



Optimizing the Product Roadmap: Insights from the Product Team

Toronto Summit
May 7-8, 2025

Confidential

Agenda

1. Next Generation of Insurance
2. Recent and Upcoming Product Innovation
3. The Future of Applied Epic in the Browser
4. Underutilized Value-Add Features in Epic
5. The Commercial Lines Journey
6. Peer insights on Using Epic



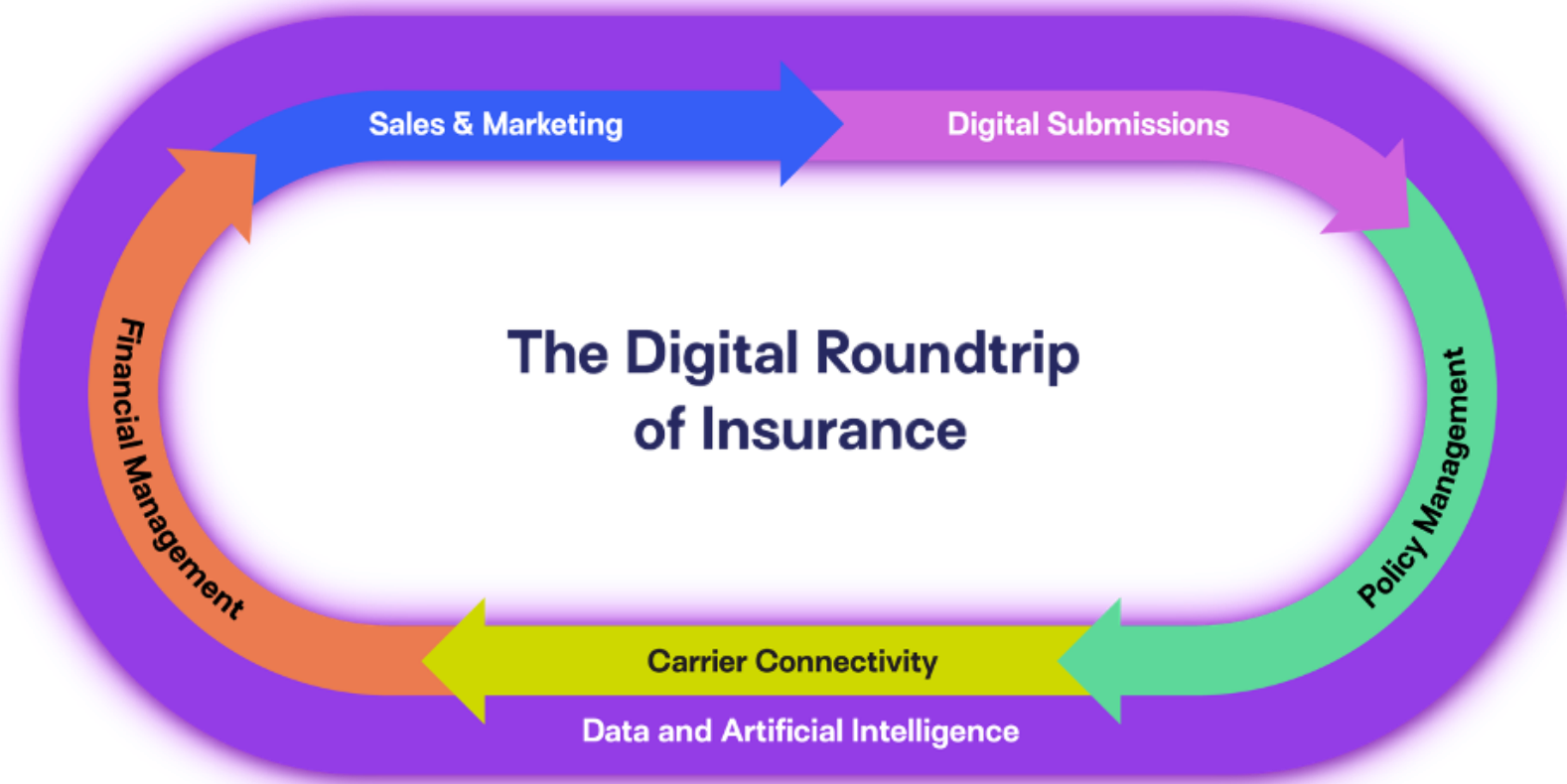
Next Generation of Insurance



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The Capabilities AI Creates Will Show Up Throughout the Next Generation of The Digital Roundtrip



