

# Fidelis Tracker

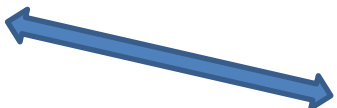
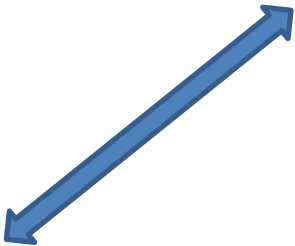
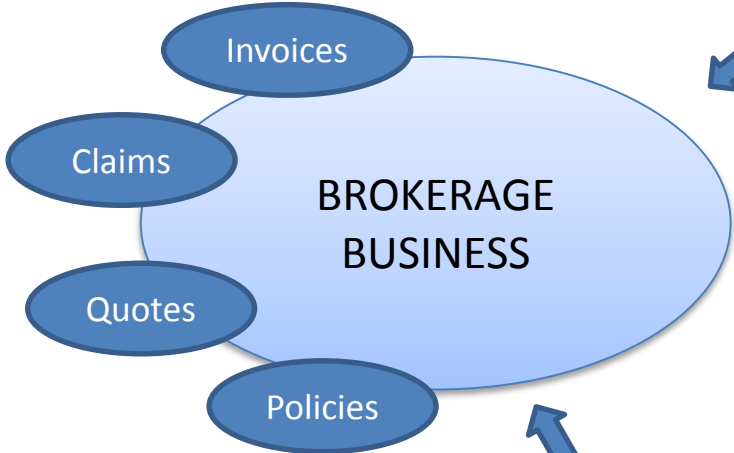
software solution for insurance brokerage  
companies

<http://fidelis.halmikron.hr>

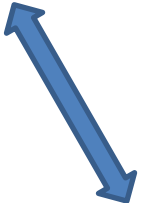
# Main modules



DMS – Document Management System



CRM – Customer Relationship Management



Integrated reporting system

## 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

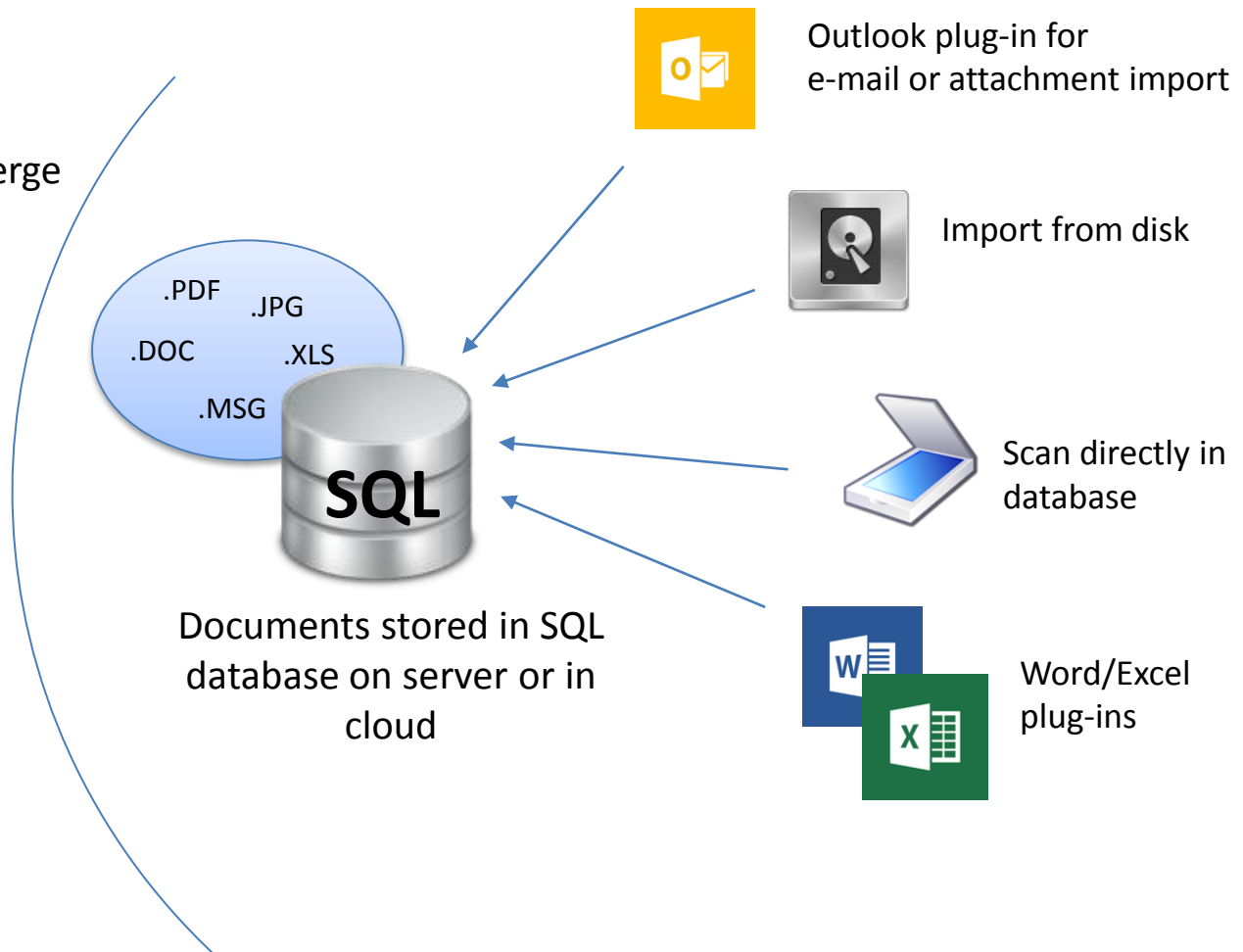
- Analyze received quotes
- Fast and easy search
- Grouping
- Create policy from quote

