

Vision Insurtech

Integrated platform for Financial Services

Vision Insurtech enabling any financial services company to design an end-to-end digital banking experience through a complete set of integrated features which serves as a full-service bank for customers to access all banking services.

Vision Insurtech unifies your business aggregating in a coherent view data, people and processes with modern, intelligent business applications that adapt to your changing needs, power by specific Al tools.

Implement and integrate your legacy system with Insurtech solutions, including everything from frontend system, CRM, reporting system to backend system and business processes.

Better align with shifting consumer behaviors and expectations leveraging employees modern way of work with agile and complex platform enabling easy build new application or integrate existing platforms and legacy systems into unified application.

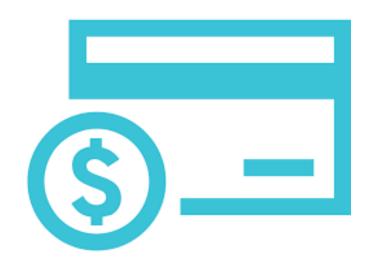
Omnichannel

Services Integration and Unified Customer and Employee Experience



Services, Product Engine and Insurance Processes

Standard features for Financial Services Industry (Customers, Sales, Products, Operations)



Integration Tools

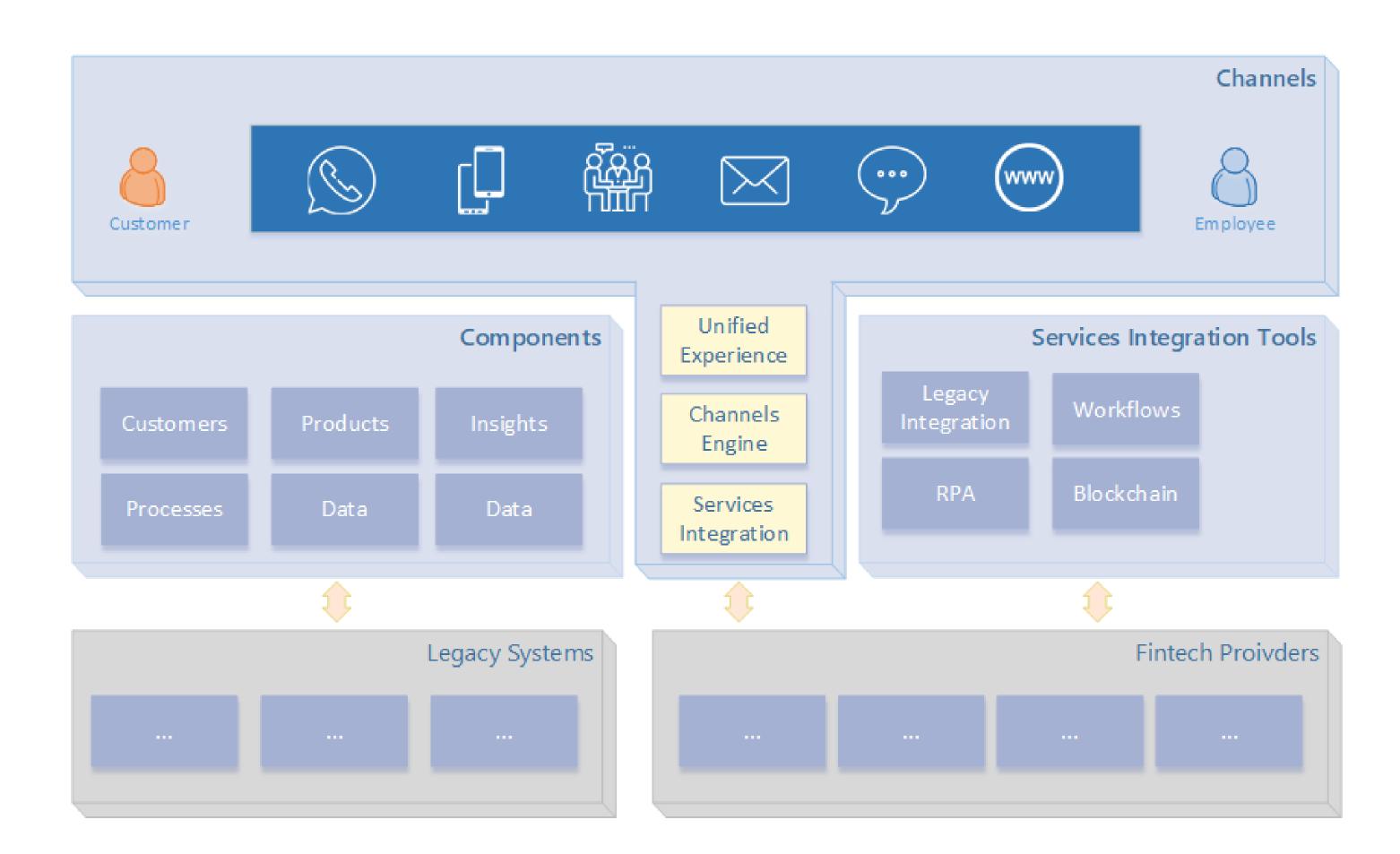
Leverage the legacy systems with new and modern IT platforms and assure the transition toward digital banking





Vision Insurtech

Platform



- Easy build new application from scratch
- Integrate existing platforms and legacy systems into unified application
- Digitalize your business workflows through business processes re-engineering
- Enhance Business-Integration Speed & Agility
- Optimize operations with processes prepared for rapid evolution
- Drive innovation by quickly creating innovative digital products and services
- Accelerates Transformation
- Simulate working software much earlier in the cycle enabling project team to iterative prototyping and agile development

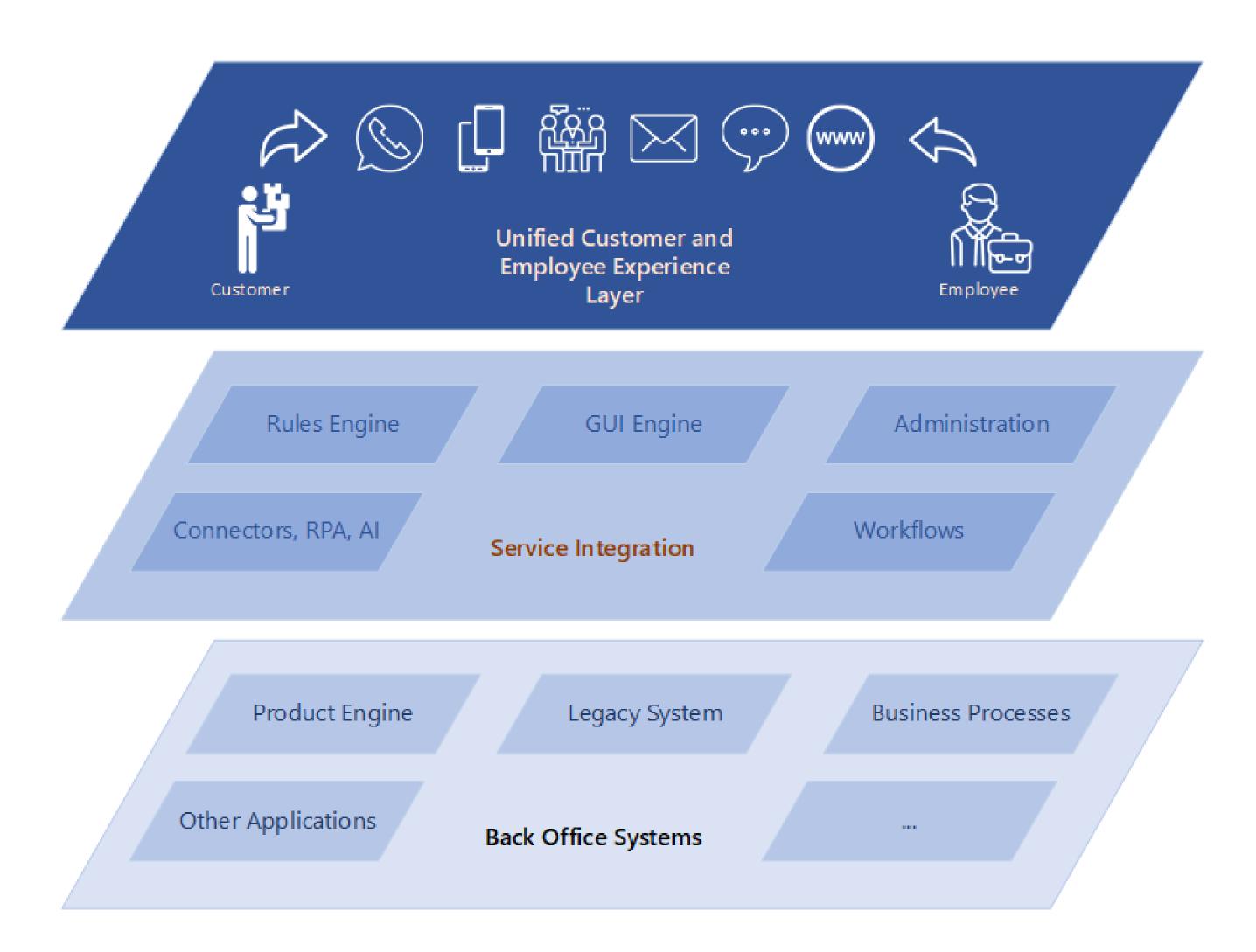


Vision Insurtech Multilayered

Support multichannel approach that allows anytime, anywhere, any device access with consistent experience across channels. Enable interactions across multiple customer touch points where intents are captured, insights are derived and conversations are personalized and optimized

Achieving rapid, large-scale process automation by simplifying the process steps and procedural requirements at each stage—streamlining the information required from the customer and eliminating redundant verification steps—to reduce the complexity of the IT solution