Recent and Upcoming Product Innovation





Key Product Investment Areas



**Artificial
Intelligence**



**Business
Intelligence**



**Connected
Commercial Lines**



**Digital
Payments**



**Employee
Benefits**





KNOW



RECOMMEND



ASSIST

Epic Reports

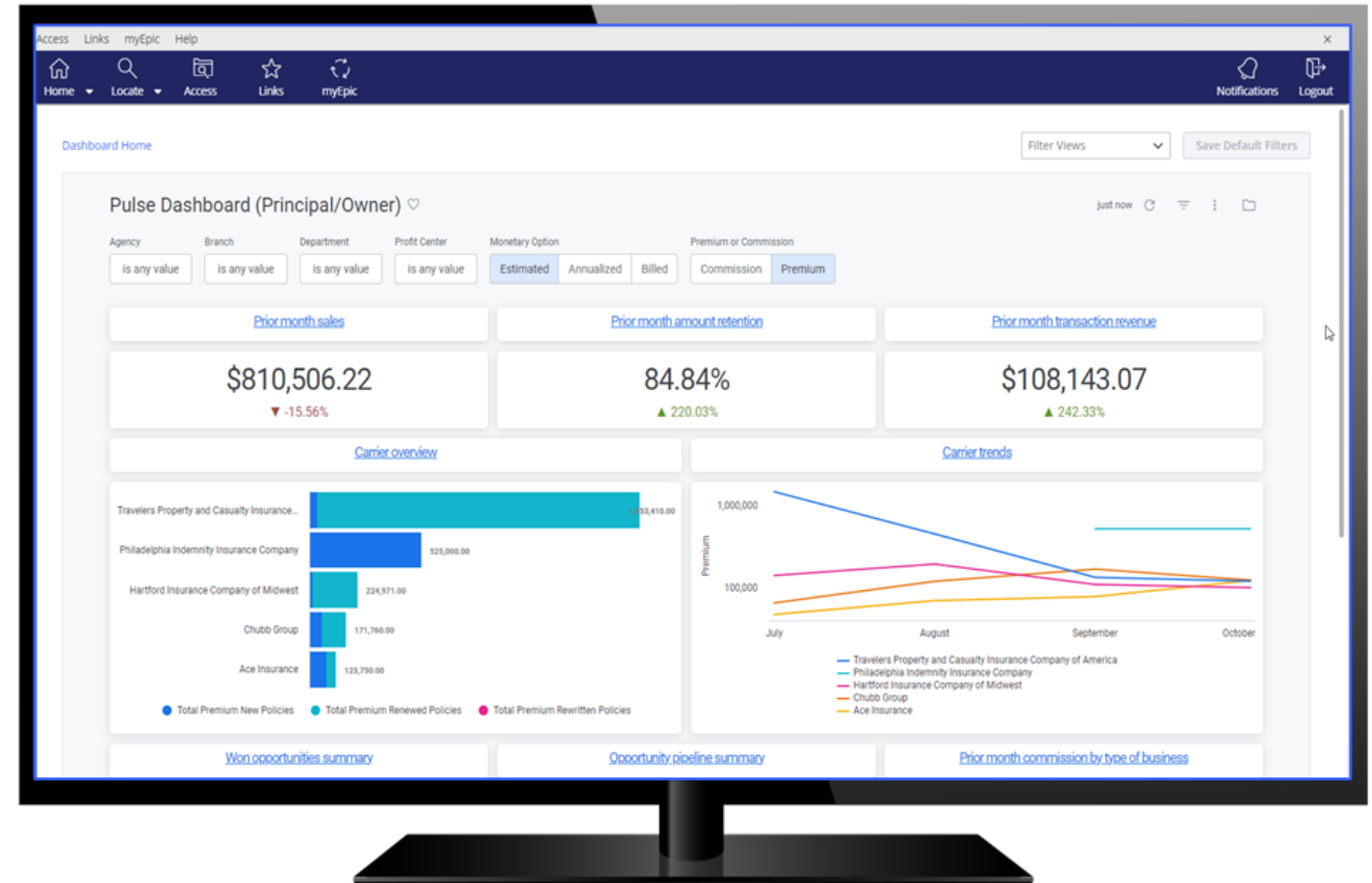
Epic Dashboards

Embedded Insights



Interactive Reporting & Analytics Embedded in Epic

- Understand performance trends, organizational productivity, and other critical business drivers
- Save time and effort by not running and preparing multiple disparate reports to answer common questions
- Reduce clicks across multiple systems with visualizations accessible from within Applied Epic
- Validate the quality and completeness of data captured in your management system



Available Now



Epic Dashboards Key Capabilities



Pulse Dashboard

Serves as starting point for each persona
– Insightful high-level summary of data most relevant to your job role



Data Delivery and Scheduling

Download data in your preferred format, schedule deliveries to others via email



Data Quality Dashboards

Validate data accuracy and understand inconsistencies visually and build trust



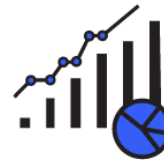
Flexible Views

Filter by structure, dollars, premium, commission and at time intervals that make sense for your business



Alerts

Configure alerts for specific thresholds and conditions met within the business: expiring policies, book of business goals



Asset Builder

Create custom visualizations based on your organization's specific and unique needs



