



ADINSURE —

AdInsure platform for agile and digital insurance

AdInsure unites your teams, streamlines your processes and helps you adapt to change.



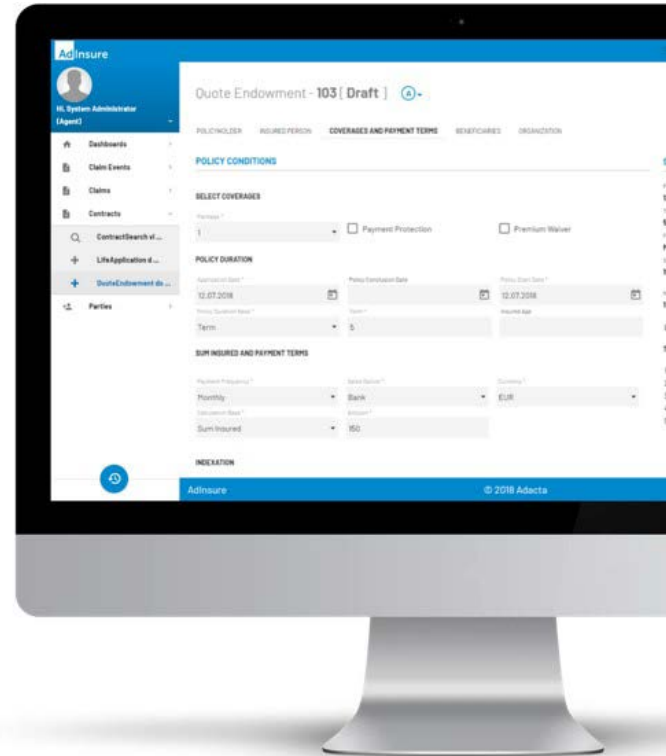
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Meet the platform

AdInsure is a powerful insurance platform that makes running your business easy. Designed for Life and P&C insurers, it gives you the functionality and capability to streamline business processes, improve user experience and manage change effectively.

Built around industry best practices, AdInsure combines comprehensive features in a single, unified platform. It delivers an innovative environment that connects your organisation with emerging technologies, service providers, partners, and clients.



Support for insurance business departments

Insurance processes: AdInsure supported processes cover the whole Insurance product life-cycle from configuring products, providing offers and concluding policies to collecting the money and managing claims.

Data insight: while the out-of-the-box reports and 3rd party BI tools provide insight into data, the Party module provides a 360 view of your clients and can act as a mini-CRM and CDI hub.

Role based portals: every insurance user (sales, claims, back-office, underwriter) can enjoy a role specific web-based portal providing access to module functionalities, user activities, dashboards and analytics.





Standardized



Configurable



Scalable



Unified



Cloud



Open

PLATFORM CAPABILITIES ———

The essence of business agility

Upgrade: adapt the modules to your needs and enjoy the regular updates.

Configure: implement changes quickly and conveniently, without touching the source code.

Cloud-ready: run on-premises or in Cloud, with great performance.

Open: the out-of-the-box integration framework and the open API make connecting to external systems simple

Modules built around key areas of insurance

AdInsure platform comes with a set of predefined insurance functionalities provided as a set of integrated and configurable modules. Built-in industry knowledge and best practice lets Life and Non-Life insurers accelerate time-to-market.



Sales

- Application, Quote, Policy
- Package and group Policies
- Underwriting
- Invoices and invoicing plans



Commissions

- Commissions rule management
- Intermediary contract management
- Calculations and payments
- Portfolio transfer



Billing & Collection

- General billing
- Direct debit management
- Reminders
- Debt rescheduling

Policy management

- Renewals: rules and automation
- Change of coverage, duration, conditions
- Business and technical amendments
- Payment rescheduling

Claims & Recoveries

- FNOL, Claims registration and claim event management
- Claim assessment, handling and settlement
- Recoveries registration and management
- Court case management