## 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



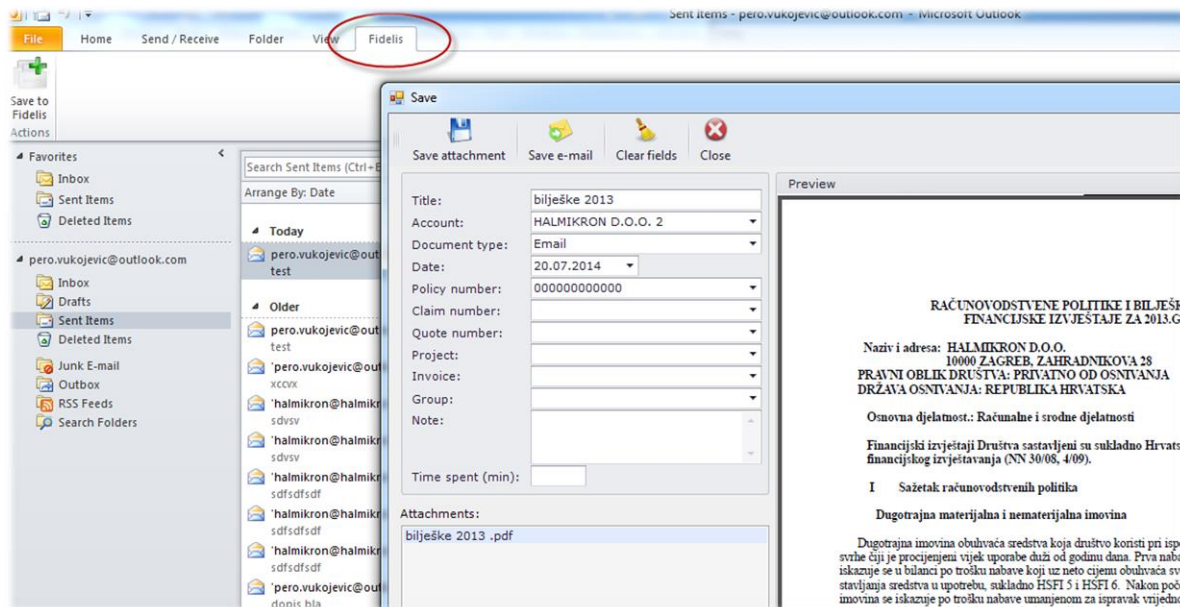
Group calendar (import meetings from Outlook, built in reminders)



