ZAAX CONSULTING | Since 1994

BUILT FOR INSURANCE BROKERS

Complete ERP Software for Insurance Brokers

Business Insurance Management & Analytics

A complete browser-based ERP solution designed specifically for insurance brokers. Unify customer onboarding, policy lifecycle, financial accounting, team collaboration, and commission management in one customisable platform.

2-in-1
General + Life Insurance in one platform

100%
Automated commission accuracy

Browser-Based
No installation, works everywhere

Mobile Ready
Field teams with full platform access

TRUST INDICATORS

IRDAI GST Compliant

ISO 27001 Data Localisation

See it in action

Schedule a demonstration of the platform with ZAAX Consulting.

Request a Demo

THE CHALLENGE

Why Insurance Brokers Need Specialized ERP Software

Most insurance brokerages still rely on a mix of spreadsheets, email, and disconnected tools for quotations, policy tracking, and commission calculations. This creates errors, delays, and lack of visibility as the business grows.

Unified System of Record

Single platform replacing spreadsheets, email, and disconnected tools for full brokerage visibility.

Automated Commission Accuracy

Product-wise commission structures with first-year, renewal, and override calculations built-in.

Regulatory & Audit Ready

Integrated financial accounting with vouchers, ledgers, BS, P&L and broker-specific reports.

AUDIENCE

Who Is This ERP For?

Purpose-built for every type of insurance brokerage operation.

- ☑ **Insurance Brokers and Brokerage Firms**
- ☑ **Corporate Insurance Brokers**
- ☑ **Multi-location Broker Networks**
- ☑ **Brokers handling both General and Life Insurance**
- ☑ **Brokerages looking to replace spreadsheets and fragmented tools**

The full workflow from lead to ledger

in one customisable, browser-based platform.

CORE MODULES

Core Modules

Each module addresses a critical broker workflow — together forming a complete operating system for your brokerage.

1 Customer Onboarding

End-to-end lead creation, RFQ management, insurance slips, multi-insurer quotations, policy placement, and issuance.

2 Policy Management

Manage endorsements, product-wise commissions, customer records, automated renewal reminders, and policy renewals.

3 Financial Accounting

Fully integrated accounting with vouchers, ledgers, balance sheets, international standards, and broker-tuned reports.

4 Team & Commission Management

CRM with leads, salesperson management, commission tracking, and mobile app for field teams.

5 Document Management

Insurer-wise and product-wise document organisation with full DMS capabilities.

6 MIS & Reporting

Quarterly reports by insurer/client, quotation reports, policy reports, and financial statements.

One customisable platform.

Customer onboarding, policy lifecycle, financial accounting, team collaboration and commissions.

EXTENDED CAPABILITIES

Extended Capabilities for Brokerage Growth

Beyond core operations — tools that drive revenue, efficiency, and compliance for modern insurance brokers.

General Insurance Features

CRM with Leads Management

Complete pipeline tracking from prospect to policyholder with automated follow-ups and conversion analytics.

Team / Salesperson Management

Assign territories, track performance, calculate commissions, and manage field force with mobile access.

Document Management System (DMS)

Insurer-wise and product-wise document organisation with version control, expiry tracking, and quick retrieval.

Premium Calculators & Illustrations

Built-in premium calculators for motor, health, property, and life products with comparison illustrations.

Claims Tracking

Register claims, track status across insurers, manage documents, and generate ageing reports for clients.

Reinsurer & Treaty Management

Manage facultative and treaty reinsurance arrangements with automated cession calculations and reporting.

Life Insurance Module

Life Quotations & Illustrations

Generate regulator-compliant benefit illustrations with multiple scenario modeling for term, endowment, ULIP, and whole life products.

Quotation Invoice Management

Track quotation invoices, payment status, and conversion to policy with automated reminders.

Individual Life Policy Administration

End-to-end policy lifecycle: proposal, underwriting, issuance, premium collection, and servicing.

Policy Register

Centralised policy register with search, filter, and export capabilities for audit and compliance.

Plan & Commission Configuration

Configure product plans, rider options, commission scales (first year, renewal, override), and bonus structures.

2-in-1 platform.

General + Life Insurance in one platform.

KEY BENEFITS

Key Benefits

Built for brokers who demand accuracy, speed, and complete operational visibility.

Single System of Record
Entire brokerage workflow in one platform.

Accurate Commissions
Transparent, automated commission calculation.

Faster Conversion
Quotation-to-policy in record time.

Financial Visibility
Complete ledgers, BS, P&L out of the box.

Mobile Field Access
Field teams stay connected on the go.

Reduced Errors
Eliminate manual work and spreadsheet mistakes.

Audit Ready
Built for regulatory reporting and audits.

Data-Driven Decisions
MIS reporting by insurer, client, and team.

Ready to Unify Your Brokerage Operations?

Looking for reliable ERP Software for Insurance Brokers that covers the full workflow from lead to ledger? Contact ZAAX Consulting to schedule a demonstration of our broker management platform.

Request a Demo | **Review Technical Portfolio**

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