



[View product screenshots](#)

- [1 Home screen](#)
- [2 Customer folder](#)
- [3 History](#)
- [4 Policies](#)
- [5 Receipts](#)
- [6 Notes](#)
- [7 Letters](#)
- [8 T-Files](#)
- [9 Attachments](#)
- [10 Relatives](#)
- [11 AR Suspense](#)
- [12 Forms](#)
- [13 Forms 2](#)
- [14 Downloads](#)
- [15 Claims](#)
- [16 X-dates](#)

**No other agency software gives you all of these features, benefits and advantages!**

### **Complete customer file management from your PC keyboard**

- Electronic document management eliminates lost or misplaced files and reduces labor costs
- Easily handle all customer, lien holder, and company calls from your computer screen
- Batch entry provides quick, easy processing of all agency documents

### **Real time**

- Your insurance companies keep your data up to date with ACORD standard download
- Download companies will supply initial data for loading your customers and policies
- Web merge feature provides instant access and data transfer to company web sites

### **Electronic document management**

- Scanned documents, photos and other items stored in customer's folder for easy retrieval
- Batch scanning supports fast scanners with fifty page automatic document feeders
- Attach any file your PC can open to your customer's folder for easy retrieval
- Email any scanned document, photo or other file stored in customer's folder archival of old images and photos

### **Seamless agency accounting**

- Automatic premium and commission capture eliminates policy invoicing
- No monthly closing required
- Extensive reporting by line of business, company, transaction type and more
- Producer / CSR commission and fee statements
- Agency / broker fee accounting
- Accounts receivable module
- Customer payment management with EFT tracking and company check writing
- End of day cash drawer
- Balancing and deposit preparation
- Complete management of agency trust account
- Account current management and direct bill statement reconciliation

### **Interface to your favorite comparative rating software**

- Eliminates re-entering customer and policy information
- Automatically calculates pro rata and policy term premium changes

### **ACORD forms**

- Fill, save, print and email all ACORD forms

### **Much, much, more!**

- Complete diary system provides follow-up on notes, letters, change requests, etc.
- Easiest system to learn and use
- Personalized training
- Knowledgeable and friendly support staff with 800 number access

### **More Information**

 [Document Management](#)

■  
[Accounting](#)

■  
[Multiple Locations](#)

■  
[System Requirements](#)

[\*\*Try our online demo today!\*\*](#)

**Or call 800-833-5179**