Dashboards Purpose-Built for Different Job Roles



Principal/Owner



Department
Manager



Sales Manager



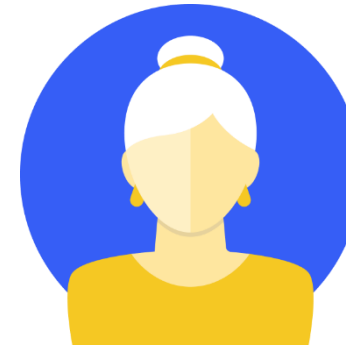
Accountant



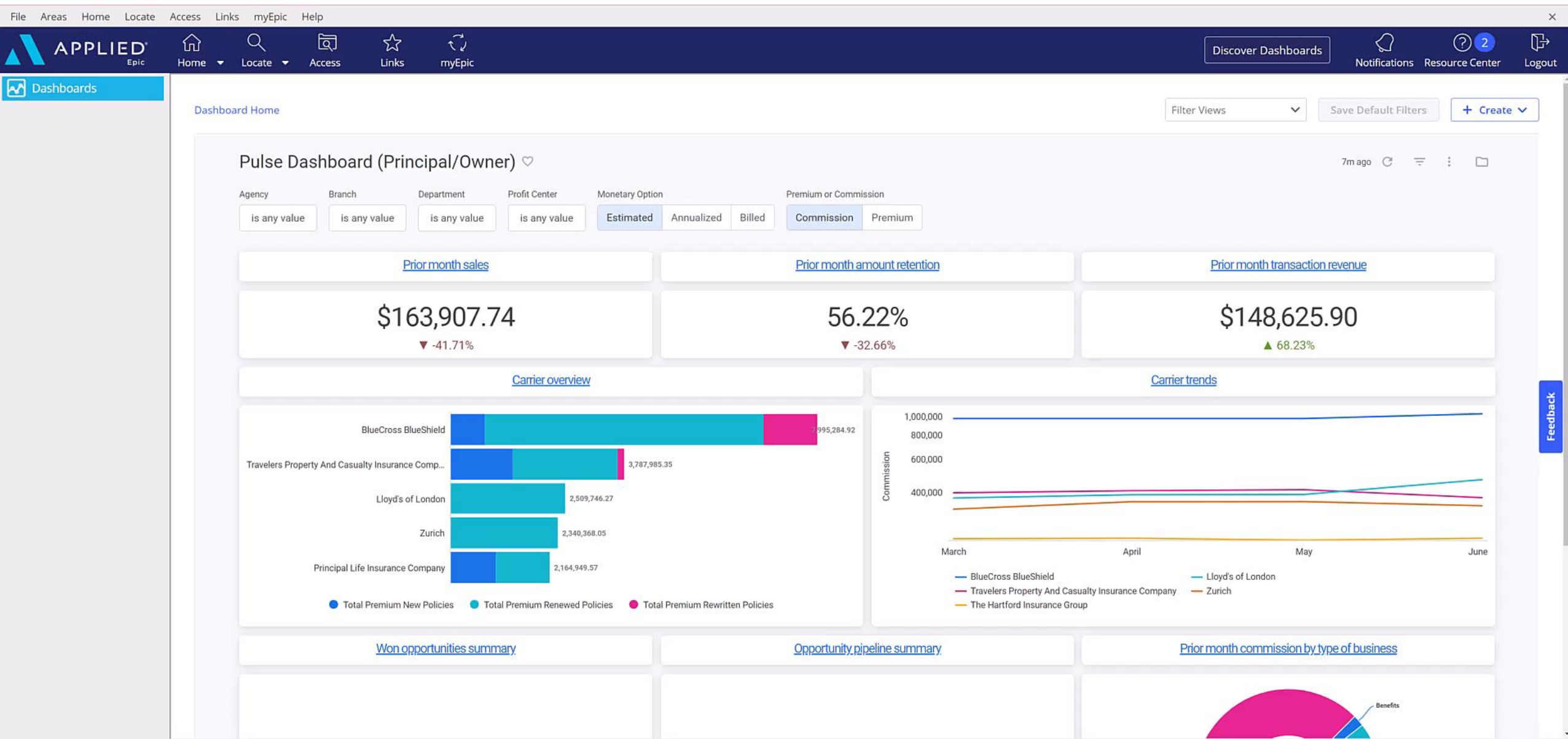
Account Manager/
Servicing Rep



Producer



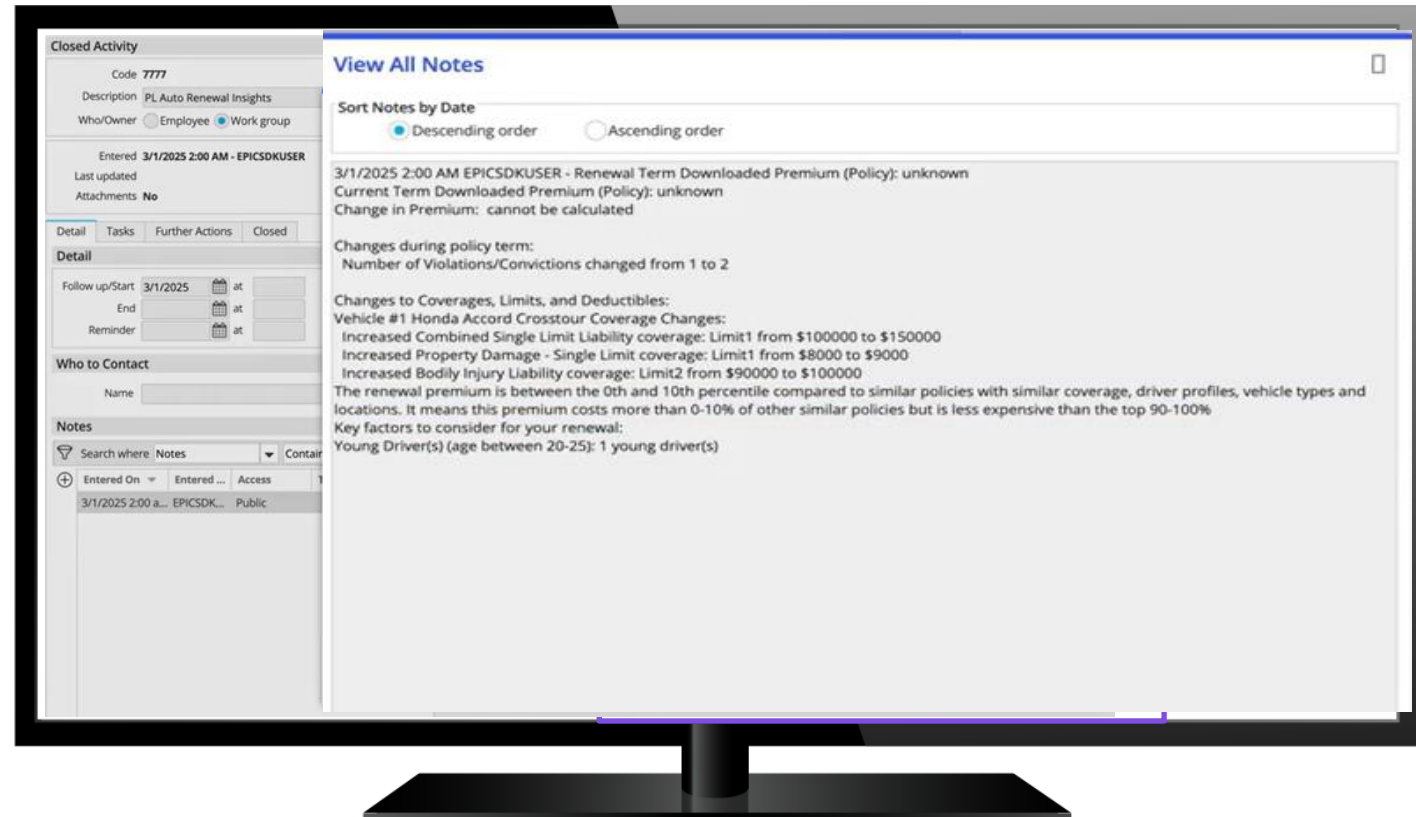
IT/Operations
Manager





Personal Lines Renewal Insights (Auto)

- Summary of current vs. renewed policy premium displayed in an Epic activity note for downloaded automobile renewals, including factors that may have impacted premium change
- Insights also benchmark premiums against other similar policies to inform decisions about remarketing (or not)
- Save hours of time manually reviewing and comparing documents during renewals, preparing for customer conversations and positioning as a strong, trusted advisor





AI-Powered Email Summaries in Epic

- A click of a button will generate an email summary that can be added as an Activity Note for Outlook emails

The screenshot displays the Epic user interface with a 'Attach To' dialog box open. The dialog box has a blue border and contains the following sections:

- Attach To**: A section with a blue border containing the 'AI Automation' text, a 'Summarize' button, and a 'Latest Message Only' checkbox.
- Attach Email/Existing Files**: A section with a text input field containing 'Email.msg'.
- Activity Note**: A section with a red border containing an 'Access Level' dropdown set to 'Public' and a 'Note' text area with the summary text: 'Acme Delivery is looking for cheaper insurance coverage to expand in 2024. No risk changes since they last spoke. Action item: Sydney, please look for cheaper insurance coverage options for Acme Delivery.'

The background interface shows the 'Attachments' table with a file named 'test.msg' highlighted in red, and the 'Detail' tab selected at the bottom.



The Applied AI Lab Has Provided a Space to Test our Early Thinking – and the Learnings Have Been Great

Benefits to Epic Customers

- Early access to test AI-assisted features
- Influential role in validating new concepts
- Informing potential use cases based on pain points/needs



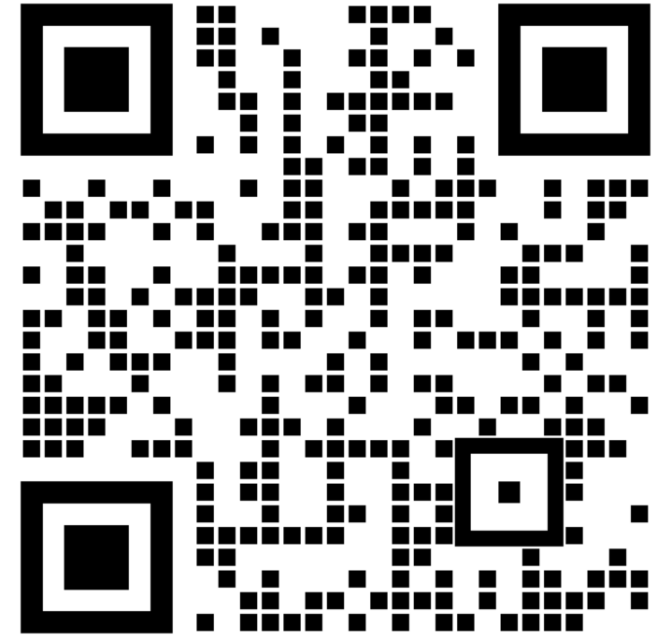
Benefits to Applied Product and Development Teams

- Access to customer segments more palatable to innovative capabilities
- Rapid iteration and learning
- Access to sample data
- Targeted experimentation with relevant user segments



How To Get Engaged with AI Initiatives at Applied

- Sign up to participate in the Applied AI Lab
 - Use the QR code to sign up ==>
- Selection for AI Lab program
 - If selected, you will be contacted via email from AILab@appliedsystems.com
- Provide feedback to guide Applied AI strategy and roadmap
 - Avenues to provide feedback:
 - Email (separate email address per program)
 - In-product survey feedback
 - Participate in small group feedback sessions or office hours
- AI Lab participation prerequisites
 - Must be using Epic Browser, on the latest Epic release, and on Epic Cloud



The Future of Applied Epic in the Browser





Why Browser?



