



AGENTMATE



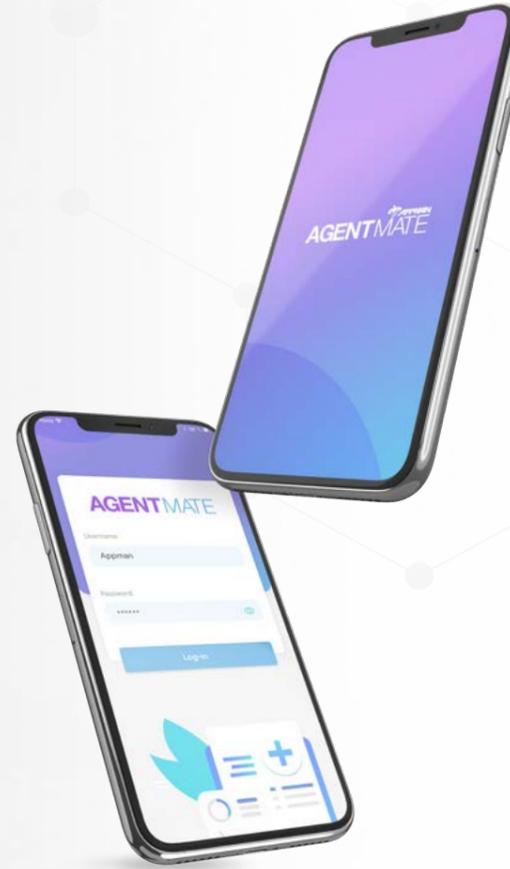
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Offices:



AGENTMATE, a powerful point of sale solution that transforms your distribution process into a seamless experience for both customers and distributors.



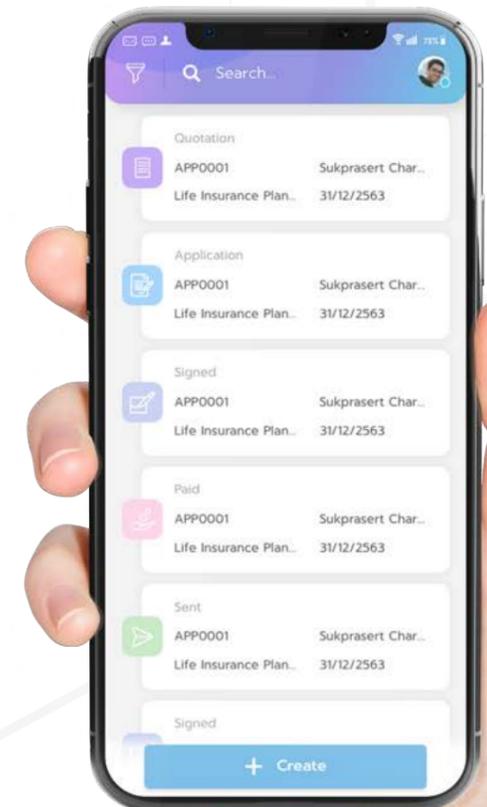
CONCEPTUALIZED FOR GREATNESS

Our vision to transform the insurance distribution channels drove us to create a comprehensive and friendly point of sale platform.

- Help agents, brokers, and bank executives boost their sales skills with our all in one solution

Transform prospects to customers by implementing new digital innovations

AgentMate is a reliable solution that condenses AppMan's passion for the insurance industry and brings you closer to digital transformation.



AGENTMATE MODULES

AgentMate has integrated with several core insurance systems and it is API friendly to connect with other third-party softwares.

The modular design of AgentMate allows insurers to easily complete their digital roadmap.

AgentMate Modules are independent and can be integrated with your current solutions.

AGENTMATE

**Financial Needs Analysis (FNA)**

Understand the needs of your prospects with ease

e-Quotation

Generate e-quotations in seconds

Unit-Linked Simulator

A unique tool that helps illustrate and explain these products

e-Application / e-Submission

e-Signature, Payment, and Policy in one application. Are you ready to sell?

