

Your next now

April 2025

Spring '25 Release

“Blossom by blossom the Spring begins.”
- Algernon Charles Swinburne

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Majesco's products remain at the sole discretion of Majesco.

"In today's rapidly evolving business landscape, operational effectiveness and efficiency are more critical than ever. Insurers are facing unprecedented challenges—from catastrophic events and social and economic inflation to heightened market competition—driving increased cost pressures and declining combined ratios. Our Spring '25 Release is designed to help insurers stay ahead by delivering advanced capabilities that accelerate product and service launches, with a strong focus on costs optimization. It enhances operational efficiency by improving business process productivity and optimizing the total cost of ownership of the Majesco Platform. Our relentless commitment to delivering impactful product enhancements that address our customers' most urgent needs remains stronger than ever."

Manish Shah

President & Chief Product Officer at Majesco



A background image of a lavender field with two hands reaching towards the flowers. The image is overlaid with large, semi-transparent geometric shapes in shades of teal, blue, and green. The text "MAJESCO P&C INTELLIGENT CORE SUITE" is centered in white, bold, sans-serif font.

MAJESCO P&C INTELLIGENT CORE SUITE

P&C Intelligent Core Suite Highlights

More Capabilities, Ready-to-Use

We're making things faster to create and easier to maintain with ready-to-use Portal Journeys that automate the Quote, Rate, and Bind Journey and a ready-to-use Umbrella LOB.

GenAI-Powered Insights

Majesco Copilot optimizes quotes by simply uploading a form and automatic cash allocation management.

Operational Efficiency

Fast upgrades, batch process reporting, more Claims capabilities, telemetry, and instrumentation improve reliability and speed.

Digital Speed and Reliability

100% out-of-the-box new business quote journeys, adaptive mappings, and more reliable transactions.



Copilot – Intelligent Quote

Powered by Majesco DocScribe

Automate Quoting with Intelligent App Processing



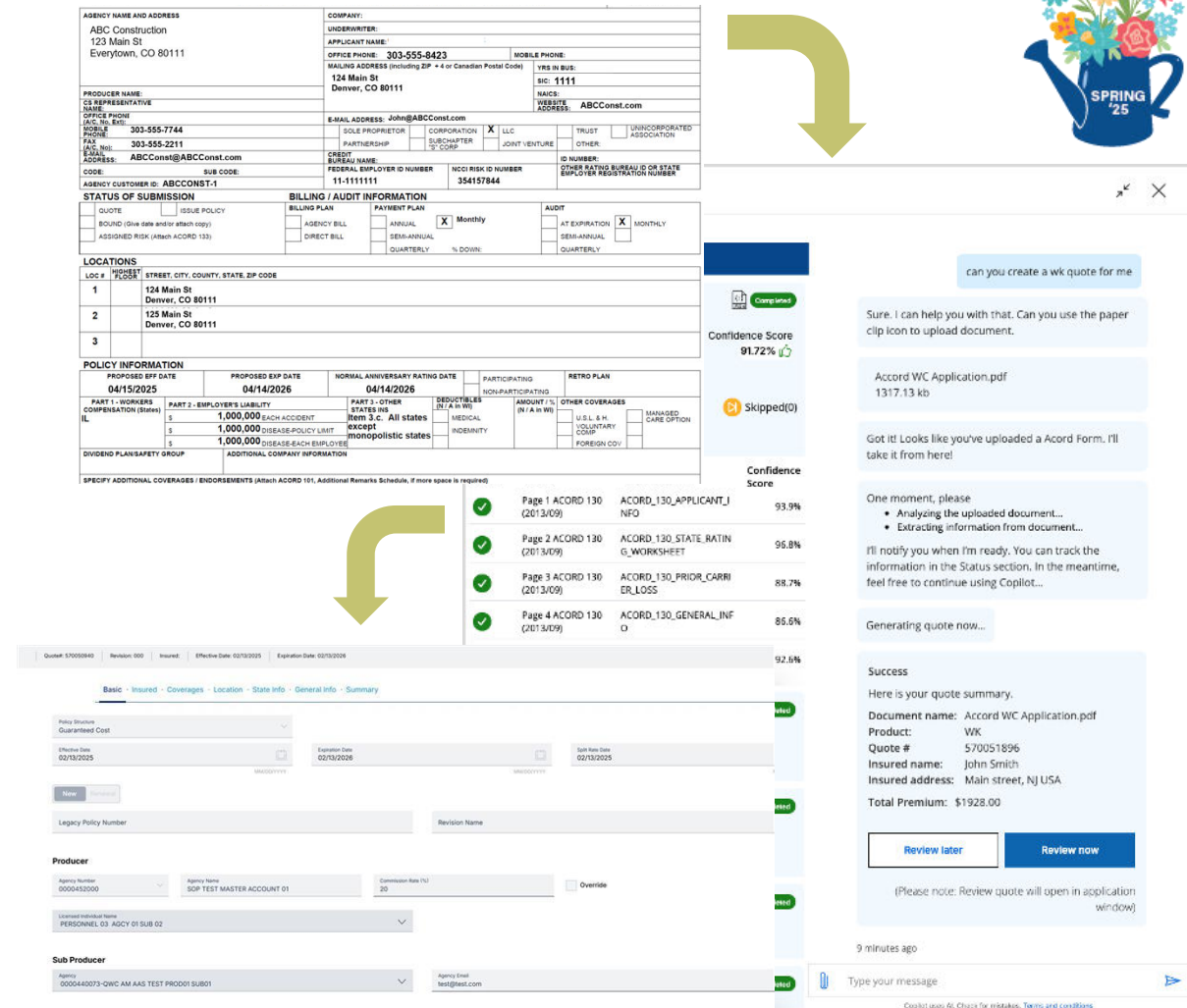
Capabilities

- Instantly generate insurance quotes by uploading complex insurance applications
- Ingest and process large (70-80 page) PDFs with Majesco Copilot DocScribe.
- AI-powered models classify pages and extract key fields with high accuracy.
- Advanced OCR and GPT-driven mapping transform data into structured requests.
- Supports Workers Comp, extendable to other lines of business and document types.



Business Value Add

- **Accelerates quoting** by reducing manual data entry from ~20 minutes to under 2 minutes
- **Improves accuracy** by using AI-driven extraction and mapping minimize errors
- **Enhances efficiency** through seamless integration into quoting workflows boosting productivity
- **Expands quoting potential** with faster turnarounds enabling you to quote more business



The diagram illustrates the workflow of the Copilot Intelligent Quote system. It starts with a complex insurance application form (left), which is processed by the Copilot system (middle). The system extracts key information and presents it in a structured, simplified view (middle-right). This structured data is then used by the Copilot agent (right) to generate a quote, providing a success message and a summary of the quote details.

AGENCY NAME AND ADDRESS: ABC Construction, 123 Main St, Everytown, CO 80111

COMPANY: UNDERWRITER: APPLICANT NAME: OFFICE PHONE: 303-555-8423 MOBILE PHONE: YES IN BUS: MAILING ADDRESS (including ZIP + 4 or Canadian Postal Code): 124 Main St, Denver, CO 80111 SIC: 1111 NAICS: WEBSITE ADDRESS: ABCConst.com

PRODUCER NAME: CS REPRESENTATIVE NAME: OFFICE PHONE: 303-555-7744 MOBILE PHONE: 303-555-2211 FAX: 303-555-2211 E-MAIL ADDRESS: John@ABCConst.com ADDRESS: ABCConst@ABCConst.com SUB CODE: AGENCY CUSTOMER ID: ABCCONST-1

STATUS OF SUBMISSION: QUOTE, ISSUE POLICY, BOUND (Give date and/or attach copy), ASSIGNED RISK (Attach ACORD 103)

BILLING / AUDIT INFORMATION: BILLING PLAN: AGENCY BILL, PAYMENT PLAN: ANNUAL, MONTHLY, SEMI-ANNUAL, QUARTERLY, % DOWN, AUDIT: AT EXPIRATION, MONTHLY, QUARTERLY

LOCATIONS: LOC #, STREET, CITY, COUNTY, STATE, ZIP CODE

POLICY INFORMATION: PROPOSED EXP DATE: 04/15/2025, PROPOSED EXP DATE: 04/14/2026, NORMAL ANNIVERSARY RATING DATE: 04/14/2026, PARTICIPATING: NONPARTICIPATING, RETRO PLAN: U.S.L. & H. VOLUNTARY COMP, FOREIGN COV.

CONFIDENCE SCORE: 91.72%

Success: Here is your quote summary. Document name: Acord WC Application.pdf, Product: WK, Quote #: 570051896, Insured name: John Smith, Insured address: Main street, NJ USA, Total Premium: \$1928.00

Review later **Review now**

(Please note: Review quote will open in application window)

9 minutes ago

Type your message

Copilot uses AI. Check for mistakes. Terms and conditions

Powered by Majesco DocScribe

Automating Allocation of Agency Payments




- Automatically identifies and extracts key summary and detailed data required for payment allocations such as broker, overall payment amount, policy/ transaction level gross & net payments to be allocated etc.
- Supports multiple file formats and data variations (Excel, CSV, etc.)
- Orchestrates payment allocation to process the payment as instructed in the remittance file intake
- Handle large remittance files with thousands of transaction allocation details



- **Saves time** by eliminating the manual effort required for payment allocation
- **Reduces errors** and minimizes manual data entry, improving accuracy
- **Enhances reconciliation** with clear, source-linked transaction records
- **Ensures financial accuracy** with faster and more precise payment processing

[illegible]





Copilot

Billing

Start here, please type a request below.

can you process a cash allocation statement for me





Upload the allocation file using the attach icon below and I will help you allocate payments.

AgencyCash1.xlsx
9.73 kb

One moment, please

- Analyzing the document...
- Generating summary...

I'm summarizing information for you now...

I've completed the payment allocation and below is a summary of records.