MODERN USER EXPERIENCE

- Modernized, updated screens
- Predictive text technology
- Search as you type



ENHANCED SECURITY

- Multiple layers of security
- Better protect your information and data
- Integrate your identity provider (IdP) for MFA



EXCLUSIVE FEATURES

- AI-Powered Email Summarization
- Attachment Preview
- Epic Quotes Commercial Lines
- Epic Dashboards



Browser Usage Continues to Grow

- Confidence around browser continues to grow, as performance improves, and defects are fixed faster
- Increased confidence has led to more customers rolling out and adopting browser

2,700+

Customers on Browser

75,000+

Users on Browser

17,000

Users in Canada on
Browser



Tips for a Successful Rollout Learned Across Hundreds of Brokerage Adoption Journeys



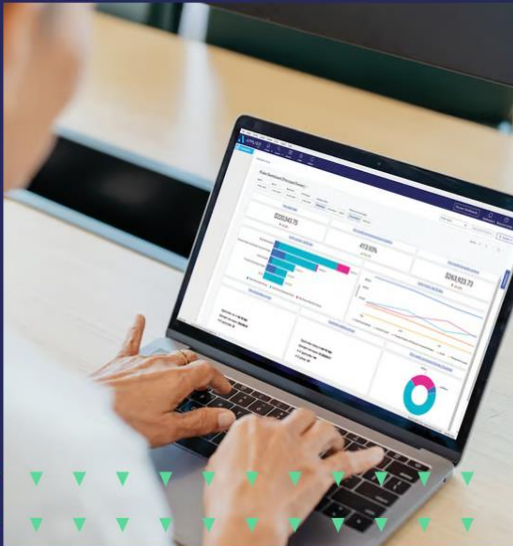
 APPLIED



Epic Innovation Starts Here

Your one-stop shop to discover all you need to know about the Applied Epic browser interface.

[Get My URL](#)







Underutilized Value-Add Features in Epic



UNDERUTILIZED FEATURES

Renewals Manager



FileAreasLocateActionsAccessLinksmyEpicSMSSMSHelp

HomeLocateActionsAccessLinksmyEpicAppetiteSMSPrint

NotificationsResource CenterLogout

Renewals Manager

Renewals - All

Filter DefaultsRefreshCollapse AllSelect ColumnsSelect All

Search where

Find

Account Name	Line Type	Policy Number	Policy Expira...	ICO/Carrier	Status	Renewal Stage
Play Now	GDSF	890123	12/31/2023	DELDE1	REN	Renewals Not Started
Play Now	GPVS	182930	12/31/2023	VSP001	NEW	Renewals Not Started
Costanza And Son	GPMD	456789	12/31/2023	AETNA1	REN	Renewals Not Started
Costanza And Son	GLAD	7894546	12/31/2023	MUTOF1	REW	Renewals Not Started
Bugsy's Constructi...	GPMD	88755142	12/31/2023	BLUCR1	NEW	Renewals Not Started
Art Vandelay	IMDC	MEDI1234	12/31/2023	BLUCR1	REN	Renewals Not Started
Art Vandelay	IMDC	MEDI1235	12/31/2023	BLUCR1	REN	Renewals Not Started
George Costanza	IMDC	MEDI1236	12/31/2023	BLUCR1	REN	Renewals Not Started

1 - 21 of 21 items , 1 policy selected

Go to Policy

Renew

Marketing Submission

Remarket

Update Renewal Stage

Market Appetite

Export to Indio

Associated Activities - Open

Code	Desc	Follow Up/Start	Status	Closed on	Who/Owner	Last Note Entered
No items found						

No items found

Claims - Open

Loss Type	Date of Loss	Status	Da
No items found			

No items found

PrimaryAdditional

George Costanza
Contact via: Phone

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UNDERUTILIZED FEATURES



Do not override Policy Status

File Edit Areas Home Locate Actions On Demand Access Links myEpic SMS Help

APPLIED[®] Epic

Home Locate Actions On Demand Access Links myEpic IVANS SMS New Print Notifications Resource Center Logout

Accounting
Activity
Attachment
Auditing
Email
Interface
International
Job Management
Leads Inbox
Links
myEpic
Policy
Statuses
Summary/Proposal Te...
Supplemental Screens
System Settings
Proofs
Quotes
Real-Time

Code	Description	Status
CAN	Cancelled - General	Active
CIR	Cancelled - Insured's Request	Active
CNP	Cancelled - Non Payment	Active
CRW	Cancel - Rewrite	Active
ECU	Entered in Error/Clean-Up	Active
MKT	Policy Marketed	Active
NEW	New Policy	Active
NNC	Non-Renew of New Business by C...	Active
NNI	Non-Renew of New Business by I...	Active
NRC	Non-Renew of Renewal by Comp...	Active
NRI	Non-Renew of Renewal by Insured	Active
NWQ	New Business Quote	Active
QNT	Quote - Not Taken	Active
REI	Reinstatement	Active
REN	Renewal	Active
REW	Rewrite	Active
SYN	Database Synchronization	Active

Detail

Code

GL subaccount **CAN**

☐ Retain this line status regardless of download transaction

Descriptions

Language

Description

☒ Update matching descriptions in other languages

Language	Description
English (Canada)	Cancelled - General
English (United Kingdom)	Cancelled - General
English (United States of America)	Cancelled - General
French (Canada)	Annulé - Général

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UNDERUTILIZED FEATURES



Email Monitoring

File

Edit

Areas

Home

Locate

Actions

On Demand

Access

Links

myEpic

SMS

Help

APPLIED
Epic

Home

Locate

Actions

On Demand

Access

Links

myEpic

IVANS

SMS

New

Print

Procedures Home

Accounting

Activities

Auditing

Document Management

Import Scans

Batch Scan History

Distribute Files

Print Front End Barcodes

Unrouted Attachments

Unrouted Emails

Unrouted Faxes

Unrouted Emails

☒ All

☐ Work group

☐ Employee

Locate

Incoming Email

Select Columns

Preview Pane

☒	Date	Email From	Email To	Subject Line
	12/6/2023 8:19 pm	jtindall@appliedsystems.com	jtindall@appliedsystems.com	FW: Test Auto Forward
	12/6/2023 8:21 pm	jtindall@appliedsystems.com	jtindall@appliedsystems.com	FW: Test now that jtinc
	12/7/2023 11:04 am	jtindall@appliedsystems.com	jtindall@appliedsystems.com	FW: Test Email 123456
	12/7/2023 11:05 am	moveacc1234@gmail.com	jtindall2@appliedsystems.com	TINDKI-01 Testing
	12/7/2023 11:06 am	moveacc1234@gmail.com	jtindall2@appliedsystems.com	TINDKIN-01 Test with c
	9/8/2023 12:24 pm	forwarding-noreply@google.com	movacc1234@gmail.com	(#408576191) Gmail Fo
	9/14/2023 7:35 am	JTindall@appliedsystems.com	movacc1234@gmail.com	Test
	9/18/2023 4:43 am	jen10doll@gmail.com	movacc1234@gmail.com	Re: Test

From: Jennifer Tindall <jtin

Sent: Wednesday, Decembe

To: Jennifer Tindall <jtindal

Subject: Test Auto Forward

Activities - All Open Activities

Code	Description	Account Name	Follow Up/Start	Who/Owner Code
EMRM	Email Routed Test again	Jennifer & Phillip Tindall	4/29/2024	TINJE1
EMRM	Email Routed FW: 123456 Help please	Jennifer & Phillip Tindall	4/11/2024	CERTS
EMRA	Test email - Email Routed Automatically	Tindall Tech	12/4/2023	TINJE1
EMRA	123456 Test - Email Routed Automatically	Tindall Kindle Repair	12/7/2023	TINJE1

UNDERUTILIZED FEATURES



Email Templates (Outlook Add-In)

