



tesis

BROKER MANAGER

A new
concept in ERP

A solution of
codeoscopic
workspace

CODEOSCOPIC WORKSPACE, THE ULTIMATE SOLUTION FOR BROKERS

Tesis Broker Manager is one of the solutions included in CODEOSCOPIC WORKSPACE: the interconnected suite of Codeoscopic applications. Aggregator, portfolio management, market analysis, business administration, risk management and claims processing all at the broker's disposal in a single interface. And it's all in the cloud, with a single, configurable and adaptable interface for the needs of each organisation.



Innovation for the insurance broker

Tesis Broker Manager is the first ERP created in software-as-a-service (SaaS) format: fully web-based, responsive, multi-user and multi-brokerage. No installation, hosting or local storage of the information is required. All the information is stored on the Codeoscopic servers.

What's more the **Tesis Broker Manager** connection with **Avant2 Sales Manager** turns the single data into a reality: with a single username, the broker can access both platforms and any operation generated on one of them is mirrored in real-time on the other. This structure multiplies the management capacity and the agility of **Tesis Broker Manager**.



The ERP designed by mediators and developed for mediators

No one knows better the needs of an insurance broker than the mediator professionals themselves. That's the main advantage of **Tesis Broker Manager**, which was devised and developed by and for insurance brokers. Featuring adjusted solutions for real use cases.

The result is an ERP that not only automates all daily processes and operations. It also offers a comprehensive view of the business, portfolio status and sales opportunities. This is why **Tesis Broker Manager**, will decisively change the way brokers work.



What's different in TESIS BROKER MANAGER from other ERPs?



1. Single customer data

Avant2 Sales Manager and **Tesis Broker Manager** share all information. Every transaction in the multi-quote calculator is immediately mirrored in the ERP; and from **Tesis Broker Manager**, a customer can be clicked on and rated for insurance in **Avant2 Sales Manager**.

2. Single username

Users of both programs are integral: both can be accessed with the same name and password (employee or partner). Opportunities and quotes can be created on **Avant2 Sales Manager** from the **Tesis Broker Manager** client tab.



3. Web-based, responsive and mobile

Like **Avant2 Sales Manager**, the new **Tesis Broker Manager** is fully web-based, responsive and accessible from a browser. This is the same for employees, partners and end customers alike.

4. Decentralised system

Codeoscopic takes care of the maintenance service, the daily operation and the support of the software used by the client, who does not need to install anything, buy servers or rent hosting. Everything is provided by the Codeoscopic SaaS, which includes: hosting, backups, maintenance and bandwidth for maximum speed and performance. All 24x7x365, using systems and infrastructures of maximum capacity, security and solvency.



5. Remote Helpdesk

Pro-active customer support to configure and monitor system processes and automations. The aim is for the insurance broker to be able to ignore repetitive tasks and focus on selling and retaining their client portfolio.

6. Multi-Tenancy Software Architecture

Multi-client system that operates in a flexible way, allowing for more efficient client service management and economies of scale. The features developed in the system are used by all clients from day 1. Model similar to how **Avant2 Sales Manager** started.



7. No License Fee

Software as a Service. Without a License, it's purely a subscription to services. The service is rented for a fee (users). That's all.

8. No hosting fee

With **Tesis Broker Manager**, hosting is a thing of the past. Welcome to the era of service delivery!



9. No minimum contract period

We don't hold clients captive against their will, we want them to be satisfied. We have no minimum contract period.

10. Fully API-certified

For the insurance broker to develop their own programs, websites, quotes calculator, Mobile Apps, etc. **Avant2 Sales Manager** and **Tesis Broker Manager** are open and accessible environments. There are no limits. Develop your imagination and business with us!



Features

- Extensive connectivity through SITEC.
- Prepared for the new EIAC standard.
- Import/export of parameterisable data from external sources.
- Extensive dashboard system.
- Powerful reporting system.
- Communication system based on custom templates.
- Scheduled Tasks Manager.
- Definition of business rules from the user interface.
- Integrated Document Manager.
- Comprehensive control of users.

What if you work with another ERP?

No problem! In FOUR SIMPLE STEPS we'll complete the migration.



1. DATA TRANSFER.

Test migration.
We analyse your data
and perform tests.



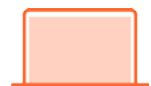
2. VERIFICATION AND TRAINING.

Training preparation
Checking. Training
sessions.



3. DEFINITIVE SET-UP AND PRODUCTION START-UP.

Permanent migration.
Last test+revision of
finalisations.



4. PROACTIVE USER SUPPORT AND ASSISTANCE.

Let's get to work!

User types and access to information

The types of users, their visibility, permissions and costs are as follows:



User Employee **AVANT2 SALES MANAGER ONLY**

Commercial expert

These are employees of the brokerage firm who are only involved in sales, not in administration, therefore do not have access to **Tesis Broker Manager**. This type of user is oriented towards sales networks, affinities, call centres focused on sales, cross-selling campaigns, etc. They are experts in **Avant2 Sales Manager**: products, coverage, companies, tuning, warranty transactions, telephone sales, etc.