Agency Payment Allocation Summary

Largest Transaction by Gross Amount:


- Insured Name: Mark Lee
- Gross Amount: \$3,125.00
- Net Amount: \$2,734.39
- Policy No: POL-20250317-0898
- Cheque Date: 03-08-2025
- Request Date: 03-18-2025

Largest Transaction by Net Amount:


- Insured Name: Mark Lee
- Gross Amount: \$3,125.00




New



Actions




Examples



About

Use an example or ask me anything else



Copilot uses AI. Check for mistakes. [Terms and conditions](#)

Copilot – Intelligent Bills & Invoice Processing

Powered by Majesco DocScribe

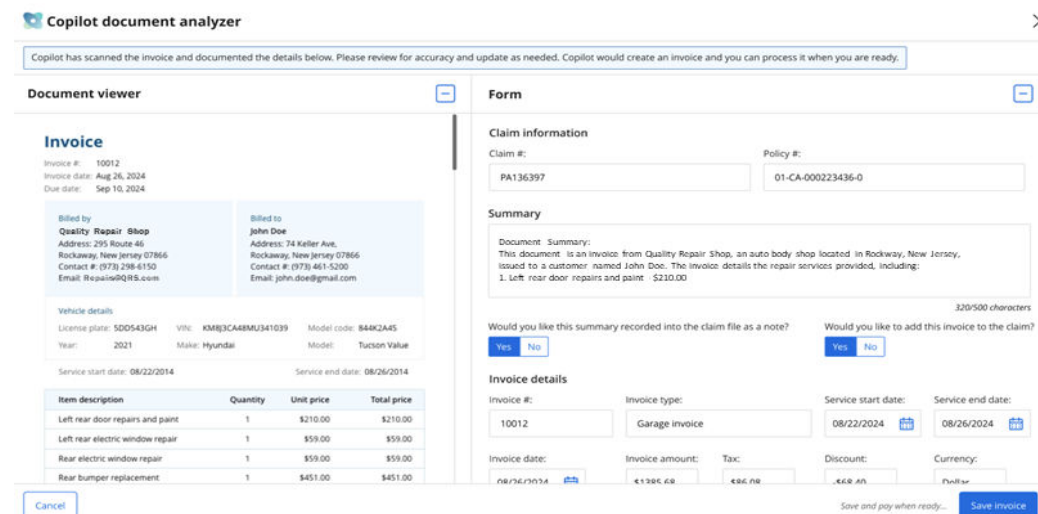
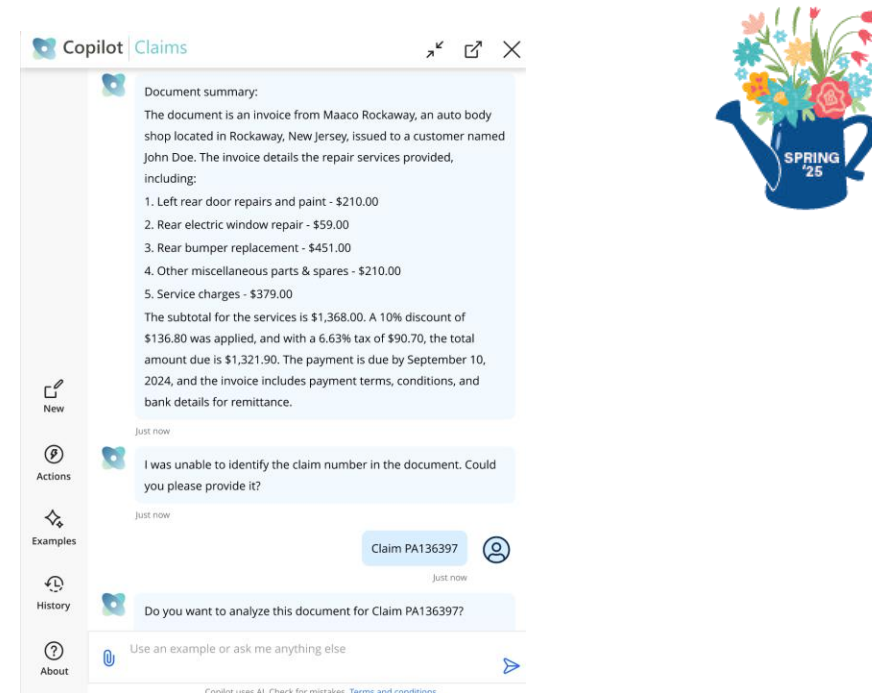
Manage Claims bills and invoices with a single upload

Capabilities

- Reads an invoice, regardless of the format or layout, and generates a summary
- Creates an invoice, populates the required fields, and creates line by line entries automatically from the uploaded invoice
- Provides a side-by-side view so you can compare the upload to the entry
- Adds a document summary to the claim file notes

Business Value Add

- **Saves time** by eliminating the need to manual enter invoices line by line, reducing time spent from 3 hours and 20 minutes to 50 minutes
- **Get more throughput** so you can focus on higher value work bringing more business value
- **Improves responsiveness** providing faster turn-around time through time savings
- **Reduces errors** by minimizing manual data entry, improving accuracy



The screenshot shows the 'Copilot document analyzer' interface. At the top, a message states: 'Copilot has scanned the invoice and documented the details below. Please review for accuracy and update as needed. Copilot would create an invoice and you can process it when you are ready.' Below this is a 'Document viewer' section showing an 'Invoice' with details: Invoice #: 10012, Invoice date: Aug 26, 2024, Due date: Sep 10, 2024. It lists the 'Billed by' (Quality Repair Shop) and 'Billed to' (John Doe) with their respective addresses and contact information. It also includes 'Vehicle details' (License plate: SDD543GH, VIN: KM8J3CA88MU341039, Model code: B4K2A45, Year: 2021, Make: Hyundai, Model: Tucson Value, Service start date: 08/22/2014, Service end date: 08/26/2014). A table shows the 'Item description', 'Quantity', 'Unit price', and 'Total price' for four items: Left rear door repairs and paint, Left rear electric window repair, Rear electric window repair, and Rear bumper replacement. To the right is a 'Form' section with 'Claim information' (Claim #: PA136397, Policy #: 01-CA-000223436-0), a 'Summary' of the document, and 'Invoice details' (Invoice #: 10012, Invoice type: Garage invoice, Service start date: 08/22/2024, Service end date: 08/26/2024, Invoice date: 08/26/2024, Invoice amount: \$1,368.00, Tax: \$90.70, Discount: \$136.80, Currency: Dollar). At the bottom right, there is a 'Save Invoice' button.

Intelligent Core Operational Reports

Advanced, User Manageable Reporting



Capabilities

- More performant reporting
- Pre-existing standard reports now replicated (six are still coming soon)
- Built on robust, high-performance, reusable, and extensible datasets
- End users can modify the existing standard reports quickly, getting exactly the view they want with little effort and without any technical resources
- Create views to include graphics, charts, and graphs

Business Value Add

- Reports are created faster, making information available with less waiting
- Get exactly the information you want, the way you want to see it
- No dependency on technical resources or Majesco to modify reports
- Eliminate dependency on the OLTP database
- Increase flexibility, accelerate reporting processes, and ensure higher quality reports, driving more informed and timely decision-making across the organization

Report Name	Category	Filters	Owner
Billing - Cancelled policies	Billing	Billing, Cancellations, Policies	Majesco
Billing - Cancelled policies Detail	Billing	Billing, Cancellations, Policies	Majesco
Billing - Commissions	Billing	Billing, Commission	Majesco
Billing - Commissions Detail	Billing	Billing, Commission	Majesco
Billing - Past due	Billing	Billing, Due	Majesco
Billing - Past due Detail	Billing	Billing, Due	Majesco
Billing - Payments collected	Billing	Billing, Collection, Payments	Majesco
Billing - Payments collected Detail	Billing	Billing, Collection, Payments	Majesco
Billing - Policies in collection	Billing	Billing, Collection, Policies	Majesco
Billing - Policies in collection Detail	Billing	Billing, Collection, Policies	Majesco
Billing - Policies on hold	Billing	Billing, Hold, Policies	Majesco

Policy - Cancelled Policies Report

Back to report list

View | Share | Subscribe to report

File | View | Ask a question | Explore | Text box | Shapes | Buttons | Visual interactions | Refresh

Cancelled Policies - Policy Overview

Policy Number	Policy Effective Date	Policy Expiration Date	Insured	Agency Name	Agency Number	Underwriter	Cancel Effective Date	Cancel Reason
01-CA-000010134-0	12/2/2014	12/2/2015	Jenifer James	Majesco Producer	9000000001	Majesco Suite4	12/10/2014	Insured Request
01-CA-000010160-0	12/1/2014	12/1/2015	Randy Robinson	Majesco Producer	9000000001	Majesco Suite4	5/13/2015	Non-Payment of Prer
01-CA-000010212-0	3/4/2025	3/4/2025	Test	Majesco Producer	9000000001		3/25/2025	Non-Payment of Prer
01-CA-000010213-0	3/4/2025	3/4/2025	Test	Majesco Producer	9000000001		4/3/2025	Non-Payment of Prer
01-CA-000010130-0	1/2/2015	1/2/2016	Robert Johnson	Majesco Producer	9000000001	Majesco Suite4	2/1/2015	Out of Business
01-CA-000010139-0	1/1/2015	1/1/2016	Joe Lopez	Majesco Producer	9000000001	Majesco Suite4	2/1/2015	Out of Business
01-CA-000010191-0	1/2/2015	1/2/2016	Richard Jhonas	Majesco Producer	9000000001	Majesco Suite4	2/1/2015	Out of Business
01-CA-000010196-0	1/2/2015	1/2/2016	Nick Jhonas	Majesco Producer	9000000001	Majesco Suite4	2/1/2015	Out of Business
01-CP-000010111-0	1/2/2015	1/2/2016	Alex Mark	Majesco Producer	9000000001	Majesco Suite4	1/17/2015	Out of Business
Total								

Visualizations | Data

Build visual

Search

Agency/Producer

Cancelled Policies

Primary Risk State

Underwriter

Underwriting Company

Values

Add data fields here

Drill through

Cross report

Keep all filters

Add drill-through fields here

Policy Overview | Insured Overview | Agency Overview | Underwriting Overview

Data Anonymization

Protect PII and Ensure PII compliance



Capabilities

- Identification of applicable policies
- Automated anonymization processes across the suite (Claims coming soon)
- Configuration options for data retention periods and anonymization criteria
- Detailed reporting of anonymized policies for audit and tracking
- Retained ability to track analytics and data using non-PII data

Business Value Add

- Protect customer PII, being a good steward of your customers and managing exposure
- Comply with regulatory and legal requirements such as NYDFS and internal best practice policies with no manual intervention
- Retain the ability to get critical business insights for reporting and related analytic needs through preservation on non-PII data

The screenshot shows the Majesco Billing interface. The top navigation bar includes 'Inquiry', 'Receipts', 'Adjustments', 'Account Current', 'Disbursements', 'Commission', 'Reports', 'System Administration', 'Batch', 'Workbench', 'Developer Tools', 'UTMTaskLoader', and 'UTMTaskLoader'. The 'Policy Details: Cancelled' section displays the following information:

- Policy: 01-CA-000010149-0 [01/02/2015]
- Policy #: 01-CA-000010149-0 (01/02/2015-01/02/2016)
- Insured: Sean Thomas
- Account #: 00000014

The 'Policy Entities' tab is selected, showing a table with the following columns: ENTITY TYPE, ADDRESS TYPE, NAME, ADDRESS, CITY, STATE, COUNTRY, ZIP CODE, EMAIL ID, PHONE NO, LOAN #, and OUTPUT DELIVERY METHOD. The table contains data for Agency, Customer, Insured, and Account entities.

ENTITY TYPE	ADDRESS TYPE	NAME	ADDRESS	CITY	STATE	COUNTRY	ZIP CODE	EMAIL ID	PHONE NO	LOAN #	OUTPUT DELIVERY METHOD
Agency	Mailing Address	Majesco Producer	123 old street	Addison	Maine	United States of Am...	04606-1234	Majescoproducer@...	(818) 292-0081		Electronic
Customer	Mailing Address	Sean Thomas	141 West 28th Street	New York	New York	United States of Am...	10003	thomas@gmail.com	(632) 555 - 6798		
Insured	Mailing Address	Sean Thomas	141 West 28th Street	New York	New York	United States of Am...	10003	thomas@gmail.com	(632) 555 - 6798		
Account	Mailing Address	Sean Thomas	141 West 28th Street	New York	New York	United States of Am...	10003	thomas@gmail.com	(632) 555 - 6798		

The screenshot shows the Majesco Billing interface. The top navigation bar includes 'Inquiry', 'Receipts', 'Adjustments', 'Account Current', 'Disbursements', 'Commission', 'Reports', 'System Administration', 'Batch', 'Workbench', 'Developer Tools', 'UTMTaskLoader', and 'UTMTaskLoader'. The 'Policy Details: Cancelled' section displays the following information:

- Policy: 01-CA-000010149-0 [01/02/2015]
- Policy #: 01-CA-000010149-0 (01/02/2015-01/02/2016)
- Insured: Qpef Rchamc
- Account #: 00000014

The 'Policy Entities' tab is selected, showing a table with the following columns: ENTITY TYPE, ADDRESS TYPE, NAME, ADDRESS, CITY, STATE, COUNTRY, ZIP CODE, EMAIL ID, PHONE NO, LOAN #, and OUTPUT DELIVERY METHOD. The table contains data for Agency, Customer, Insured, and Account entities.

