

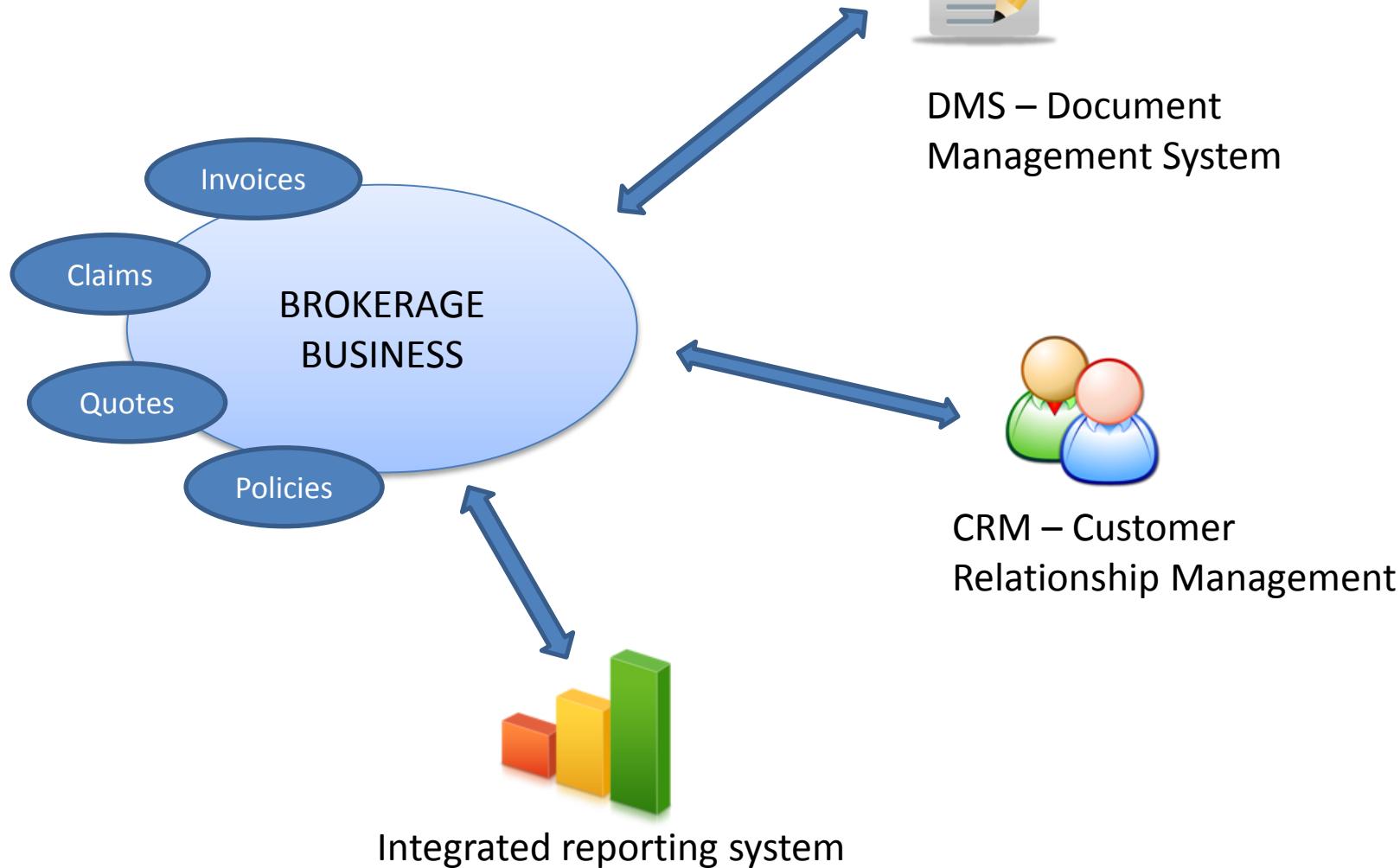


Fidelis Tracker

software solution for insurance brokerage companies

<http://fidelis.halmikron.hr>

Main modules



Policies

- Payment plan
- Fast and easy search
- Grouping
- Expiration track
- Easy renewal

