



ABNIC CRM

USER GUIDE



MAY 25, 2023

AL BUHAIRA NATIONAL INSURANCE CO
Sharjah

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2 INTRODUCTION

Welcome to the ABNIC CRM tutorial! In this tutorial, you will learn all about ABNIC's Customer Relationship Management (CRM) system, which is designed to help organizations improve their interactions with customers and enhance customer satisfaction.

ABNIC CRM offers a wide range of features and tools to manage customer data, track interactions, and automate various processes. Whether you are new to ABNIC CRM or looking to expand your knowledge, this tutorial will guide you through the basics and provide valuable insights to help you get the most out of the system. So let's get started and explore the world of ABNIC CRM!

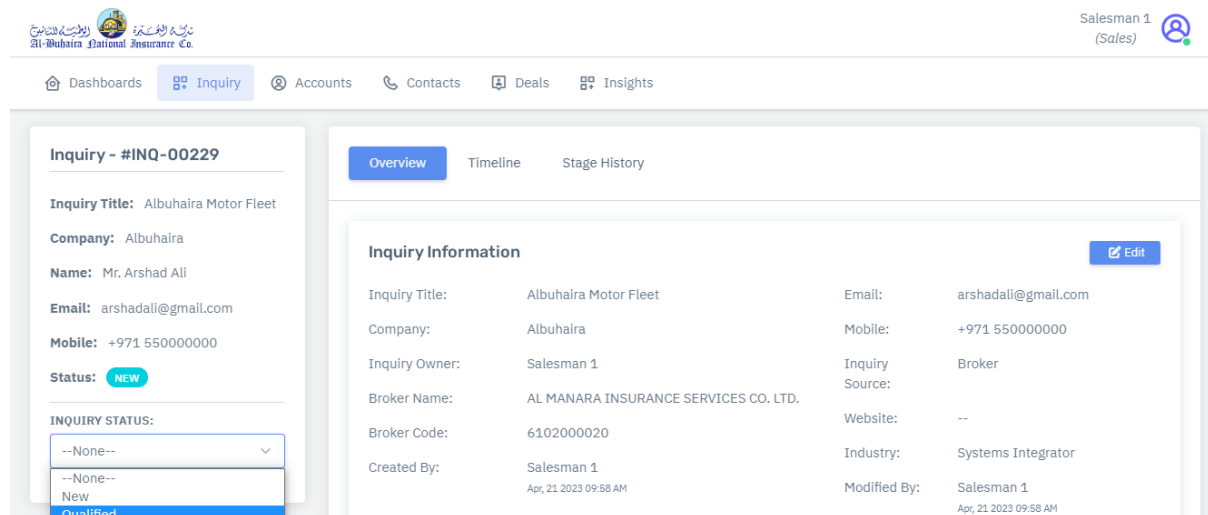
Below are some of the key features and functionalities of the CRM and how your teams can use them:

3 CRM USERS

The application caters to various departments within the organization, providing them with the necessary tools to manage their day-to-day tasks and business opportunities effectively. Each user has specific roles and permissions based on their responsibilities within the organization. Below are the roles and permissions of ABNIC CRM users:

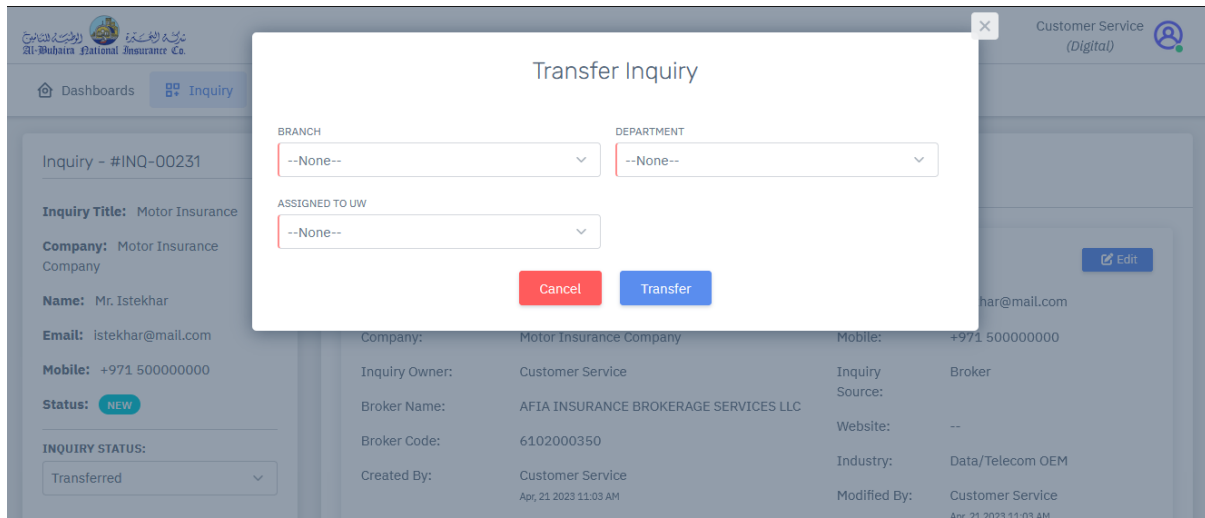
3.1 SALES:

The sales team is responsible for generating inquiries, managing inquiries, and converting them into deals. They have the authority to create, edit and update customer information, policies, and deals. Sales users can refer the deals to underwriters for pricing and risk assessment.



3.2 DIGITAL:

The digital team is responsible for managing online leads received through the company's website or other sources. They have the authority to create, edit and update customer information, policies, and deals.