ENTITY TYPE	ADDRESS TYPE	NAME	ADDRESS	CITY	STATE	COUNTRY	ZIP CODE	EMAIL ID	PHONE NO	LOAN #	OUTPUT DELIVERY METHOD
Agency	Mailing Address	Majesco Producer	123 old street	Addison	Maine	United States of Am...	04606-1234	Majescoproducer@majesco.com	(818) 292-0081		Electronic
Customer	Mailing Address	Bkvy Ulixas	191 Mykj 18Mb Hnixvz	Joo Duyo	XX	XX	79284	ndxqy@gqal.lib	(248) 237 - 2468		
Insured	Mailing Address	Qpef Rchamc	490 Ubyo 448h Ejfry	Rdw Dhlw	XX	XX	13048	vyrcz@sxnap.ymt	(849) 169 - 0213		
Account	Mailing Address	Hood Lsqnbg	092 Dced 395r Cnmgv	Sce Xjpl	XX	XX	82421	mngzop@xigdi.wdh	(867) 047 - 8157		

Ready-to-Use Portal Journeys

Faster and More Reliable Portal Journeys

Capabilities

- Customers and Agents benefit from ready-to-use quote, rate, bind journeys, covering the entire lifecycle from account creation to payments gateways
- Automatically import product configuration metadata to create apps, business rules, and everything else you need to build a class-leading user experience
- Use out-of-the-box product definitions allowing for faster roll-outs and upgrades

Business Value Add

- Reduced effort for deployments and maintenance
- Get to market more quickly, creating more business and a better customer experience
- Circular changes are easier to adopt as the product definitions are now automated
- Get new features more quickly through both the faster upgrades and tight integration with Majesco Core
- Lower maintenance efforts, more successful transactions, and higher uptime

TE

Jon Doe
123 main, Abbot Village, ME, 04406, USA

(986) 532 - 6598
David@gmail.com

Effective date:

Mar 20, 2025

Expiration date:

Mar 20, 2026

Producer name:

Producer 10052

Pro rate factor:

Total premium
\$2545
Per Policy Period

Total Transaction premium: \$2545
Total Surcharges/Taxes/Fees: \$160

Policy Level Risks

Name	Limit	Additional Limit	Premium
Risks (1 Item)			
Locations			\$100
Subtotal (1 Item)			\$100

Line of Business

Name	Limit	Additional Limit	Premium
Workers Compensation (3 Items)			
State Information			\$2445.00
Coverages			
Minimum Premium			\$0.00
Expense Constant			\$200.00
Subtotal (3 Items)			\$2445.00

Surcharges and Taxes

Name	Type	Amount
Kentucky Special Fund Assessment	Surcharge	\$160.00
Subtotal (1 Items)		\$160.00

Total premium:

\$2545





Improvements to Digital1st and Policy Integration

Faster and More Reliable Portal Journeys

Capabilities

- Improved specification for start new quote, syncing data to and from PAS and D1st, validating & rating and transaction finalization APIs
- Redesigned D1 Connector that works without any additional configuration
- Robust error handling mechanism with improved logging and actionable messages
- LOB agnostic capability to export and import PAS transaction data using API and JSON/Excel format

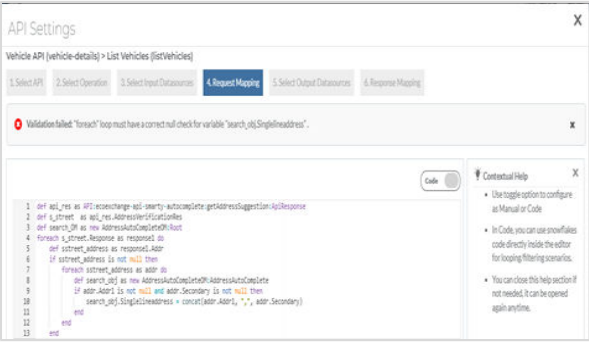
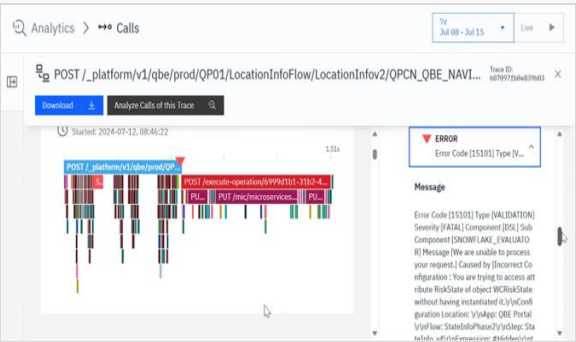
Business Value Add

- Easier integration and reduced manual effort and improve efficiency
- Minimized errors and data inconsistencies
- Improved user experience due to data synchronization and user-friendly error messages
- Faster troubleshooting and resolution with improved error logging and debugging
- Faster download of object schedule improves the user experience and satisfaction

	State#	Location#	Classes#	Old Reading	New Reading	% Improvement
Bulk Upload Performance Metrcis	1-7	1-10	1-15	73	25	65.75
	8-10	11-20	16-50	180	53	70.56
	11-20	21-40	51-200	668	111	83.38
	21-40	41-80	201-400	1800	115	93.61
	41-51	81-110	401-600	1800	234	87.00

	State#	Location#	Classes#	Old Reading	New Reading	% Improvement
Bulk Download Performance Metrcis	1-7	1-10	1-15	10	4	60.00
	8-10	11-20	16-50	15	7	53.33
	11-20	21-40	51-200	35	7	80.00
	21-40	41-80	201-400	116	9	92.24
	41-51	81-110	401-600	178	21	88.20

Bulk Upload/ Download Improvements



Graceful Error handling



Ready-to-Use Umbrella LOB

Faster Implementation Out-Of-The-Box



Capabilities

- Pre-configured template for Umbrella coverage of General Liability, Commercial Auto (liability), Businessowners (liability) & Other Liability
- Rating functionality for Umbrella Quotes & Policies
- Accurate Umbrella Layer Premium calculations
- Issuance of Umbrella policies with detailed premium summaries
- Declaration and worksheet document



Business Value Add

- Customers with manuscript endorsement forms can see up to 98% savings. Even those with a large number of forms (~300) can save around 15%.
- Reduced time required for implementation, getting customers up and running more quickly
- Flexibility to meet unique needs allowing for modification and extensions, ensuring this meets your business need.
- Cost savings as bureau fees aren't necessary

Line Of Business	Quote/Policy Number	Effective Date	Expiration Date
Business Owners	01-BP-00002100-3	04/01/2025	04/01/2026
Commercial Auto	01-CA-000058758-0	01/01/2025	01/01/2026
General Liability	01-CP-000008196-0	06/19/2024	06/19/2025
Other Liability	01-OL-00009164-0	04/01/2025	04/01/2026

Layer	Layer Limit	Layer Factor	Layer Premium	Minimum Premium
1	\$ 1,000,000	1.000	\$ 4,143	\$ 1,000
2	\$ 2,000,000	.500	\$ 2,072	\$ 1,000
3	\$ 3,000,000	.500	\$ 1,036	\$ 1,000
4	\$ 4,000,000	.500	\$ 518	\$ 1,000
5	\$ 5,000,000	.500	\$ 259	\$ 1,000
6	\$ 6,000,000	.500	\$ 130	\$ 1,000
7	\$ 7,000,000	.500	\$ 65	\$ 1,000
8	\$ 8,000,000	.500	\$ 33	\$ 1,000
9	\$ 9,000,000	.500	\$ 17	\$ 1,000
10	\$ 10,000,000	.500	\$ 9	\$ 1,000



Reduced Deployment Times

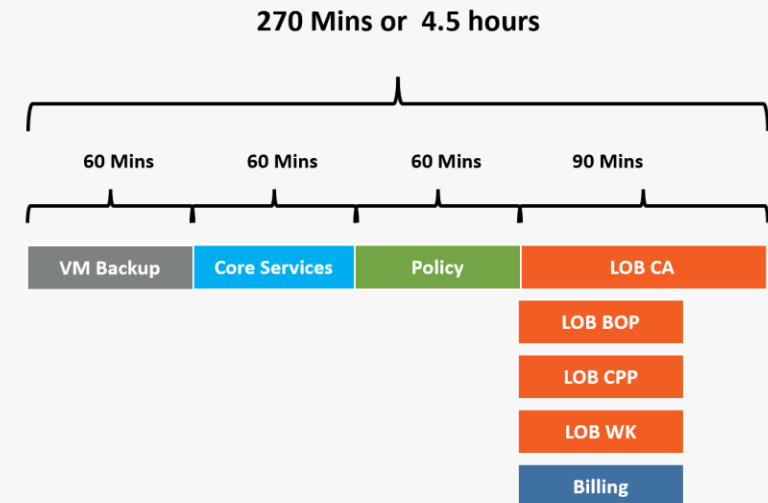
Reduction in deployment of P&C Core Suite from 8 hours to 4.5 hours

Capabilities

- Parallel deployment of Policy, Billing, and Claims
- Parallel deployment of LOB products
- Individual product deployment times reduced by 50%
- Aligns with the new automates hotfix process

Business Value Add

- More uptime through reduced deployment durations
- Save time and reduce human error through no manual involvement for hotfix deployments with upgrades
- Reduced deployment times can reduce the barrier to upgrade, helping you stay current, so you can get the newest capabilities quickly



Fast Upgrade

Upgrade Faster. Innovate Sooner. Stay Ahead.