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

AW Tracker 6.3.6. Fidelis

- Accounts & Contact: (down arrow)
- Projects (down arrow)
- Policies (up arrow)
- New policy
- Payment plan view
- Policies view
- Installments payment
- Quotes (down arrow)
- Claims (down arrow)
- Documents (down arrow)
- Invoices (down arrow)
- Reports (down arrow)
- Control panel (down arrow)

Home
Installments
Policy x

Save changes
Refresh
New document
New quote
Send e-mail
New claim
New doc. by template
Open invoice
History
Phone calls
Close

**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  Renewal  Penetration

Type of income:  Fee  Commission  None

Status:  Inactive  Active  Storno

Type:  Life  Non life

Internal contact: Marijana Mihovec Policy inception: 01.02.2014

**Policy number:** 389790062672 Policy expiration: 01.02.2015

Leasing:  Exch. rate date: 20.07.2014

Recurring:  Global programme:

**Leasing and other information**

Leasing client: GAL MIŠEL

Leasing contract:  Special cond.:

Plates:  MTPL bonus:  %

Revenue sharing:  Vehicle type:  kW/t:

Note: INAD.D.

**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

Inst. no.	Premium	Commission	Date
1	67,00	8,04	23.01.2014
2	67,00	8,04	23.02.2014
3	67,00	8,04	23.03.2014
4	67,00	8,04	23.04.2014
5	67,00	8,04	23.05.2014
6	67,00	8,04	23.06.2014
7	67,00	8,04	23.07.2014
8	67,00	8,04	23.08.2014
804,00		96,48	

**Additional information**

**Sums insured:**

<input type="text"/>	<input type="text"/>	HRK
<input type="text"/>	<input type="text"/>	HRK
<input type="text"/>	<input type="text"/>	HRK
<input type="text"/>	<input type="text"/>	HRK

**Deductibles:**

<input type="text"/>	<input type="text"/>	HRK
<input type="text"/>	<input type="text"/>	HRK

Documents

Select	Type	Title	Document type	Account	Policy number	Note	Date created	Created by
<input type="checkbox"/>		Polica Policy		CROATIA DOPUNSKO OSIGURANJE D.D.	389790062672		03.02.2014	Marijana Mihovec

Close | Look and feel | PDF Merge | Calen



# Payment plan screenshot

Početna stranica		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:	<input type="text"/>	-	<input type="text"/>													
Drag a column header here to group by that column																
Odaberi	Plaćeno	Partner	Vrsta osig...	Podvrsta ...	Broj police	Ukupna ...	Datum	Godina	Mjesec	Datum pla...	P					
<input type="checkbox"/>	<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"/>	<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 type="checkbox"/>	<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 type="checkbox"/>	<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 type="checkbox"/>	<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 type="checkbox"/>	<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 type="checkbox"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.04.2013	2013	4							
<input type="checkbox"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.05.2013	2013	5							
<input type="checkbox"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.10.2013	2013	10							
<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.12.2013	2013	12							
<input type="checkbox"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.01.2014	2014	1							
<input type="checkbox"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.02.2014	2014	2							
<input type="checkbox"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.03.2014	2014	3							
<input type="checkbox"/>	<input type="checkbox"/>	Halmikron d.o.o.	01 PERSO...	01.01 Insu...	3555555	1,500.00	11.04.2014	2014	4							