3.3 SALES COORDINATOR:

The sales coordinator position is specifically created to support the sales team by handling the process of entering inquiries into the CRM system and subsequently forwarding them to the underwriting department. Their responsibilities include uploading all necessary information and documents on behalf of the sales team and referring the inquiries to the underwriting department.

The screenshot displays the ABNIC CRM interface. At the top left is the logo for Al-Buhaira National Insurance Co. The top right shows the user role as 'Coordinator (Coordinator)'. The navigation menu includes 'Dashboards', 'Inquiry', 'Accounts', 'Contacts', 'Deals', and 'Insights'. The main content area shows an inquiry record for '#INQ-00232' with the title 'Motor Insurance'. A dropdown menu for 'Name' is open, showing options: '--None--', 'New', 'Qualified', 'Not Qualified', 'Pending', and '--None--'. The 'Inquiry Information' section contains the following details:

Inquiry Title:	Motor Insurance	Email:	tawfiq@gmail.com
Company:	Motor Insurance Company	Mobile:	+971 500000000
Inquiry Owner:	Salesman 1	Inquiry Source:	Broker
Broker Name:	AFIA INSURANCE BROKERAGE SERVICES LLC	Website:	--
Broker Code:	6102000350	Industry:	Network Equipment Enterprise
Created By:	Coordinator Apr, 21 2023 11:12 AM	Modified By:	Coordinator Apr, 21 2023 11:12 AM

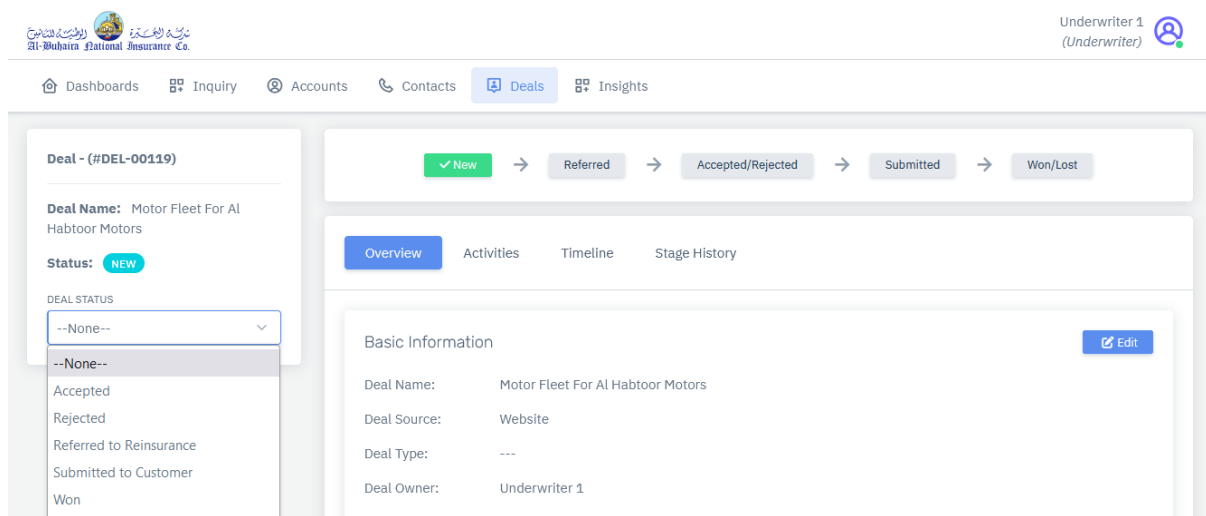
3.4 UNDERWRITER:

3.4.1 Underwriter coordinator

The main duty of the underwriter coordinator is to assess and analyze the risks related of referred deals to the department, and then assign them either to themselves or to the appropriate underwriter.

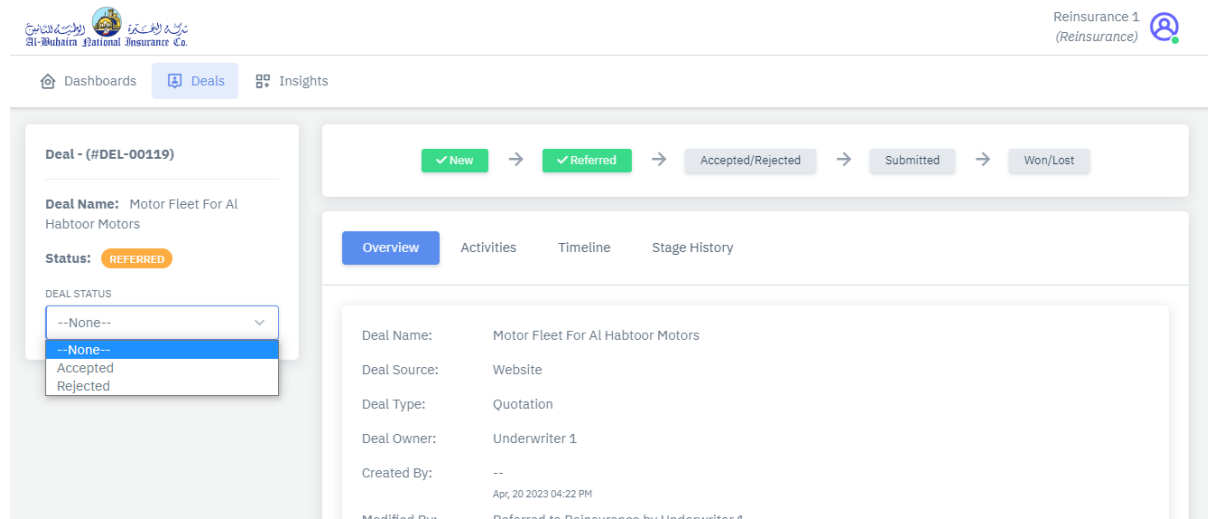
3.4.2 Underwriter

The primary responsibility of underwriters is to evaluate and analyze the risks associated with insurance policies and subsequently issue quotations and policies. They possess the authority to accept, reject, or refer any deal to the reinsurance department for further evaluation. Underwriters have access to customer information, insurance policies, and pricing models to make well-informed decisions. Additionally, they have the capability to generate their own inquiries and handle them for the purpose of management, record-keeping, and reporting.



