ZAAX CONSULTING | Since 1994

FOR INSURANCE & ENTERPRISE OPERATIONS

Accounts & Finance Software

Integrated Financial Management Platform

A fully integrated financial management system designed specifically around insurance and enterprise operations. Real-time financial integration with operational workflows, configurable Chart of Accounts with up to 9 reporting levels, and comprehensive financial reporting — all in one browser-based platform.

9 Levels
Chart of Accounts
Configurable Chart of Accounts depth

12+
Reports
P&L, BS, Cash Flow, GL, AP/AR & more

Real-time
Integration
Operational-to-financial integration

Audit Ready
Compliance
Complete traceability & compliance

LIVE FINANCIAL VIEWS ACROSS

TPAs | HMOs | Providers | Payers | Insurers | Corporate Accounts

See it in action

Schedule a demonstration of the platform with ZAAX Consulting.

Request a Demo

THE CHALLENGE

Why Organizations Need Integrated Financial Software

Most organizations operate with disconnected accounting systems that don't reflect operational reality. Claims, settlements, premiums, and provider payments happen in operational systems while finance teams manually reconcile — creating delays, errors, and lack of real-time visibility.

Real-time Operational Integration

Financial entries auto-generated from claims, settlements, batches, and premiums — no manual re-entry.

Deep Configurable Chart of Accounts

Up to 9 reporting levels covering assets, liabilities, income, expenses, receivables, payables, and insurance-specific accounts.

Complete Financial Reporting Suite

P&L, Balance Sheet, Trial Balance, Cash Flow, General Ledger, AP/AR, Provider/Payer Outstanding, Reconciliation.

Real-time Financial Visibility

Live financial views across TPAs, HMOs, providers, payers, insurers, and corporate accounts.

Automated Reconciliation

Operational transactions linked to financial entries for improved reconciliation and auditability.

Audit-ready Compliance

Complete audit trails, opening balance management, and regulatory reporting built-in.

PLATFORM HIGHLIGHTS

Financial Management at a Glance

9 Levels
Chart of Accounts
Configurable Chart of Accounts depth

12+
Reports
P&L, BS, Cash Flow, GL, AP/AR & more

Real-time
Integration
Operational-to-financial integration

Audit Ready
Compliance
Complete traceability & compliance

Designed specifically around insurance

and enterprise operations.

CORE CAPABILITIES

Complete Financial Management in One Platform

Each capability addresses a critical financial workflow — together forming a complete operating system for your finance and accounting operations.

1 Chart of Accounts

Configurable CoA covering Assets, Liabilities, Income, Expenses, Receivables, Payables, Provider Balances, Payer Balances, Pending Payments, Claim Liabilities, Premium Accounts — up to 9 reporting levels.

2 Real-time Financial Integration

Claims, statements, batches, provider settlements, and premium transactions automatically reflect in accounting workflows across TPAs, HMOs, providers, payers, and corporate accounts.

3 Major Financial Reports

Profit & Loss, Balance Sheet, Trial Balance, Cash Flow, General Ledger, Opening Balance, Accounts Payable, Accounts Receivable, Provider Outstanding, Payer Outstanding, Claim Payment Reports, Reconciliation Reports.

4 Accounts Payable & Receivable

Complete AP/AR management with aging, payment tracking, vendor/customer management, and automated reconciliation with operational transactions.

5 Insurance-specific Accounts

Provider balances, payer balances, claim liabilities, premium-related accounts, pending payments, and other operational accounts tailored for insurance operations.

6 Reconciliation & Audit Trail

Operational transactions remain linked to financial entries for improved reconciliation, auditability, and compliance with complete traceability.

7 Multi-level Reporting

Up to 9 reporting levels enabling detailed financial reporting and organizational analysis at entity, department, branch, or project level.

8 Multi-entity & Multi-currency

Support for multiple legal entities, currencies, and consolidation with configurable exchange rates and inter-entity eliminations.

9 Configurable Financial Workflows

Define approval hierarchies, posting rules, period controls, and validation rules aligned with your organizational policies.

One platform.

Complete financial management for your finance and accounting operations.

KEY BENEFITS

Accurate, Visible and Audit Ready

Built so operational transactions flow straight into finance — with full traceability and compliance.

Zero Manual Re-entry
Operational transactions auto-post to finance.

Accurate Financials
Eliminate reconciliation errors & discrepancies.

Real-time Close
Continuous close with live operational data.

Complete Visibility
P&L, BS, Cash Flow at your fingertips.

Anywhere Access
Cloud-based, mobile responsive.

Reduced Close Time
Automated workflows cut month-end effort.

Audit Ready
Full traceability & compliance built-in.

Insurance-native
Built for TPA/HMO/payer financial operations.

Ready to Unify Your Financial Operations?

Looking for a fully integrated Accounts & Finance platform that connects operational workflows with real-time financial visibility? Contact ZAAX Consulting to schedule a demonstration of our financial accounting software.

Request a Demo | **Review Technical Portfolio**

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GLOBAL SUPPORT
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