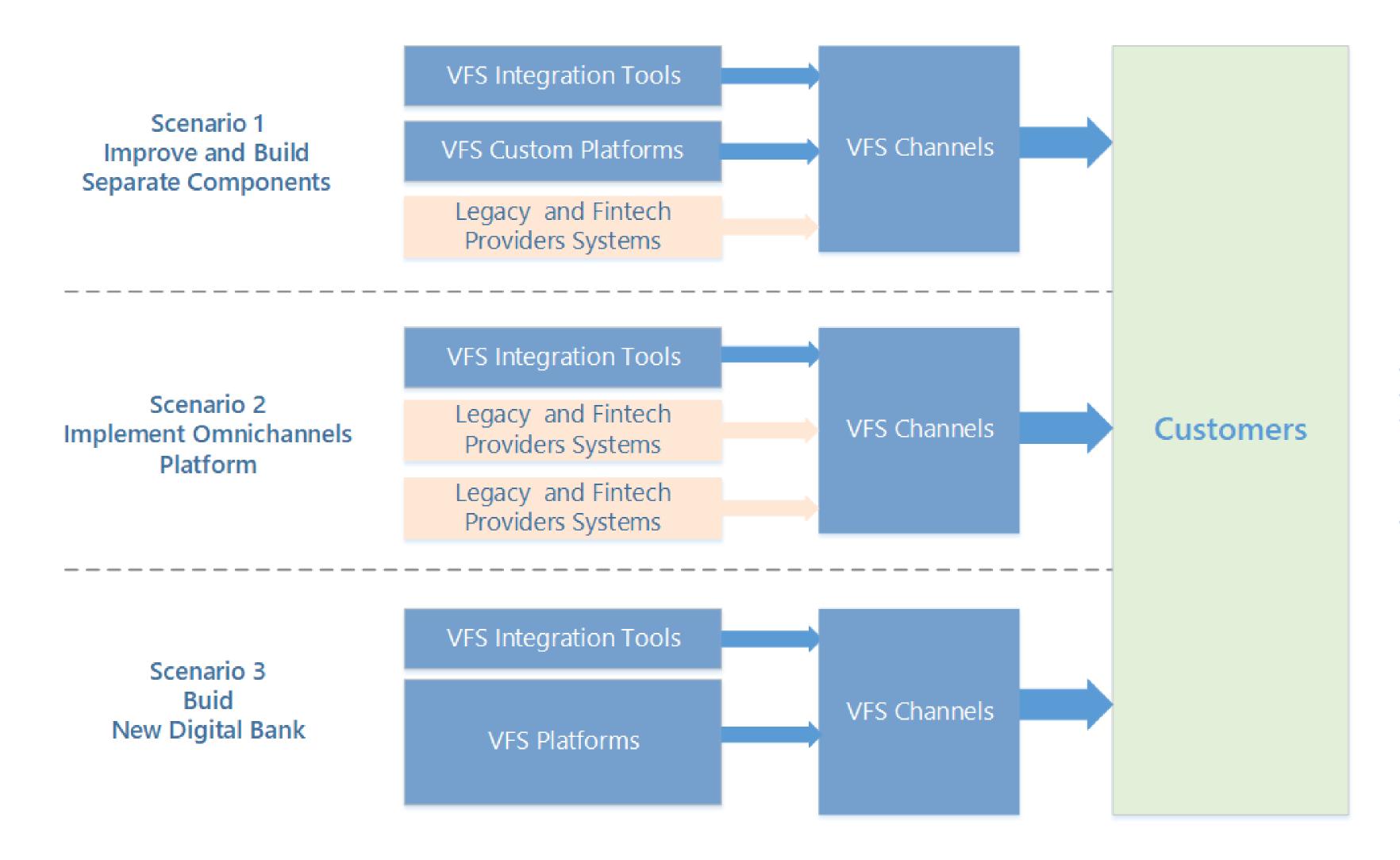
Combine legacy systems with new, modern and flexible tools leveraging accumulated practices in using existing systems with flexibility and openness provided by new platforms.





Vision Insurtech

Transition



Base your digital transformation on modern, flexible and complex platform including low-code development enablement capabilities, support for an omnichannel digital approach, robust business functionality that is reusable and scalable, enterprise notifications that are relevant and timely and the operational robustness to provide the right levels of security and scalability as customer growth occurs.



Support multichannel approach that allows anytime, anywhere, any device access with consistent experience across channels. Enable interactions across multiple customer touch points where intents are captured, insights are derived and conversations are personalized and optimized.

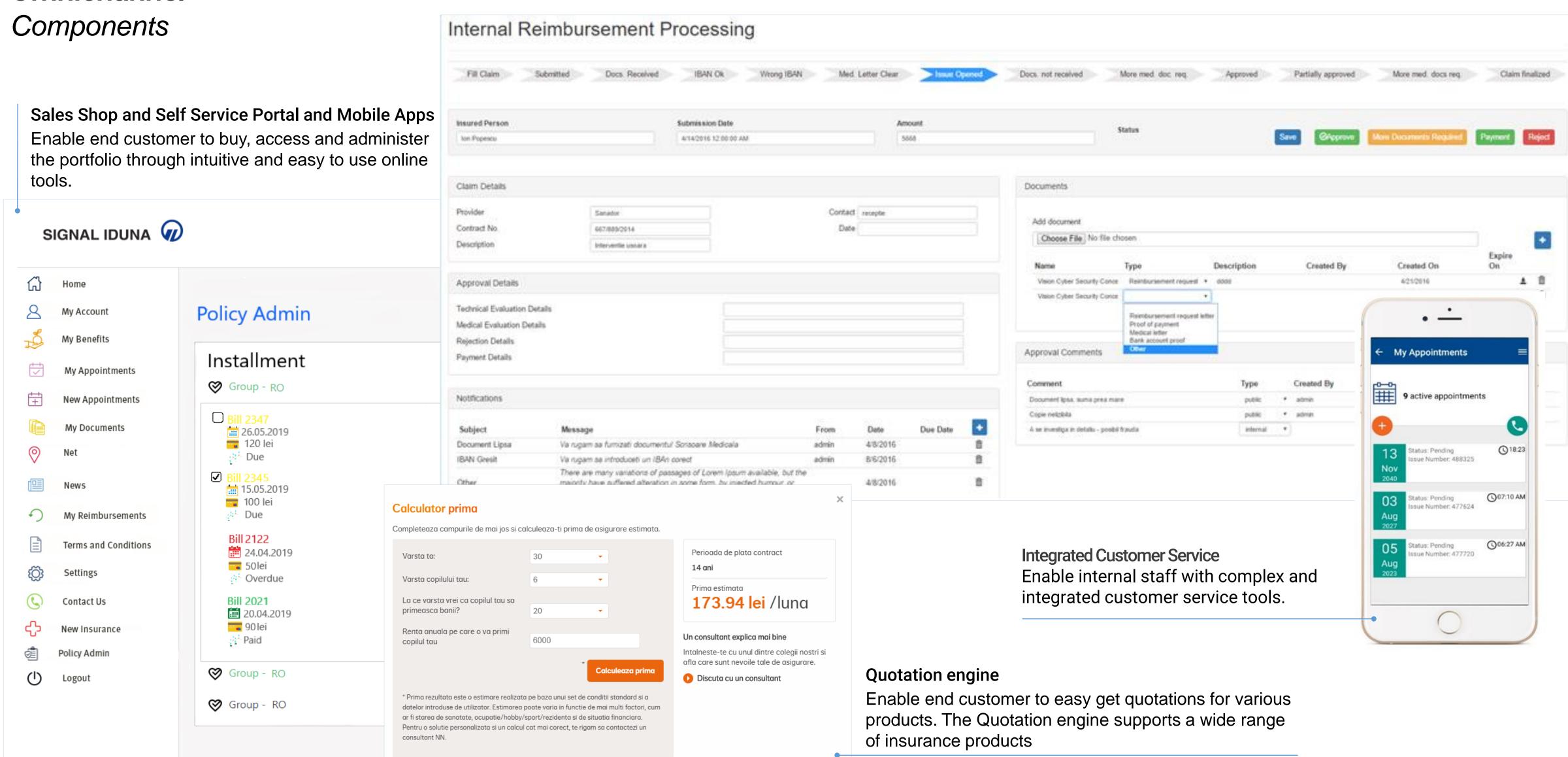
Omnichannel

- Portal and mobile components fully integrated with company systems
- Focus on improving customer relationships via 360 views across financial products.
- Digital Customer Onboarding (Online Shop), Account Opening & Product Origination
- Understand customer behavior across channels, optimize team and agent network performance
- Fully integrated with back-office systems and social media sites enabling full
 Omnichannel approach

Portal and Mobile components are based on modern technologies genuinely integrated with the main platform enabling agile and seamless services availability to the end customers and offering unified customer and employees experience.



Omnichannel







Quickly and easily automate banking business processes and tasks to eliminate manual handling, reduce costs and errors and automate processes activities.

Process Automation and Digitalization

- Customer Onboarding, Account Opening & Product Origination
- Quotation and evaluation
- Internal collaboration processes
- Specific processes (sales, credit scoring, corporate administration, etc.)