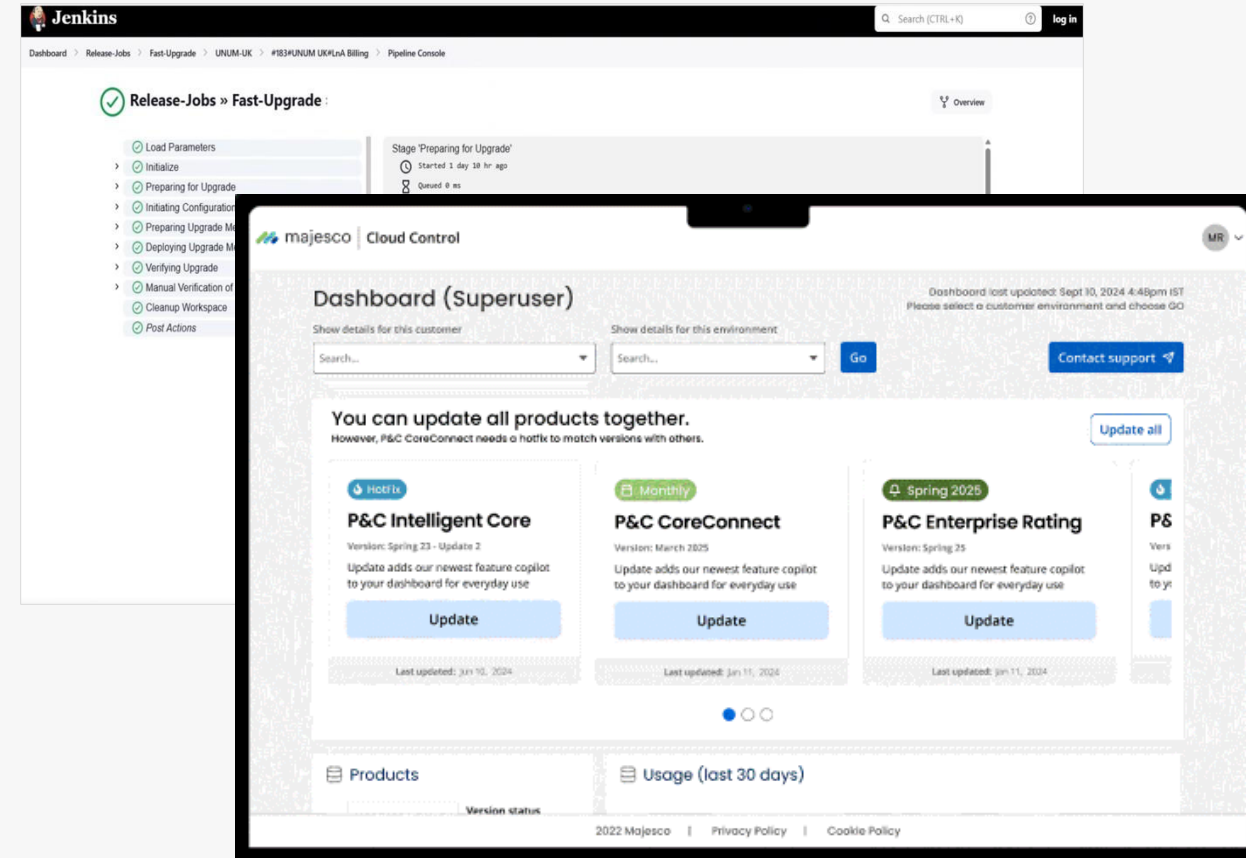


Capabilities

- **Faster Upgrades:** Reduce upgrade time to under 14 days, with a future goal of 1-3 days.
- **Simplified Process:** Eliminate lengthy, complex, and error-prone upgrades
- **Accelerated Feature Access:** Minimize delays in new features and fixes.
- **Maximize product value to customers**

Business Value Add

- **Operational Efficiency:** Faster upgrades and automated issue resolution reduce system downtime.
- **Get new features** and fixes with minimal delays.
- **Faster Time-to-Market:** Quick access to new features enhances competitiveness.



Business Metrics and Telemetry

Better, More Relevant Insights



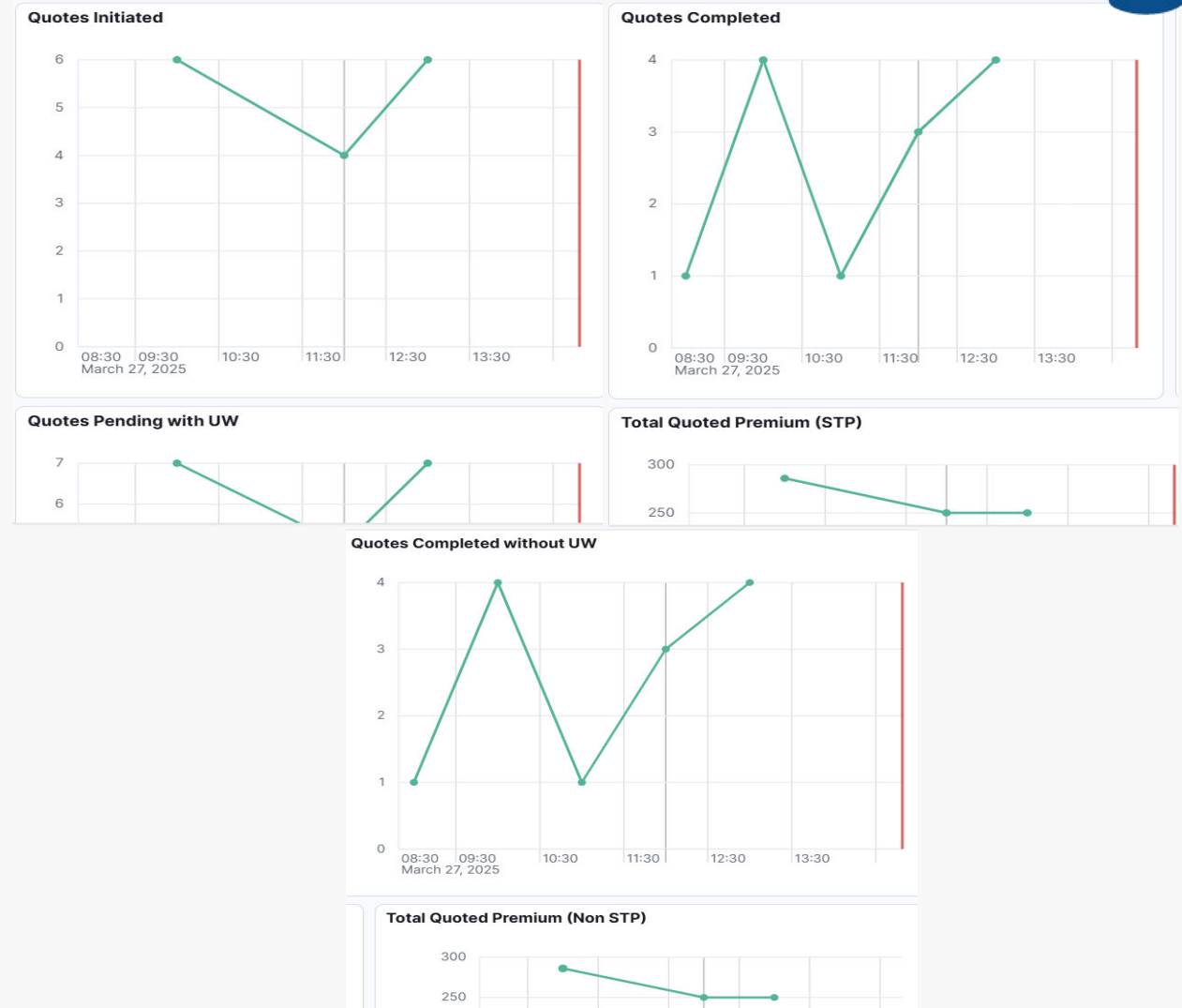
Capabilities

- Centralized logging across the entirety of the Majesco P&C Suite
- Real time insights
- Operational metrics tracking performance, system events, transaction completion and select business metrics around completion of workflows through the system
- Error notification to alert support automatically notified



Business Value Add

- A complete view of events allows for faster understanding and resolution of any issues across products
- Improved ability to detect trends so issues can be more effectively prioritized
- Majesco can start resolving issues before they are even reported
- Less downtime, faster issue resolution, higher user satisfaction and effectiveness



P&C LOB Data Dictionary

Easier Understanding of System Data

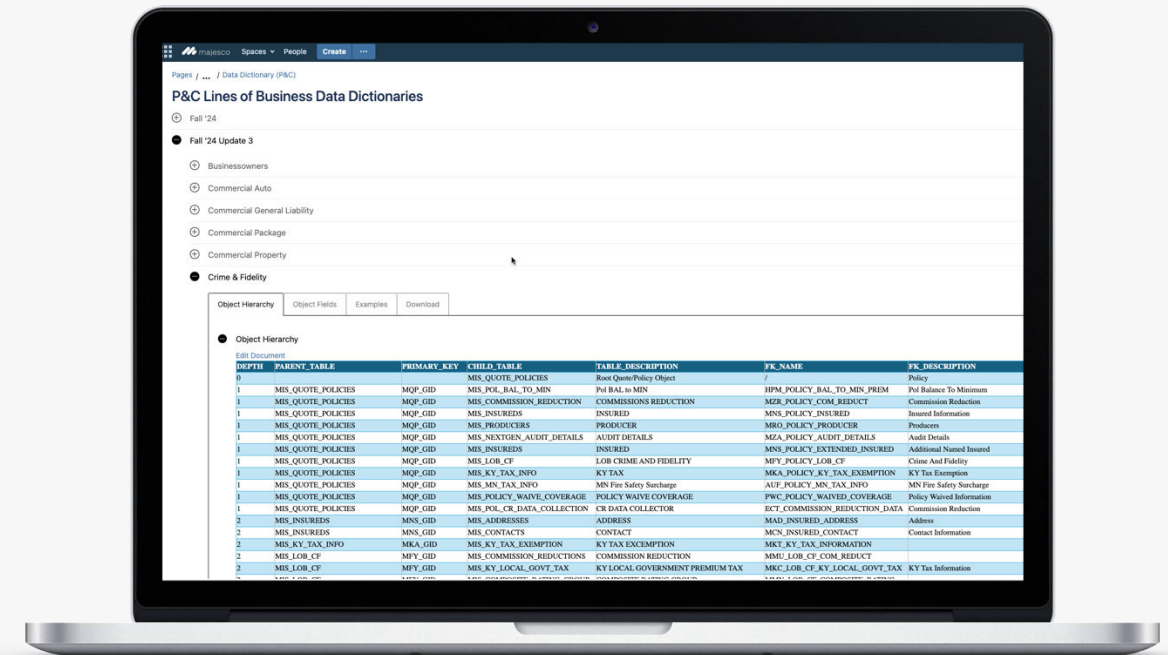


Capabilities

- Structural view of Base product implementation
- Details of tables at all levels in the hierarchy, facilitating targeted configuration/customization activities
- Field-level definitions included for all data elements
- Download functionality enabling offline access and distribution of Data Dictionaries for implementation, support and customers

Business Value Add

- Object and Field-level documentation enable faster configuration with reduced dependency on technical resources and SMEs
- Standardized data structure references support streamlined integration with external systems and data providers
- Detailed attribute mapping for Base LOB configuration data provides faster and more accurate analysis





EFT and Commissions Reconciliation

Ensure Financial Accuracy and Compliance



Capabilities

EFT reconciliation & Alerts:

- Proactively monitor all electronic recurring payment making sure the automated withdrawal amounts are accurate and timely.
- Automated alerts and notifications in case a discrepancy is identified.
- Configurable actions in case of any failures / technical errors.