FileEditAreasHomeLocateActionsOn DemandAccessLinksmyEpicSMShelp

APPLIED
Epic

HomeLocateActionsOn DemandAccessLinksmyEpicIVANSMSNewPr

Configure Home

Account

Accounting

Activity

Attachment

Auditing

Email

System Settings

Branding Profiles

Email Events

Email Templates

Interface

International

Job Management

Leads Inbox

Links

myEpic

Policy

Proofs

LPR - Request Client Signature... Active

**New Policy Cover Letter - Distr... Active

**PL Policy Renewal ** Active

WC Renewal Review Active

CAB - Email Template Active

Deliver Policy via Email Active

Email Template for Report Test ... Active

Endorsement Request to Carrier Active

Grenier's Email Template Active

Invoice to Client - Agency Bill Active

JAT Email Template Active

Loss Notice Active

LPR - Submit to Company Active

RAP Proposal Template Active

Request for Quote Active

SC - Renewal Proposal to Client Active

Description**LPR - Request Client Signature**

☒ Update matching descriptions in other languages

Language	Description
English (Canada)	**LPR - Request Client Signature**
English (United Kingdom)	**LPR - Request Client Signature**
English (United States of America)	**LPR - Request Client Signature**

Template DetailsAttachment Settings

Template Body

Branding ProfileDemo Branding Profile

SubjectCancellation form to sign for (ACCOUNT NAME)

Dear (CONTACT NAME)

Per your request, please find the attached Cancellation Request form that requires your signature.

The form indicates your request to cancel your policy effective (CANCELLATION DATE).

Please note that the carrier will be unable to cancel the policy unless I receive the attached form back with your signature. I can accept a scanned document back via email rather than mail if that is convenient for you.

If you have any questions or concerns, please contact me. Thank you!

☐ Epic Contacts

☐ Attach to Epic

Insert Email Template

Insert Epic Attachments

Applied

Applied Epic

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DE221_APPLI42_03 For Jennifer Tindall

EMAILTPL



Opportunities

Account

Type **Employee** ☐ Do not purge

Prefix

First

Middle

Last

Suffix

Name

▼

 Jennifer Tindall

▼

Account name Jennifer Tindall

Lookup code TINJE1

Account

Service/Producer

Share Revenue

Personal/Contacts

Identification Numbers

Personnel

View Others

Sales

Categories/History

Sales Teams

☒ Sales manager ☒ Executive

+

Sales Team ▲

×

Lightning Sales Team

Maverick Sales Team

Thunder Sales Team

Sales Manager

Bart Bailey

Bobbie Alfredson

Brianna Stamford

Sales Targets

🔍

Search where

▼

▼

Find

+

Fiscal Ye... ▲

✎

2022

×

🖨

Premium

Revenue

of Policies

of Risks

of Client Contracts

Sales Team

Type

\$100,000.00

\$10,000.00

Thunder Sales Team

New business

Confidential

29



Annualized Premium Calculations

File
Edit
Areas
Home
Locate
Actions
On Demand
Access
Links
myEpic
SMS
Help

Home
Locate
Actions
On Demand
Access
Links
myEpic
IVANS
SMS
New
Print
Notifications
Resource Center
Logout

Configure Home
Account
Accounting
Service Class Codes
Statement Layouts
System Settings
Transaction Codes
Activity
Attachment
Auditing
Email
Interface
International
Job Management
Leads Inbox
Links
myEpic
Policy
Proofs

Code	Description	Status
24PY	Payment from Customer	Active
ACHP	NACHA Payment	Active
AFEE	Agency Fee	Active
APAY	Applied Pay Payment	Active
AUDI	Audit of &PolDesc& Expired &Lin...	Active
AUWD	Automatic Withdrawal/Payment f...	Active
BDWO	Bad Debt Write-off	Active
CANC	Cancellation of &PolDesc& Expire...	Active
CFEE	Company Fee for &PolDesc&	Active
CFIN	Company Financed for &PolDesc&	Active
COIN	Contingency Income Received by ...	Active
DBAV	Direct Bill Premium Advance	Active
DBCM	Direct Bill Commission Received f...	Active
DINS	Direct Bill Installment for &PolDes...	Active
ENDT	Endorsement for &PolDesc& Effe...	Active
GFEE	Government Fee	Active
GTAX	Government Tax	Active
LATE	Late Charge	Active
NEWB	New &PolDesc& Effective &LineEf...	Active
NSFF	NSF Fee for &PolDesc& Effective ...	Active
OPEN	Balance Forward	Active
PDCQ	Post Dated Cheque Payment	Active

Detail
Code: NEWB
Class: Account Current/Direct Bill
☐ Service Fee (Defer Revenue)

Descriptions
Default Characteristics
Update Policy

Update Policy
☒ Policy estimated premium
Billed: Add To
Annualized: Replace - Term

Annualized
Add To - Actual
Add To - Term
Add To - Yearly
No Effect
Replace - Actual
Replace - Term
Replace - Yearly
Zero Out

History

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TRNSDETL



Contact Classifications

FileEditAreasHomeLocateActionsOn DemandAccessLinksmyEpicSMSHelp

HomeLocateActionsOn DemandAccessLinksmyEpicIVANSSMSNewPrintNotificationsResource CenterLogout

Configure HomeAccountContact ClassificationsContact DescriptionsContact LanguagesDefine RelationshipsAccountingActivityAttachmentAuditingEmailInterfaceInternationalJob ManagementLeads InboxLinksmyEpicPolicyProofs

Contact Classifications

Q

Include Inactive

+

Description

Status

Benefits - CAA Recipient

Active

Benefits - Compliance Notices

Active

Benefits - Decision Maker

Active

Benefits - General Contact

Active

Benefits - Human Resources Contact

Active

Benefits - Management

Active

Benefits - Marketing

Active

Benefits - Newsletter

Active

47 Items

Descriptions

LanguageDescription

English (United States of A...

Benefits - CAA Recipient

☒ Update matching descriptions in other languages

LanguageDescription

English (Canada)

Benefits - CAA Recipient

English (United Kingdom)

Benefits - CAA Recipient

English (United States of America)

Benefits - CAA Recipient

French (Canada)

Benefits - CAA Recipient

4 Items

CancelSave & Add AnotherSave

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31



More Interface Download Value Drivers

Auto Close Activities:
configure Download to close open activities

Download Results: searchable Communication Log; easily resend download transactions

eDoc Naming Convention:
ability to name attachments with merge variables

Instant Download:
instantly receive data from the carrier

Submit In-Process SSR:
Mark in-process SSR as submitted vs. suspending

Reprocess Suspense: triggers system to pull items out of suspense automatically

Retain Agency Entered Remarks: download no longer removes agency entered remarks

Download Dashboard:
easily see download metrics & why items hit suspense

Increase / Decrease Activities: Specific activities for premium increase/decrease (aka. exception report)

Populate Activity Amount field: If download created the activity, NEW, RWL, & PCH activities will contain the premium.