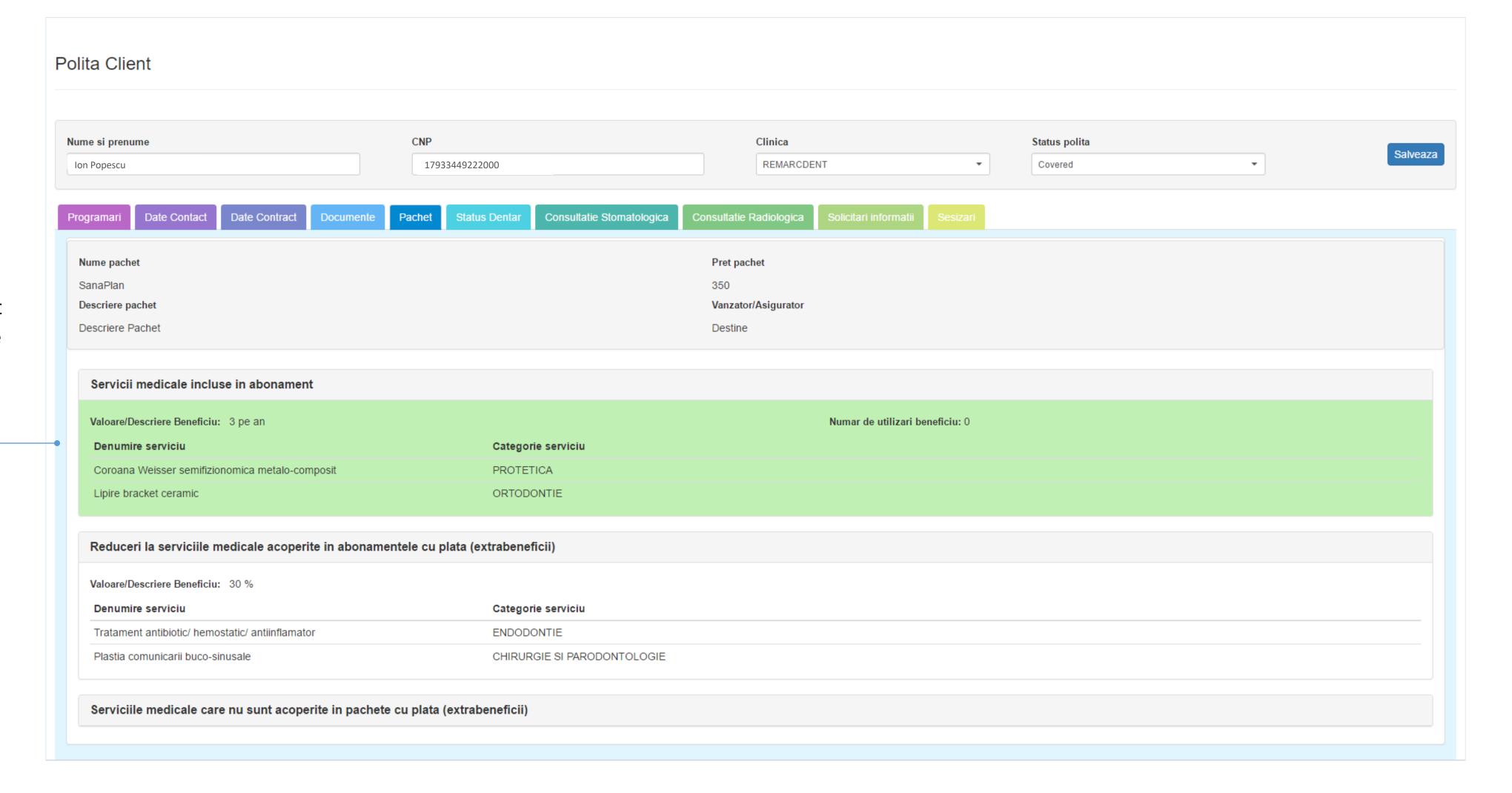
Vision Insurtech provides an adaptable framework allowing the structural embedding of standardized approaches for the digital transformation of processes within a bank and creates the prerequisite to identify digital customer experiences. Besides the standards workflows, the platform is ready to support various processes automation and digitalization.



Product Engine Health Insurance

Key features:

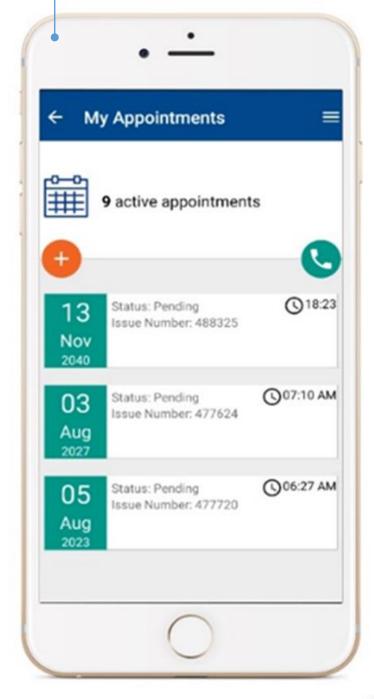
- Clinics administration
- Benefits packages management
- Customer information exchange
- Customer management
- Activity management
- Forms and documents