# Pivot tables screenshot

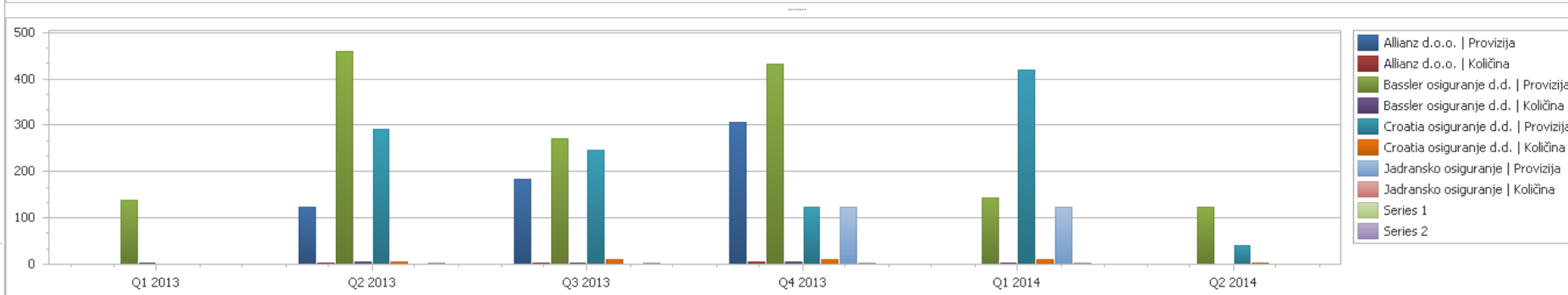
Početna stranica | Rate pivot

Print preview | Izvoz grafa | Zatvori

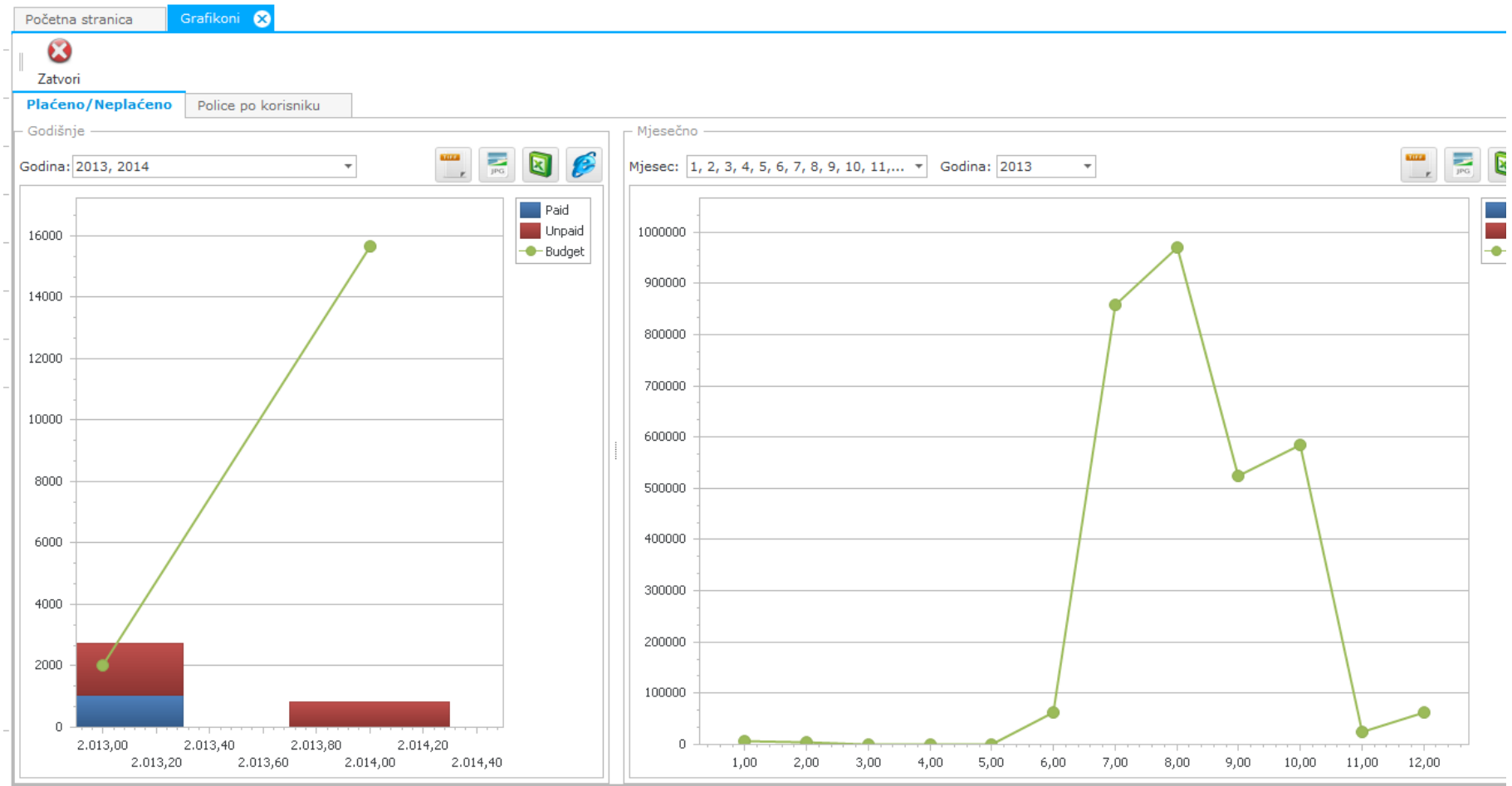
Datum | Premija | Ukupna premija | Broj rate | Broj police | Partner | Plaćeno | Kategorija osiguranja | Interni kontakt