3.5 REINSURANCE:

The reinsurance department is responsible for evaluating the risk associated with the policies and deals received from underwriters. They have the authority to approve, reject. Reinsurance users have access to customer information, policies, and pricing models.



3.6 BROKER RELATION:

The broker relation are responsible for managing relationships with brokers and providing them with the best quotations for their clients. They possess the authority to create, edit, update, and refer inquiries to the underwriting department on behalf of brokers.

Logo: شركة التامين الوطنية
Al-Bubaina National Insurance Co.

User: Broker Supervisor (Sales)

Navigation: Dashboards, Inquiry, Accounts, Contacts, Deals, Insights

Form Fields:

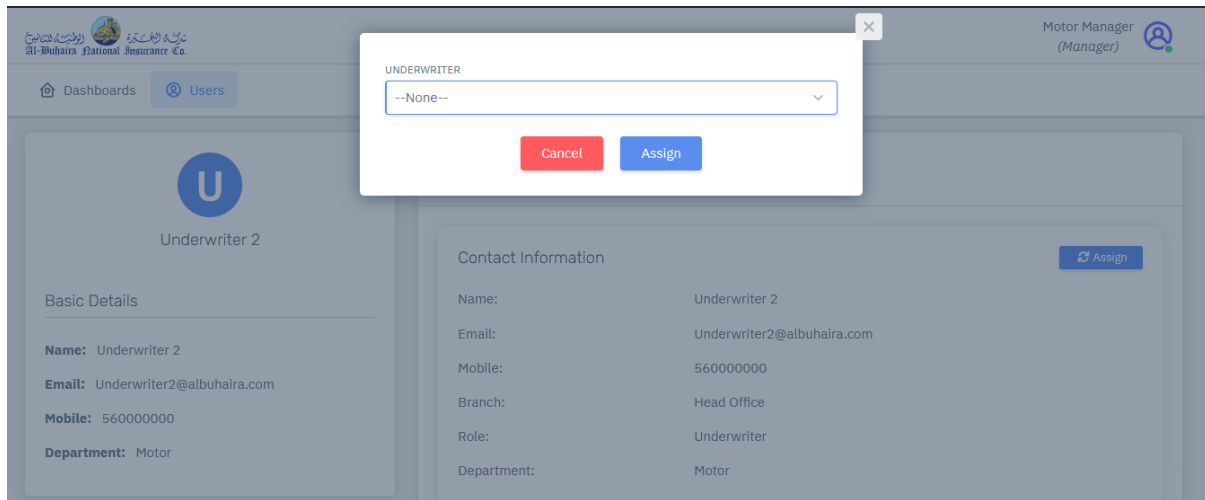
- INQUIRY TITLE: Inquiry Title
- EMAIL: Email
- MOBILE: +971 Mobile
- REFERENCE NO: Reference No
- DATE: 03/22/2023 - 04/21/2023
- INQUIRY STATUS: --None--
- CALL BACK: --None--

Buttons: + Add New, Reset, Search

REF NO.	INQUIRY TITLE	INQUIRY STATUS	EMAIL & PHONE	MODIFIED BY	CREATED BY
#INQ-00233	Motor Insurance	NEW	suleman@mail.com +971 564646554	21 Apr, 2023 11:39:02 AM Broker Supervisor	21 Apr, 2023 11:39:02 AM Broker Supervisor

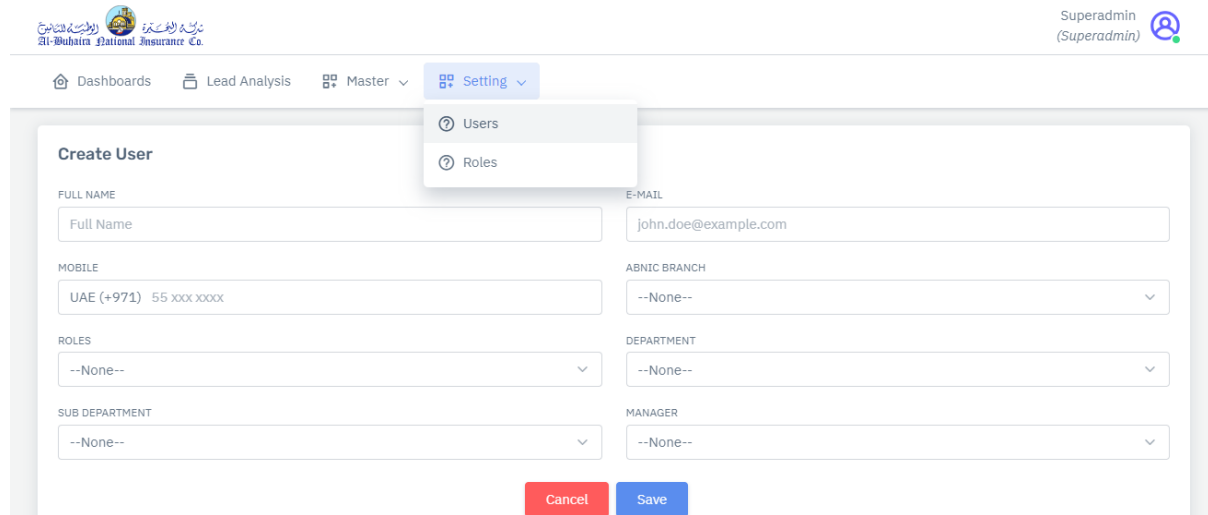
3.7 DEPARTMENT MANAGER:

