



# BROCHURE

EAZZY INSURANCE BROKERS



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# Company Profile

KM ORIZZON LTD is the software specialist for the following Professions/Industries:

- Offshore Management Companies and Company Secretary
- Insurance companies / Insurance Brokers & Agents
- Commerce/Maintenance/Workshop/Garage
- Notaries

All our solutions have been integrated with the powerful EAZZY Filing, which is a Document Management Software.

We also have many add-on modules to cater for the specific needs a company may have.

Many leading companies use EAZZY and more 50% of the Mauritian Brokers' market uses EAZZY INSURANCE BROKERS.





# EAZZY INSURANCE BROKERS

Welcome to EAZZY INSURANCE BROKERS, your software in windows version for the management of customers, their various insurance policies, their payments & their related customer claims towards an insurance policy.

Simple to use and to understand, this software will change the way you operate, and ensure you remain focused on your customers and your insurance business operations.





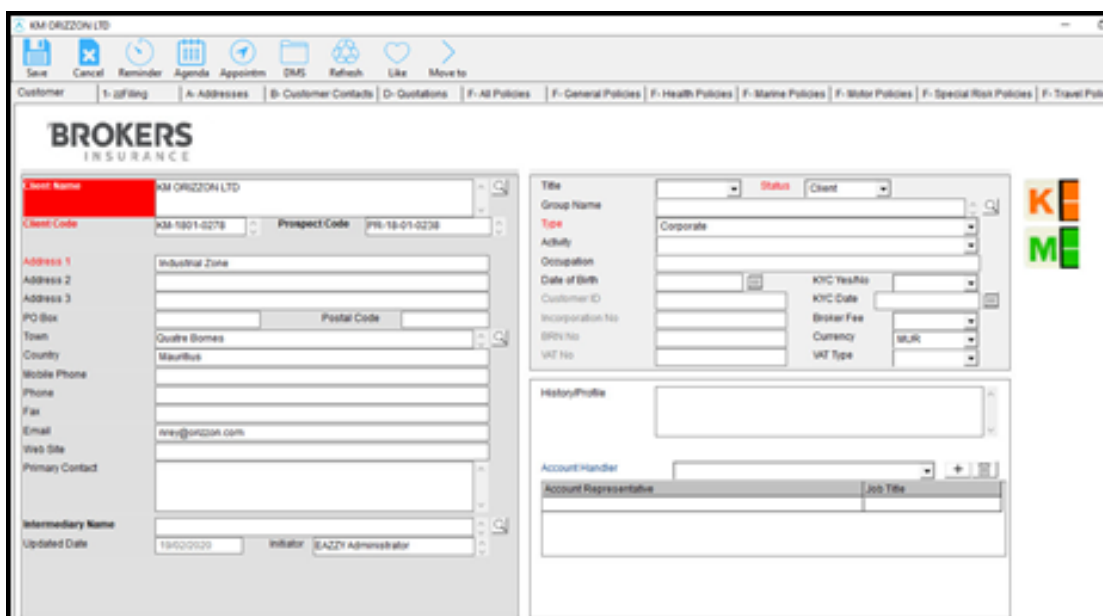
# EAZZY INSURANCE BROKERS

## Default Features

### Customers Management

Ensure there is one single & complete source of truth about your customers, and from which, you can get a reliable 360-degree view including policies, claims etc.

View/manage the customers' policies history and refer to related uploaded documents or those generated from the system; in EAZZY, data and documents are found in the same place. This philosophy ensures that you give satisfaction to your customers, by being able to provide them with answers rapidly, if required.





# EAZZY INSURANCE BROKERS

## Default Features

### Policies Management

- The software provides for the management of all lines of business an Insurance Broker would require - Travel, Health, Motor, Marine, General & Financial Lines Insurances
- Underwrite, endorse, adjust and renew your transaction easily
- Classify your documents in the integrated Document Management System to save time.
- Management of Placing Slips

The screenshot displays the EAZZY Insurance Brokers software interface for policy management. The form includes fields for Client Name (CALUMAN CO LTD GROUP), Insured Name (CALUMAN LTD), Description (MOTOR), Policy Type (MOTOR), and Transaction Type (NEW). It also shows a list of dates and a table for policy details.