Recycle Bin: items deleted from policy, claims, eDocs go to recycle bin. Ability to recall them if needed

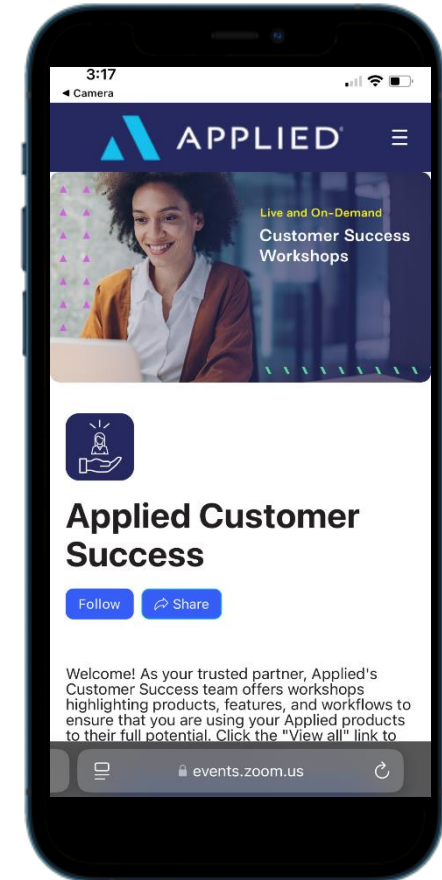
DL Activities Contain Policy Number: policy number written to notes section, allowing for auditing when it changes



Applied Customer Success Workshops

Available On Demand (Select the “Past Events” box)

- Understand Transaction Codes and Their Impact on Premium Fields
- Improving Workflows with Download Optimization
- Use Renewals Manager to Improve the Renewals Process
- Configure Renewals Manager to Improve the Renewals Process
- Achieve Efficiency and Consistency with Applied Epic Email Templates
- Underutilized Functionality in Applied Epic





Where to Find Assistance?



Applied Community

<https://community.appliedsystems.com/s/>

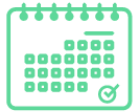
Product info, PAC, Applied University, Knowledge Base articles, Testimonials, and more



Customer Success Hub

<https://www.appliedsystems.com/en-us/customer-success-hub/>

Curated resources and job aides filterable by Applied product or job role



Applied Office Hours

Register via the Applied University Live Training Calendar



Email Applied Support: support@appliedsystems.com

Technical issues (e.g., report not working, can't log in, etc.)



Email Customer Success: customersuccess@appliedsystems.com

Questions about workflows and recommendations for best practices



Applied Community



Applied Epic Resource Centre

Home

epicd3b-us-itm.asi.corp/#/

File Edit Areas Locate Actions On Demand Access Links myEpic SMS Help

APPLIED

Epic

Home Locate Actions On Demand Access Links myEpic Appetite IVANS SMS New Print Refresh

Notifications Resource Center Logout

Accounts

General Ledger

Reports/Marketing

Procedures

Configure

Utilities

Email

Renewals Manager

Marketing Automation

Leads Inbox

Activities - All Open Activities

Description	Account Name	Priority	Follow Up/Start	End
No items found				

Activity at a Glance

Association

Attachments

Issuing company

Premium payable

SMS

Servicing contacts

Activity - Tasks

Description	Status	Start	Due	Owner
No items found				

Report Quick View

No items found

New/Waiting

Suspended workflows

new items

Unrouted attachments

0 new items

Unrouted faxes

0 new items

Notifications

No items found

Epic Resource Center

Announcements

2

Epic Overviews

Introductory Tours

Step-by-Step Tutorials

Hands-On Learning

Customer Support

Chat with a Technician or Log a Case

Troubleshooting Documentation

Knowledge Center

Applied University

Foundational Epic Training

Customer Success Events

Upcoming Webinars and Workshops

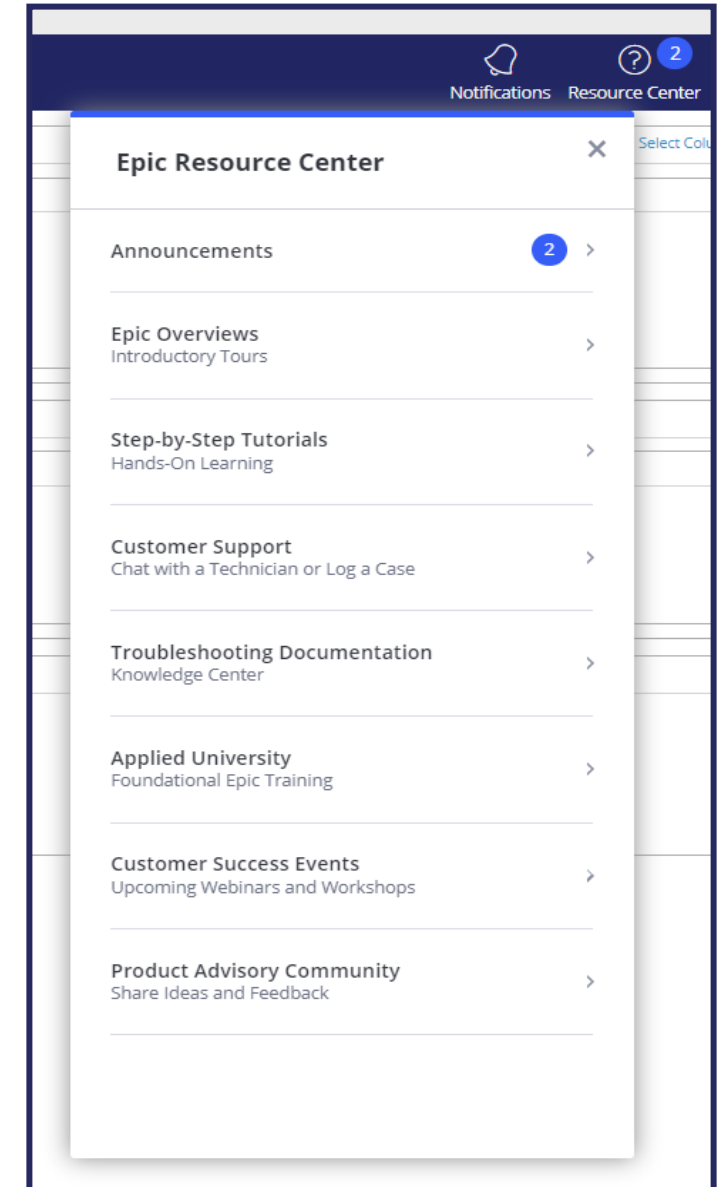
Product Advisory Community

Share Ideas and Feedback



Applied Epic Resource Centre

- **Announcements:** Get the latest updates
- **Epic Overviews:** New high level introductory tours of different areas of Epic
- **Step-By-Step Tutorials:** New targeted guidance to complete Epic workflows
- **Customer Support:** Chat with a technician or log a case
- **Troubleshooting Documentation:** FAQs and Support documentation in Applied's Knowledge Center
- **Applied University:** Live & on-demand training courses and office hours sessions
- **Customer Success Events:** Expert-led workshops
- **Product Advisory Community:** Share your ideas for product enhancements and feedback on product development themes