Reinsurance

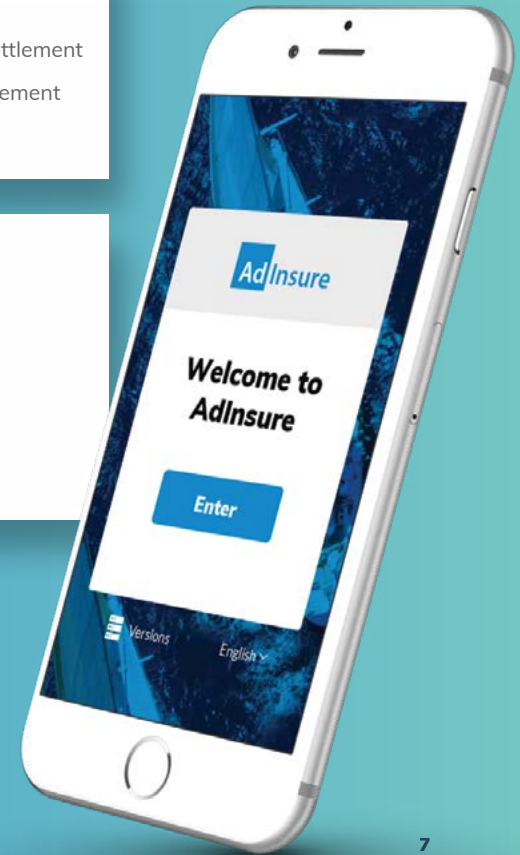
- Contract registration: proportional, facultative, coinsurance
- Bordereau management
- Risk identification and allocation
- Premiums/Claims: calculation & settlement

Accounting

- Journals
- Accounting reports
- Accounts receivable and payable
- Payment management

Party & Organization

- Central repository of User and Actor data
- Provides "mini CRM" functionality
- Versioning and deduplication, GDPR
- Organization roles management



The right information at your fingertips

With the provided BI integration and user data functionality, you always have the right information at your fingertips.



360-degree views of every customer

The Party module can be used as the single central repository for all Client related data providing a 360-degree view of the customer and acting as a mini CRM. The 360 view offers overview of Clients Personal information, Sales opportunities (applications, offers), Contracts (active, closed and for renewal Policies), financial data (invoices, payments), overview of Claims status.





Full customer data integration

The Party module can also act the role of Corporate CDI hub- centralisation of user data across all systems. This allows managing different versions of data via deduplication functionality, managing Consensus and Preferred way of communication to increase compliance and exceed customer expectations.



Multiple reporting options with BI integration

Get operational reports for policies, claims, and accounting straight out of the box, with AdInsure's pre-defined reports. When you need more in-depth data analysis, AdInsure enables business intelligence integration with Qlik to give you the exact insights you need.

Role-based portals

- Every insurance role (sales, claims, back-office, underwriter) can enjoy a role specific web-based portal
- The portal provides access to functionalities of the AdInsure modules based on user role permissions and role in the process
- Portal provides access to Users activities and supports creation of custom dashboards to access analytics, predefined queries
- The UI is configurable and can be performed by non-IT users

Key benefits

- **Unified user experience** - the same web-based functionality for all users and across all devices
- **Lower cost of ownership** - no necessity to build custom portals and role-specific applications
- **Ease of change** - does not require AdInsure code change

Key features



Sales functionality

- Complete Application-Quote-Policy workflow
- Management of renewals
- Management of Amendments
- Collaborative Workflows involving underwriters
- Powerful search
- Payment processing



360 degree user view

- New prospect registration and modification
- Client portfolio overview; Policies, Claims, Offers overview
- Policy history overview: amendments for selected policies
- Policy payments: payment information on selected policies



Activities & Notifications

- Underwriters notifications
- User activities
- Upcoming renewals and expired policies
- List of non-payments
- Overview of monthly commissions
- Issued policies and net premium overview



Dashboards

- Commissions: earned commissions overview, list of included policies
- Sales data: number of sold policies, net earned premium
- Upcoming renewals
- Non-payments, reminder levels (Dunning related)
- Expired policies