The department managers are tasked with supervising the operations of the underwriting department and ensuring the efficient processing of policies and deals through their team of underwriters. They hold the authority to assign out-of-office responsibilities to underwriters and transfer their workload to other team members. Additionally, they have the ability to generate comprehensive reports for the department, including branch-wise and underwriter-wise reports.



3.8 SUPER ADMIN:

The super admin role has complete access to the application and is responsible for creating new users and departments, managing user roles and permissions, and generating reports. They have the authority to modify and update any part of the application and can manage the system's configuration and settings.

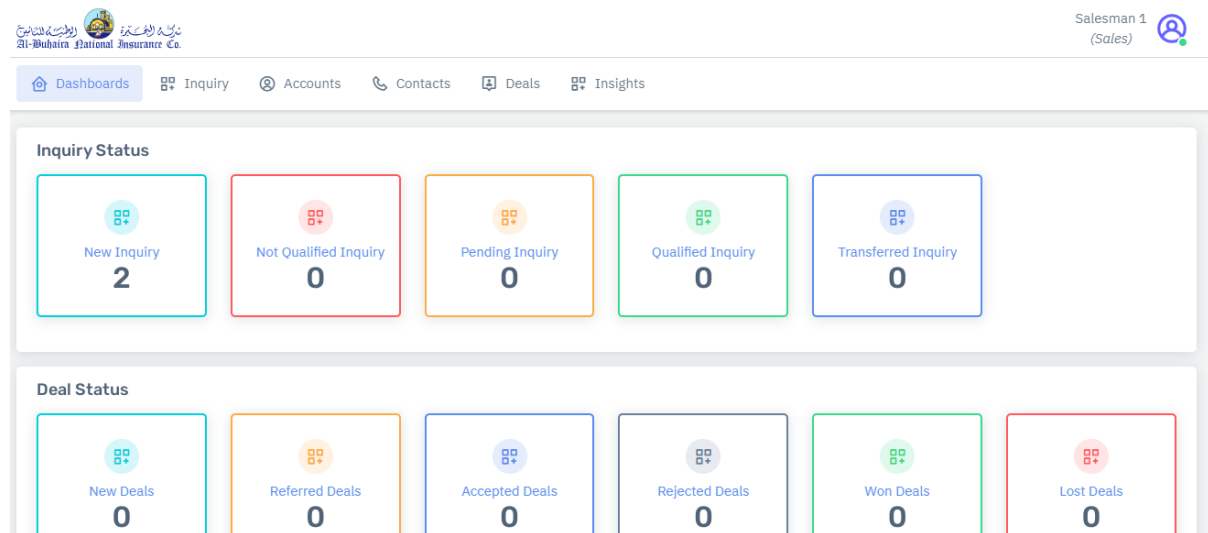


4 CRM SECTIONS

ABNIC CRM is a comprehensive customer relationship management tool with six sections that help the company manage its customer relationships efficiently.

4.1 DASHBOARD SECTION:

The Dashboard section provides users with an overview of their inquiries and deals. Users can see the status of all inquiries, including New, Not Qualified, Pending, Qualified, and Transferred Inquiry, as well as the status of all deals, including New Deals, Referred Deals, Accepted Deals, Rejected Deals, Won Deals, and Lost Deals.



4.2 INQUIRY SECTION:

The Inquiry section is where users can enter new leads and potential customers into the CRM. Underwriters, sales, digital, coordinators, and broker supervisors can create inquiries for potential customers, manage them efficiently, and change their status to Pending, Not Qualified, or Qualified after contacting the customers.

The screenshot displays the 'Inquiry' section of the CRM. At the top, there is a navigation bar with options: Dashboards, Inquiry (selected), Accounts, Contacts, Deals, and Insights. The user profile 'Salesman 1 (Sales)' is visible in the top right. The main area contains a form with the following fields:

- INQUIRY TITLE:** Inquiry Title
- EMAIL:** Email
- MOBILE:** +971 Mobile
- REFERENCE NO:** Reference No
- DATE:** 03/22/2023 - 04/21/2023
- INQUIRY STATUS:** --None--
- CALL BACK:** --None--

Buttons for '+ Add New', 'Reset', and 'Search' are located below the form. Below the form is a table with the following data:

REF NO.	INQUIRY TITLE	INQUIRY STATUS	EMAIL & PHONE	MODIFIED BY	CREATED BY
#INQ-00229	Abuhaira Motor Fleet	NEW	arshadali@gmail.com +971 550000000	21 Apr, 2023 09:58:38 AM Salesman 1	21 Apr, 2023 09:58:37 AM Salesman 1

At the bottom of the table, it says 'Showing 1 to 1 of total 1 entries'.

4.3 ACCOUNT SECTION:

The Account section is where users can save customer accounts in the CRM, including details of the customers and the deals related to the account. This section helps users to keep track of their customers' information and manage their accounts more effectively.