Claims

- Track by status
- Fast and easy search
- Grouping
- Store documents related to claims

Brokerage business

Quotes

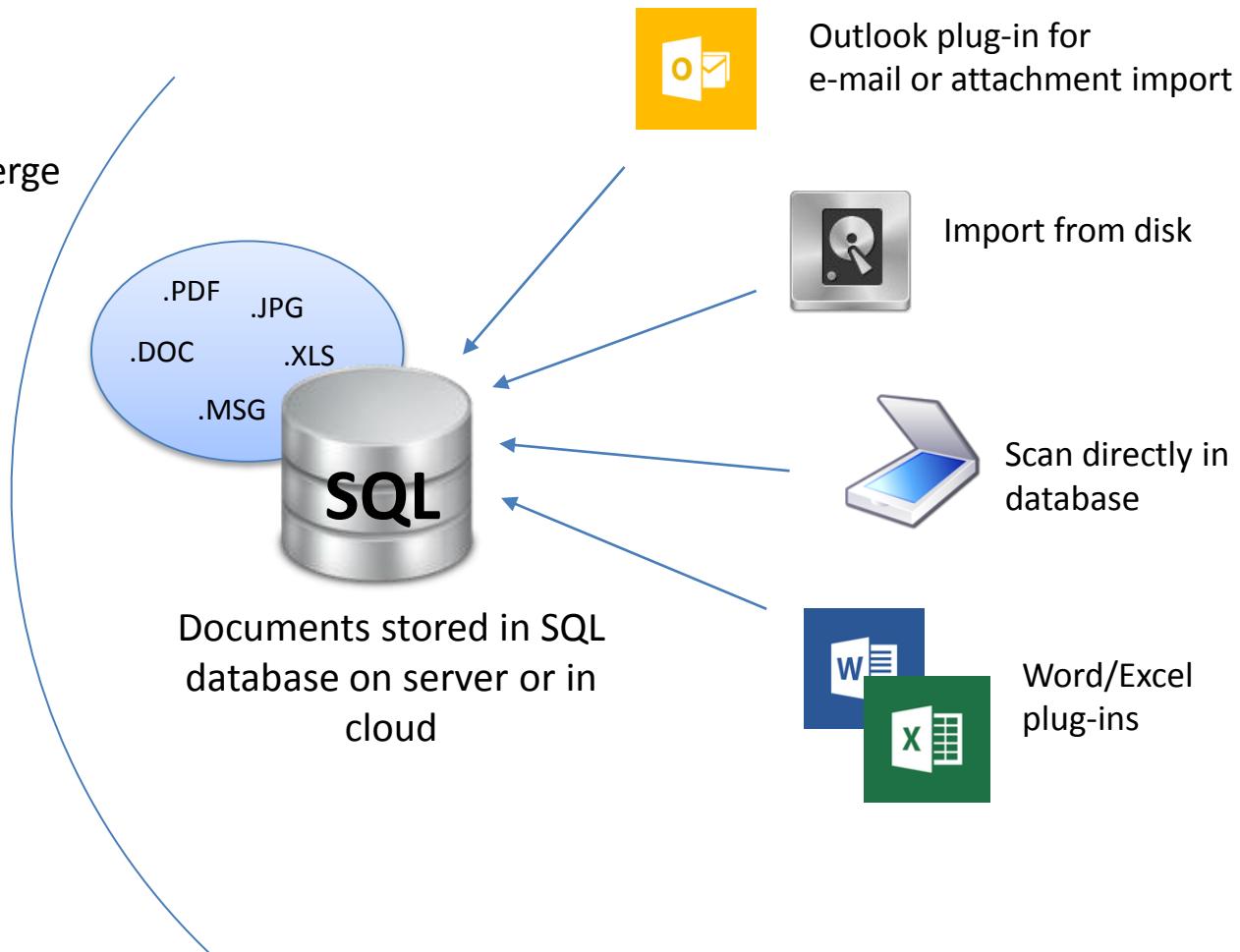
- Analyze received quotes
- Fast and easy search
- Grouping
- Create policy from quote

