



# FIDO

## **Sales Workflow Management: Enhanced Client Relationship Manager & Workflow Management System.**

**InsureZone's modular platform provides flexibility to customize a policy sales and service pipeline to meet your operation's needs.**

Start with the complete suite of tools or add products and services as you need them over time. From simplifying the rating process to processing complicated policy service tasks, this suite of back-office tools is designed to improve operational efficiency. Manage the full policy lifecycle in one place, with integrated tools branded for your company.

### **FIDO's Capabilities:**

- Integrated Application Prefill
- ACORD Upload
- Business Classification Lookup
- Personal and Commercial Comparative Rating
- Calendared Sales and Service Pipeline
- AL3 Policy Download
- Automated Policy Document Retrieval
- Policy Renewal and Remarketing Tools
- Advanced Carrier Data Storage
- Manage Multi-level Users (Insured, Agent, Wholesaler, MGA, Wholesaler)
- Comprehensive Administrative Reporting Tools

**INSUREZONE**