The screenshot displays the 'Accounts' section of the ABNIC CRM. At the top, there is a navigation bar with options: Dashboards, Inquiry, Accounts (selected), Contacts, Deals, and Insights. The user is identified as 'Salesman 1 (Sales)'. Below the navigation bar, there is a search and filter area with three input fields: 'ACCOUNT NAME' (Account Name), 'REFERENCE NO' (Reference No), and 'DATE' (03/22/2023 - 04/21/2023). There are three buttons: '+ Add New', 'Reset', and 'Search'. Below this is a table with the following data:

REF NO.	ACCOUNT NAME	MODIFIED BY	CREATED BY
#ACC-00158	Najda Transport COORDINATOR	21 Apr, 2023 10:44:58 AM Salesman 1	21 Apr, 2023 10:44:58 AM Coordinator

At the bottom of the table area, it says 'Showing 1 to 1 of total 1 entries'.

4.4 CONTACT SECTION:

The Contact section is where users can save individual contacts associated with an account in the CRM. This section helps users to manage their customer relationships more effectively and keep track of all the individuals associated with an account.

The screenshot displays the 'Contacts' section of the ABNIC CRM. At the top, there is a navigation menu with 'Dashboards', 'Inquiry', 'Accounts', 'Contacts' (highlighted), 'Deals', and 'Insights'. On the right, the user is identified as 'Salesman 1 (Sales)'. Below the navigation is a search bar and a list of filters: 'ACCOUNT NAME', 'CONTACT NAME', 'EMAIL', and 'MOBILE'. There are also fields for 'REFERENCE NO.' and 'DATE'. Action buttons include '+ Add New', 'Reset', and 'Search'. The main content is a table with the following data:

REF NO.	CONTACT NAME	ACCOUNT NAME	PHONE	EMAIL	MODIFIED BY	CREATED BY
#CON-00157	Mr. Asgar Ali COORDINATOR	Najda Transport	+971 500000000	asgar@gmail.com	21 Apr, 2023 10:44:58 AM Salesman 1	21 Apr, 2023 10:44:58 AM Coordinator

Showing 1 to 1 of total 1 entries

4.5 DEAL SECTION:

The Deal section is where users can save potential sales deals in the CRM. All qualified inquiries to a deal will appear here, and users can see the status of all deal sections, including New, Referred, Accepted, Rejected, Won, Lost, and Submitted. This section helps users to manage their deals more effectively and follow up with potential customers in a timely manner.


The screenshot displays the ABNIC CRM interface for the 'Deal' section. At the top right, the user is identified as 'Salesman 1 (Sales)'. The navigation menu includes 'Dashboards', 'Inquiry', 'Accounts', 'Contacts', 'Deals', and 'Insights'. The 'Deals' section is active, showing a deal flow diagram with stages: New (checked), Referred, Accepted/Rejected, Submitted, and Won/Lost. Below the flow, there are tabs for 'Overview', 'Activities', 'Timeline', and 'Stage History'. The 'Overview' tab is selected, displaying 'Basic Information' for the deal. The deal details are as follows:

Basic Information	
Deal Name:	Motor Fleet
Deal Source:	Broker
Deal Type:	---
Deal Owner:	Salesman 1
Created By:	Coordinator


On the left sidebar, the deal '#DEL-00124' is shown with the name 'Motor Fleet' and status 'NEW'. A dropdown menu for 'DEAL STATUS' is open, showing options: '--None--', 'Referred to Underwriter', 'Resubmitted to Underwriter', 'Submitted to Customer', 'Won', and 'Lost'. An 'Edit' button is visible next to the 'Basic Information' section.







4.6 INSIGHTS SECTION:

Finally, the Insights section provides users with valuable information about their deals. Users can view the deal status, department-wise, and underwriters' TAT (turn-around time) to reply for an individual deal, both for open and closed deals. This section helps users to analyze their deals' progress and identify areas for improvement to manage their customer relationships more efficiently.



شركة الوطن للتأمين
Al-Balad National Insurance Co.

Underwriter 1
(Underwriter) 

 Dashboards
 Inquiry
 Accounts
 Contacts
 Deals
 Insights

Deals - Status

DEAL STAGE	MOTOR	FGA	MARINE	MEDICAL	REINSURANCE	IT	BROKER	COORDINATOR
New	5	0	0	0	0	0	0	0
Referred	1	0	0	0	0	0	0	0
Accepted	0	0	0	0	0	0	0	0
Rejected	0	0	0	0	0	0	0	0
Won	0	0	0	0	0	0	0	0
Lost	0	0	0	0	0	0	0	0
Submitted	0	0	0	0	0	0	0	0

Open Deal Response Time

DEPARTMENT	0 - 2 HOURS	2 - 5 HOURS	5 HOURS - 2 DAYS	2 DAYS - 3 DAYS	ABOVE 3 DAYS
Motor	0	0	1	0	0

Closed Deal Response Time

DEPARTMENT	0 - 2 HOURS	2 - 5 HOURS	5 HOURS - 2 DAYS	2 DAYS - 3 DAYS	ABOVE 3 DAYS
Motor	0	0	0	0	0

5 STATUS

5.1 INQUIRY STATUS

Status Name	Description
New	The inquiry has been newly entered into the CRM and hasn't been contacted yet.
Qualified	The inquiry has been reviewed and determined to be a good fit for our products or services.
Not Qualified	The inquiry is no longer being pursued due to a lack of interest or other factors.
Pending	The inquiry is being kept warm through regular communications and follow-ups.
Transferred	The inquiry has been newly entered into the CRM and has been transferred to the other underwriters.