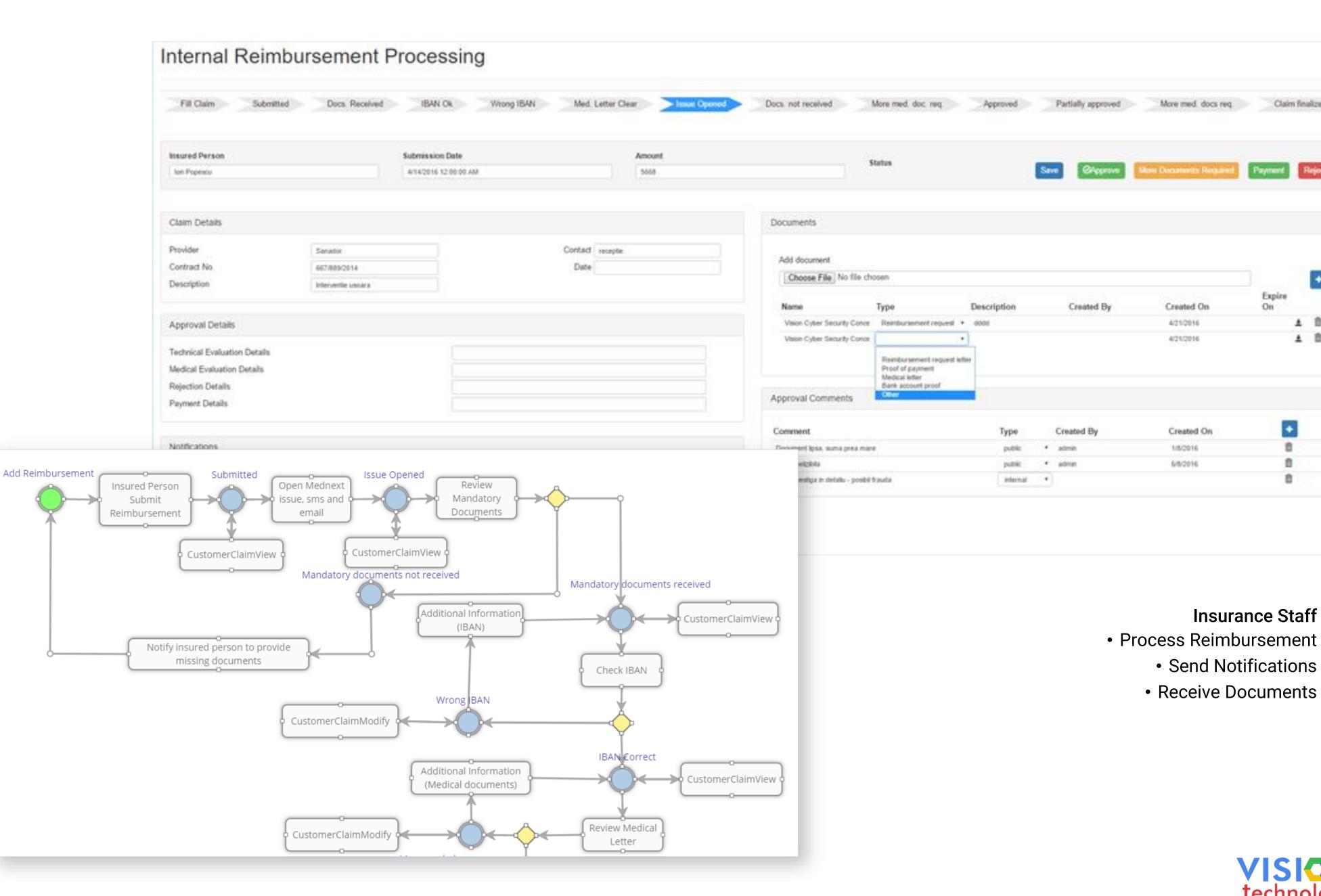






- Open Reimbursement
- Receive Notifications
- Add Documents



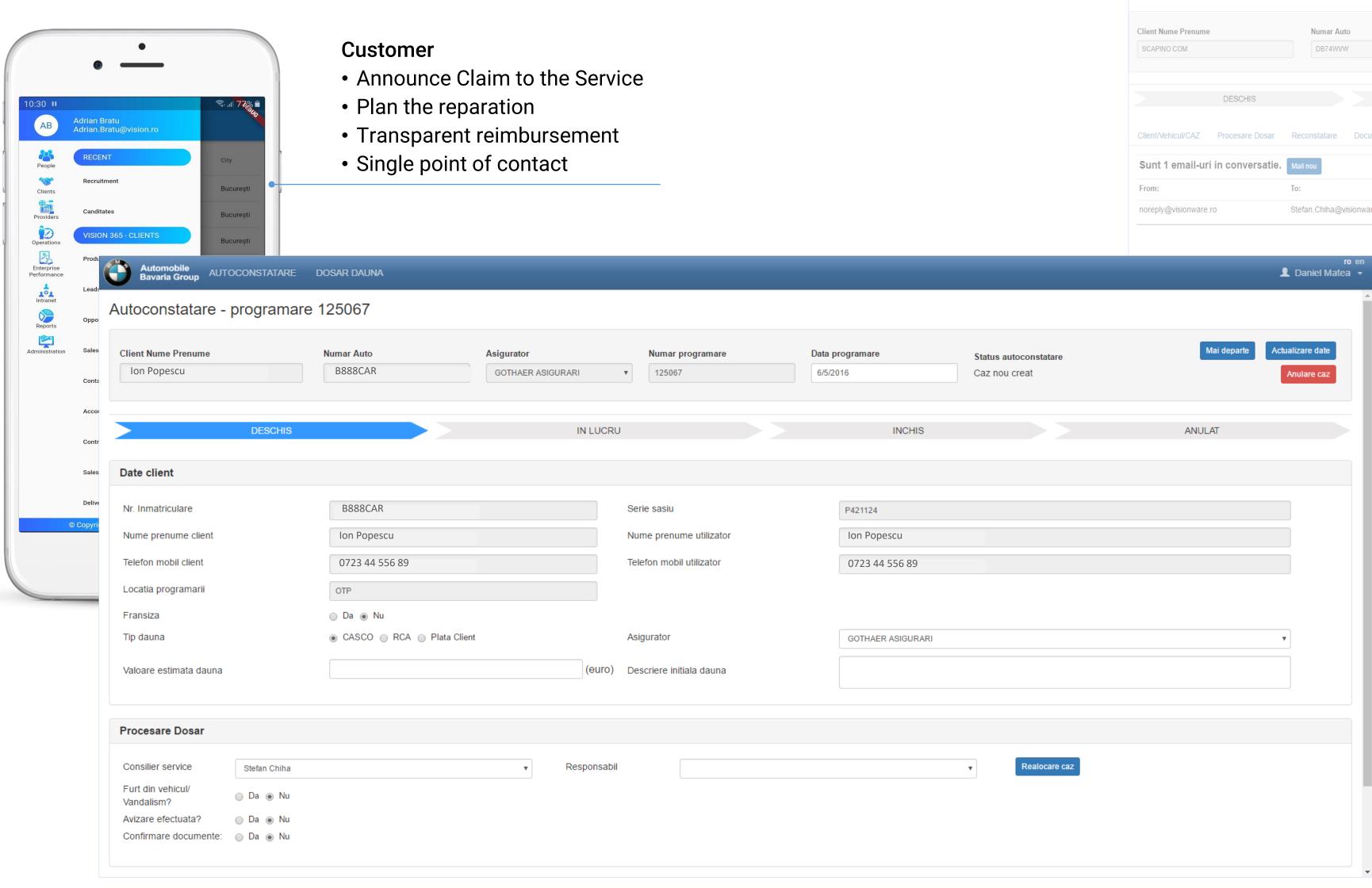


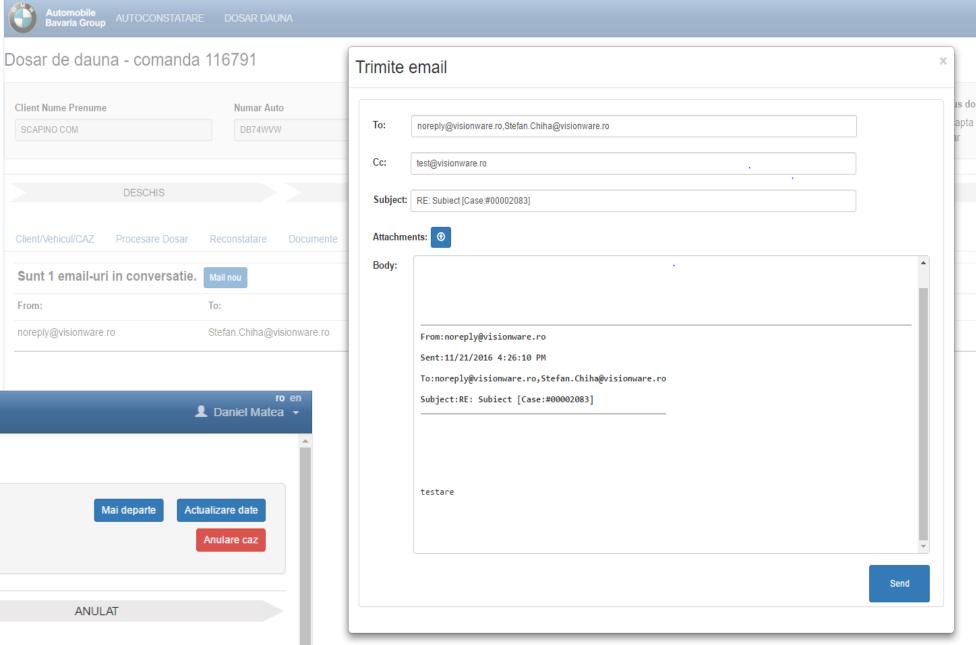


Expire

4 8

Claim Management Auto Insurance





Service

- Estimate the cost
- Get approval from insurance
 - Manage Documents



Integrated Customer Service Insurance Products

Activity Management

Different types of activities are available: task, email, appointment and call. The Case and activity panel is can be associated with any entity or interface.

Case Management

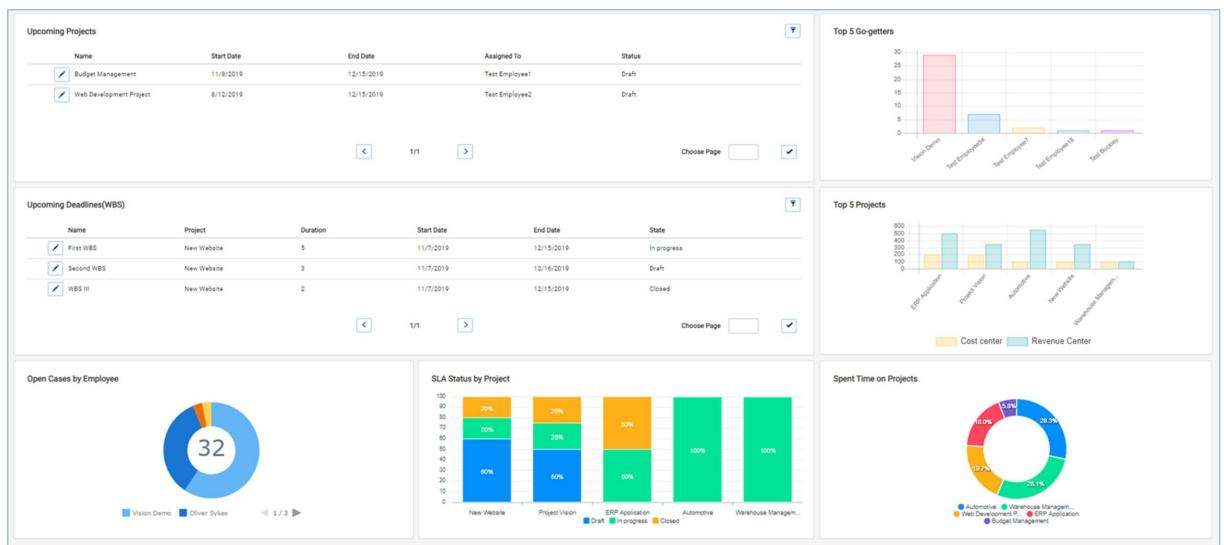
A case in grouping one or many activities leading to a specific purpose. Any activity or case can be associated to a specific entity (customer, provider, contract, invoice, etc.)

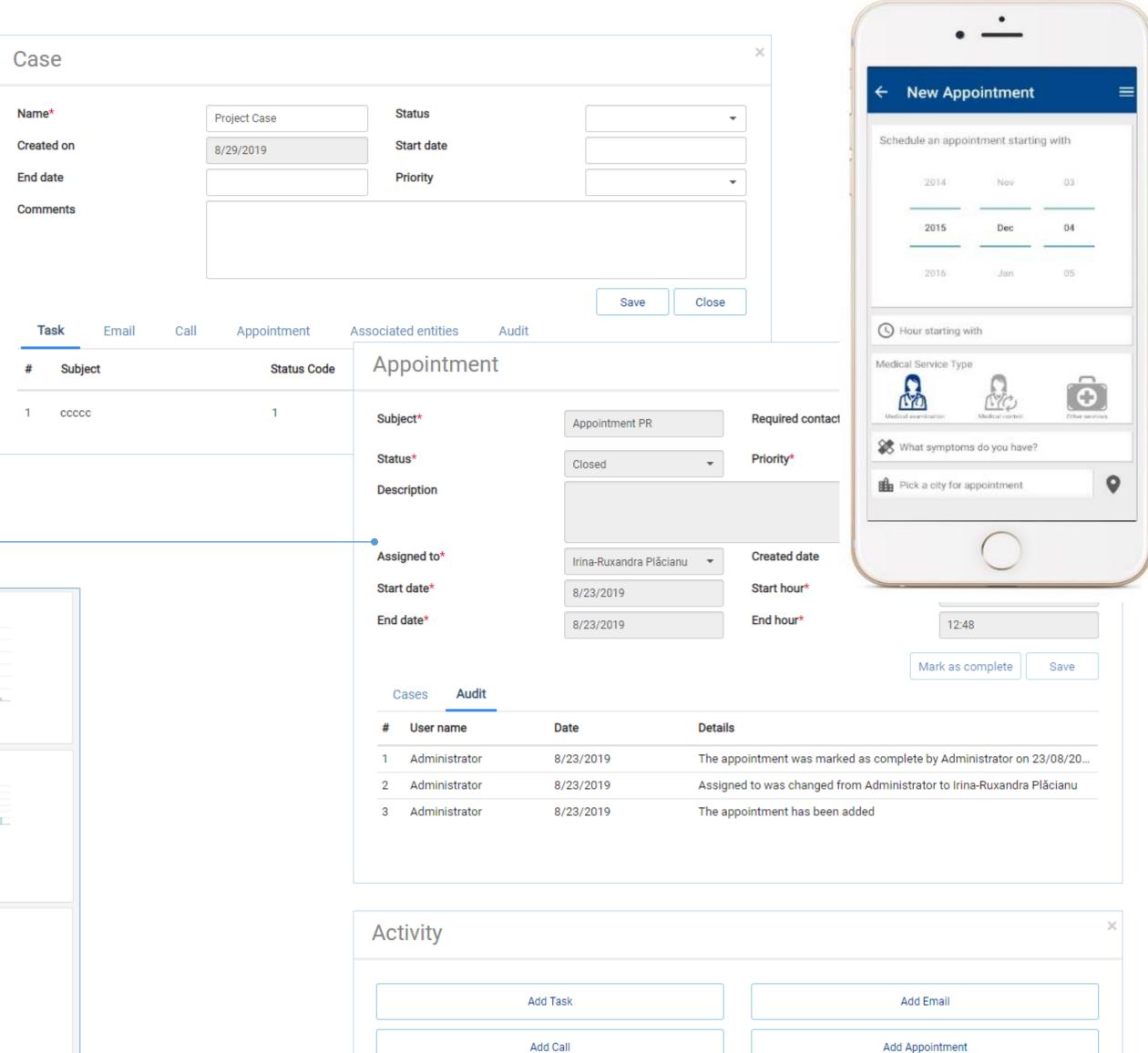
Analytic

Dashboards regarding the duration of an activity or workflow phase are available in real time.

Post

Post feature is available on each entity allowing users to post comments or to respond to some specific comments.