Remote e-Application / e-Submission

All the features to enable remote selling

Automated Underwriting

Simplify the task of underwriters by enhancing underwriting rules automation

Product Configurator

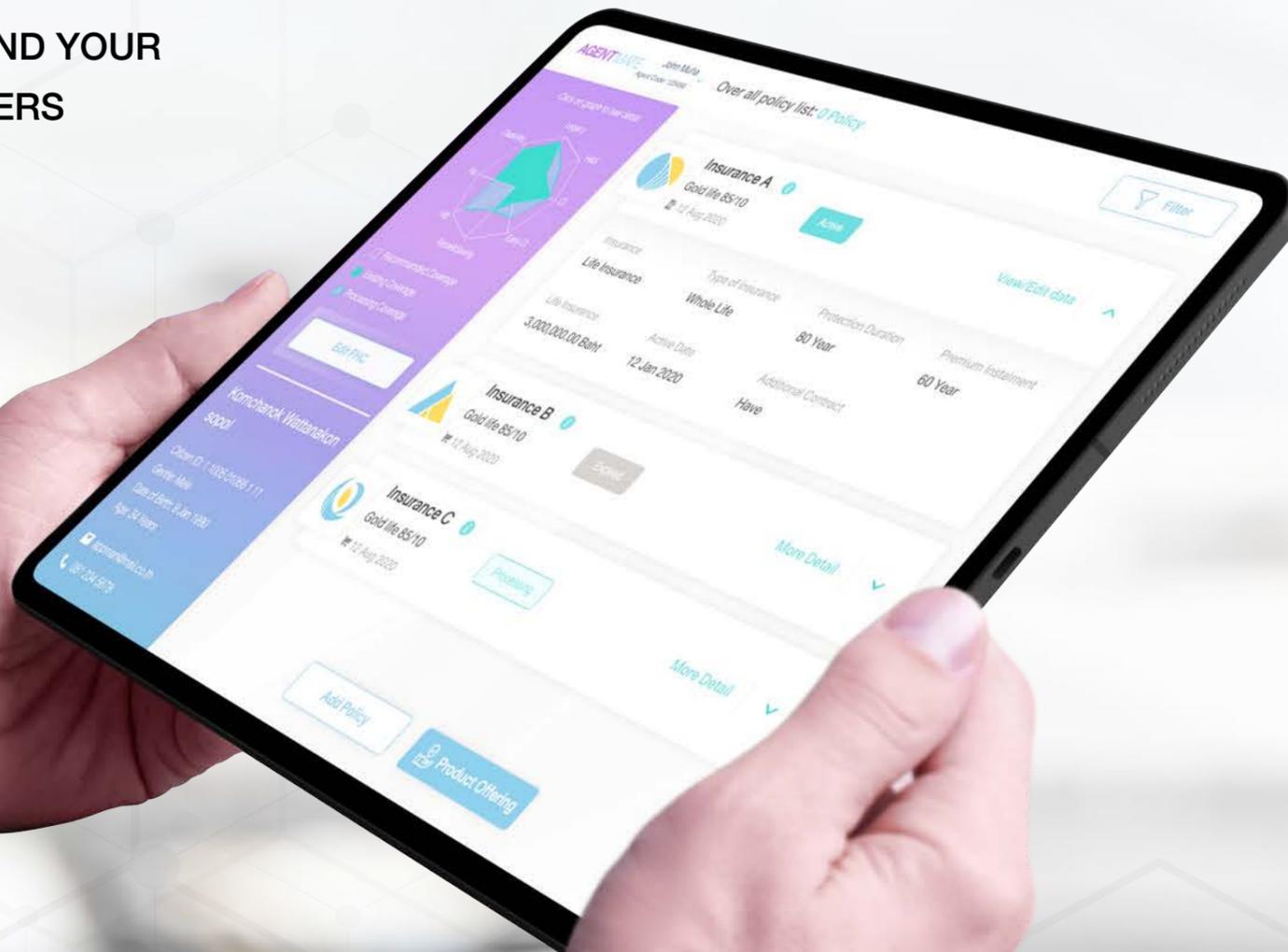
No charges, no waiting, simply create and configure your new products

AGENTMATE

FINANCIAL NEEDS ANALYSIS (FNA)

Each customer is unique. AgentMate FNA Module allows you to understand customers' requirements thoroughly and respond accurately.

THE EFFICIENT WAY
TO UNDERSTAND YOUR
CUSTOMERS



Identify your customers' goals and understand their motives with a Financial Health Check

- Critical Illness Coverage
- Funds for Family
- Savings as Scheduled
- Retirement Plan
- Child's Education
- And More

Analyze the gap between your customer's ideal insurance and their current products.