Commission reconciliation & Alerts:

- Automatically reconcile monthly commissions payouts with written premiums / booked commissions.
- Automated alerts and highlighted discrepancies in the commission preview
- Automatically generated reconciliation summary



Business Value Add

- No manual reconciliation saves hours every month
- Higher accuracy means fewer issues to resolve, lower regulatory and compliance risk, and greater trust with all stakeholders
- Compliance with NACHA regulations





Improved Batch Processing

Stable, Scalable and Reliable Batch Operations With No Manual Intervention

Capabilities

- Automatically generated report for each batch
 - See all business processes along business metrics and response times
- Lists any failures that needs follow up actions
- Monitor each process with automated (configurable) timeouts for any runaway process avoiding cascading delays and downstream operational disruption
- Numerous performance and scalability improvements to address peak volumes
- Holiday calendar improvements

Business Value Add

- Batch data and reports generated every day, shared with customer teams reducing time and manual effort, while increasing communication
- Certified to handle 1+ Million batch processes per hour ensuring support for the volumes handled by all carriers
- Save considerable time setting up batch scheduler for the year
- More reliable holiday schedules ensure batches are run as and when expected

BILLING BATCH STATUS REPORT

Environment	PRODUCTION
Batch Run Date	3/4/25
Batch Type	SCHEDULED DATE RUN
Business Date (Post Batch Run)	3/5/25
Next Business Date (Post Batch Run)	3/6/25

Batch Start Time	03/04/2025 10:30:00 AM CST
Batch End Time	03/04/2025 11:11:45 AM CST
Total Batch Time	0:48:45
Batch Status	COMPLETED

#Interfaces Failed	1
#Outputs Failed	0
#Objects Failed / Not Picked	2

Interface Status							
Interface Type	Interface Name	File Name (Shown Only for Inbound)	Status	Transactions Count	Success Count	Failed Count	Transactions Amount
Inbound	Agency Payment	Comm_Remit_03_04_2025_728.xlsx	Success	50	50		6,370.00
Inbound	Check Status Update	CheckNumberUpdate_03042025.txt	Success	12	0		
Inbound	Entity	Entity_20250403.txt	Success	4	4		
Inbound	Payment	PaymentInterface_20250403.txt	Error	120	118	2	34,901.00
Inbound	Premium Transactions	Premium_20250403.txt	Success	480	480		263,890.00
Outbound	Account Payable		Success				
Outbound	General Ledger		Success	2804	2804		
Outbound	Policy Status Change		Success	1290	1290		
Outbound	Request for Cancellation		Success	10	10		
Outbound	Request for Endorsement		No Eligible Records				
Outbound	Request for Reinstatement		Success	3	3		



C360 FNOL – Dwelling Fire, Commercial Property

Submit Claims Online for Improved Customer Service



Capabilities

- Insured can submit a FNOL directly from the customer portal
- FNOLs are immediately available in the claims system
- Claim Intake Specialist can collect remaining required information
- The FNOL is submitted as a claim
- Once the claim is submitted, any existing automated workflows begin



Benefits

- Insureds will now have the convenience of submitting a FNOL from the customer portal at a time and place convenient to them, reducing the gap between Date of Loss and Date Reported
- FNOL process is easier and faster for all parties increasing the speed of resolution and all users' satisfaction
- Insureds can also track the status of claims reported directly in the portal reducing calls and increasing satisfaction

Consolidated Vendor Payments

Expense and Loss Payments Consolidation



Capabilities

- Expense and Loss (Indemnity) payments consolidated for joint processing
- Define payment schedules to match the vendors' preference
- The vendor's preferred payment method can be defined on the vendor's profile
- Track payment status and activity



Business Value Add

- Reduced effort in managing vendor payment
- Vendors receive consolidated payments for multiple claims, in their preferred payment method, on their schedule, improving traceability and efficiency, meeting vendor payment requirements
- Less time understanding current payment status and payment history
- Reduced chance of error through automation



Repair Shop | Organization | Safelite

Tax ID: 09-8123745 | Address: 7400 Safelite Way, Columbus, OH 43235 USA | Bulk Pay Frequency: Monthly | Pay Day: Last Day | Next Pay Date: 31-Mar-2025

Make Payment

Open Batch | Closed Batches | Deleted

Usage guidelines:
1. "Release Payment" - At a time, there is a limit of 10 payments.
2. "Close Batch" - There is a limit of 100 payments for closing a batch manually.
If there are more than 100 payments in a batch, the payment will be processed on the next pay date for the vendor as per the frequency setup on the vendor profile.

BATCH #	PAYMENT TYPE	AMOUNT	PAYMENT MODE	
55983	Expense	275.00	One Inc Customer Choice Payment	
55982	Loss	975.00	One Inc Customer Choice Payment	

Records: 1 - 2 of 2 | Go to page: 1 of 1 << < 1 > >>

Paid Details

Medical Payments - Brett Comstock 2- Loss

Payments Included In Paid Amount | Total: 61,000.00

STATUS	AMOUNT	PAY TO	TRANSACTION DATE	BATCH ID	PAYMENT MODE
Requested	61,000.00	BA Bulk Validation	03/07/2025	54517	Check

Records: 1 - 1 of 1 | Go to page: 1 of 1 << < 1 > >>

Payments Not Yet Included In Paid Amount | Total: 40,000.00

STATUS	AMOUNT	PAY TO	TRANSACTION DATE	BATCH ID	PAYMENT MODE
Pending Approval	40,000.00	Brett Comstock 2	03/07/2025	54544	One Inc Customer Choice Pay...

Records: 1 - 1 of 1 | Go to page: 1 of 1 << < 1 > >>

Close

Hotfix Process Improvement

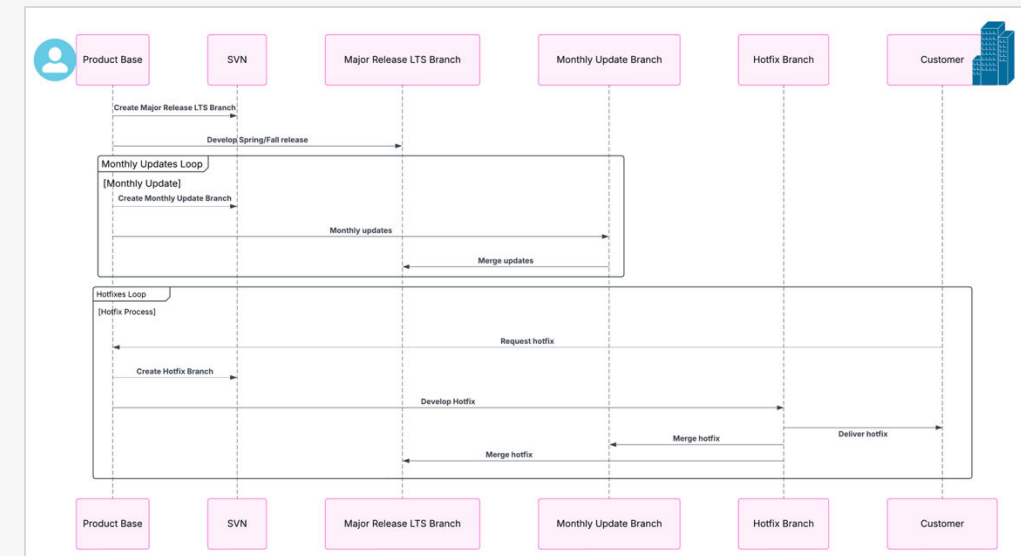
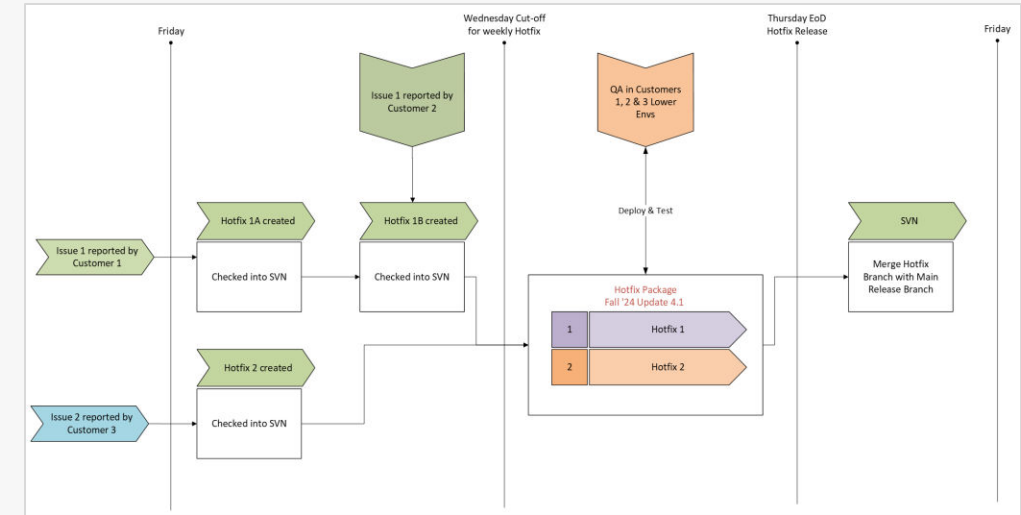
More Predictable Process and More Fixes, Faster

Capabilities & Changes

- Standardized hotfix release process for P&C Policy, Core Services, and LOB.
- Improved testing pipeline
- Cumulative hotfix for consistency and stability of releases
- Hotfix releases will occur weekly on Thursdays (except release week)
- Hotfix releases will no longer be specific to individual customers but will be applicable to all customers as a base release
- Hotfixes will be developed on the code/configuration base from two major releases prior to the most recent major release
- Improved communication and provide organized tracking through Epic grouping.

Business Value Add

- You will see a more predictable schedule, consistent, well-tested codebase
- Hotfixes will be cumulative, letting you get more in each hotfix
- Backported versions means hotfixes are readily available even if you're not on the latest version



Other Enhancements

Improving Your Day-to-Day Interactions



Capabilities & Changes

- Usability enhancements to moratorium workflows
- Underwriter rule no longer triggered for roll forward transactions while performing out of sequence endorsements
- Auto-withdrawal of earned premium invoice billed amount
- Ability to configure how invoicing is handled in more complex account conditions
- Added sorting/reverse sorting capability on all columns in the Policy Lifecycle tab

Business Value Add

- Moratoriums management is more efficient and less error prone than ever before
- Underwriters - they no longer need to re-approve/deny changes previously approved/denied prior to performing out of sequence endorsements
- Reduced risk of bad debt for carriers through auto-withdrawal of earned premium
- Reduced cost of creating, printing, and mailing invoices for policies that are likely to be cancelled; reduced end insured confusion; and increased back-office efficiency.
- Enhanced sorting capabilities provide increased efficiency and improved customer service

POLICY/QUOTE NUMBER	ENTITY TYPE	REVISION/NUMBER	EFFECTIVE DATE	EXPIRATION DATE	STATUS	LAST MODIFIED BY	LAST MODIFIED DATE	INCLUDED	ACTION
01-CA-00001186-0	POLICY	001	01/31/2025	06/01/2025	Invalid by Revision 004	Default Administrator	03/12/2025	Yes	Exclude
01-CA-00002062-0	POLICY	005	01/31/2025	01/10/2026	Ready for Booking	Default Administrator	01/30/2025	Yes	Exclude
01-CA-00002063-0	POLICY	001	01/31/2025	11/19/2025	In Force	Default Administrator	01/30/2025	Yes	Exclude
01-CA-00002064-0	POLICY	005	01/31/2025	08/22/2025	In Force	Default Administrator	08/22/2024	Yes	Exclude
01-CA-00001188-0	POLICY	004	01/31/2025	06/01/2025	In Force	Default Administrator	03/12/2025	Yes	Exclude
01-CA-00001186-0	POLICY	003	01/31/2025	06/01/2025	In Force	Default Administrator	03/12/2025	Yes	Exclude
01-CA-00001186-0	POLICY	002	01/31/2025	06/01/2025	Invalid by Revision 003	Default Administrator	03/12/2025	Yes	Exclude