Invoices

- Payment monitoring
- Fast and easy search
- Grouping

Document management

- PDF tools (split & merge)
- Search by meta data
- Mail merge
- Assign document to any entity (partner, policy, claim, invoice, etc.)
- Templates
- Versioning
- Send documents via e-mail directly from application as attachment or link



CRM – track activities related to your clients



Keep records about phone calls



Send and save e-mail from Fidelis



Keep record of time spent on different activities



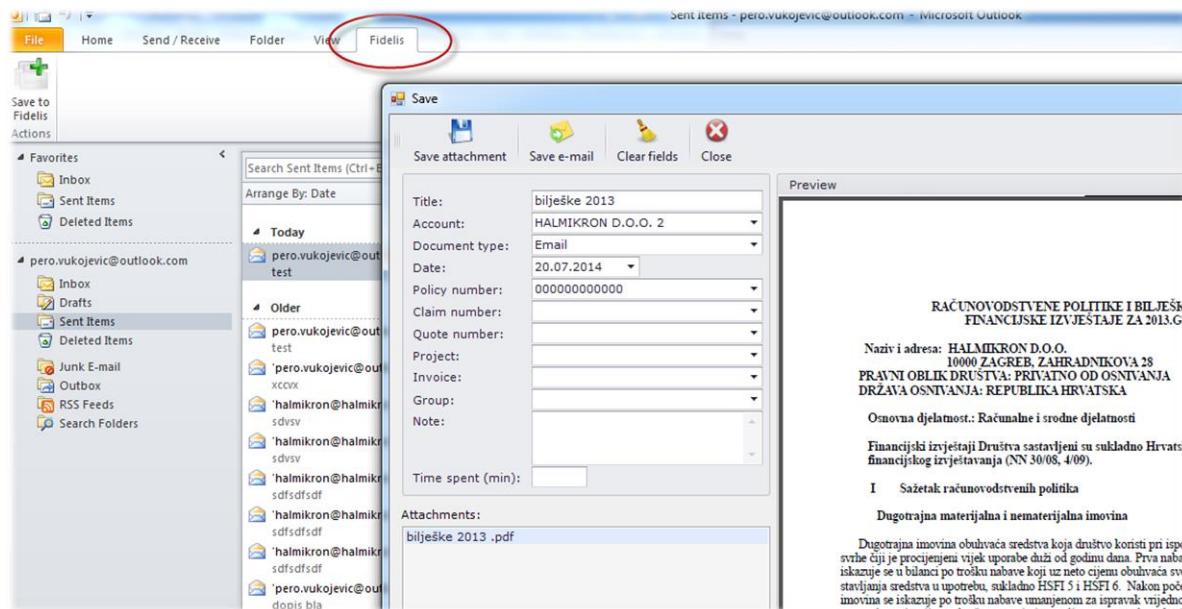
Group calendar (import meetings from Outlook, built in reminders)



Projects and activities

MS Office Plug-ins

- Save Word or Excel document directly to Fidelis via plug-in
- Convert Word document to PDF „on the fly”, and save to Fidelis
- Save received Outlook e-mail message in „msg” format or only attached document
- Save the e-mail message that has just been sent
- Preview the attachments in e-mail



Reporting tools

→ Dynamic pivot tables with drag & drop operations

→ Dashboards for planning and budgeting

→ Charts

→ Static reports

→ KPIs

Policy screenshot

Tracker 6.3.6. Fidelis

The screenshot displays the 'Policy' tab of the Tracker 6.3.6 Fidelis application. The interface is divided into several sections:

- Top Bar:** Home, Installments, Policy (selected), Save changes, Refresh, New document, New quote, Send e-mail, New claim, New doc. by template, Open invoice, History, Phone calls, Close, Look and feel, PDF Merge, Calen.
- Left Sidebar:** Accounts & Contact, Projects, Policies, New policy, Payment plan view, Policies view, Installments payment, Quotes, Claims, Documents, Invoices, Reports, Control panel.
- Basic Information:** Account: CROATIA DOPUNSKO OSIGURANJE D.D., Insurer: CROATIA ZDRAVSTVENO OSIGURANJE D.D., Type of insurance: 02 HEALTH INSURANCE, Type of risk: 02.02 Supplementary insurance for the difference above..., Type of business: New, Type of income: Fee, Status: Inactive, Type: Life, Internal contact: Marijana Mihovac, Policy number: 389790062672, Policy inception: 01.02.2014, Policy expiration: 01.02.2015, Leasing: checked, Exch. rate date: 20.07.2014, Recurring: checked.
- Payment details:** Net premium: 804,00 HRK, Premium tax: 0,00 %, Commission: 12,00 %, Additional premium: 0,00 HRK, Additional commission: 0,00 %, Total gross premium: 804,00 HRK, Total gross premium: 804,00 HRK, Total commission: 96,48 HRK, Number of installments: 12, First installment: 67,00 HRK.
- Leasing and other information:** Leasing client: GAL MIŠEL, Leasing contract: (empty), Special cond.: (empty), Plates: (empty), MTPL bonus: (empty) %, Revenue sharing: (empty), Vehicle type: (empty), kW/t: (empty), Note: INA D.D.
- Additional information:** Sums insured: (empty), Deductibles: (empty).
- Documents:** A table showing a single document entry: Policy number: 389790062672, Note: (empty), Date created: 03.02.2014, Created by: Marijana Mihovac.

Payment plan screenshot

Pregled rata											
Osvježi	Detalji police	Izvoz u Excel	Kreiraj račun	Postojeći račun	Otvori račun	Označi kao plaćen	Detalji plaćanja	Označi sve	Odznači sve	Zatvori	
Mjesec:	<input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4 <input checked="" type="checkbox"/> 5 <input checked="" type="checkbox"/> 6 <input checked="" type="checkbox"/> 7 <input checked="" type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 11 <input checked="" type="checkbox"/> 12	 	 	- više od 60 dana od datuma plaćanja							
Godina:	<input checked="" type="checkbox"/> 2013 <input checked="" type="checkbox"/> 2014	 	 	- od 0 do 60 dana od datuma plaćanja							
Datum plaćanja:											
Drag a column header here to group by that column											
Odaberij	Plaćeno	Partner	Vrsta osig...	Podvrsta ...	Broj police	Ukupna ...	Datum	Godina	Mjesec	Datum pla...	P
											
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.05.2013		2013	5	30.08.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.06.2013		2013	6	31.10.2013
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.07.2013		2013	7	30.07.2013
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.08.2013		2013	8	30.04.2013
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.09.2013		2013	9	30.05.2013
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.10.2013		2013	10	30.06.2013
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.11.2013		2013	11	30.04.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	89089	4,000.00	11.12.2013		2013	12	30.01.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.01.2013		2013	1	30.09.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.02.2013		2013	2	31.10.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.03.2013		2013	3	31.10.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.04.2013		2013	4	
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.05.2013		2013	5	
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.10.2013		2013	10	
	<input checked="" type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.11.2013		2013	11	30.04.2013
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.12.2013		2013	12	
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.01.2014		2014	1	
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.02.2014		2014	2	
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.03.2014		2014	3	
	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.04.2014		2014	4	

