



Move
Beyond.



OneShield
**Market
Solutions**

Policy & Billing Solution Overview

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Embrace innovation, lower costs and reduce IT complexity through process automation of your Policy Management lifecycle.

Speed-to-Market = Speed-to-Value. OneShield Market Solutions' Policy & Billing module leverages an integrated cloud-hosted and rules-based application to automate and streamline the entire policy lifecycle.

Our SaaS model includes license, hosting, support, implementation, annual managed service hours and upgrades, all in one subscription fee. Upgrades and enhancements are pushed monthly, so you will always be on the latest version of the software. Plus, you have the ability to choose which enhancements you want, all at no additional cost. And, our tools interact with your ecosystem of third-party partners to meet the specific needs of insurers.

Functionality at Your Fingertips:

Adaptable, integrated, and secure, OneShield Market Solutions' (OMS) reduces rising IT costs and pressures leaving you with more time to focus on business priorities like customer service, growth, and innovation.

Policy Management:

- Real-time quoting, binding, issuing, and servicing
- Spreadsheet rating via microservices
- Industry-standard Workflows coupled with embedded underwriting rules engine, tailored to your requirements
- Straight-Through Processing and exception focused underwriting are supported, based on your underwriting guidelines
- Support for underwriter discretion in rating (overrides, surcharges, manual premium)
- Support for quota share/subscription policies
- Forms Generation including:
 - Rules for automatic form attachment and form order
 - Support for static or dynamic forms
 - Support for manuscript or external form inclusion.
- Automated renewals and audits
- Fully integrated document management
- Agent and Customer Web portals
- Underwriting and carrier clearance

Billing & Accounting:

- Integrated Billing
- Custom Billing Plans
- Invoicing for Agency/Broker-billed or Multi-payor options and transactions
- Built-in integrations to Payment Gateways & Lockbox
- Automated cash application
- Automated NOIC and cancellation processing
- Fee management (automated and manual)
- Combined/Account billing support
- Built-in integrations with General Ledger Systems

Information when and where you need it: Customer Center provides a 360-degree view of existing and prospective accounts, including:

- Submissions/quotations
- Policies
- Locations
- Claims
- Contacts

Integrated Partner Management:

- Carriers
- Agent/Brokers, including License Tracking
- Commission Management
- Vendors

Integrated Journal and Task Management including:

- One-time, recurring, and automatic diary entries with automated escalation
- System and user-created notes, correspondence generation from templates, and embedded email integration.
- Document Repository

Reporting - Information you need, when you need it:

- Powerful reporting solution
- Standard Operational reports
- Configurable Ad Hoc reports
- Tool designed for Business Users - no IT experience required

Technology Eco-system Friendly with standard integration to third-party applications, including:

- Financial and General Ledger systems
- Payment Gateways
- Flexible Integration Standards to support other third-party integrations

User Dashboard provides a complete snapshot of:

- Appointments
- Daily activities
- Critical alerts
- Open workflow items
- Quick access to all open applications, submissions, and policy records
- Direct access to action items, contacts, reports, financials, search, and administration



About OneShield

OneShield provides business solutions for P&C insurers and MGAs of all sizes.

OneShield's cloud-based and SaaS platforms include enterprise-level policy management, billing, claims, rating, relationship management, product configuration, business intelligence, and smart analytics.

Designed specifically for personal, commercial, and specialty insurance, our solutions support over 80 lines of business. OneShield's clients, some of the world's leading insurers, benefit from optimized workflows, pre-built content, seamless upgrades, collaborative implementations, and pricing models designed to lower the total cost of ownership.

Our global footprint includes corporate headquarters in Marlborough, MA, with additional offices throughout India.



For more information, visit www.OneShield.com

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Visit us at **OneShield.com** or
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your business.