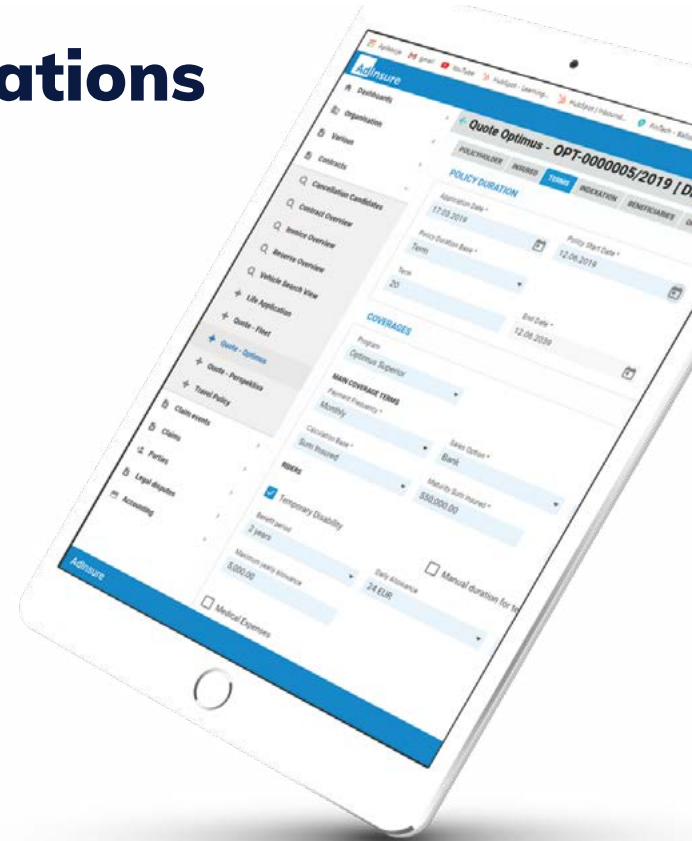
Simple, swift configurations

When industry best practice just doesn't cut it, make quick configurations of your products, process workflows and the User interface in a simple, timely and inexpensive manner.

You can change all aspects of the predefined functionalities to meet your own needs without needing to change the source code.

Adinsure Studio - a set of tools for IT and non-IT teams to define new or change existing configurations

Configuration management- support for the complete content life-cycle, Build, Publish, Deploy





Product configuration

Product configuration capabilities allow users to configure all aspects of insurance products including coverages, insured objects, risks, limits, deductibles, conditions, clauses.

Product configuration also provides the necessary definitions and rules for Sales, Policy, Claims, and Reinsurance functionality.



User interface configuration

The User interface can be tailored to the need of a specific user. At every step of the workflow new product attributes can be added, as well as new UI sections and even new UI layouts.



Workflow & Process configuration

Sales, Policy and Claims processes are configurable with easy-to-create workflows that support process automation (and straight through processing) by use of business rules. Users can also easily manage their workloads with the provided Activity management functionality.

- **Save time** - products and forms can be updated in minutes
- **Simplicity** - modifications do not require coding
- **Lower costs** - changes can be performed without the vendor
- **Continuous improvement** - you can adapt and improve processes