Provizija | Količina | Osiguravatelj

Godina	Kvartal	Allianz d.o.o.		Bassler osiguranje d.d.		Croatia osiguranje d.d.		Jadransko osiguranje		Grand Total		
		Provizija	Količina	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	



# Charts screenshot



# Home page screenshot

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

Početna stranica

### MJESEČNO

Fakt. ovaj mjesec: **1.676,00**  
 Plan ovaj mjesec: **25.252,00**  
 Postotak: % **6,64**

Fakt. prošli mjesec: 0,00  
 Plan prošli mjesec: 525.252,00  
 Postotak: % 0,00

### KVARTALNO

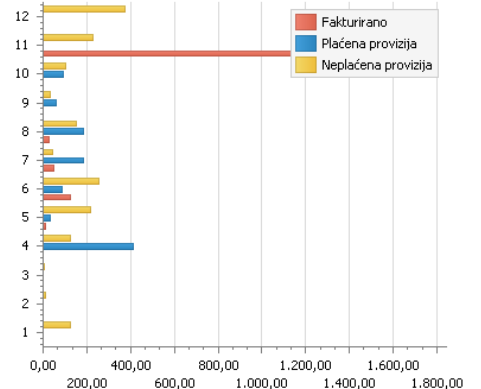
Fakt. ovaj kvartal: **1.676,00**  
 Plan ovaj kvartal: **54.645,00**  
 Postotak: % **3,07**

Fakt. prošli kv.: 75,00  
 Plan prošli kv.: 321.654,00  
 Postotak: % 0,02

### GODIŠNJE

Fakt. ove godine: **1.886,00**  
 Plan ove godine: **2.000,00**  
 Postotak: % **94,30**