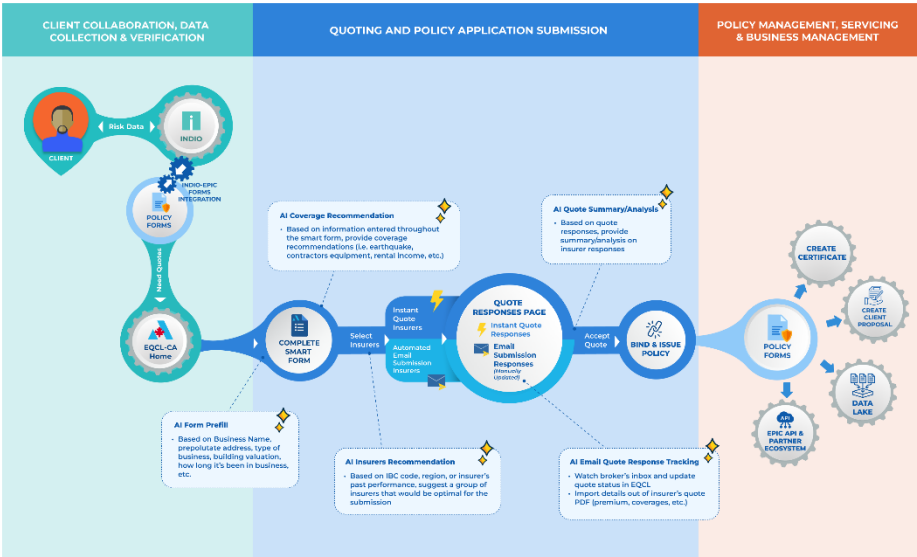
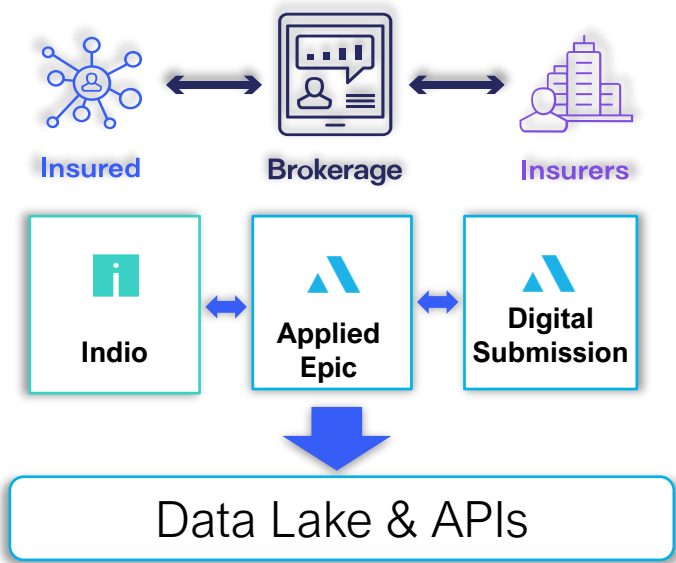
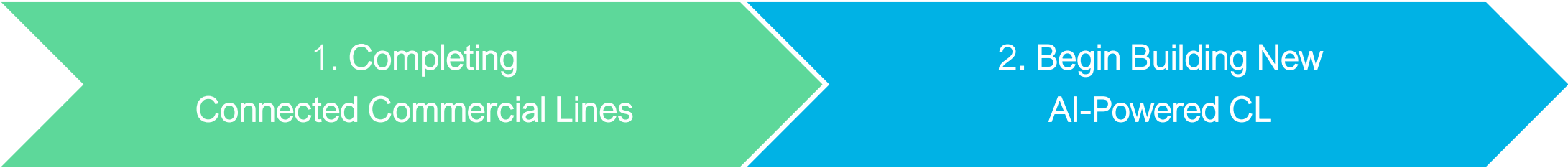


The Commercial Lines Journey





2025 Canadian Commercial Lines Product Focus: Completing CCL and Begin Building Intelligence in CCL





Epic Quotes Commercial Lines (EQCL)

Simplifying the Commercial Lines submission process:

- ✓ Unified workflow for real-time and email submissions
- ✓ Modern & smart UI with dynamic questions
- ✓ Support of multi-operations and multi-locations
- ✓ Re-use of insured data; eliminating double entry
- ✓ Smooth transition between submissions and Policy Forms for policy creation, certificate management and enterprise reporting via Data Lake

The screenshot shows the 'APPLIED' software interface for 'Small Business Submission'. It features a sidebar with navigation options like Account Detail, Contacts, Opportunities, Client Contracts, Quotes (selected), Policies, Proofs of Insurance, Transactions, Attachments, Claims, Activities, and SMS History. The main area displays a 'Quote Responses' table with columns for Insurer, Response, Premium Quoted, Quote Number, Quote Type, and Submission Date. The table lists several insurers including ClearCover, HD Mutual, L'Unique, Wawanesa, and others, with their respective quote details and submission dates.

Insurer	Response	Premium Quoted	Quote Number	Quote Type	Submission Date
ClearCover	Quoted	\$1,900	12025	Instant	2024-12-12
HD Mutual	Conditions	\$2,200	12026	Instant	2024-12-12
L'Unique	Quotes	\$2,400	12026	Instant	2024-12-12
Wawanesa	Refer to Underwriter	-	12026	Instant	2024-12-12
Definity	Waiting for Response	-	-	Manual	2024-12-12
Aulva	Waiting for Response	-	-	Manual	2024-12-12



Two additional leading carriers expected to join in 2025



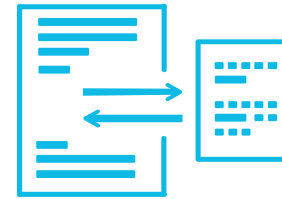
Modern & Smart Digital Submissions in Epic for ALL Commercial Packages in 1H 2025



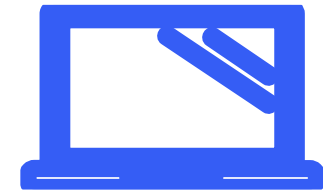
Unified Workflow for real-time and email submissions for ALL SME Commercial Packages



Modern & Smart UI with Dynamic Questions



Eliminate Double Entry. Smooth Transition between Indio and Epic Forms



Data Retained in Epic for Enterprise-level BI & AI Requirements



New Industry Segments Available in Epic & PW



Coming Soon (Early Q3)





Canadian EQCL - Automated Email Submission

Account Detail

Contacts

Opportunities

Client Contracts

Quotes

Policies

Proofs of Insurance

Transactions

Attachments

Claims

Activities

SMS History

← View All Quotes

Small Business Submission

Account Information

Business Information

Location Details

Coverages Requested

Brokerage & Insurer Information

Quote Responses

Brokerage Information

Selected Branch
ABC Broker - Main Branch

Brokerage Contact Email Address*
ABC@mail.com

Instant Quote Insurers

Select insurers to include in this submission. These providers offer real-time quotes.

☒	Insurer ↓	Broker Number ⓘ
☒	Clearcover	127826
☒	HD Mutual	54332
☒	L'Unique	653452
☒	Wawanesa	234325

Automated Email Submission Insurers

Select insurers to receive a PDF of your submission via email. They don't offer real-time quotes. Update the email address if needed.

☒	Insurer	Broker Number ⓘ	Email Address ⓘ	Actions
☒	Definity	266345	definity@definity.ca	Review and Edit Email
☒	Aviva	257448	calgary@aviva.ca	Review and Edit Email

Previous

Submit Quote Request

Need more quotes?

