

# INSURANCE

## Industry Challenges

In the competitive world of the insurance industry, customer service, and client inquiries are what define the success of an insurance agency. Document management and professionalism are key components that will help any insurance agency prevail and gain the most business opportunities. Managing documents such as applications, insurance policies, claims, photographs and reports can be a challenge especially dealing with a lot of customers and clients.

## Insurance Solutions

- Effortless form management
- Secure Release Printing
- Easy management of documents requiring notes or signatures
- On-demand form filling, printing and archiving
- Simple electronic distribution of hard copy documents
- Transparent document approval processes
- Easy management of photographs for insurance claims

## Who Uses FabSoft's Solutions?



Insurance Brokers

Insurance Adjusters



# INSURANCE

## Insurance Solutions

Reform allows you to intelligently print, distribute and capture data contained on applications, policies, and claims. No more bursting and hand delivering documents, now you can electronically deliver each part of the form to its final destination. Also forms can be generated on-demand with up to date information, eliminating the need to bulk purchase and store multi-part forms

### **Easy Management of Documents Requiring Notes or Signatures**

Tag Doc allows documents that require signatures or notes to be scanned and automatically associated with the information on the document, such as client name, policy number, agent, etc. The document can then be archived or routed for further processing

### **Seamless Integration with Information Management Systems**

Modular Object Scanning Technology (MOST) provides insurance companies with the walk up convenience of scanning & distributing documents directly from their multifunctional printer (MFP). Select fax numbers, email addresses, subjects & notes, specify directory locations, indexes, document types, and enter descriptions for archival systems. For common tasks, quick keys can be assigned to process jobs with fewer keystrokes.

### **On-Demand Form Filling, Printing & Archiving**

Desktop Filler allows a company to access, fill-in and process forms from the most convenient location -- the MFP screen. After selecting the form, customer data is merged and fields can be entered directly from the MFP screen. Forms are now printed with accurate and legible information. Additionally, when forms are completed & scanned, Reform can intelligently distribute them to any printer, fax, email, or archival system.

### **Transparent Document Approval Processes**

Document Authority Control® (DAC) can be used to automate approval processes. An agent may make a change to a report that needs to be reviewed by another associate in the office, the agent's supervisor, a manager in another location and then finally sent to the client. DAC routes documents to individuals, across specific departments or within work groups for approval. When notification is received, the document can be viewed, approved or changed then routed to the next approver or department. Upon final approval, a copy of the document can be distributed or archived.

### **Photo Management**

Snap Doc® integrates insurance claim information, handwritten notes and images seamlessly. Simply record information on a Snap Doc form, scan the barcode and the necessary pictures. Pictures are automatically associated with information on the form and can be delivered to your fax, email, or digital archive system.

### **Secure Release Printing**

Print To Me allows insurance professionals to print insurance documents from any local or remote PC. The documents can be retrieved from any network connected MFP at any time if necessary. The implementation of Print To Me will increase insurance document security, eliminate redundant print jobs, and allow smart release of pending print jobs.

