Features and Benefits of InfoWise iBroker

- ◉ Record search forms with options to locate a record of interest easily
- ◉ Simplified record *navigation* to make intuitive link between related records like customer, policy, invoice and receipt data
- ◉ Easy-to-use and self-guiding *data entry* screens
- ◉ Well formatted *printable risk-notes, credit notes, invoices, receipts, and renewal letters* for the data entered
- ◉ Built-in user-generated *summary reports* for management as well as commissioner of insurance
- ◉ Co-insurance schedule management and its associated payments posted to relevant insurer summaries automatically
- ◉ Supports recording of business from multiple *branches* (including agents and sub-agents)
- ◉ Configurable security roles assignable to users
- ◉ Business data of customers, invoices, receipts, credit notes and refunds data may be continually and automatically synchronized with QuickBooks (accounting package) which may be used to manage additional operational accounting details (like fuel, salaries, utility bills) and produce complete accounting reports (like balance sheet, trial balance, profit and loss, etc) without entering business data twice
- ◉ The system sends automatically generated renewal notifications for expiring policies and renewal reminders for lapsed policies as text messages (SMS) and emails (with renewal letters as attachments)
- ◉ Data in iBroker is exportable to csv, excel, pdf and xml. Makes data in iBroker extractable by end-users into office productivity packages like Microsoft Word and Excel.
- ◉ Data used by InfoWise iBroker can be stored in a *relational database* including MySQL (extensively-tested), SQL Server, Postgre SQL and Oracle. Thus technical staff can use other reporting package to summarise data in any preferable format.
- ◉ Built-in data *backup* and *restore* utilities for off-the -server storage
- ◉ Since the package has been developed from ground-up by InfoWise, it is open for future *enhancement, customization and integration* into other systems

2.3. Screenshots

The following are some of the InfoWise iBroker screenshots:

iBroker - Insurance Information System

Policies

Name: Town:

Policy Class: Insurer:

Currency: Customer Type:

Entered By:

Start Date: End Date:

Records Limit: Search

10 Items found, displaying 6 to 10.
[First/Prev](#) 1,2 [Next/Last](#)

| Id | Date | Name | Policy Class | Insurer | Premium | Status | Entered By | |
|----|------------|-------------------------|-------------------|----------|-------------------------------|----------|------------|-------------------------|
| 24 | 15/02/2011 | Super Meal Producer Ltd | Electronic | ALLIANCE | USD46.00 | New | madock | Details |
| 23 | 27/01/2011 | Super Meal Producer Ltd | Fire | LION | TShs600,000.00 | New | madock | Details |
| 22 | 27/01/2011 | Super Meal Producer Ltd | Buglary | LION | TShs500,000.00 | New | madock | Details |
| 21 | 07/12/2010 | Selemani Kamiliha | Motor Comm - Comp | ALLIANCE | TShs525,000.00 | New | madock | Details |
| 20 | 06/12/2010 | Juanita Peter Samson | Motor Comm - Comp | ALLIANCE | TShs78,000.00 (Subj. To Ext.) | Extended | madock | Details |

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

[Help](#)

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Customers

- Insurance Policies
- Insurance Covers
- Invoices
- Receipts
- Endorsements
- Refunds
- Claims
- Deposits
- Remittances
- Other Bank Transactions
- Reports
- Commissioner's Reports
- System
- Logout

Demo Insurance Brokers
 User Name: madock
[Help](#)

InfoWise iBroker search form/result list page for insurance policies

Policy : Buglary: Super Meal Producer Ltd

Details | **Edit** | **Covers** | **Insurer(s)** | **Extensions** | **Invoices** | **Activities**

| | | | |
|------------------------|-----------------------|------------------------------|-------------------------|
| Id: | 16 | Name: | Super Meal Producer Ltd |
| Business: | Food Processing | Customer Type: | Corporate |
| Address: | P. O. Box 44444, Keko | Town: | Dar es Salaam |
| Insurer: | LION | Policy Class: | Buglary - Buglary |
| Date: | 27/01/2011 | Insured Value: | TShs 300,000,000.00 |
| Premium: | TShs 500,000.00 | Premium Rate: | 0.16666667 |
| Commission: | TShs 75,000.00 | Commission Rate: | 15.0 |
| Fleet Discount: | 0.0 | Special Discount: | 0.0 |
| Excess: | | Subject to Extension: | No |
| Effective: | 27/01/2011 | Expires: | 26/01/2012 |
| Contact Person: | | Status: | New |

[List](#) | [Customer](#) | [Issue risk note](#) | [Issue schedule](#) | [Renew](#) | [Extend](#) | [Endorse](#)

InfoWise iBroker policy information screen

Risk Note

Date: 27/01/2011

| | | |
|--------------------|---|---------------------|
| Insured | Super Meal Producer Ltd P. O. Box 44444, Dar es Salaam | Risk Note No. 22 |
| Business | Food Processing | |
| Class of Insurance | Buglary | Policy Number |
| Period | From: 27/Jan/2011 | |

Printable output (risk note) from InfoWise iBroker**3. About InfoWise Systems Ltd**

InfoWise Systems Ltd focuses on Information Systems Development and Integration. It has been registered by Registrar of Companies as a limited liability company. It has its offices located at Josam House, Block B, Ground Floor, Plot 16, Mikocheni Light Industrial Area, Dar es Salaam.

Our services are focused into:

- ⦿ System Development
- ⦿ System Integration
- ⦿ Website Development
- ⦿ Domain Registration and Website Hosting

List of Clients

For any inquiries contact us at:
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Email: info@infowise.co.tz
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