Fakt. prošle god.: 0,00  
 Plan prošle god.: 6.546,00  
 Postotak: % 0,00

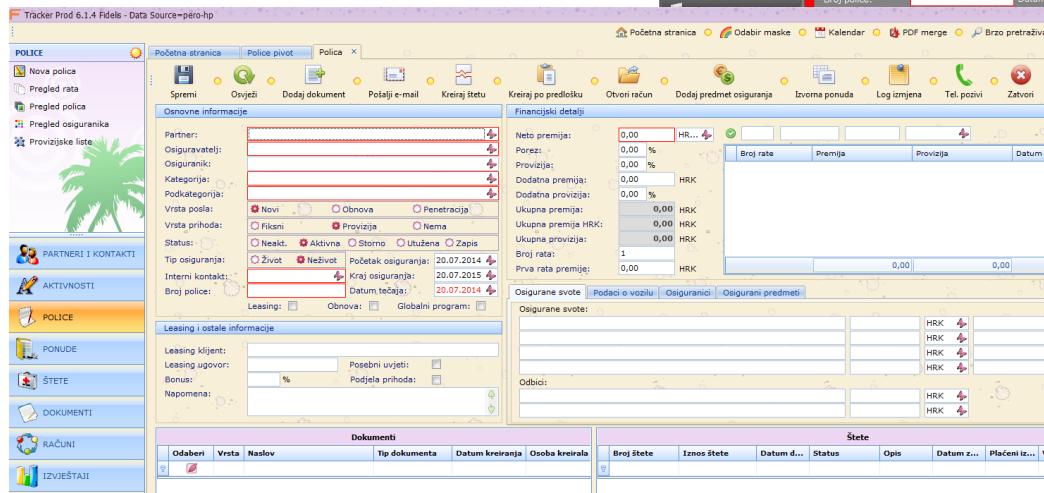
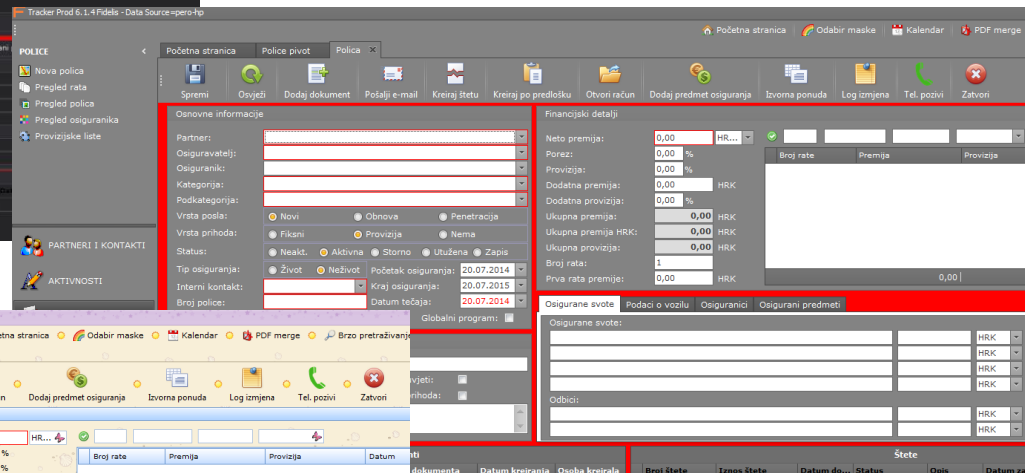
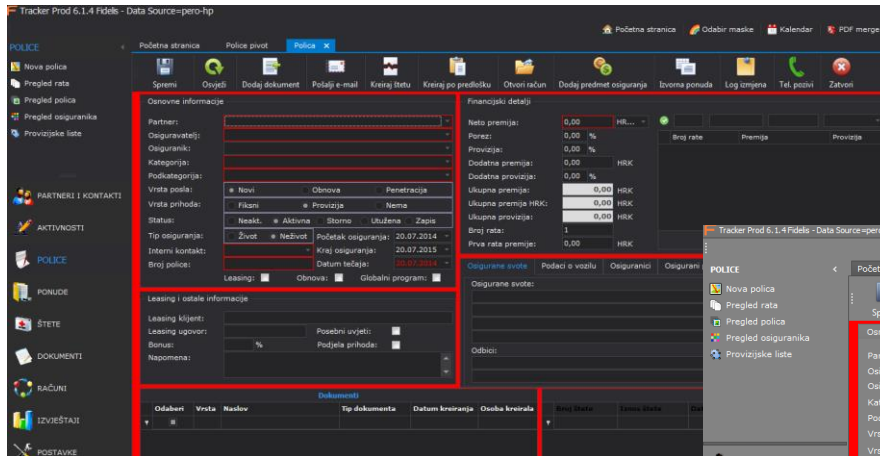


Mj.	Neplaćene rate	Naplać. provizija	Fakturirano
1	123,00		
2	9,33		
3	6,25		
4	123,00	410,11	
5	215,53	35,00	12,50
6	256,00	86,25	122,50
7	41,11	184,25	50,00
8	154,11	184,25	25,00
9	31,11	61,25	25,00
10	105,36	91,25	1,676,00
11	225,36		
12	373,36		
<b>Ukupno</b>	<b>1.663,52</b>	<b>1.052,36</b>	<b>1.886,00</b>

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



# 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