



mPACS Policy Manager



General Insurance Software

The need to use a simple, powerful yet comprehensive policy manager application is vital for any insurance intermediary.

The mPACS insurance software solution provides management for a range of products including Travel, Household, Commercial, Motor, Marine and Healthcare.

Internet enabled, mPACS also integrates with Microsoft Office to provide a comprehensive tool to help you manage multi-currency quotations, policies, reporting and provide an accounts interface.

Full user-level security allows only users with the appropriate permissions to perform specific tasks. In addition, every transaction is recorded with the user code, transaction date and time.

Flexible Insurance Software that adapts to your business



Quotations

The simple graphical interface allows quotations to be entered quickly and easily. The user-definable Quotation Wizard provides an alternative method of quickly entering information followed by printing or emailing the quotation to your client – or the quotation request (fact find) to the insurer.

In order to maintain a history against your clients, previous quotations can be selected, modified and then stored as new versions of the same quotation. The search options can find previously stored quotes by quote number, client name and postcode.

A breakdown of the gross premium can be stored against each quotation as can a very comprehensive set of fields about the risk and definable tables drive all static fields to avoid input errors.

Entered information can be 'held' and picked up for later completion, when for example additional information is required.

Selecting an existing quotation and converting it to a policy is simple and only needs the effective date to be entered.

mPACS will also automatically expire quotations after a definable time.

Statistical reports on quotations and cover notes can be printed, exported to Microsoft Excel or e-mailed. As part of the support agreement, additional reports are provided free of charge by Mandon Software.

Policies – including IPT, Foreign Taxes and more

Quotations taken up are easily converted to policies without the need to re-key any information. New business can be entered directly without having to provide an initial quotation.

All the quotations, cover notes and policies for a client, are stored and visible against the client and the Last Search facility allows stepping through each in turn without the need to search again.

mPACS automatically applies IPT or foreign taxes, sub-agent, insurer commissions and admin fees and provides an audit trail of transactions giving each financial transaction an audit or debit note number. The individual elements of each transaction are split out for automatic posting to Sage Line 50 or other accounting software if required.

The applicable policy section is table driven, as are the endorsement wordings with the ability to embed variable data. Policy documents can be printed either individually or by user definable sets to increase efficiency. Documents can also be e-mailed directly from the application if required.

Once a policy is nearing its renewal date, the invitation process invites the policy, allowing further editing prior to sending the invitation to the client or sub-agent. The on screen list of invited policies provides options to uninvite, lapse, re-edit and produce relevant documentation, such as chaser and lapsed letters.



Accounts including Agent Statements and Insurer Bordereaux

mPACS fully integrates with Sage Line 50. Postings are automatically made to Sage and cash allocations made in Sage are reflected in mPACS. The client ledger facility gives details of all financial transaction associated with a specific client. Other accounting systems can be integrated with mPACS.

mPACS produces agent statements (including an in-house statement) and insurer bordereaux.

Full and part payments from clients and sub-agents and to insurers are possible via Sage and are automatically reflected in the statements and bordereaux.

Diary and Notepad with reminders for tasks due

Future events that relate to quotes and policies as well as client, agents and insurers (known as entities), can be placed in the diary and will appear upon logging into the application on the due date.

Diary items can also be printed if required. A notepad facility allows miscellaneous notes to be attached to any quote, policy or entity, broken down by user definable categories and marked as priority notes if required.

mPACS Policy Manager

..an enormous help in our business..
**Porthcawl Insurance Consultants
(UK) Ltd**

*..after sales support has been of
great assistance..*
Yachtmaster Insurance Services Ltd

*..reliable and conscientious in
approach..*
Nautical Insurance Services Ltd

Mandon Software Ltd produces a range of insurance management software specifically tailored to specialist needs, including: Household, Motor, Commercial and Travel, as well as additional mPACS modules including Premium Manager and Claims Manager. Please contact us for further details.

www.mandon.co.uk

Summary of mPACS Benefits

- Customise and create your own documentation
- Process insurance documentation in different languages for when clients travel internationally
- Track and analyse your business and income by class
- Collect taxes based on location
- Fully integrated claims system
- Work on multiple clients or records at same time so you can look up queries without losing your original work
- Bordereaux
- Agent and Client Credit Control
- Agent Statements
- Integrates with Sage and other accounting systems
- Mid Term adjustments
- Renewals
- Cancellation and refund calculations
- Marketing
- Addons
- Reminders for follow up of tasks and diary items due
- Email and other communication is all in one place



Why Mandon and mPACS?

We have a full understanding of the insurance market place and have been developing software for insurance brokers for 25 years. We are fully dedicated to insurance systems.

With mPACS you can be more efficient and run a smoother operation so that you can concentrate on being more productive and profitable.



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