



SUPERVISED AGENT INFO & ANALYSIS

- Supervised agent list (Name wise, Appointment date wise, Issue date wise, Renewal date wise)
- Supervised agent's business history (Policy data wise, Business data wise)
- Supervised agent's target v/s actual performance
- Supervised agent's income (Agent wise, Appraisal year wise)
- Supervised agent's ranking (Sum assured wise, no. Of lives wise, Premium wise)

PERIODICAL QUERIES/REPORTS

- CLIA benefit statement
- Policy registers
- Policy status report
- Premium due statement
- Premium outstanding statement
- Lapsed policy statement
- Multiple due statement
- Survival benefit due statement
- Policy maturity statement
- Paid-up policy statement
- Non paid-up policy statement
- Business analysis
- Commission statement
- Commission pending statement

EXCLUSIVE FEATURES

- Single page plan presentation with yield, Risk cover, Surrender value, Loan value, Tax rebate & Re-investment returns
- Database maintenance of other investments
- Prime plans
- Multi-plan presentation
- Endowment special
- Premium budgeting
- Plan features / rules in brief
- L.I.C. v/s other investments
- Maturity calculation
- Surrender value / loan value calculation
- Medical requirements calculator
- Premium calculation
- Late fee and revival amount calculation
- Greetings for birthday, anniversary, festivals & new year
- Human life value
- Keyman insurance information
- Auto update feature and Online policy status.



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LOCAL SALES INQUIRY