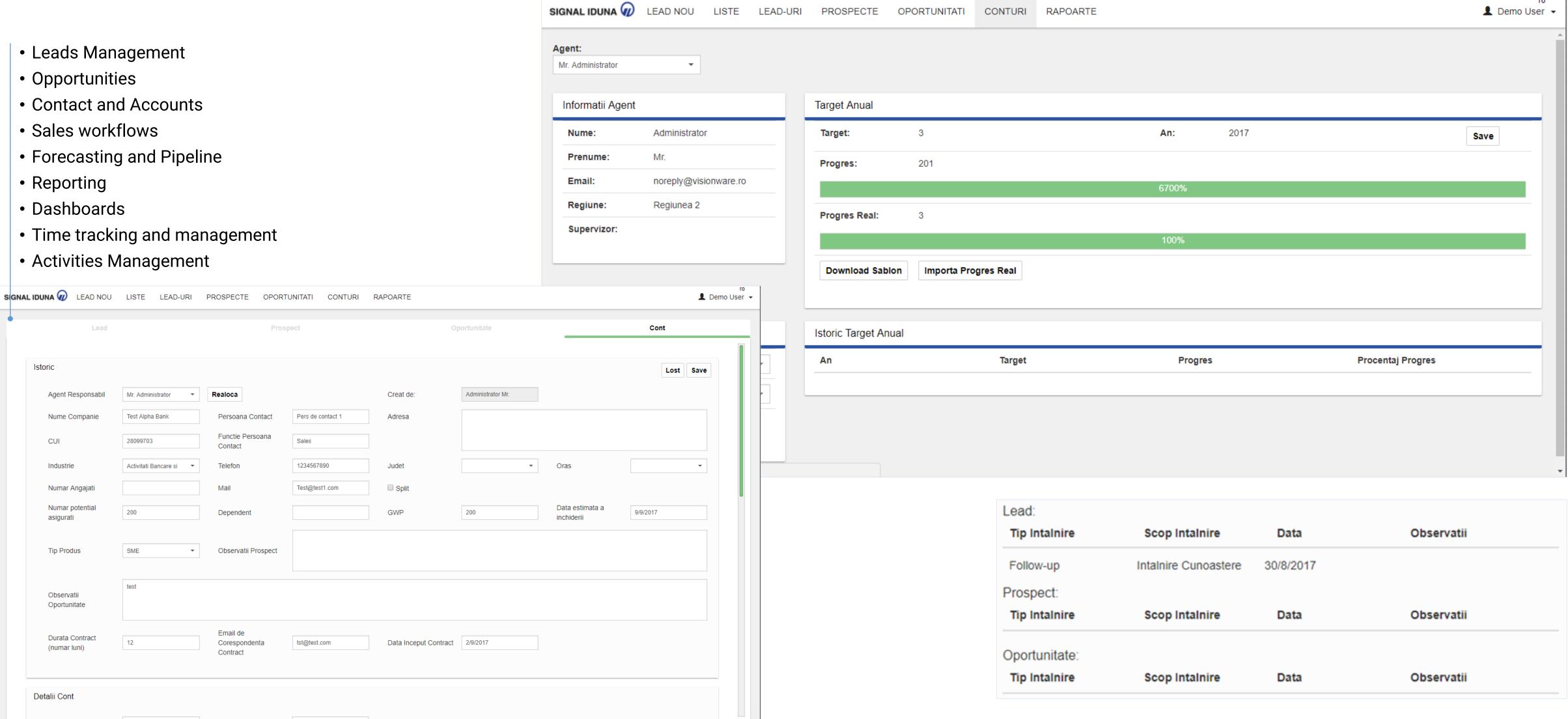






CRM / SFA

Insurance Industry



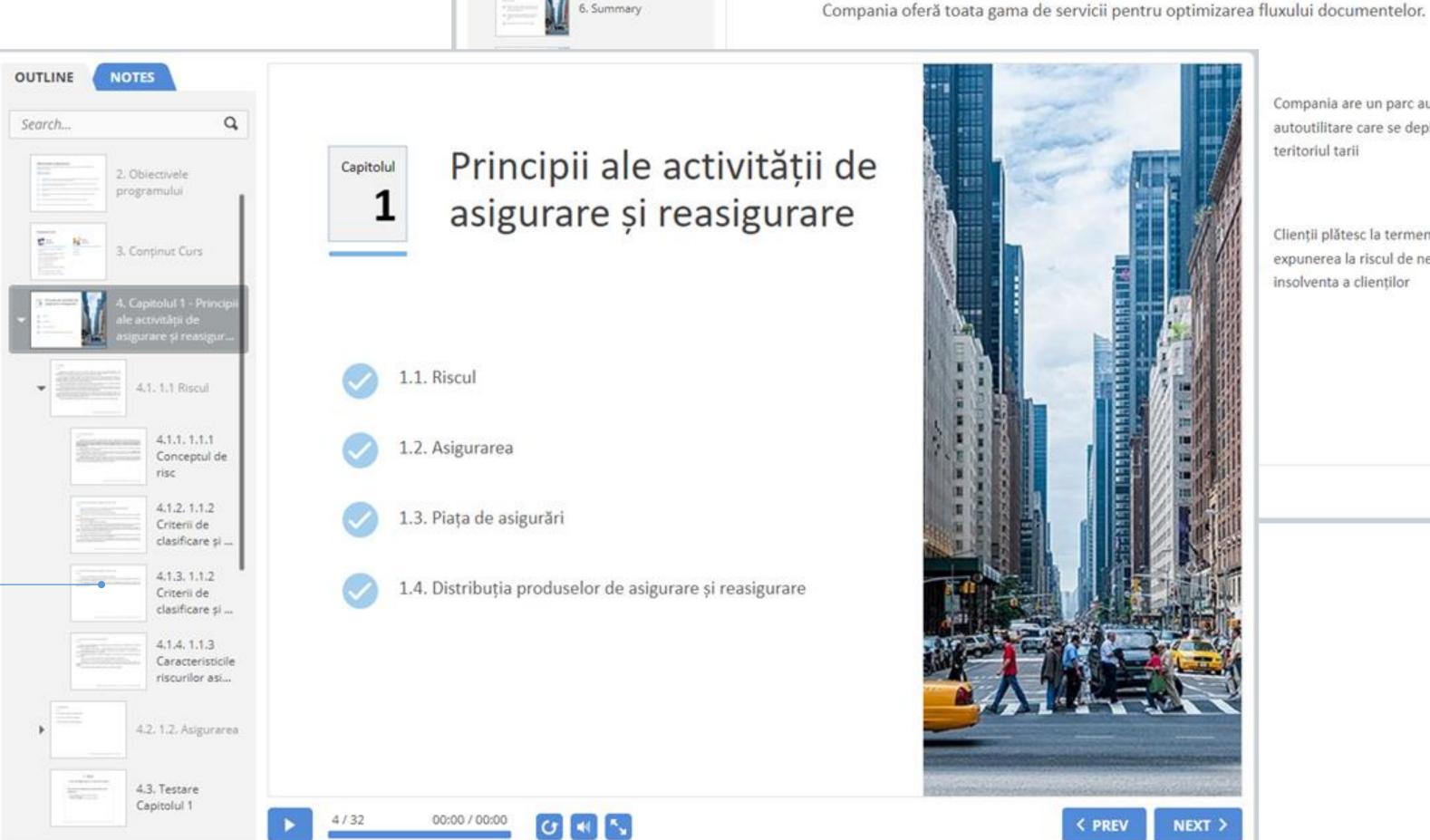


eLearning Insurance Sales Force

NOTES OUTLINE Search... Studiu de caz #1 4.3. Testare Capitolul 1 Contextul O companie specializata in soluții complexe de procesare si document management.

Features Overview

- Easy to customize
- Web based
- Content supported standards: SCORM, **IMS**
- Designed for "CSA: Professional training for insurance sales force"
- User management
- Lessons and courses
- Content management editing tools
- File manager and digital libraries
- Test builder
- Access rules
- Courses progress tracking
- Communications tools
- Reporting



Compania are un parc auto de 25 de autoutilitare care se deplasează pe întreg teritoriul tarii

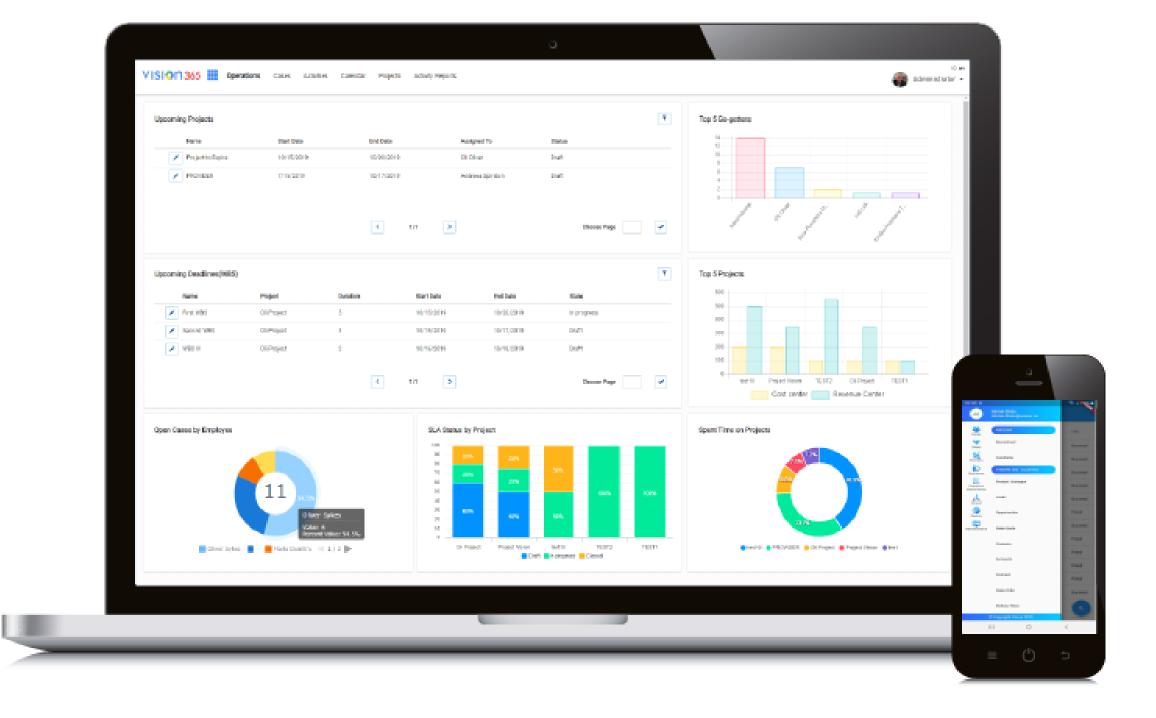
Clienții plătesc la termen dar exista expunerea la riscul de neplata sau insolventa a clientilor

< PREV

NEXT >

Create complex applications in visual designer, with no code and high flexibility for further changes and customizations with Vision App Maker Platform.