User Employee **EXECUTIVE ADMINISTRATIVE** **Avant2 Sales Manager + Tesis Broker Manager**

Full employee

They are the ninjas or leaders of the office. Employees who sell through **Avant2 Sales Manager** and, in addition, manage the brokerage with **Tesis Broker Manager**. They are experts in the management of both platforms. In this group there may also be specialists in Receipts (unloading portfolios), Claims or General Administration (queuing, settlements, company configuration, etc.).



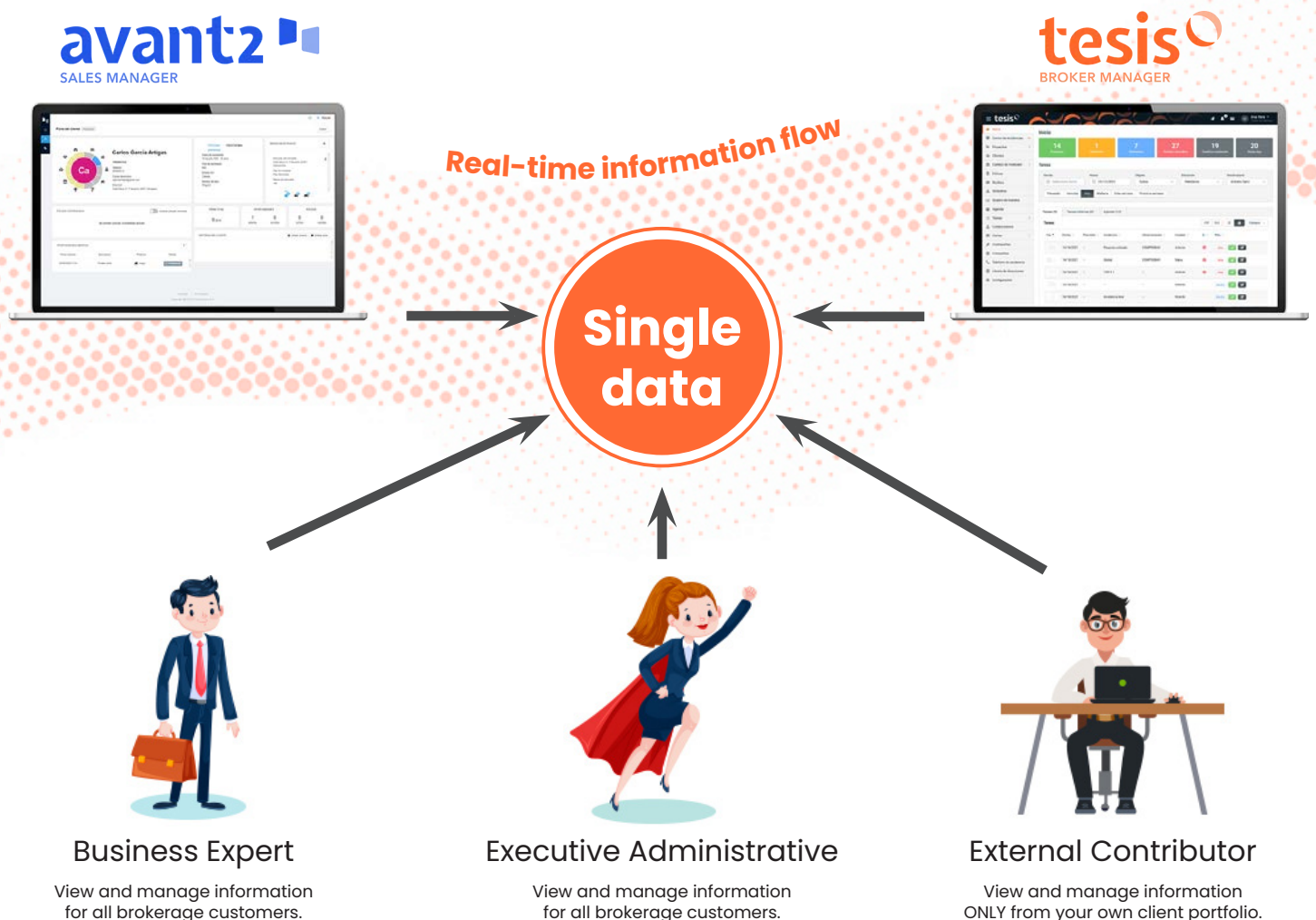
CONTRIBUTING User

Self-sufficient collaborator

This type of user includes the brokerage's external collaborators. They can use both platforms: **Avant2 Sales Manager** to sell insurance to their customers (they only see their own client portfolio) and manage it through **Tesis Broker Manager**. They receive support from sales representatives in the use of **Avant2 Sales Manager** and from managing executives in the use of **Tesis Broker Manager** to self-manage their portfolio.

Connecting with Avant2 Sales Manager: Management + Administration + Sales

Avant2 Sales Manager and **Tesis Borker Manager** work fully synchronized, which reduces the broker's workload, multiplying their efficiency. There is no longer any need to duplicate information: everything you do on one platform is automatically mirrored on the other. Thanks to this seamless connection, the insurance broker will have at their disposal a comprehensive ecosystem for sales, administration and brokerage management: the leading quote calculator, reinforced with a powerful CRM + the ERP with the most advanced technology and management capacity on the market.





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