Email Submission ▾

+ Enter Manual Quote

...	Insurer	Response	Premium Quoted ↑	Quote Number	Quote Type	Submission Date
...	ClearCover	Quoted	\$1,900	12025	Instant	2024-12-12
...	HD Mutual	Conditions	\$2,200	12026	Instant	2024-12-12
...	L'Unique	Quotes	\$2,400	12026	Instant	2024-12-12
...	Wawanesa	Refer to Underwriter	-	12026	Instant	2024-12-12
...	Definity	Waiting for Response	-	-	Manual	2024-12-12
...	Aviva	Waiting for Response	-	-	Manual	2024-12-12

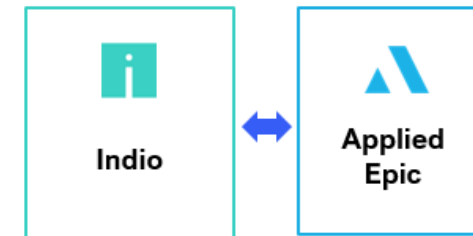
6 Items

■ Automated email submissions to *all* markets for *all* SME commercial packages

■ Real-time response from the carriers on the panel

Indio Forms Integration with Epic Forms

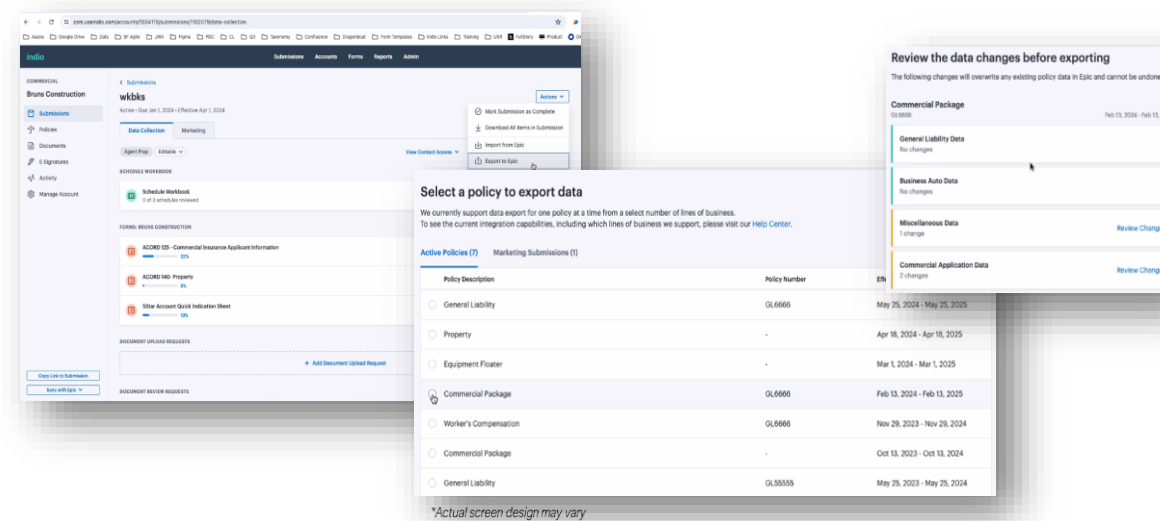
Early Adopter Program (EAP) in Progress



Brokers can now enhance the **efficiency** and **productivity** of their application data entry process with the **seamless** Indio/Epic Forms **integration**.

This new integration not only simplifies data entry but also reduces scope for error, providing a streamlined workflow for **E&O Prevention**.

- ✓ **4,900+** Canadian Common Data Store (CDS) fields now available for a seamless data transfer!

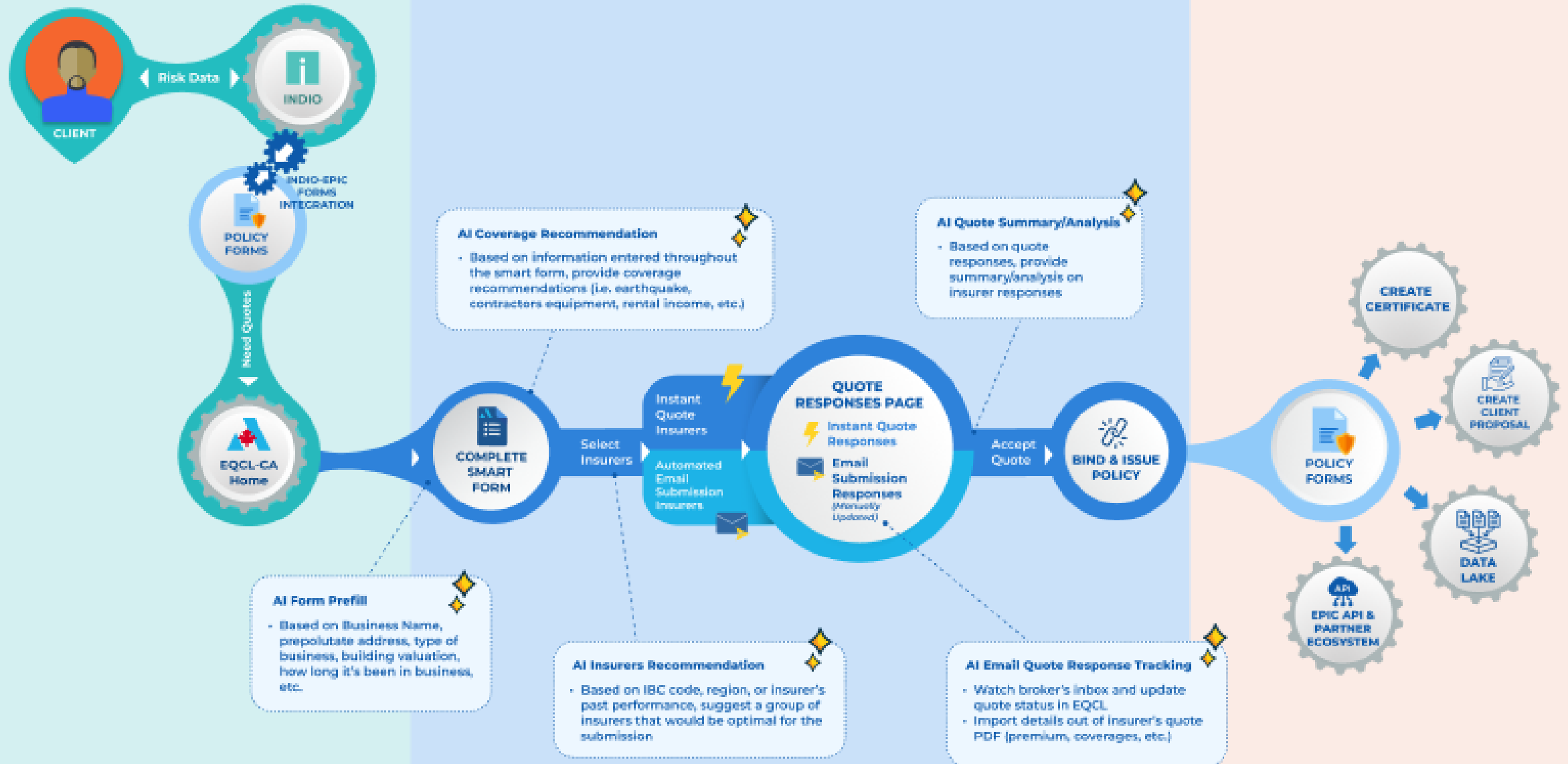


The Indio-Epic Form integration works for all CDS data fields irrespective of whether the integration is utilized with Applied provided forms, cloned Applied forms or custom Epic forms created via the Epic Form Builder.

CLIENT COLLABORATION, DATA COLLECTION & VERIFICATION

QUOTING AND POLICY APPLICATION SUBMISSION

POLICY MANAGEMENT, SERVICING & BUSINESS MANAGEMENT





Next Steps - Setting Your Team Up for Success

Epic Browser

- Adopt Epic Browser

Epic Forms

- Adopt Epic Forms
- Complete Custom Form Conversion

Broker Licensing

- EQCL, CSR24 and Indio