STANDARDISED ———

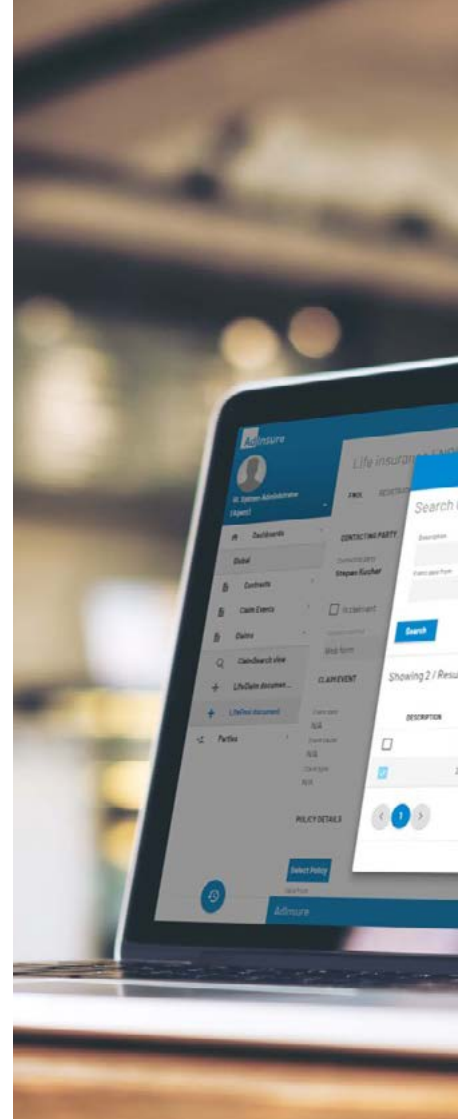
Best practice for a head start

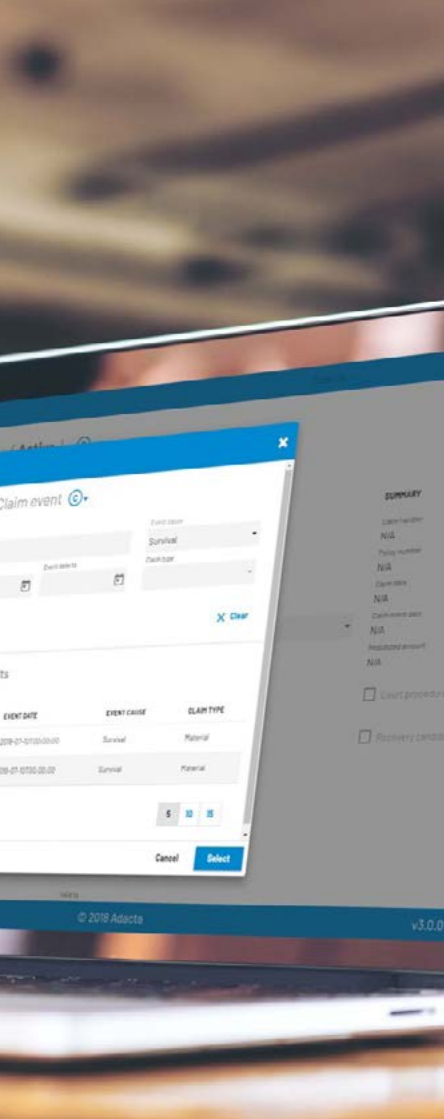
We designed the platform the way that there is always an upgrade path. Clients can freely modify the predefined configurations to meet their specific needs, and still enjoy the benefits of platform updates.

SCALE ———

Go as you grow

Adinsure has several modules available, but you can make your project roll-out more manageable by starting with the modules you need, then add more later. Plus, modules are not the only way to scale up. You can also configure new products, develop integration accelerators, and add plug-ins.





MOBILE

Work where the business takes you

AdInsure delivers a seamless, continuous experience across computer, tablet and mobile. Every action you do is quickly synced across all your devices, so your teams can stay productive with Adinsure, whatever they're doing.

OPEN

And ready to integrate

AdInsure is an important part of your digital journey and a gateway to emerging technologies and partners. Platform services, functionality and custom configurations come with a RESTful API, allowing systems to interact with all the aspects of your platform; the out-of-the-box integration framework makes connecting to external systems and partners simple.

General platform functionality



Multi-language

- Ease of language switching
- New dictionaries defined during projects
- Current support: German, English, Russian



Multi-currency

- Support for all international currencies
- Contract, claim, accounting documents- all can have multiple currencies



Printing

- Configurable HTML templates
- HTML to PDF converter needed
- Preferred 3rd party can be bundled



Activity management

- When User or Group action is required, you can create, assign, schedule
- Can be created automatically during state transitions



Versioning

- All types of Documents
- Configurations



Auditing

- Technical: application service calls, database access
- Business: internal rules defined on the project level



Document import

- Provided framework for import of data packages
- Attachments



Compliance

- Support for EU and other regulatory acts
- GDPR, IDD, FATCA, Solvency II

AdInsure architecture

Users



Sales



Underwriters



Claims department



Back-office



Management



Customers

Presentation



Web interface



Desktop



Mobile



Responsive design

User / Role functionality

Role based UI

Activities

Business functionality

Workflow

Dashboards

Business logic

✓ Sales

✓ Reinsurance

✓ Policy administration

✓ Accounting

✓ Claims

✓ Billing & Collection

✓ Reporting/BI

CONFIGURATION TOOLS

- Products
- Workflows
- Documents
- User interface



IT user



Non-IT

Services

✓ Business rules

✓ Tariff engine

✓ Workflow

✓ Full-text search

✓ Print-outs

✓ Batch processing

Data

✓ Configurations

✓ Transactions (Documents, Relational)

✓ Data vault

Integration

✓ CRM

✓ Finance & Accounting

✓ Document management

✓ Service providers

✓ Sales channel

About us

We are Adacta — a leading software provider for the insurance industry. Our insurance platform, AdInsure, gives Life and P&C insurers a future-proof way to streamline their operations and processes.