5.2 DEAL STATUS

Sales Status	Description
New:	The deal has just been created and has not yet been assigned to an underwriter for a quotation.
Assigned to UW:	The deal has been assigned to an underwriter for quotation or policy.
Sent to Customer by Sales:	Communication regarding the quotation or policy has been sent to the customer.
Won:	The deal has been successfully closed, and the customer has purchased the policy.
Lost:	The deal has not been successful, and the customer has decided not to purchase the policy.

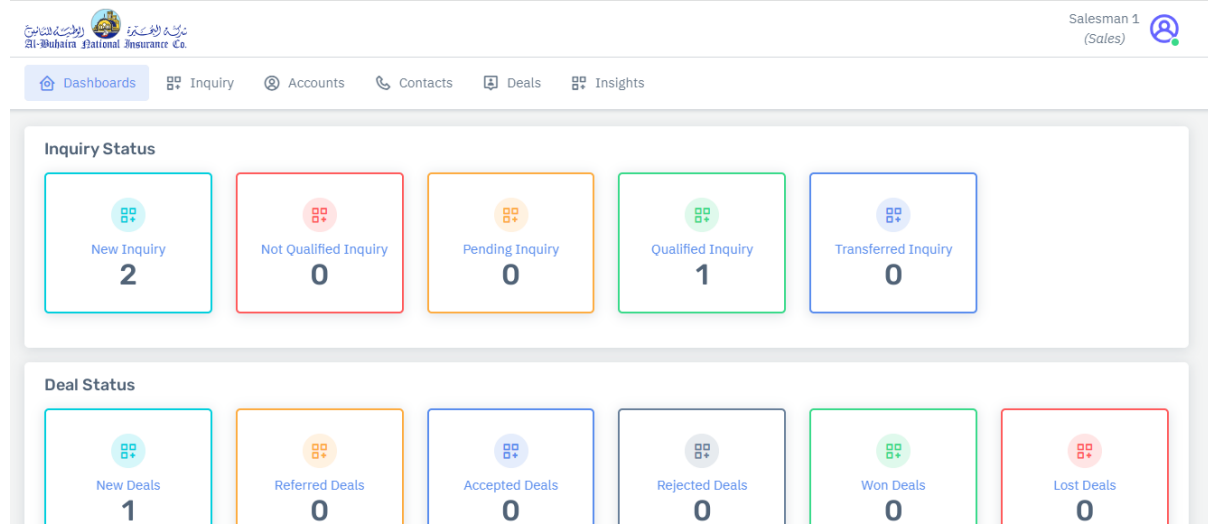
Underwriter Status	Description
Unassigned:	The deal has been sent to the underwriting department, but an underwriter has not been assigned yet.
Accepted by UW:	The underwriter has accepted the quotation or policy request.
Rejected by UW:	The underwriter has rejected the quotation or policy request.
Sent to Customer by UW:	Communication regarding the quotation or policy has been sent to the customer.
Pending with UW:	The underwriter has kept the deal on hold until they discuss it internally with the seniors or manager.
Referred to Re:	The deal has been referred to the reinsurance for their approval on the quotation.

Reinsurance Status	Description
Pending with Re:	The reinsurance is currently keeping the case on hold until they discuss it internally with the seniors or manager.
Accepted by Re:	The reinsurance has approved the deal request.
Rejected by Re:	The reinsurance has rejected the deal request due to specified reasons.

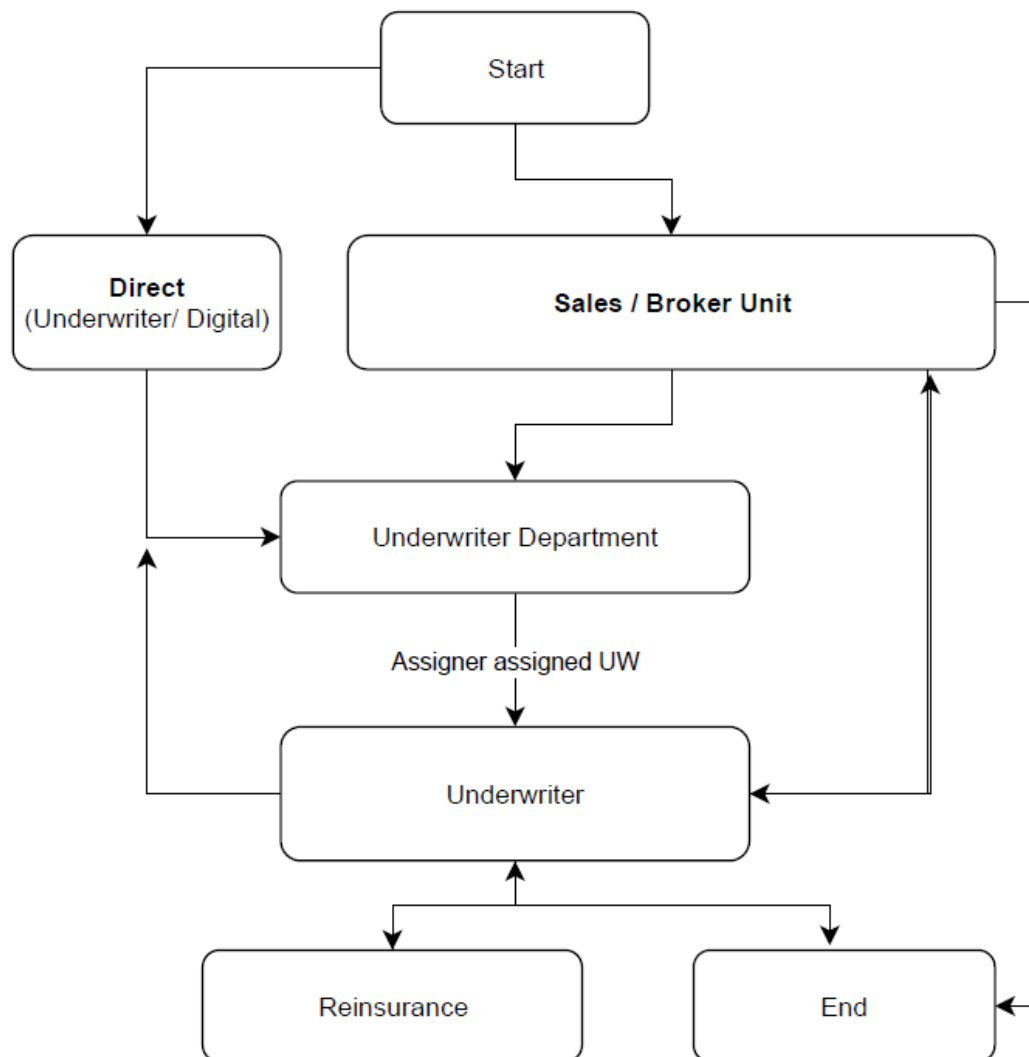
6 PROCESS FLOW FOR USERS:

6.1 DASHBOARD:

Users can see the status of all deals and inquiries.



6.2 INQUIRY SECTION:



- Sales/Broker/Coordinator/Digital/Underwriter can create an inquiry.
- User can change the status of inquiry to Pending/Not Qualified/Qualified after contacting customers.
- Digital users can transfer inquiries from the website and reception to the underwriting department and then assigner will assign inquiry to underwriter.
- Digital users can only transfer qualified inquiries to the concerned underwriting department, and the inquiry will be marked as transferred.
- Qualified inquiries will be converted into deals, and contact and accounts.
- If the inquiry is genuine but no deal / opportunity available, then user can convert the inquiry into a contact and account without creating the deal.

INQUIRY TITLE

EMAIL

MOBILE

REFERENCE NO

DATE

INQUIRY STATUS

CALL BACK

[+ Add New](#)
[Reset](#)
[Search](#)

REF NO.	INQUIRY TITLE	INQUIRY STATUS	EMAIL & PHONE	MODIFIED BY	CREATED BY
#INQ-00232	Motor Insurance COORDINATOR	NEW	tawfiq@gmail.com +971 500000000	21 Apr, 2023 11:12:03 AM Coordinator	21 Apr, 2023 11:12:03 AM Coordinator
#INQ-00230	Motor Fleet COORDINATOR	QUALIFIED	asgar@gmail.com +971 500000000	21 Apr, 2023 10:44:58 AM ..	21 Apr, 2023 10:03:56 AM ..

6.3 ACCOUNTS SECTION:

Sales/Broker/Coordinator/Underwriter can view account details, add notes, and images if required.

The screenshot displays the 'Accounts' section of the ABNIC CRM. At the top, there is a navigation bar with options: Dashboards, Inquiry, Accounts (selected), Contacts, Deals, and Insights. The user profile 'Salesman 1 (Sales)' is visible in the top right corner. Below the navigation bar, there are three search filters: 'ACCOUNT NAME' with a text input field containing 'Account Name', 'REFERENCE NO' with a text input field containing 'Reference No', and 'DATE' with a date range input field containing '03/22/2023 - 04/21/2023'. To the right of these filters are three buttons: '+ Add New', 'Reset', and 'Search'. Below the filters is a table with the following data:

REF NO.	ACCOUNT NAME	MODIFIED BY	CREATED BY
#ACC-00158	Najda Transport COORDINATOR	21 Apr, 2023 10:44:58 AM Salesman 1	21 Apr, 2023 10:44:58 AM Coordinator

At the bottom of the table area, it says 'Showing 1 to 1 of total 1 entries'.