Select the objective of the insurance, apply filters, and compare single brand or multi-brand products.

AGENTMATE

E-QUOTATION

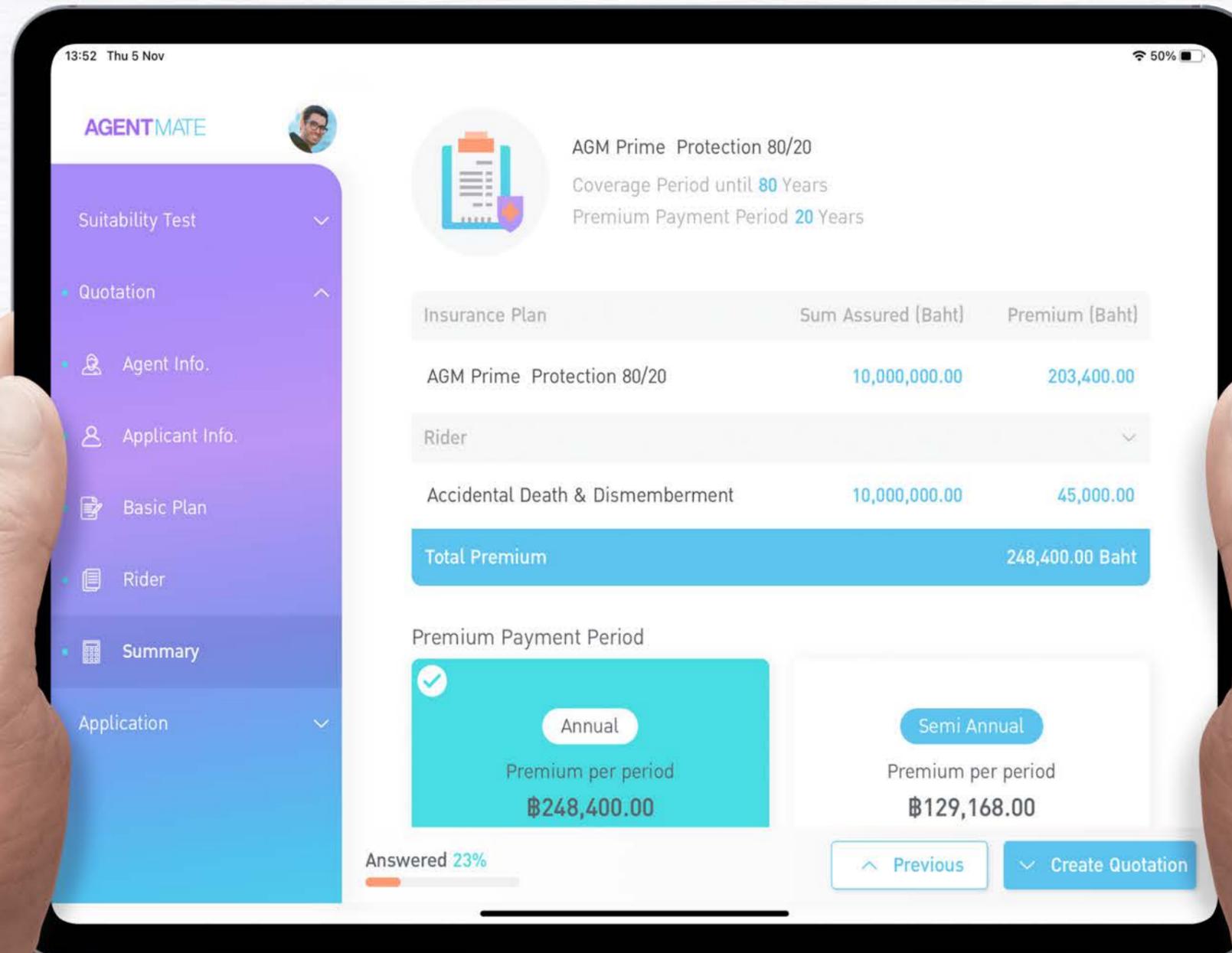
Generate multiple quotations and provide your customers with clear explanations and guidance on suitable products.

With online and offline functionality, you will be able to promote sales and generate quotations without any barrier.

Adapt the product quotation and illustrate the outcome to your customers.