So, what's special about us? Formed in 1989, we've spent decades helping insurance organisations to grow their digital capabilities and drive new profits. Our mission is simple: empower tomorrow's industry leaders to reach their potential through technology.



30+ years of experience

20+ successful implementations in nine countries



180+ dedicated experts

International teams based in five offices across Europe



Industry approved

AdInsure is recognised by leading research firms

 **Slovenia**

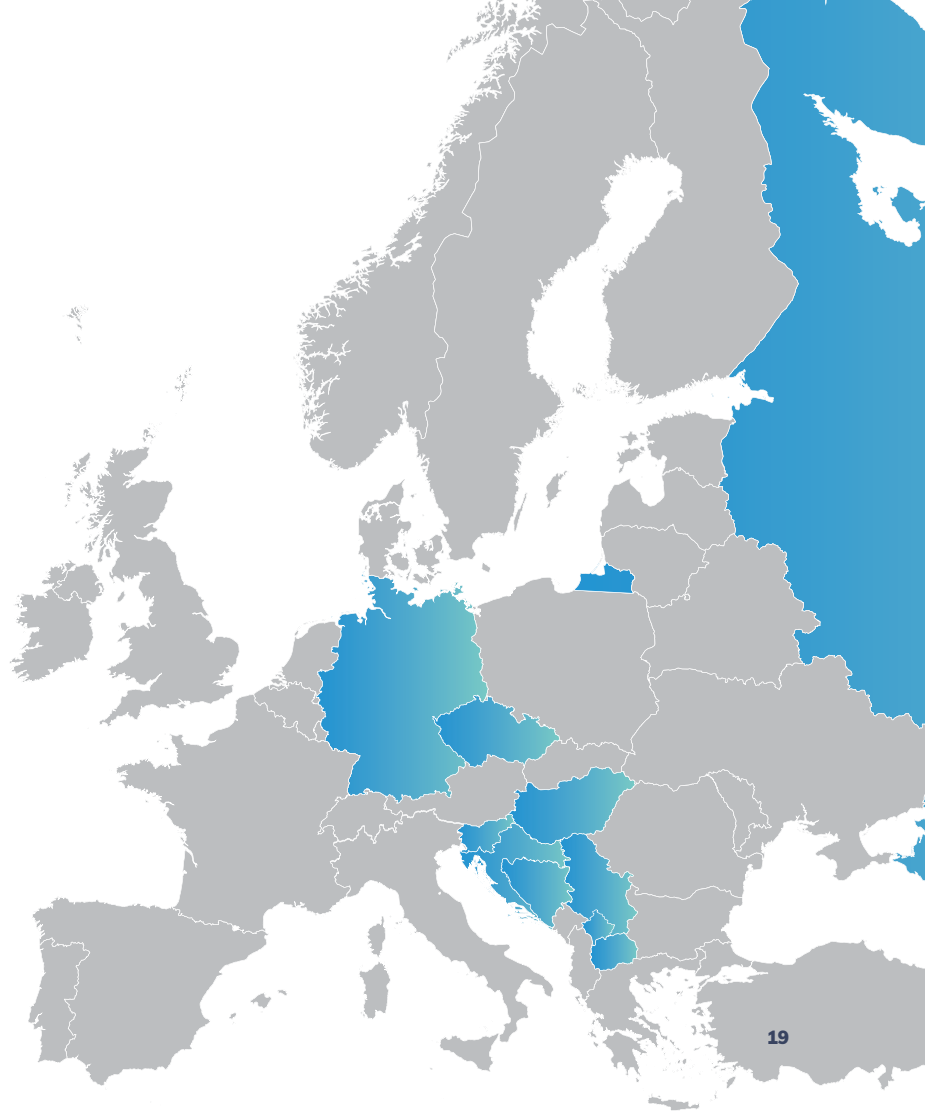
 **Germany**

 **Serbia**

 **Croatia**

 **Czech**

 **Russia**



VISIT US —

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