

# AMITY *i*Broker

## Insurance Management System for Brokers



### BRIDGES CUSTOMERS AND INSURANCE COMPANIES

Single solution, enabling brokers to address the requirements and surpass expectations of customers and brokers.



### ONE-STOP SOLUTION

Integrates diverse offerings from multiple insurance companies, and negotiates to deliver custom-built, personalized solutions for customers.



### LEVERAGES KNOWLEDGE

Provides a comprehensive view of all information relating to customers, insurance companies and products, enabling opportunities for cross-selling.



### EMPOWERS BROKERS

To deliver informed solutions to customers, demystifying the intricacies of the insurance world.



**CMMI** DEV | ML 5  
APPRAISED

Appraisal # 63344 | Exp. Feb 28, 2026



**NASSCOM**  
MEMBER

*“Delivering Quality Products And Services Through Innovative Usage of Technology”*

[www.AmitySoftware.com](http://www.AmitySoftware.com)

## The Need

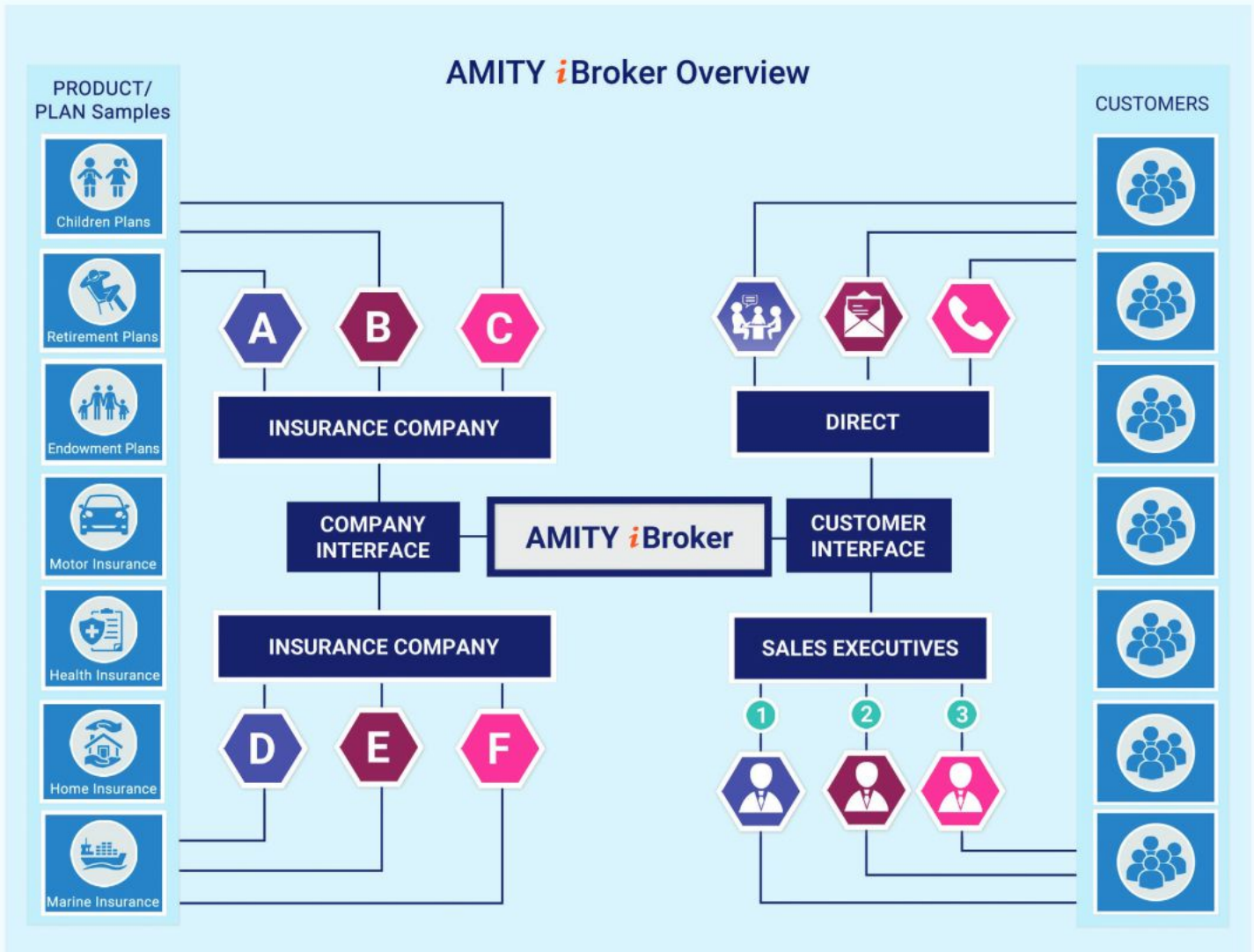
Rapid technological advances and continually evolving business models, over the past two decades, have revolutionized the insurance business approach, both for companies as well as brokers. The advent of the digital age, specially for the broker community, has given rise to a whole new environment, offering customers a virtual platform to directly interact with multiple insurance companies, effectively removing the need for an insurance broker. This has necessitated the need for a radically different model where the Insurance Broker needs to serve as a bridge between the customer and the insurance companies and provide value through the best suited solutions, quickly and seamlessly.