Date	Employee	Follow-up	Reminder Date
2018/10/26 13:22	Administrator EAZZY	Save	
2018/10/26 13:41	Administrator EAZZY	Save	
2018/10/26 13:41	Administrator EAZZY	Save	
2018/10/26 13:41	Administrator EAZZY	Save	
2018/10/26 13:41	Administrator EAZZY	Save	
2018/10/26 13:41	Administrator EAZZY	Save	

### Management of Claims

- Manage and follow-up the claims of your customers
- Management of Claim Dispatched...

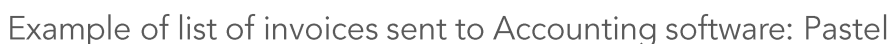






## Proforma and Invoicing Management

With EAZZY, you may also link invoices to your accounting software.



Results of the search - 111 - Pastor Export Invoices - Credit Notes - 20/04/2021 10:26:23

File Help

Print Open Actions Reminder Agenda Search

Company	Client name	Client Code	Ref Type	Type	Date Sent	Invoice To	Document	Invoice Ref	Client PO#	Alt No.	Title	Remarks	Invoice	Total W/T	Remarks	Status	Due Date	Currency	Exchange	Created At	Link To Invoice
EAGZY BRU CALDWELL LTD	LA-1812-0	Zero Rated Invoice	20200902	MOTOR	20181002	RW-00001		Insurance	EAGLE REF	50 713.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU CALDWELL LTD	LA-1812-0	Zero Rated Invoice	20200902	MOTOR	20181215	RW-00001		Insurance	EAGLE REF	44 900.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU CALDWELL LTD	LA-1812-0	Zero Rated Invoice	20200902	MOTOR	20200902	RW-00001		Insurance	EAGLE REF	25 488.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU VERTUALITY SOL	VA-1814-0	Zero Rated Invoice	20200901	MOTOR	20200901	RW-00001		Insurance	LFWHWH	50 475.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU CALDWELL LTD	LA-1812-0	Zero Rated Invoice	20200901	MOTOR	20200901	RW-00001		Insurance	EAGLE REF	7 375.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU CALDWELL LTD	LA-1812-0	Zero Rated Invoice	20200901	MOTOR	20200901	RW-00001		Insurance	EAGLE REF	7 375.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU CALDWELL LTD	LA-1812-0	Zero Rated Invoice	20200901	MOTOR	20200901	RW-00001		Insurance	EAGLE REF	7 375.00	Closed						NRM	EUR	1	2020-09-01	
EAGZY BRU NECOCON LTD	NE-2102-0	Zero Rated Invoice	20210215	GENERAL	20210215	RW-00002		Insurance	EAGLE REF	25 336.00	Closed						NRM	EUR	1	2021-02-15	
EAGZY BRU NECOCON LTD	NE-2102-0	Zero Rated Invoice	20210215	GENERAL	20210215	RW-00002		Insurance	EAGLE REF	23 957.00	Closed						NRM	EUR	1	2021-02-15	
EAGZY BRU NECOCON LTD	NE-2102-0	Zero Rated Invoice	20210215	GENERAL	20210215	RW-00002		Insurance	EAGLE REF	25 188.00	Closed						NRM	EUR	1	2021-02-15	
TOTAL GER															289 010.00						



# EAZZY INSURANCE BROKERS

## Default Features

### Balance Due Management

- Manage and view the balances on each policy per client.
- This module report will be updated only if EAZZY Insurance Brokers is linked to your accounting software. In such a case you will be able to update and manage:
- General Company/client information
- See who has paid or not
- See which police has been paid for or not

### Document Management System (DMS)

The document Management sections exist at various levels in EAZZY INSURANCE BROKERS:

- In the client, policies, Efilng etc datarooms
- In the Efilng section which is linked to your company specific filing directory.
- Generate, Create, Search, Modify, Save and Classify all your documents in the dataroom sections.
- Generate any type of document from your dataroom: emails, word, excel, powerpoint documents
- Documents and Data are linked and saved together.
- Gain time using our inbuilt templates. Insert your own as well.
- Ensure there is a standardized naming rule for your documents when they are created and saved
- Each document will have a unique document reference, versioning etc
- Many more features for an efficient administration of your documents

# EAZZY INSURANCE BROKERS

## Default Features

## Reports :

The software includes a variety of inbuilt reports by category:

Made easier by a simple extraction in excel

## Generate and modulate your pivot tables with downloaded data

[illegible]

## Other Features:

- User Journal
- EAZZY INSURANCE BROKERS datarooms can be put on the cloud (OneDrive, Google Drive, Sharepoint etc)





# EAZZY INSURANCE BROKERS

## Add-on Module

### Payment allocation module :

Manage and allocation payments made by clients towards an insurance policy. This is particularly useful when there are different invoices or monthly payments to allocate on various invoices issued to a client. (standard and/or health).