6.4 CONTACT SECTION:

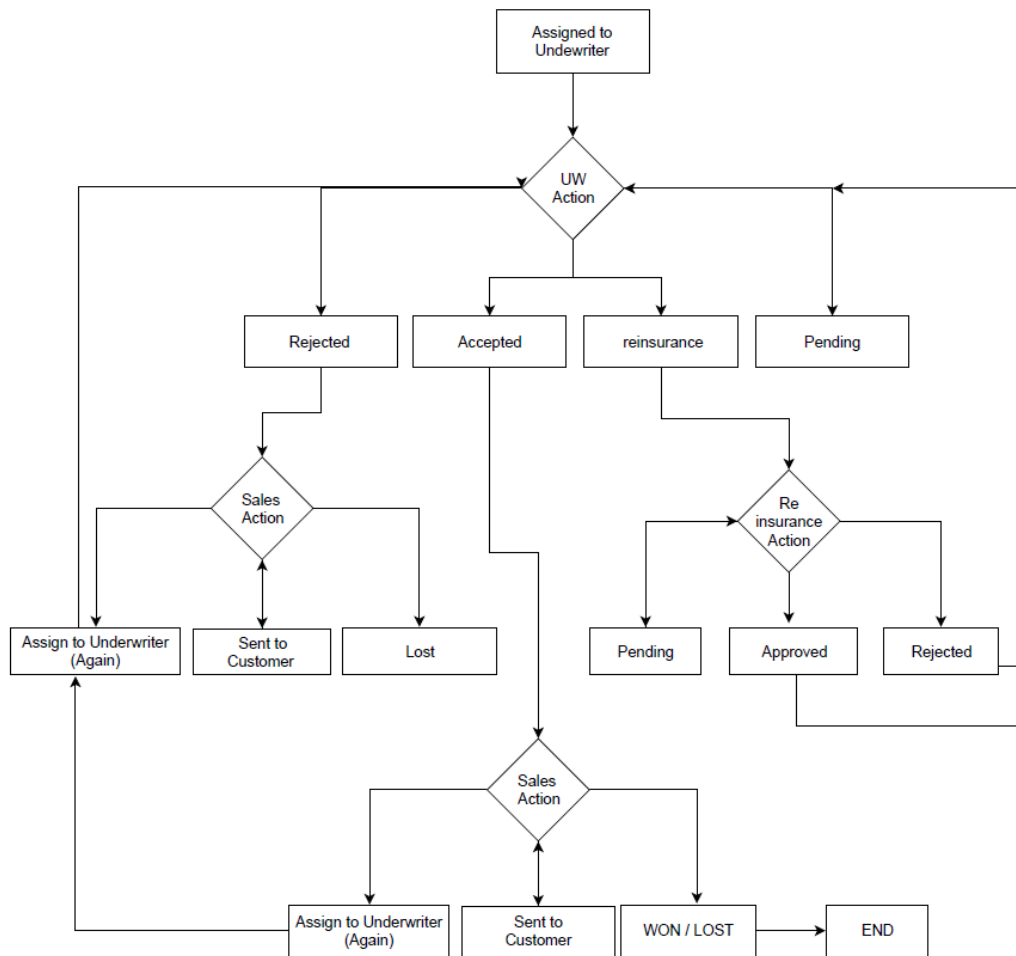
Sales/Broker/Coordinator/Underwriter can view contact details, add notes, and images if required.

The screenshot displays the 'Contacts' section of the ABNIC CRM. At the top left is the company logo for 'Al-Buhaira National Insurance Co.' and the user profile 'Salesman 1 (Sales)'. A navigation bar includes 'Dashboards', 'Inquiry', 'Accounts', 'Contacts', 'Deals', and 'Insights'. The 'Contacts' section features a search form with fields for 'ACCOUNT NAME', 'CONTACT NAME', 'EMAIL', 'MOBILE', 'REFERENCE NO', and 'DATE'. Below the form are buttons for '+ Add New', 'Reset', and 'Search'. A table lists contact entries with columns for 'REF NO.', 'CONTACT NAME', 'ACCOUNT NAME', 'PHONE', 'EMAIL', 'MODIFIED BY', and 'CREATED BY'. One entry is shown for 'Mr. Asgar Ali' at 'Najda Transport'.

REF NO.	CONTACT NAME	ACCOUNT NAME	PHONE	EMAIL	MODIFIED BY	CREATED BY
#CON-00157	Mr. Asgar Ali COORDINATOR	Najda Transport	+971 500000000	asgar@gmail.com	21 Apr, 2023 10:44:58 AM Salesman 1	21 Apr, 2023 10:44:58 AM Coordinator

Showing 1 to 1 of total 1 entries

6.5 DEAL SECTION:



- Sales/Broker/Coordinator/Underwriter can view chat between sender and receiver (not available for others).
- Inquiry can be converted into a deal by Sales/Broker/Coordinator/Underwriter.
- The deal will be referred to an underwriter for a quotation, and if the underwriter approves, it will be referred to reinsurance for treaty approval.

شركة البحيرة
Al-Buhairah Stational Insurance Co.

Salesman 1

(Sales)

[Dashboards](#)
[Inquiry](#)
[Accounts](#)
[Contacts](#)
[Deals](#)
[Insights](#)

DEAL NAME

ACCOUNT NAME

CONTACT NAME

REFERENCE NO

DATE

TAX REGISTRATION NUMBER (TRN)

EMIRATE ID

STATUS

UNDERWRITER

PRIORITY

+ Add New
Reset
Search

REF NO.	DEAL/ACCOUNT/CONTACT	STATUS	CREATED	UNDERWRITER	REINSURANCE	PRIORITY	MODIFIED BY	CREATED BY
#DEL-00124	Motor Fleet Najda Transport Mr. Asgar Ali	NEW	Coordinator	Underwriter 1	---	Low	21, Apr 2023 10:44:58 AM Coordinator	21, Apr 2023 10:44:58 AM Coordinator

6.6 REPORTING:

Comprehensive reporting via dashboards and with data-driven insights are available for the managers to have a clear view and monitor performance, allowing them to identify areas for improvement and measure the success of their strategies.

The screenshot displays the 'Deals - Status' dashboard. At the top left is the logo for 'Al-Bahain National Insurance Co.' with Arabic text. The top right shows the user profile 'Salesman 1 (Sales)'. A navigation bar contains icons for 'Dashboards', 'Inquiry', 'Accounts', 'Contacts', 'Deals', and 'Insights' (which is highlighted in blue). Below the navigation bar is a table titled 'Deals - Status'.

DEAL STAGE	MOTOR	FGA	MARINE	MEDICAL	REINSURANCE	IT	BROKER	COORDINATOR
New	0	0	0	0	0	0	0	0
Referred	0	0	0	0	0	0	0	0
Accepted	0	0	0	0	0	0	0	0
Rejected	0	0	0	0	0	0	0	0
Won	0	0	0	0	0	0	0	0
Lost	0	0	0	0	0	0	0	0
Submitted	0	0	0	0	0	0	0	0