Transaction Premium	Taxes, Fees, Surcharges	Written Premium	Commission	Policy Period	Current Due	Open Claims	Status
\$3,236.00	\$1.76	\$3,236.00	\$323.60	03/18/2025 - 03/18/2026	\$0.00	0	Ready for Booking

Transaction Premium	Taxes, Fees, Surcharges	Written Premium	Commission	Policy Period	Current Due	Open Claims	Status
\$1,934.00	\$2.00	\$7,923.00	\$0.00	10/07/2024 - 10/07/2025	\$0.00	2	In Force

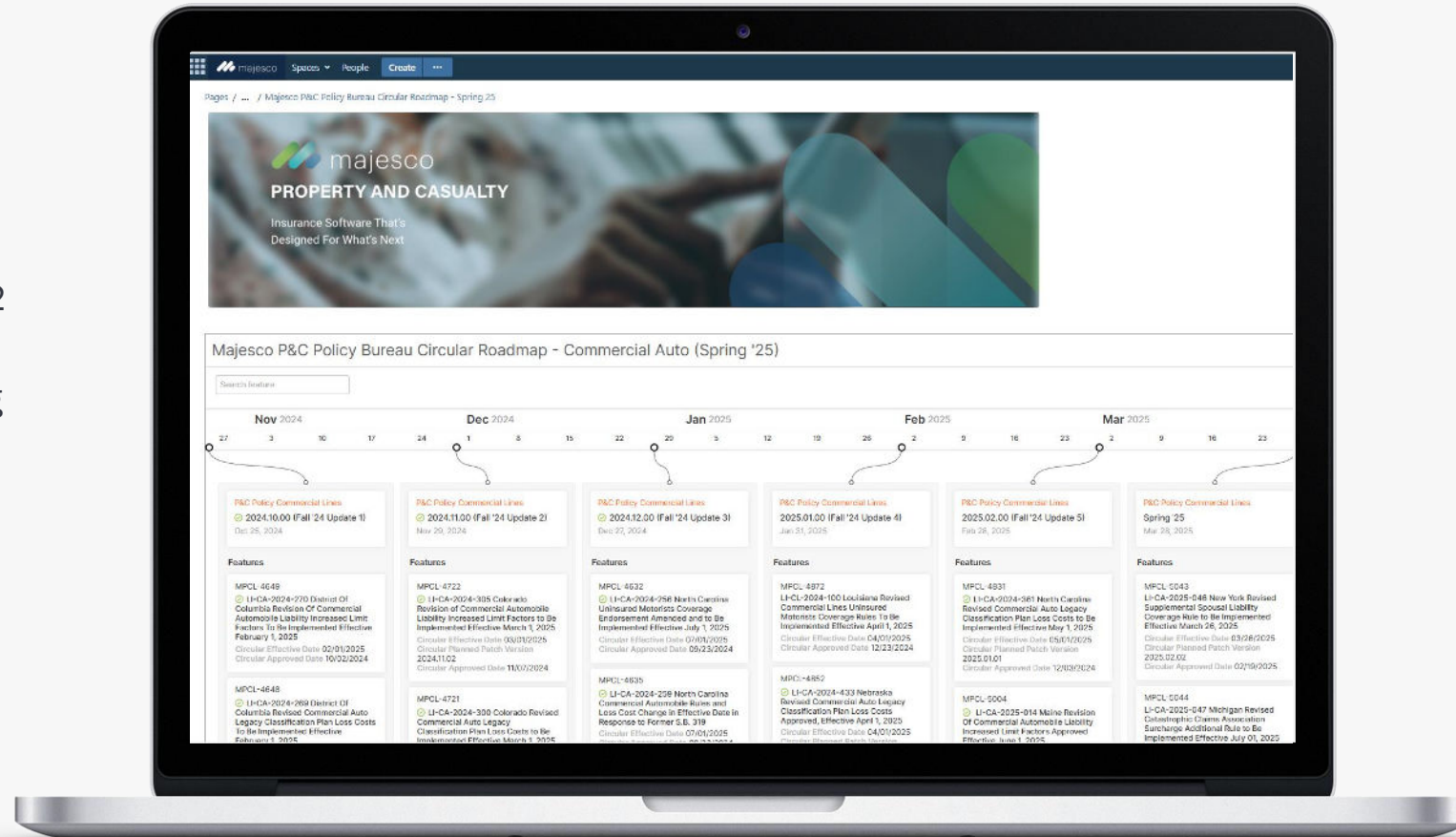
Policy Term	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	CHANGE SUMMARY
Policy 01-CA-000024258-0	003	Endorsement	03/05/2025	03/05/2025 01:22	03/05/2025 04:48	Default Administrator	Rating - Suspended	View
Policy 01-CA-000024258-0	002	Endorsement	12/09/2024	10/30/2024 07:56	10/30/2024 08:00	Default Administrator	In Force	View
Policy 01-CA-000024258-0	001	Endorsement	11/09/2024	10/30/2024 07:54	10/30/2024 07:58	Default Administrator	In Force	View
Policy 01-CA-000024258-0	000	New Business Policy	10/07/2024	10/30/2024 07:04	10/30/2024 07:04	Default Administrator	In Force	
Quote 01-CA-000024258-0	000	Clone Quote	10/07/2024	10/30/2024 06:51	10/30/2024 07:01	Default Administrator	Converted to Policy	

Majesco P&C Bureau Content Service

What does it do?

We manage circulars so you don't have to

- Manages the most common circulars so customers don't need to
- Always have the latest circulars available for adoption
- 642 circular updates applied resulting in 82,890 changes and 1 million+ records updated in the last 12 months
- Take advantage of Majesco's long history of managing circular updates and the expertise to make sure it is done correctly
- Use a simple management portal to manage available circulars and apply the appropriate one(s)



A background image of a lavender field with two hands reaching out towards the flowers. The image is overlaid with several semi-transparent geometric shapes in shades of teal, blue, and green. The text 'MAJESCO P&C CORECONNECT' is centered in white, bold, sans-serif font.

MAJESCO P&C CORECONNECT

P&C Core Connect Highlights

Fast Upgrade – Phase 1

New architecture will enable effortless, rapid updates with SQL source control, a locked core, and hooks for customization—allowing clients to extend capabilities and tailor the UI without modifying locked core code.

New Insured Portal – Mobile Device Support

A modern, mobile-friendly experience enhances usability and accessibility for insureds.

Power BI Landing Page – New Look, New Technology

Part of a broader initiative to embed new AI driven insights and analytics with feature-rich industry proven Microsoft Power BI.

Productivity Enhancements

- Quote of Record – restore previous versions of Quote.
- Billing - greater flexibility with due date adjustments, refund tracking, and improved write-off management.
- Performance Enhancements - 18% average improvement.





Fast Upgrade – Phase 1

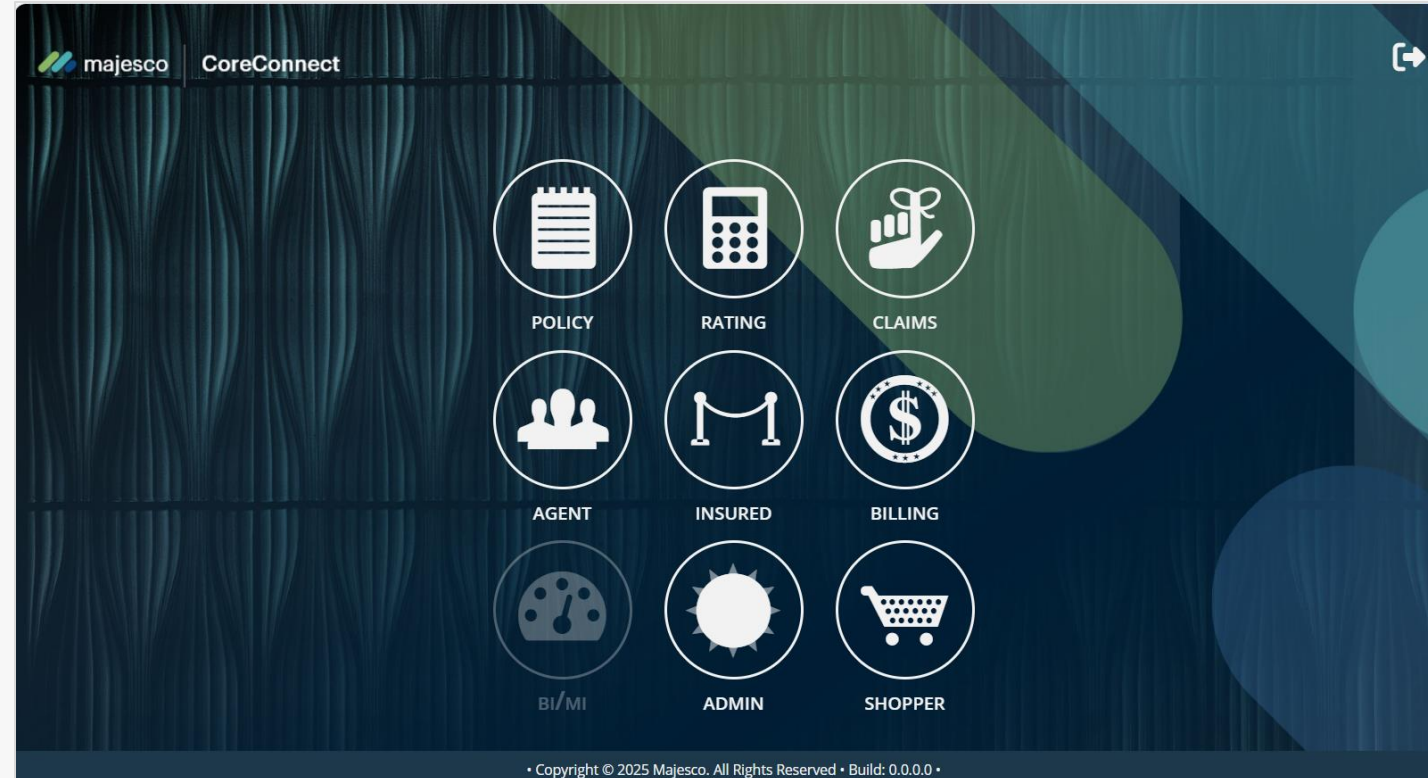
Effortless SQL Updates with Customizable Architecture

Capabilities

- **True Base Core** – A standardized, locked core that remains identical across all clients, eliminating the need for code-level merges.
- **Hooks Framework** – Enables clients to customize UI and extend functionality without modifying shared core code.
- **Split Solution Architecture** – Separates core framework from custom client configurations.
- **SQL Source Control Implementation** – Provides structured, version-controlled database updates for stability and transparency.

Business Value Add

- Upgrade effort reduction by 90%, enables seamless, frequent updates, lowers costs, and ensures continuous security, compliance, and feature enhancements without disrupting business.