## What is AMITY *i*Broker?

Amity *i*Broker is a complete ERP solution for Insurance Brokers, enabling in design of customized and personalized insurance solutions for customers. It leverages cutting edge technology combined with their knowledge and experience for increase and retention of business for different customer segments. Amity *i*Broker helps the Insurance Broker perform this role effectively and efficiently.



\* Samples of menus for indicative purposes



## Process Overview



Customer Engagement

- Customer onboarding.
- Single view of all policies for each customer.
- Leverage customer data for customer retention.
- Real-time updates and notifications.
- Multi-modal access through web and mobile app.



Marketing & Sales

- Configurable Products.
- Quotation generation from multiple underwriters on single submission of minimum basic details.
- Proposal forms for selected underwriter available at a single click.
- Recruitment and management of sales force.
- Commissions and incentives program for sales force.
- Performance monitoring of sales force – Productivity and Persistency.
- Lead management system.



Underwriting

- Fully configurable premium rates and benefits for every underwriter.
- Single view to track the status of quotations, proposals and policies.
- Ability to accept applicable endorsement requests for all policies.
- Certificate and Policy printing as per underwriter.



Claims

- Claim requests management.
- Claims history record maintenance.



CRM

- Service request management with SLA monitoring.
- Complaints management with SLA monitoring.
- Campaign Management and Product Launches
- Real time information visibility for the Call Center and authorized users.
- Contact through mail / phone or chat with call center executives.



Finance

- Easy setup of finance / accounting books.
- Automatic posting of transactions to respective GL accounts based on the transaction type.
- Simplified reconciliation process with automated matching of transactions.
- Real-time availability of reports.
- Multi-currency functionality.
- Cashless remittances (Inward / Outward).



ICT

- Secure and safe environment.
- Proper access control and authorization level as per organizational requirements.
- Complete audit trail for every transaction.

## Key Benefits

- Multiple quotations from different companies generated on a single click.
- Direct online access to customers for evaluation and purchase of policy without agents, anytime and from anywhere.
- Interpreted and reliable data analytics, enabling informed decision-making, more focused planning and development of best-suited solutions for customers.
- Calculation and validation of commissions and incentives from different insurance companies.
- Commission and incentives calculation for the sales executives.
- Real time information available for all stakeholders.

## About Amity

Amity Software was founded with a focus to provide technology driven solutions in line with industry best practices. Pioneers in providing Software & Smart Card technology based products and solutions, Amity's solutions are tailored to meet the specific requirements and in use across a wide range of industries including Insurance, Sugar, Steel, Cement, Agriculture, Retail, Health, etc.

We are SAP implementation partners for US, India and East Africa. Our expertise and experience is specially geared for the end-to-end execution of projects, from Conceptualization, Design, Solution Architecture, Process Re-engineering, Development, through till Installation, Testing and Commissioning. Our project execution methodology is backed by matured processes and secured work methods, as is evidenced in our CMMI Level 5, ISO 27001 and ISO 20000 certifications.

At the leading edge of System Integration Technologies, our success hinges on our unparalleled domain expertise spanning diverse industry verticals, in each of which we have designed and implemented path breaking, first-of-their-kind, mission-critical solutions. Amity enjoys a reputation for developing innovative turnkey customized solutions, delivered on time and within budget. Testimony to this lies in close to 100% of our customers, from across user segments, industry verticals and geographies, entrusting us with ongoing and repeat business.

Our management team draws technocrats with experience across a wide cross section of industries. A customer centric enterprise, the employee comprises of software engineers, R&D engineers, SAP consultants and technology specialists, have helped us deliver to our customers the best cost-performance advantage.

### Already in use at:

- Family Bank Insurance Agency
- Kenya Orient Insurance Limited
- Kenya Orient Life Assurance Limited
- Alpha Africa Asset Managers Limited



## Our Offices



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