Technology and Integration







Vision App Maker is a mature platform with 100+ implementations for various industries: Banking, Insurance, Automotive, Pharma, Services, Government, Distribution, Travel, Field Services.

Vision App Maker Suite

Build complex applications in visual designer, without code.

- Easy build new application from scratch
- Integrate existing platforms and legacy systems into unified application
- Digitalize your business workflows through business processes re-engineering
- Enhance Business-Integration Speed & Agility
- Optimize operations with processes prepared for rapid evolution
- Drive innovation by quickly creating innovative digital products and services
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Our customers are successfully rollout their daily operation on applications powered by Vision App Maker:

























Vision App Maker Suite Features

Powerful Integration Capabilities

Allows integration with any system through a plugin mechanism. Data can be imported from ERP, CRM, DMS or legacy systems and can be further used in workflows, rules, interfaces and document templates.

Workflow Visual Editor

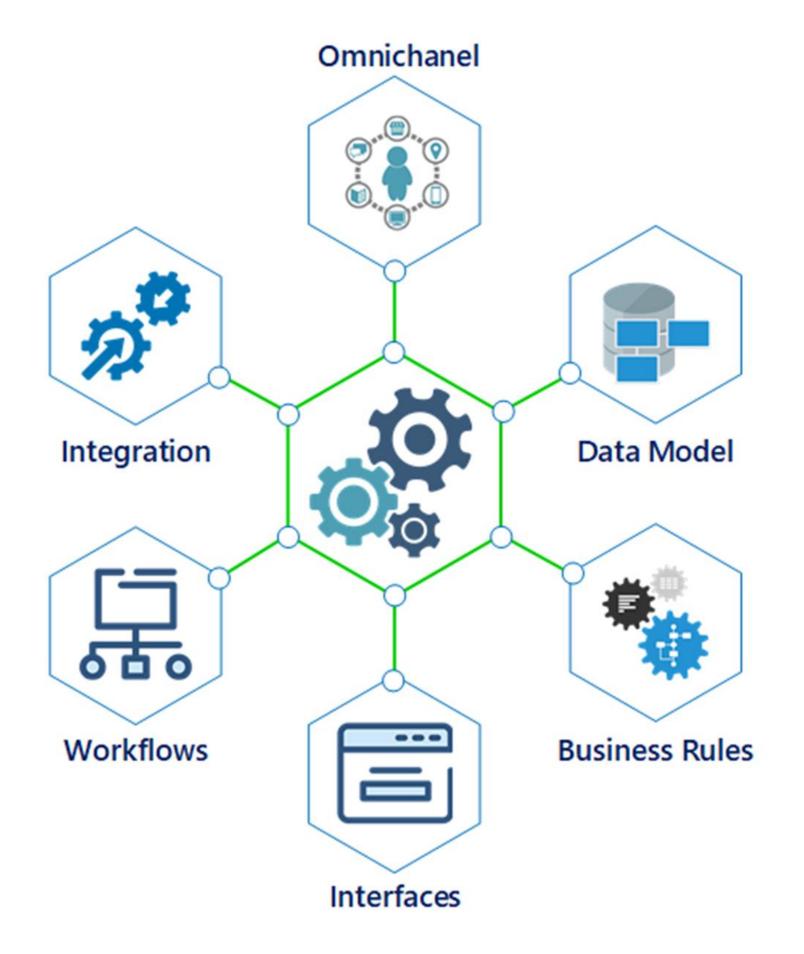
Flows can be simple or complex, from procurement approval to credit management or back-office solutions.

Document Generation

Design and generate document templates that can then be used in workflows to print any type of forms, like Quotes, Contracts or Invoices.

Omnichannel

Same user experience across all channels: Internal Portal – External Portal – Mobile – Public API



Interface Visual Editor

Generate responsive UI accessible from any web browser or mobile device. Build Single Page Applications providing a fluid, desktop-like user experience.

- Modular, multi layered, decoupled architecture, enabling security segregation and high availability implementation
- Two factor and self registration authentication mechanism
- Identity and Access systems integration (ex. Active Directory)
- Plugins for various commercial systems (Microsoft CRM Dynamics, SharePoint, ERP, DMS, etc.)
- Persistent vs. Non-persistent data mechanism

Data Model Graphic Designer

Definition of simple and complex data types, cardinalities, lists, parameters and entities for any type of application.

Business Rules

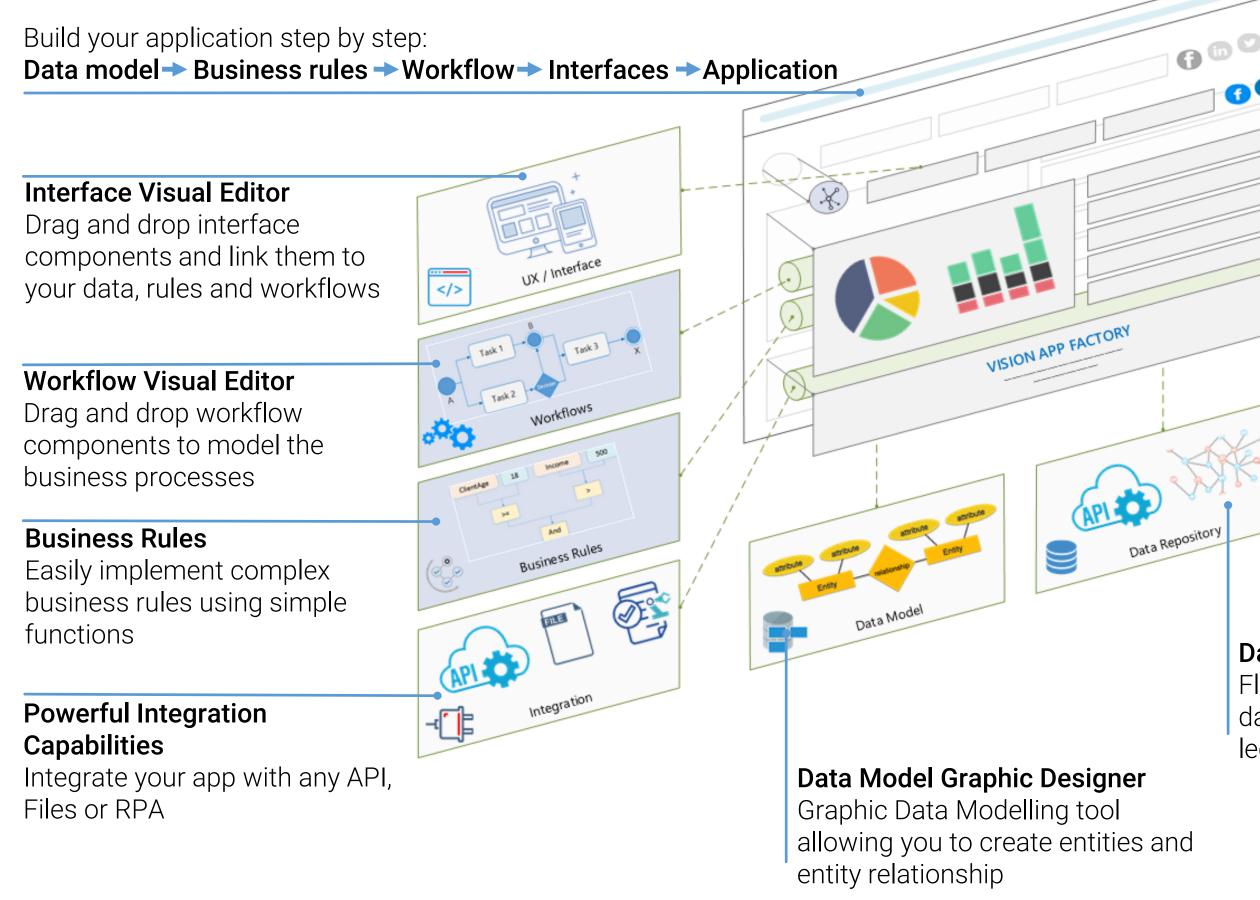
Can be designed by any user who has the ability to write formulas in Excel. You can easily implement scoring, escalation and notifications or you can manage how information is displayed and processed in the interface, documents and reports.