- Adjust premium
- Add riders
- Adjust sum assured
- Validate suitability rules
- e-Quotation in PDF format

ANYTIME
AND
ANYWHERE



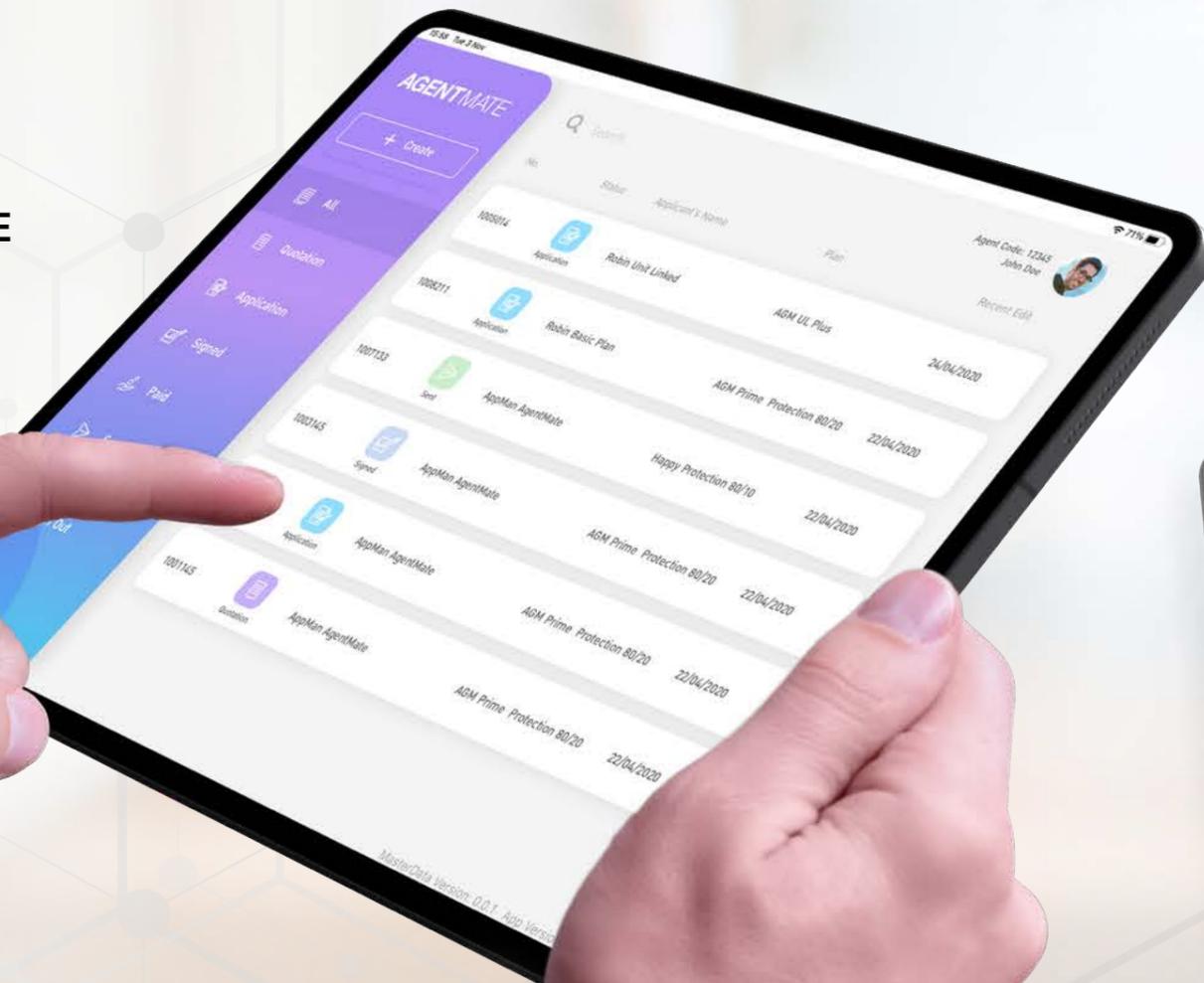
AGENTMATE

UNIT-LINKED SIMULATOR

Illustrate and explain the benefits of Unit-Linked products to your customers.

Explain, teach and guide your customers through the complexity of Unit-linked products. Display tables, graphs and use features to make sure your customer understands all aspects of the product.