New Insured Portal - Mobile Device Support

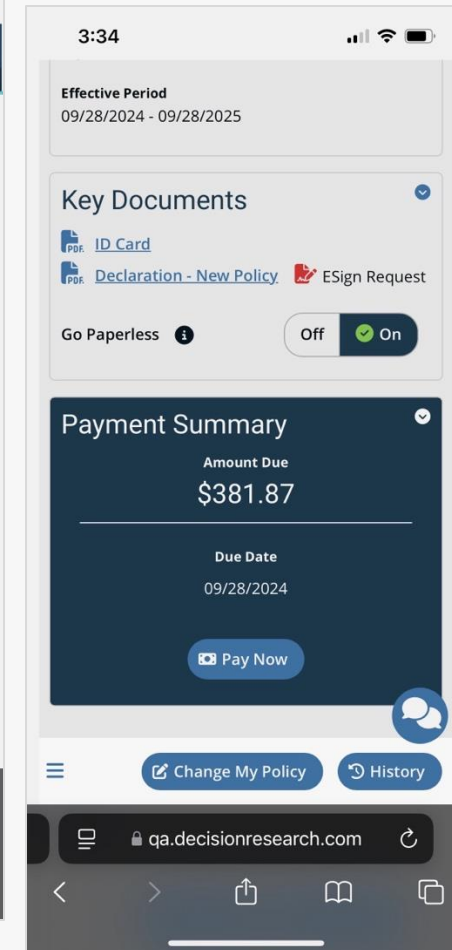
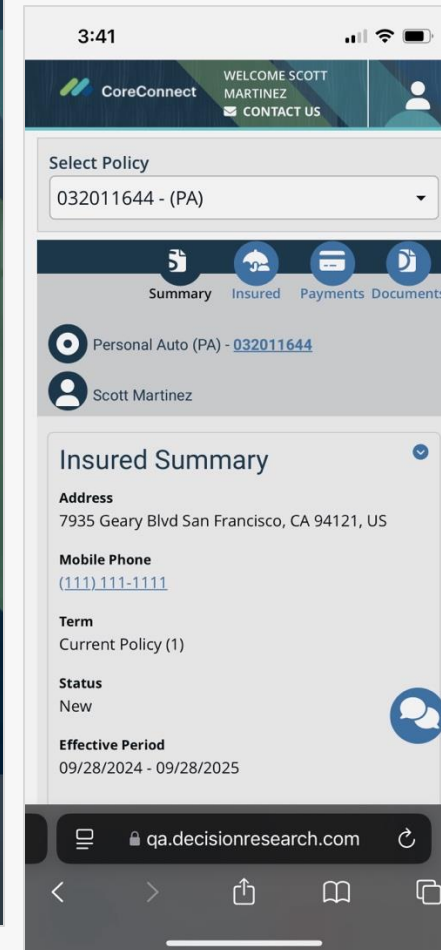
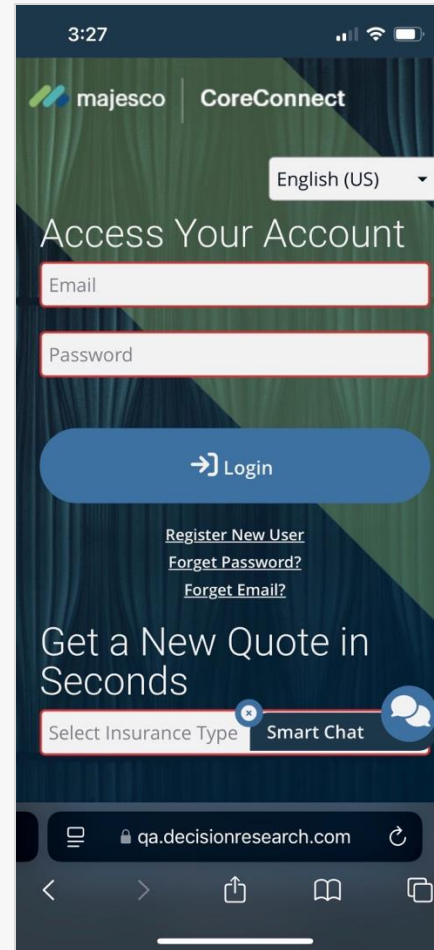
Mobile-Friendly for Better Usability

Capabilities

- 100% responsive compatibility for all customer devices increasing end-user adoption of Insured Portal.
- Anytime, anywhere, any device portal access is required by consumers and our customers. Also, consistency of brand proposition of our customers.

Business Value Add

- Customers benefit from reduced operational effort for servicing customers' requests for Billing, Evidence of Insurance, Policy Docs, etc.





Power BI Analytics

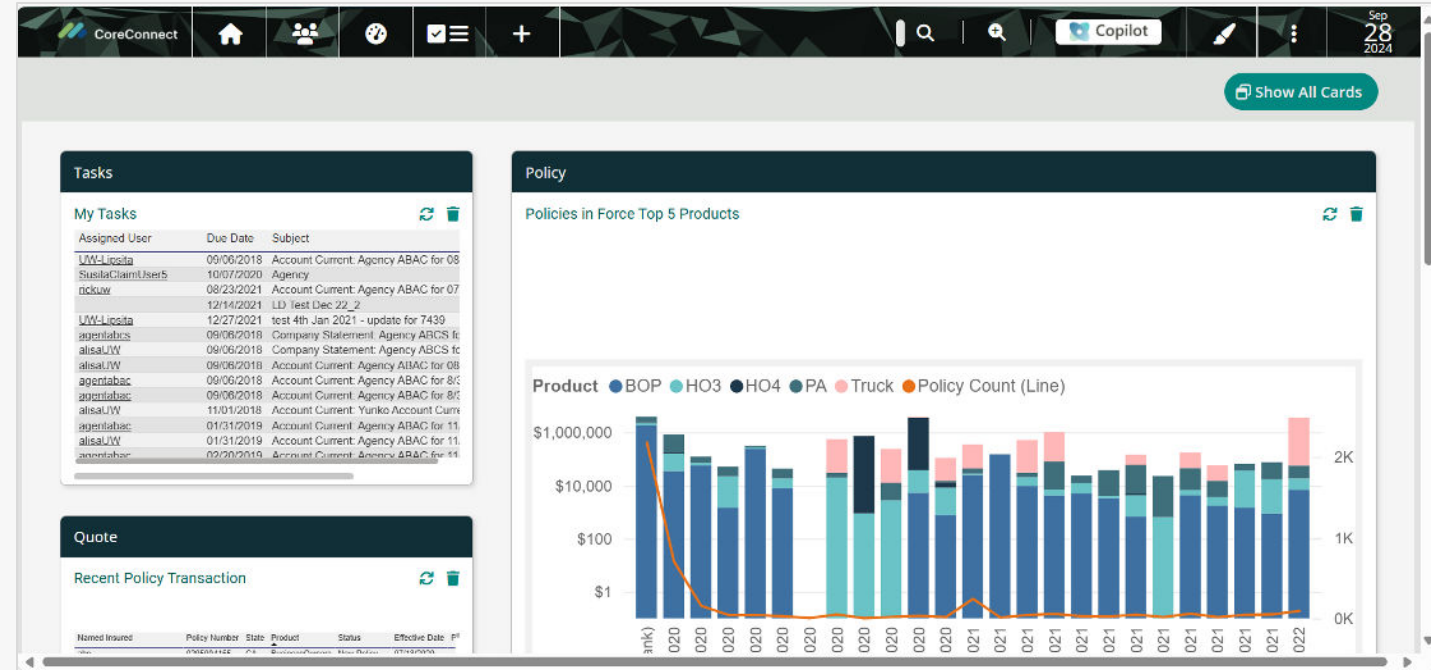
AI Insights with Power BI Integration

Capabilities

- A refreshed, data-driven dashboard improves insights and user experience.
- Part of a broader initiative to embed new AI driven insights and analytics with feature-rich industry proven Microsoft Power BI.

Business Value Add

- Empowers business users with enhanced, intuitive AI-driven analytics for deeper insights and faster decision-making—while reducing licensing and maintenance costs with modern Power BI technology.





Policy, Quote & Billing Enhancements

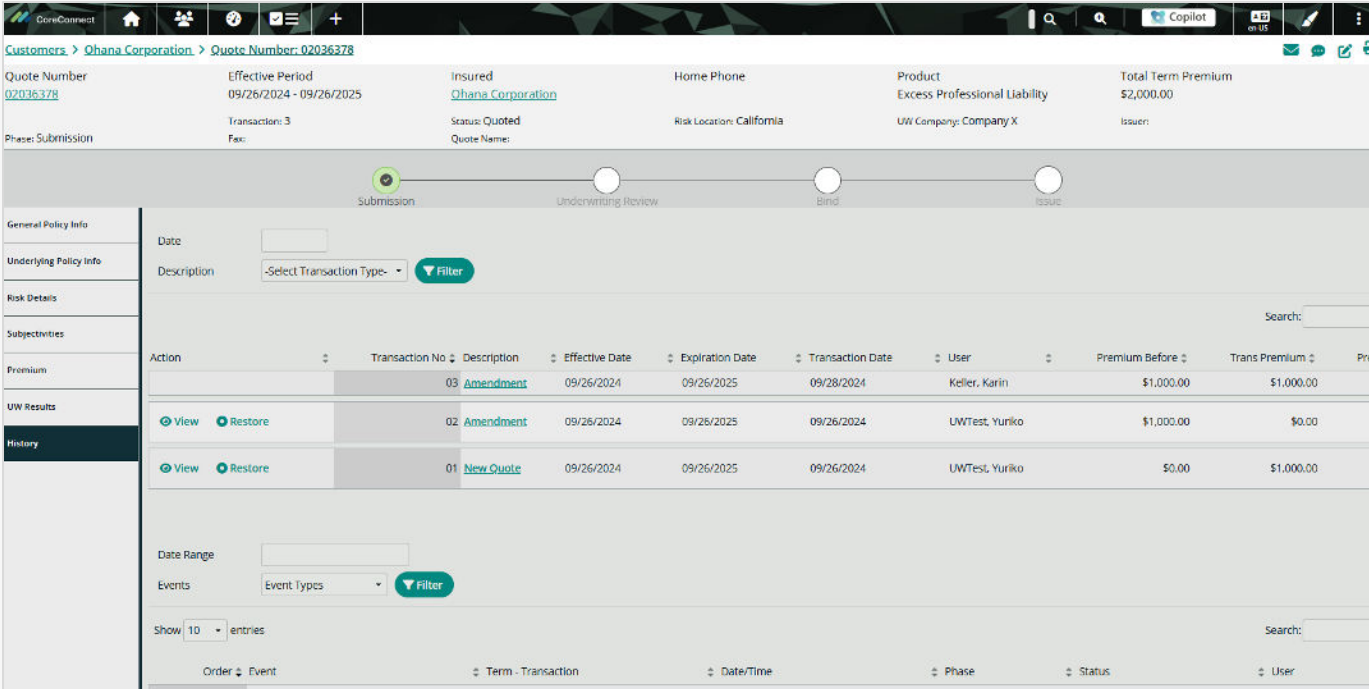
Effortless SQL Updates with Customizable Architecture

Capabilities

- **Quote of Record** – restore previous versions of Quote.
- **Billing Enhancements** - greater flexibility with due date adjustments, refund tracking, and improved write-off management.
- **Performance Enhancements** - 18% average improvement in API performance

Business Value Add

- Customers benefit from faster processing, greater flexibility, and enhanced functionality with CoreConnect's quote, policy, billing, and performance updates.