Pivot tables screenshot

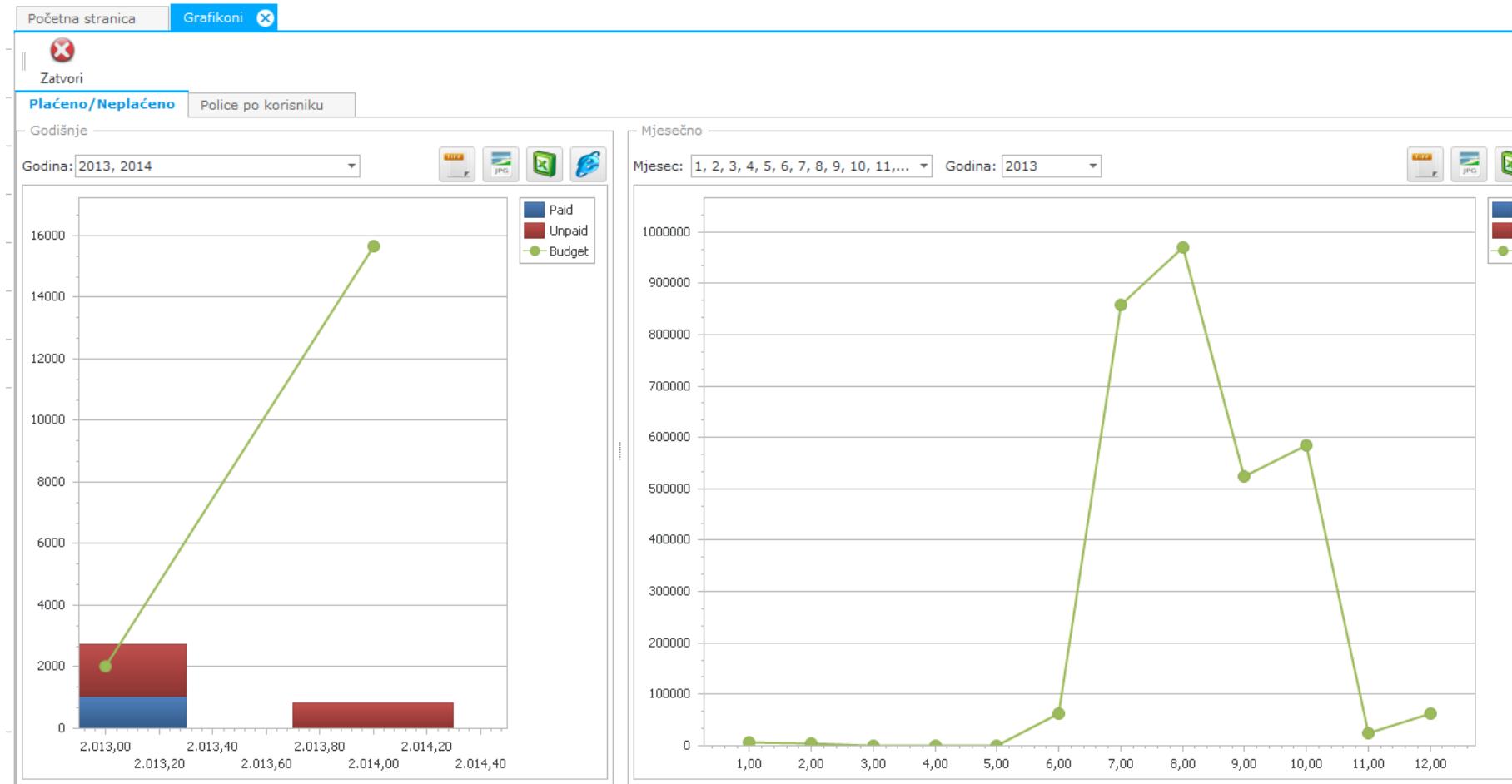
Početna stranica Rate pivot X

Print preview Izvoz grafa Zatvor

Datum	Premija	Ukupna premija	Broj rate	Broj police	Partner	Plaćeno	Kategorija osiguranja	Interni kontakt					
Provizija	Količina	Osiguravatelj ▲											
Provizija	Količina	Allianz d.o.o.	Bassler osiguranje d.d.	Croatia osiguranje d.d.	Jadransko osiguranje	Grand Total							
Godina	Kvartal	Provizija	Količina	Provizija	Količina	Provizija	Količina	Provizija	Količina				
2014	1			142,25	3	418,11	9	123,00	2	683,36	14		
	2			123,00	1	41,11	3			164,11	4		
2014 Total				265,25	4	459,22	12	123,00	2	847,47	18		
2013	1			138,58	3					138,58	3		
	2	122,50	2	458,36	4	290,28	6	0,00	2	871,14	14		
	3	183,75	3	271,00	3	246,33	9	0,00	3	701,08	18		
	4	306,75	4	432,00	6	123,33	10	123,00	3	985,08	23		
2013 Total				613,00	9	1.299,94	16	659,94	25	123,00	8	2.695,88	58
Grand Total				613,00	9	1.565,19	20	1.119,16	37	246,00	10	3.543,35	76