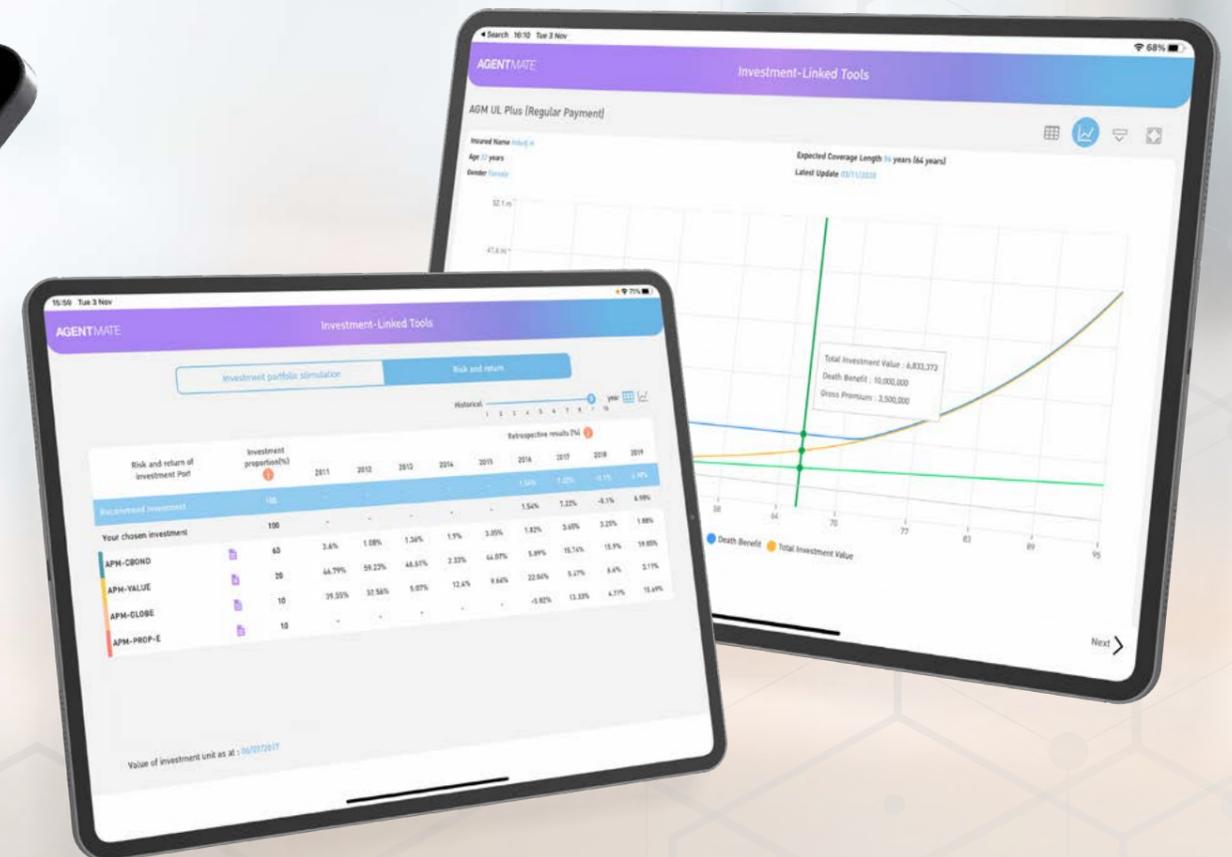
CLEAR
AND SIMPLE



Unit-Linked Simulator offers valuable features to display the investment performance accordingly to your customers' needs.

A seamless experience for your customers, when promoting your products with a full integration between Unit-Linked Simulator and e-Quotation.

- Risk profile questionnaire
- Dynamic graphs
- Portfolio selection
- Performance records



AGENTMATE

■ E-APPLICATION / E-SUBMISSION

Anytime, anywhere, AgentMate enables you to close the deal on the spot.

FROM PROSPECTS TO CUSTOMERS
WITH E-APPLICATION

Easy onboarding for new agents while you shorten the time and reduce the cost to complete the sales process.

A complete experience with all the compliance and validations necessary to ensure that the sale is being processed accordingly.