Doc Type	Transaction No	Currency	Total Net Inv	Balance	Payment Due	New Balance
Total			0.00	0.00	0.00	0.00

Invoice No	Amount	Balance
1/202004	1,242.00	0.00
2/202005	1,000.00	0.00
3/202006	1,000.00	0.00
4/202007	1,000.00	0.00
5/202008	1,000.00	0.00
6/202009	1,000.00	0.00
7/202010	1,000.00	0.00
8/202011	1,000.00	0.00
9/202012	1,000.00	0.00
10/202001	1,000.00	0.00
11/202002	1,000.00	0.00
12/202003	1,000.00	0.00
Total	12,242.00	0.00

**EAZZY**

Address: Trionon, Industrial Zone, Quatre Bornes  
Tel: Tel (230) 4676550  
Fax: Fax (230) 4676555  
Email:  
Website: [eazzy.com](http://eazzy.com)

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**OFFICIAL RECEIPT**

Member Code: KM-1811-0001  
Member Name: KIM ORIZZON LTD  
Address: Trionon, Industrial Zone  
Quatre Bornes, Mauritius

Date: 08/04/2022  
Receipt No: PCL\_MONTHLY-2022-000032  
Mode: Cheque

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Received with thanks the sum of MUR: **1,000.00**

The issue of this receipt is conditional on the cheque being honoured by the bank.

Signature: \_\_\_\_\_

Manage receipts to issue against customers' and payments to be made to insurers.

**Reports:** Debtors lists, Statements of Accounts, Debit Note (Health policies), insurers' payment slips (amount due to insurers)



# EAZZY INSURANCE BROKERS

<b>Eazzy Insurance Brokers - Features</b>		
<b>Business Application</b>		
	CRM	✓
	Contacts Database	✓
	Managing Multiple Addresses	✓
	Managing Contact Persons	✓
	Management of Policy Holders	✓
	Insurer's Database	✓
	Management of agent's commissions	✓
	Follow up of the insured	✓
	Specification requests to insurers	✓
	Management of quotes for follow-up	✓
	Placing Slips	✓
	Instruction forms	✓
	Policy Management	✓
	Managing Policy Renewals	✓
	Claims Management	✓
	Dispatched claims management	✓
	Billing Management - Client & Insurer	✓
<b>File &amp; Document Management</b>		
	Create any type of documents	✓
	Add documents by drag and drop	✓
	Open Office files and documents	✓
	Edit Office files & documents	✓
	Scanned documents	✓
	Photos	✓
	Videos	✓
	Manage versions	✓
	Add a reference	✓
	Encrypt	✓
	Naming Conventions for documents	✓
	Batch renaming of documents	✓
	Filing and saving of Outlook Emails	✓
	Filing email attachments	✓
	Local storage of files	✓
	Possible External Sharing & File Storage via the cloud (Dropbox, OneDrive or other)	✓



# EAZZY INSURANCE BROKERS

<i>Security via Active Directory</i>	✓
<i>Create Folder Trees</i>	✓
<i>Themes definition page</i>	✓
<i>Duplicate a theme</i>	✓
<i>Duplicate a folder with sub-folders and documents</i>	✓
<i>Move a folder and its files/documents</i>	✓
<i>Secure a top-level folder in the directory</i>	✓
<i>Point to a folder in the directory on a disk location</i>	✓
<i>Customisation of the filing directory</i>	✓
<b>Reports</b>	
<i>List of all contacts</i>	✓
<i>Quote lists</i>	✓
<i>Lists of insured persons</i>	✓
<i>Lists of insurers</i>	✓
<i>Lists of claims</i>	✓
<i>Daily Transaction</i>	✓
<i>List of renewals</i>	✓
<i>Overdue Renewal List</i>	✓
<i>Reminders follow up</i>	✓
<i>List of proformas</i>	✓
<i>Invoices List/Credit Notes</i>	✓
<b>Data Management</b>	
<i>Eazzy Actions or Search buttons</i>	✓
<i>Eazzy (Log) Journal</i>	✓
<i>Search Reports</i>	✓
<i>Security settings on the software themes</i>	✓
<i>Add a field</i>	✓
<i>Mandatory Fields</i>	✓
<i>Eazzy Script Language</i>	✓
<i>Export search results to a spreadsheet</i>	✓



**Thank you**