

"Technology coverage we can count on."



Insurance Agency Management System

In today's competitive business world you need an insurance agency management software system that gives you the ability to process your work flow faster than ever before. It's no longer enough just to keep track of your client names, addresses, and policy information. Our software enables you to better manage your organization's daily workflow, improve your customers' service experience, and reduces overhead costs toward your bottom line.

Core BackOffice's Insurance Agency Management System is a powerful and robust tool. It's designed to give you total control and help automate your agency business. The system allows an agency to manage clients, policies, accounting, production, commissions, list bills, workflow, run standard & customizable reporting, and much more.

- Premium accounting.
- Unlimited policy specific billing options and payment schedules (invoices, payroll deduction, etc).
- Contribution accounting for annuities.
- Generate list bills for carriers, payroll deduction change reports for corporate clients.
- Fully customizable (add any data fields you need).
- Consolidated single bill statements for your clients.
- Commission accounting (pending, transactional, renewals, one-time, bonuses, etc.).
- Enter notes, alerts and view transaction history.
- Assign policies to multiple agents (splits).
- Change customer information & policy requirements instantly.
- Integrated with Core BackOffice's Licensing and Imaging Systems or stand-alone.
- Management, ad-hoc, and customized reporting.
- Import or export information to other programs.
- Import data from carriers or groups.
- Comprehensive training and support.

Contact us today to arrange for a free consultation and demonstration.