- Know your customers compliance
- e-Signature with watermark protection
- Watermark protection for sensitive documents
- Integrated payment gateway
- Instant policy delivery
- Pre-underwriting
- Field and criteria validations



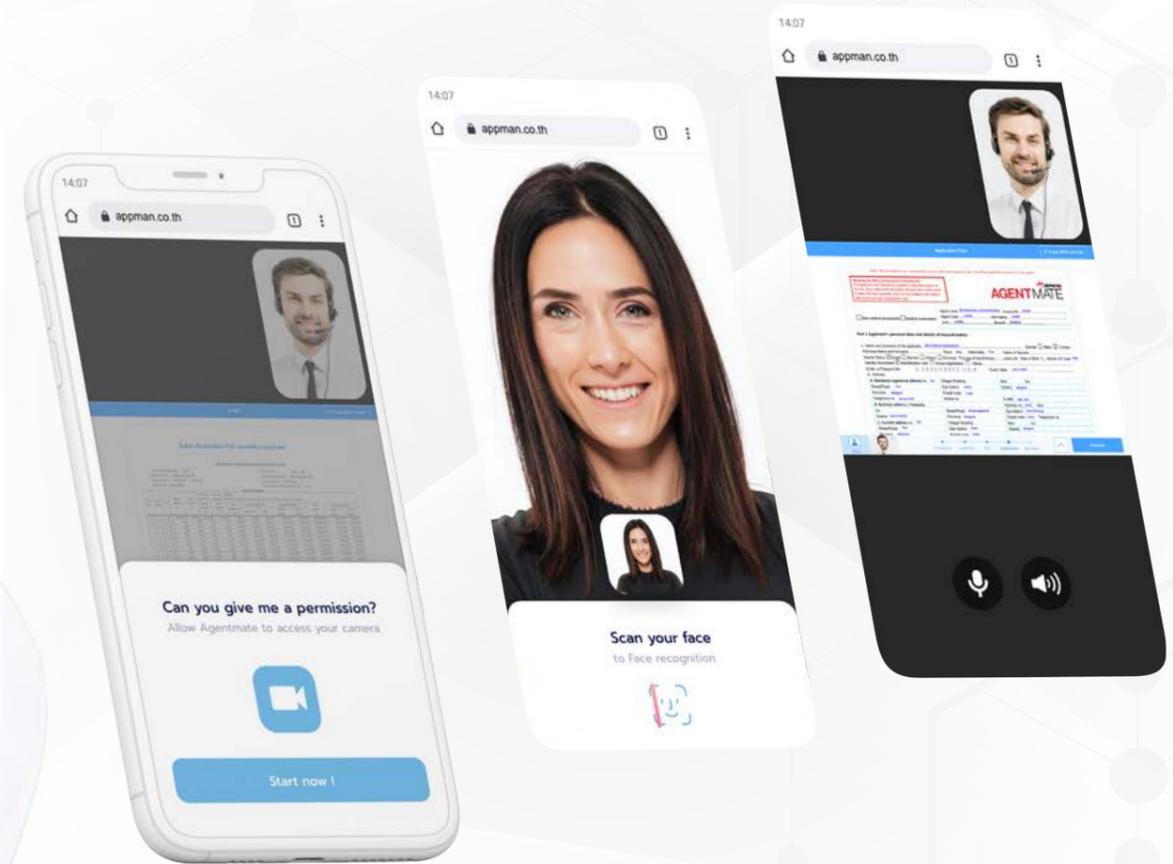
AGENTMATE

■ REMOTE E-APPLICATION / E-SUBMISSION

UNLOCK REMOTE
COMMUNICATION
WITH YOUR CUSTOMERS



Bring the AgentMate 'Living Room Experience' to your customers. In your house, in your device, your policy.



When time and distance are a barrier between you and your customers, AgentMate is the door that lets you access your customer's living room.

- Video call recording
- Screen sharing
- Face comparison between Selfie and ID card owner
- Consent through voice recording
- Cloud documents

TALKING
ABOUT SEAMLESS

We transform your underwriting business intelligence into a powerful tool that enhances your operations.

Automated Underwriting is capable of handling large volumes of simple cases without human assistance. Let your underwriters work more efficiently.

- Simplify Med/Non-Med rule management
- Enabled health reflexive questionnaires
- Straight Through Processing (STP)
- Streamline memo and counter offer process

A suitable tool for insurers that started digital transformation and desire to keep moving forward.