Quarter	Allianz d.o.o. Provizija	Bassler osiguranje d.d. Provizija	Croatia osiguranje d.d. Provizija	Jadransko osiguranje Provizija
Q1 2013	10	130	10	10
Q2 2013	120	450	10	10
Q3 2013	180	270	20	10
Q4 2013	300	420	10	120
Q1 2014	10	140	10	120
Q2 2014	40	120	10	10

Charts screenshot



Home page screenshot

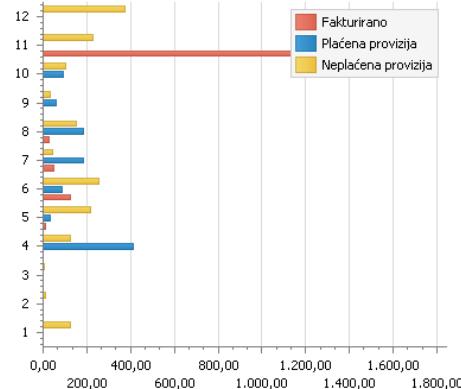
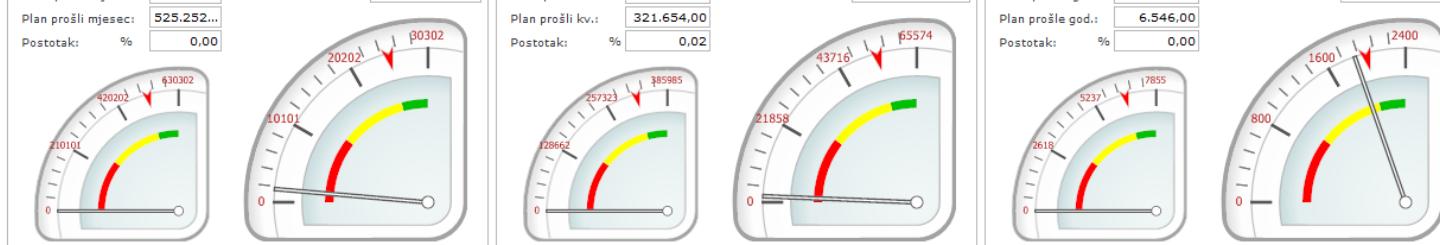
Tracker 6.1.0 Fidelis

- Partneri i kontakti
- Projekti
- Police
- Ponude
- Štete
- Dokumenti
- Računi
- Izvještaji
- Police pivot
- Rate pivot
- Štete pivot
- Računi pivot
- HANFA izvještaj
- Utrošeno vrijeme
- Unos plana
- Grafikoni
- Indikatori
- SLO Izvještaj
- Postavke

Početna stranica X

Početna stranica | Odabir maske | Kalendar | Brzo pretraživanje | Zatvori

MJESEČNO	KVARTALNO	GODIŠNJE
Fakt. ovaj mjesec: 1.676,00	Fakt. ovaj kvartal: 1.676,00	Fakt. ove godine: 1.886,00
Plan ovaj mjesec: 25.252,00	Plan ovaj kvartal: 54.645,00	Plan ove godine: 2.000,00
Postotak: 6,64	Postotak: 3,07	Postotak: 94,30
Fakt. prošli mjesec: 0,00	Fakt. prošli kvartal: 75,00	Fakt. prošle god.: 0,00
Plan prošli mjesec: 525.252,00	Plan prošli kvartal: 321.654,00	Plan prošle god.: 6.546,00
Postotak: 0,00	Postotak: 0,02	Postotak: 0,00



Mj.	Neplaćene rate	Naplać. provizija	Fakturirano
1	123,00		
2	9,33		
3	6,25		
4	123,00	410,11	
5	215,53	35,00	12,50
6	256,00	86,25	122,50
7	41,11	184,25	50,00
8	154,11	184,25	25,00
9	31,11	61,25	
10	105,36	91,25	
11	225,36		1.676,00
12	373,36		
	1.663,52	1.052,36	1.886,00

Broj polica početak ovaj mjesec: 4

15. studeni.