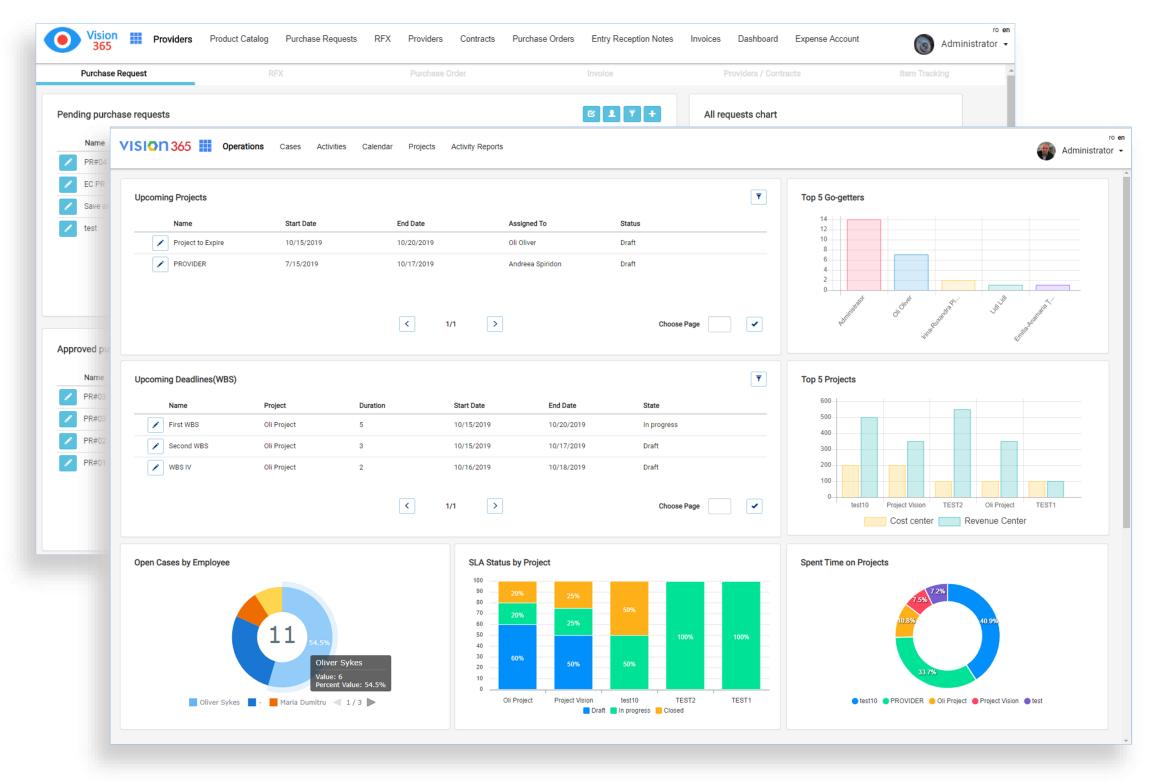
Reporting and Alerts

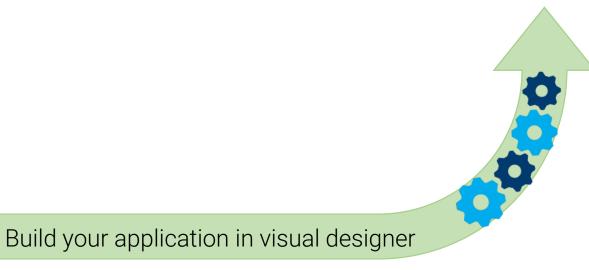
Generate various types of alerts within workflows, from information transmitted by e-mail to reports generated by the system and exported in a predefined format.



Business Processes *Automation Factory*





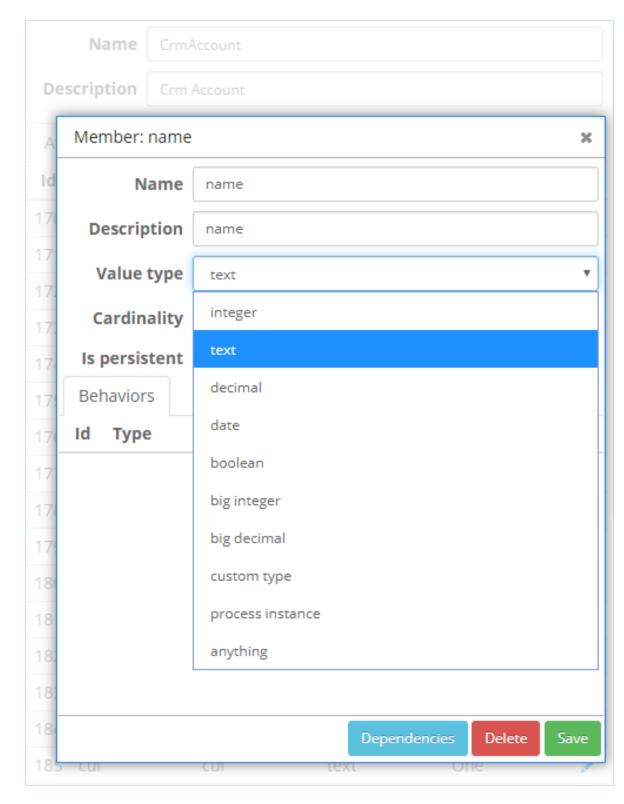


Data Repository

Flexible data repository: local/cloud database or Blockchain digital ledger



Business Processes Easy build and configure new features



Data Model 1

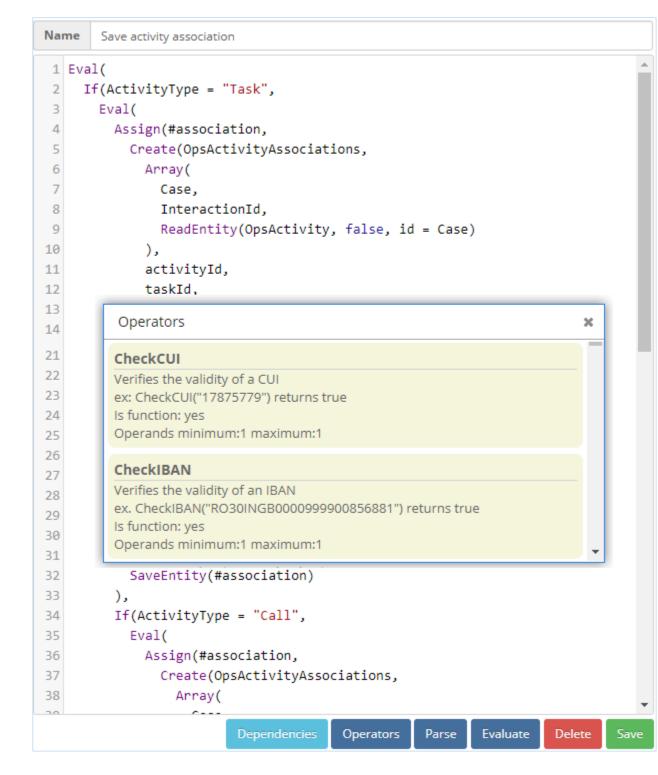
Define the data model for the data to be stored in the database for your application: create entities, cardinalities, relationship, etc.

The defined date model will be further used in building the application.

Business Rules 2

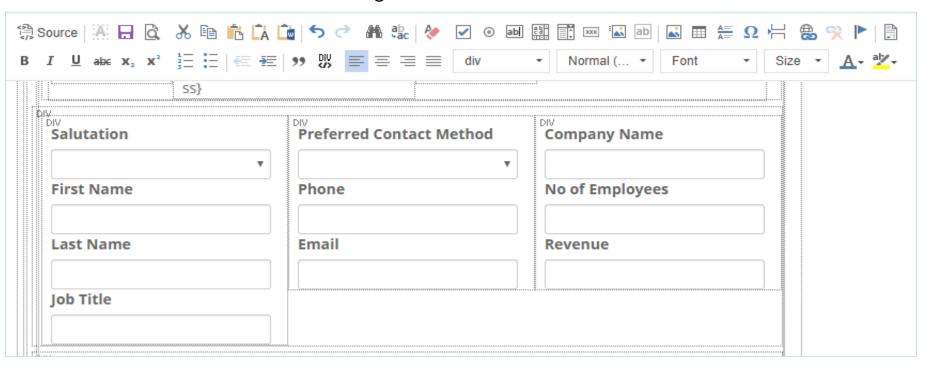
Translate your business rules into simple functions to be further used in the application interface, workflow, data and behavior. A business rule defines or constrains some aspect of business and always resolves to either true or false.

The Vision Rules Engine relies on complex operators, predefined functions (ex: check PIN, validate IBAN, etc.).



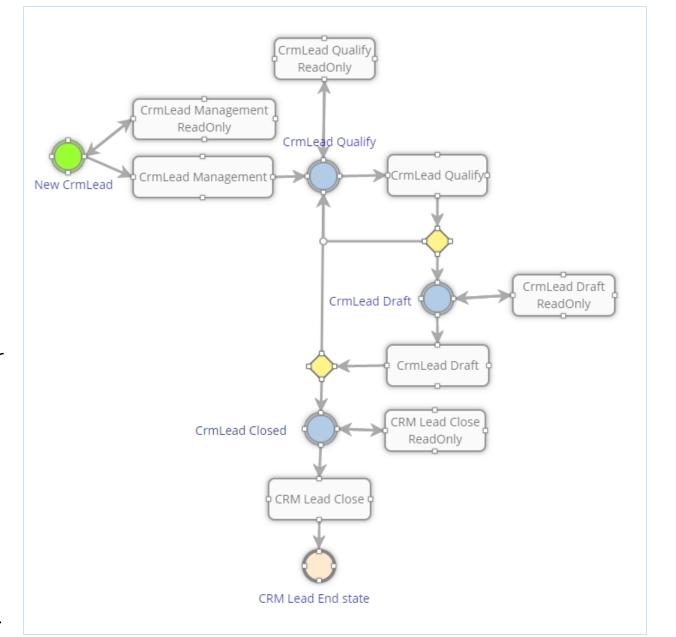
Build User Interface 4

Using a visual editor that enables writing content directly inside of web page or online application, allowing to create complex user interfaces. The Visual Editor has features found in word processors such as styles formatting (bold, italic, underline, bulleted and numbered lists), tables, block quoting, web resource linking, safe undo function, image inserting, paste from Word and other common HTML formatting tools.



Design your workflow 3

Define the workflow states, activities and transitions. The visual design tool, intuitive and easy to use for assembling workflows, enabling you to easily create simple to advanced workflows with no code. Use drag-and-drop actions to add steps, configure behavior, business rules, access and user interfaces.