USE
YOUR
RESOURCES
SMARTER

AGENT MATE

■ **AUTOMATED UNDERWRITING**

PRODUCT CONFIGURATOR

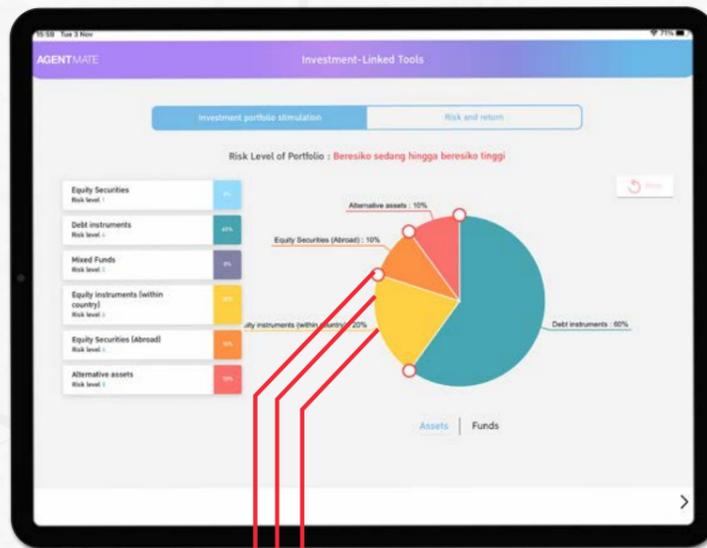
Try Freedom! No Developers Lockdown. Set your own new products or modify your existing ones freely.

The Product Configurator is designed to grant you the power to pull the strings of your own platform.

Support individual, traditional, General Insurance and Unit-Linked products.

Ease the process of product configuration

- Product - Rider relation
- Product rules
- PDF mapping (application forms)
- Add new products
- No tech knowledge required (suitable for non-IT Users)



The screenshot shows the 'Fund Categories' interface with a table of fund details. The table has columns for ID, Fund ID, Title, Color, Status, Create by, Create date, and Update by. Red lines connect the 'Color' column to the 'Fund Categories' table in the laptop screenshot below.

ID	Fund ID	Title	Color	Status	Create by	Create date	Update by
54	0034	Bond	#7ebc8d	True	Admin	2020-04-22	Subprasert Jaroenasakittul
53	0045	Equity securities	#5444ad	True	Admin	2020-04-22	Subprasert Jaroenasakittul
52	0067	Bond	#7ebc8d	True	Subprasert Jaroenasakittul	2020-04-22	Admin
51	010	Bond	#7ebc8d	True	Subprasert Jaroenasakittul	2020-04-22	Subprasert Jaroenasakittul
50	0894	Equity securities	#5444ad	True	Subprasert Jaroenasakittul	2020-04-22	Subprasert Jaroenasakittul
49	0001	Equity securities	#5444ad	True	Admin	2020-04-22	Subprasert Jaroenasakittul
48	0995	Bond	#7ebc8d	True	Subprasert Jaroenasakittul	2020-04-22	Subprasert Jaroenasakittul
47	0684	Equity securities	#7ebc8d	True	Admin	2020-04-22	Admin
46	1004	Bond	#5444ad	True	Subprasert Jaroenasakittul	2020-04-22	Subprasert Jaroenasakittul
45	8953	Bond	#7ebc8d	True	Subprasert Jaroenasakittul	2020-04-22	Admin
44	9302	Bond	#7ebc8d	True	Subprasert Jaroenasakittul	2020-04-22	Subprasert Jaroenasakittul

The screenshot shows the 'Mapping Basic with Riders' interface. It displays a list of riders under the heading 'AGM Whole Life Protection'. The riders listed include 'AGM4102: Waiver of Payer', 'AGM0202: Health Protection', 'AGM01: Cancer Benefits', 'AGM0202: Health Protection Plan 1', 'AGM0202: Health Protection Plan 2', 'AGM01: Cancer Benefits Plan 1', 'AGM01: Cancer Benefits Plan 2', and 'AGM01: Cancer Benefits Plan 3'. There are also sections for 'Except Rider' and 'Cancel'.

The screenshot shows the 'Create Rule Validation' interface. It features a 'Rule Validation Playground' with various logical operators and conditions. The playground includes sections for 'Calculate symbol', 'Condition symbol', and 'Instruction'. The 'Rule Validation Playground' section contains a complex rule structure with 'IF', 'THEN', 'ELSE', and 'AND' operators. The 'Instruction' section provides instructions on how to use the playground, such as adding values from the Basic Plan, Riders, or Insured fields.



Mobility Solution for Insurance Distribution

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