



Adaptik Billing is a new enterprise billing platform from the leaders in configurable, scalable P&C insurance software solutions. Adaptik Billing features everything insurers across North America love about the Adaptik Suite – flexibility, ease of deployment and highly configurable integrations – in an entirely new paradigm.

- ▶ Integrate with third-party systems and data repositories with unparalleled speed and ease
- ▶ Enjoy best-in-class usability, robust search capabilities and advanced reporting and analytics
- ▶ Manage billing on an agency bill or direct bill basis
- ▶ Automate processes throughout the billing lifecycle – lockbox, allocation, transfers, disbursements and write-offs
- ▶ Reduce billing leakage and collection time frames through sophisticated workflow and task management
- ▶ Support multiple currencies with automatic FX gain and loss adjustments
- ▶ Deliver timely and accurate information through comprehensive reports

It's billing – made easier.

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The Adaptik Portal connects users and carriers like never before, making it easy for all stakeholders to submit new applications, handle subsequent transactions and routine policyholder self-service, and generate quick quotes and full quotes based on production-ready data from core systems. Best of all, the portal supports upload from and download to agency management systems like Epic, TAM, DORIS, Vision, AMS360 and Sagitta, and integrates directly with legacy carrier systems – increasing data integrity and all but eliminating the need for duplicate entry.

- ▶ Straight-through processing, with manual exception handling guided by advanced work management tools
- ▶ Full support for complex and specialty lines and large schedule uploads
- ▶ Intuitive, brandable user interfaces for desktop and mobile
- ▶ Guided, open and hybrid user navigation, depending on the user's expertise level and role
- ▶ Intelligent, live data completeness tools
- ▶ Real-time access to policy documents and third-party data providers
- ▶ On-premise and cloud deployment options
- ▶ Web service integrations via RESTFUL, SOAP and more

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Adaptik Rating sets the new standard for performance and easy to maintain advanced capability rating for every line of business, including specialty. It has everything an insurer needs in an industrial strength rating solution.

- ▶ Exceptional performance (out-performs the market leading rating engine in head-to-head comparison)
- ▶ Seamless Integration with Adaptik Policy (and you can integrate it with your other policy administration solutions as well)
- ▶ Flexible, simple table maintenance including Excel upload and download
- ▶ Full-featured algorithm capabilities (infinite-tier, multi-variant, interpolation/extrapolation, etc.)
- ▶ Familiar, intuitive product designer (design and configure with the same acclaimed designer used for Adaptik Policy)
- ▶ Supports full policy life-cycle including out-of-sequence mid-term calculations

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SOLUTION GUIDE



Flexible, Integrated P&C Insurance Software Solutions

The Adaptik Suite empowers P&C insurers to turn even the most complex products and lines into opportunities for sustainable growth. Available on-premise or in the cloud, our solutions for policy administration, customer management, task management, product design, rating and billing are intuitive, user-friendly and endlessly scalable.



Adaptik Policy is used by agents, underwriters and customers to quote, issue and administer policies. It is fully integrated with Adaptik Product Designer to provide users with configuration-driven and context-sensitive web page presentation, navigation, transaction processing and integration with third-party systems and services. Adaptik Policy provides comprehensive policy lifecycle support for all P&C lines of business and enables carriers to support:

- ▶ All distribution channels including internal
- ▶ Role-based processing
- ▶ Configured straight-through processing
- ▶ Complete quote, issue, bind and service functionality, including what-if scenario building
- ▶ Complete historical views of policy information with full audit capability

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Adaptik Customer provides agents and underwriters with a complete customer picture at-a-glance – including account history, contacts, relationships and more. Designed to address the specific business challenges of P&C insurers, Adaptik Customer enables P&C insurance carriers to:

- ▶ Capture and manage customer information
- ▶ Group related customers into Households or Corporate Hierarchies
- ▶ Identify and manage duplicate entry
- ▶ Provide a consolidated view of all policies for customers within a Household or Corporate Hierarchy
- ▶ Pre-fill customer data on new quotes and policies, reducing keying and data mismatches
- ▶ Automatically update customer information as a by-product of policy activity
- ▶ Optionally trigger updates to associated policies when customer data changes

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Adaptik Work Manager enables collaboration among agents, underwriters and other internal users for streamlined end-to-end underwriting and policy workflows. Adaptik Work Manager's intuitive inbox and user-friendly features provide P&C insurance carriers with:

- ▶ Greater ease of doing business through agent and underwriter collaboration
- ▶ Optimized efficiency and productivity with automatic assignment and notifications
- ▶ Improved customer service through SLA tracking
- ▶ Enhanced visibility into workload allocation to prevent bottlenecks and minimize quiet times through supervisor views and management reports
- ▶ Complete task histories
- ▶ Multiple assignment functions for bulk transfers
- ▶ Rich user throughput and task analytics
- ▶ Simple web services integrations

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Adaptik Product Designer is a user-friendly Web Application that controls the Product Rules related to Adaptik Policy. Adaptik Product Designer's advanced tools allow you to easily control the complexities of working with two or more sets of business rules simultaneously. In addition, it facilitates the sharing of rules across products and distribution channels – all without programming – enabling corporate agility and speed-to-market for new and existing products.

- ▶ Business-friendly configuration of user interface and system behavior, including drag-and-drop web user interface creation
- ▶ Easily configured system integration wherever it makes sense (not just at pre-determined exit points) allows rapid integration with external systems and services such as rating engines, claim systems, valuation services and more
- ▶ Supports comprehensive product definition for all P&C insurance products including specialty and standard lines
- ▶ Includes comprehensive change control capabilities for effective rule management

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