8:00	
9:00	sastanak sa klijentom
10:00	ručak
11:00	
12:00	
13:00	
14:00	

Skins screenshots

Three screenshots of the Tracker Prod 6.1.4 software interface, showing different skins:

- Top Skin (Dark Gray):** The most common skin, featuring a dark gray header and sidebar. The main form has a white background with red borders around input fields. Buttons are white with black outlines.
- Middle Skin (Light Gray):** A variation of the top skin, with a light gray header and sidebar. The main form has a white background with red borders around input fields. Buttons are white with black outlines.
- Bottom Skin (Light Blue):** A variation of the top skin, with a light blue header and sidebar. The main form has a white background with red borders around input fields. Buttons are white with black outlines.

The screenshots show the following interface elements:

- Header:** Početna stranica, Odabir maske, Kalender, PDF merge.
- Toolbar:** Spremi, Osvježi, Dodaj dokument, Pošalji e-mail, Kreiraj ststu, Kreiraj po predlošku, Otvori račun, Dodaj predmet osiguranja, Izvorna ponuda, Log izmjena, Tel. pozvi, Zatvori.
- Left Sidebar (POLICE):**
 - Nova polica, Pregled rata, Pregled polica, Pregled osiguranika, Provizjske liste.
 - PARTNERI I KONTAKTI, AKTIVNOSTI, POLICE, PONUDE, ŠTETE, DOKUMENTI, RAČUNI, IZVJEŠTAJI, POSTAVKE.
- Form Fields (Osnovne informacije):**
 - Partner, Osiguravatelj, Osiguranik, Kategorija, Podkategorija.
 - Vrsta polja, Vrsta prihoda, Status, Tip osiguranja, Interni kontakt, Broj police.
 - Leasing, Leasing klijent, Leasing ugovor, Bonus, Napomena.
- Form Fields (Finansijski detalji):**
 - Neto premija, Porez, Provizija, Dodatna premija, Dodatna provizija.
 - Ukupna premija, Ukupna premija HRK, Ukupna provizija.
 - Broj rata, Prva rata premija.
- Form Fields (Osigurane svote):**
 - Podaci o vozilu, Osigurani, Osigurani predmeti.
- Form Fields (Dokumenti):**
 - Odaberi, Vrsta, Naslov, Tip dokumenta, Datum kreiranja, Osoba kreirala.
- Form Fields (Stete):**
 - Broj Stete, Iznos Stete, Datum do... Status, Opis, Datum z... Plaćeni iz... Vrh.

Security

- For every user
 - define which menu is available
 - allow/decline export to Excel
 - define who can delete items

Technical details

- Windows .NET client-server application
- SQL database server (on local network, on Internet server or Azure cloud)
- MS ClickOnce technology (easy upgrades from local share or Internet)
- Prerequisites:
 - Windows OS
 - .NET Framework 4.0
 - MS Office 2010 or 2013

Reference list

- AON Zagreb d.o.o. – Zagreb, HR
- Vipox Insurance Brokerage Ltd. – Sarajevo, BiH
- Zaba partneri d.o.o. – Zagreb, HR
- Prvi broker d.o.o. – Banja Luka, BiH
- Intercapital d.o.o. – Zagreb, HR
- Gras Savoye d.d. – Zagreb, HR
- Finos d.o.o. – Banja Luka, BiH
- M Broker d.o.o. – Banja Luka, BiH
- Kor Broker d.o.o. – Zagreb, HR