Use Case

Contract Configuration, Approval and Automatic Generation

Contract Content

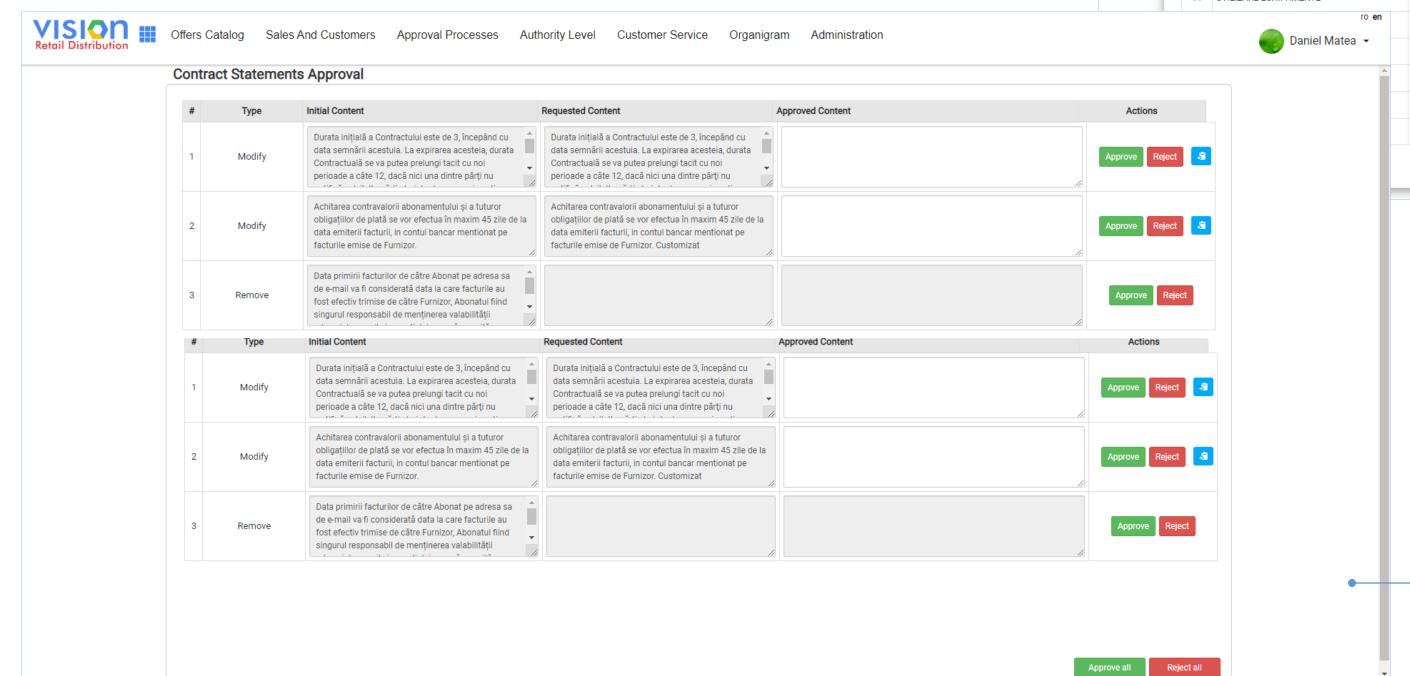
Organize the contract content in chapters and subchapters in arborescent structure. Add statements to each chapter. Associate each statement to a Product Category, Client Segment and Action Type.

Dynamic Content

Define and use in contract dynamic content through parameters such as payments terms, contract duration, value, etc.

Structured Content

Associate each Chapter and statement for a specific document like Additional Annex or Main Contract.



Contract Chapters Administration Definitions Chapters SUBJECT OF THE CONTRACT DEFINITIONS. SUBJECT OF THE CONTRACT DEFINITIONS. SUBJECT OF THE CONTRACT DEFINITIONS: 2 SUBJECT OF THE CONTRACT Body ACCEPTANCE OF INVOICES TRANSMISSION OF INVOICES Statements Definitions 6 METHODS OF PAYMENT AND PENALTIES Show active 8 OBLIGATIILE ABONATULUI Options Commercial Paramete **≠** 📋 9 OBLIGATIILE FURNIZORULUI. LIMITAREA RAS... Body 1 Subscription details Product supply, Company Name brand water, pro invoicing period 10 RETURNAREA ECHIPAMENTELOR PROPRIETA... Body the sale of the number of cans required for the ful 11 UTILIZARE ECHIPAMENTE Included services 2 Temporary custody leaving in temporary custody a number of water-c Body 2 Sale number of supports Optionally, sale of the number of cup holders acc. Body service for the entire duration of the Contract 5 Service Anexe pricing

Automatic Contract Generation

Offers Catalog Sales And Customers Approval Processes Authority Level Customer Service Organigram Administration

VISION III

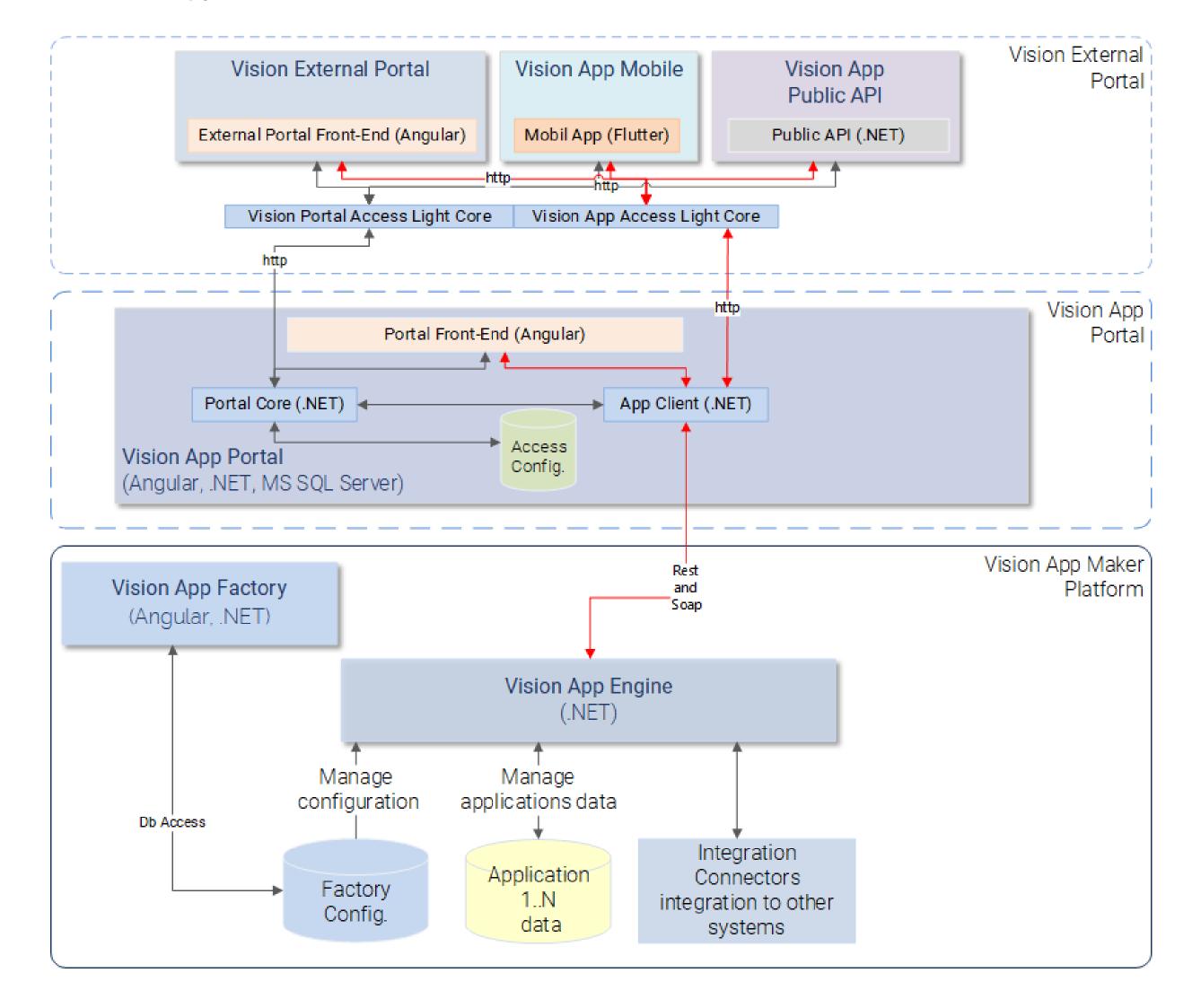
The contract is automatically generated based on customer details, commercial parameters, available statements for respective client. At generation time the user can add new or modify existing statement according with level of authority.

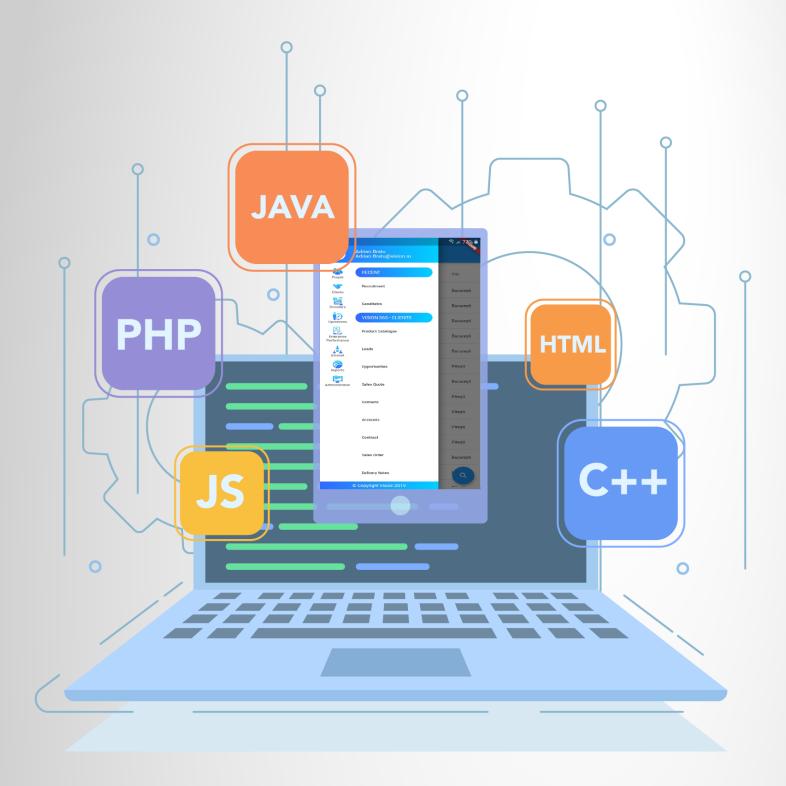


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Vision App Maker Suite

Technology stack





Vision App Maker components were developed with modern and appropriate technologies for each layer purpose: reliable back-end developed in Microsoft .NET and flexible, responsive and rich frontend based on Java Script and Angular.







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