The screenshot displays the CoreConnect application interface for managing a quote. The top navigation bar includes 'CoreConnect' and various utility icons. The main header shows the breadcrumb 'Customers > Dhana Corporation > Quote Number: 02036378'. Below this, a summary section provides key details: Quote Number (02036378), Effective Period (09/26/2024 - 09/26/2025), Insured (Dhana Corporation), Home Phone, Product (Excess Professional Liability), Total Term Premium (\$2,000.00), Phase (Submission), Transaction (3), Status (Quoted), Risk Location (California), UW Company (Company X), and Issues.

A progress bar indicates the workflow stages: Submission (active), Underwriting Review, Bind, and Issue.

The left sidebar contains a menu with options: General Policy Info, Underlying Policy Info, Risk Details, Subjectivities, Premium, UW Results, and History (selected).

The main content area features a search bar and a table of transactions. The table has columns for Action, Transaction No., Description, Effective Date, Expiration Date, Transaction Date, User, Premium Before, Trans Premium, and Pre. The table lists three transactions: 03 Amendment, 02 Amendment, and 01 New Quote. Each transaction row includes 'View' and 'Restore' links.

Below the table, there are filters for Date Range, Events (Event Types), and a 'Filter' button. At the bottom, there is a 'Show 10 entries' option and a search bar.

Action	Transaction No.	Description	Effective Date	Expiration Date	Transaction Date	User	Premium Before	Trans Premium	Pre
	03	Amendment	09/26/2024	09/26/2025	09/28/2024	Keller, Karin	\$1,000.00	\$1,000.00	
View Restore	02	Amendment	09/26/2024	09/26/2025	09/26/2024	UWTest, Yuriko	\$1,000.00	\$0.00	
View Restore	01	New Quote	09/26/2024	09/26/2025	09/26/2024	UWTest, Yuriko	\$0.00	\$1,000.00	

A background image of a lavender field with two hands reaching towards the flowers. The image is overlaid with several semi-transparent geometric shapes in shades of teal, blue, and green. The title text is centered within a large teal circle.

MAJESCO P&C ENTERPRISE RATING

P&C Enterprise Highlights

Akur8 Integration

Integrates Akur8's modeling with Enterprise Rating workbooks, covering the entire rating lifecycle and improving efficiency by unifying systems.

Copilot

Trained with additional documentation to help troubleshoot workbook errors, accelerating error resolution and improving user efficiency.

Product Schema Enhancements

No-code import creates a schema with key details, enabling automatic UI and validation rule generation for faster front-end development.

EcoExchange Pre-integration

Enterprise Rating customers can easily incorporate BCEGS data into their rating process, enhancing underwriting results and reducing implementation costs.





Akur8 Integration

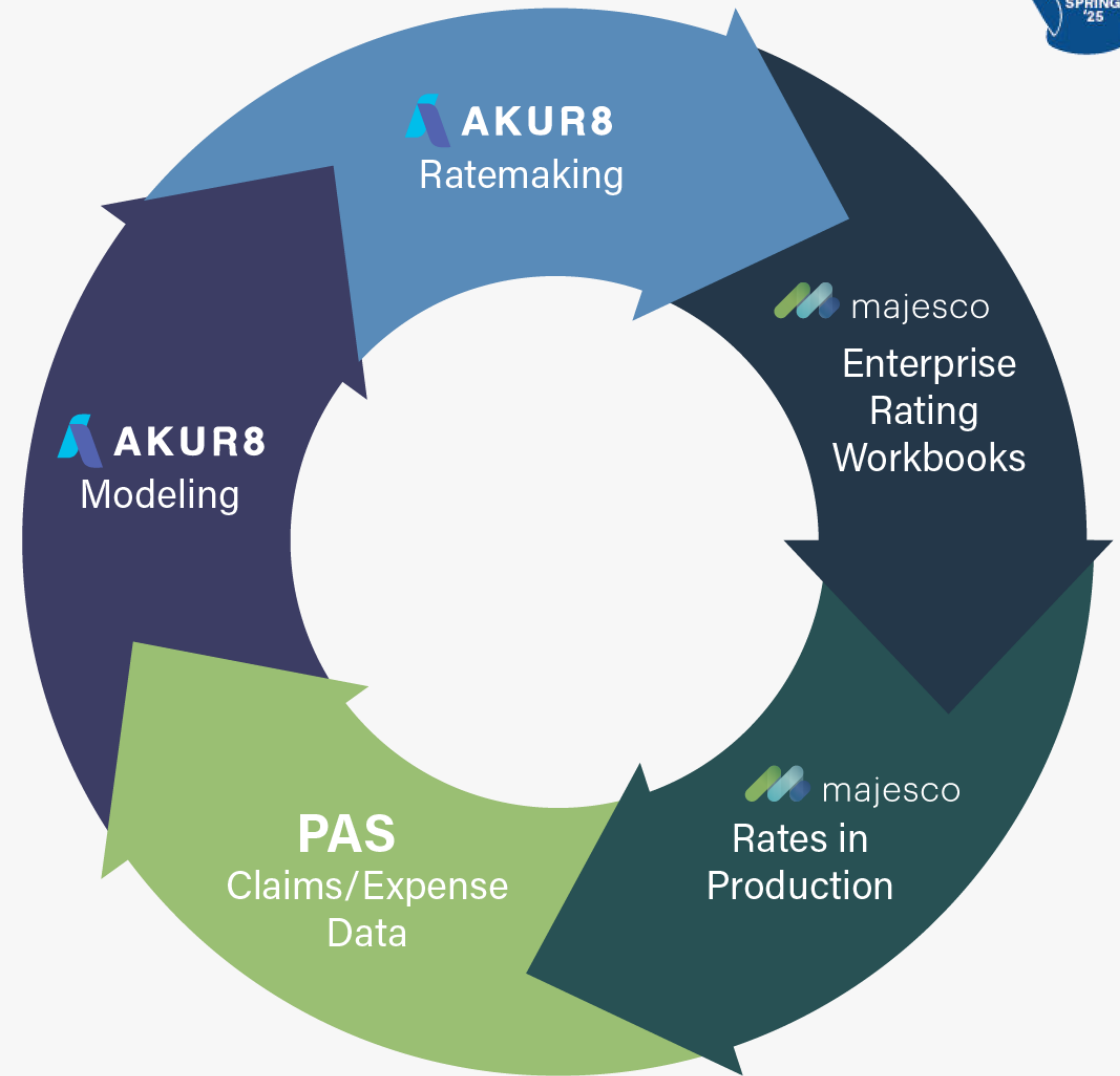
Streamlined Rating Integration

Capabilities

- Enterprise Rating, in conjunction with our rate modeling partner Akur8, now offers tooling that seamlessly integrates the output of the Akur8 modeling process with workbooks used in Enterprise Rating.

Business Value Add

- This integration enables Enterprise Rating clients to cover the full rating lifecycle, from rate-making to production rating.
- Having a unified ecosystem for this full lifecycle removes the need for multiple systems to handle various aspects of this lifecycle, improving overall efficiency.





Copilot with Compile Error Assistance

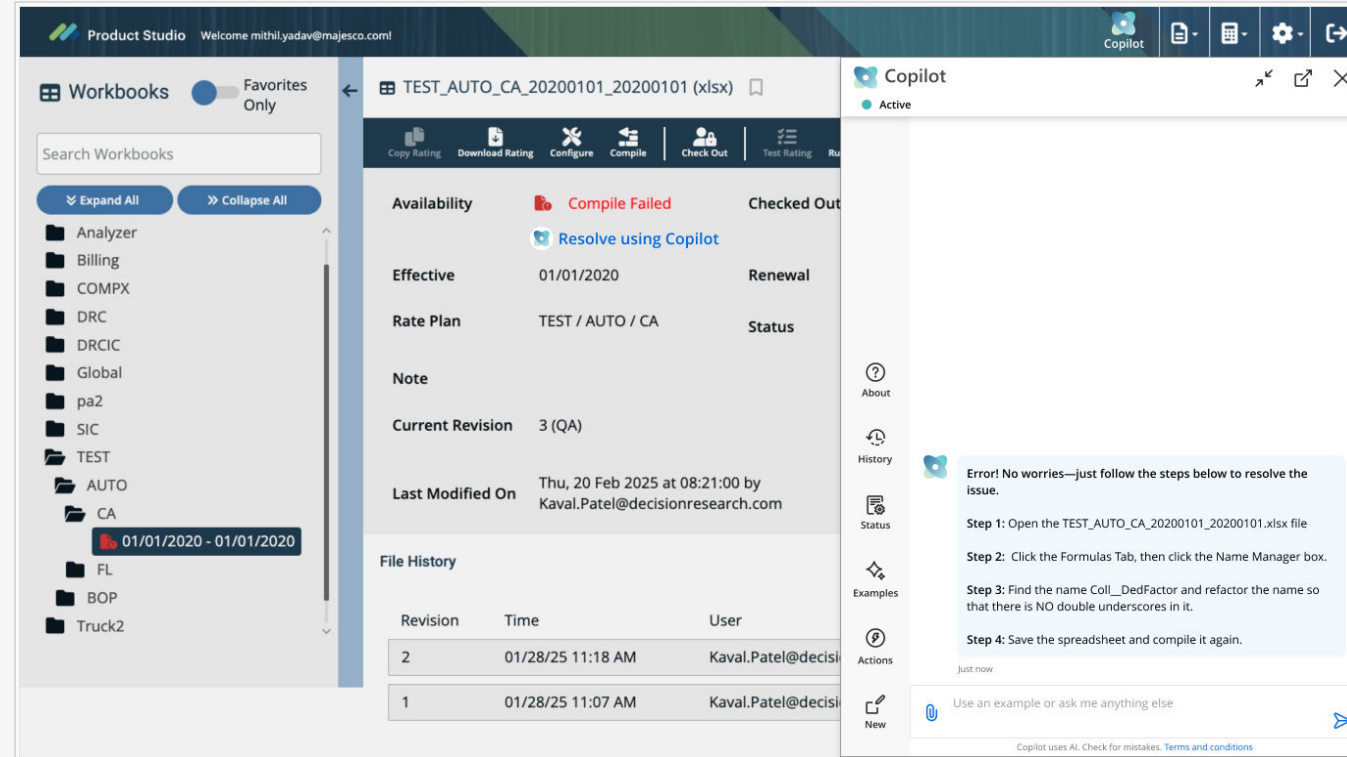
Enhanced Error Resolution Training

Capabilities

- Enterprise Rating's Product Studio Copilot has been trained with additional documentation and enhanced to provide help for troubleshooting errors that can potentially occur during the workbook development process.

Business Value Add

- Troubleshooting compiler errors can be challenging for new users of the system, this new Copilot helper will greatly accelerate the process of resolving such errors and getting them back to true insurance product building activity.



The screenshot displays the Product Studio interface with a sidebar showing a file tree. The main area shows a workbook titled 'TEST_AUTO_CA_20200101_20200101 (xlsx)' with a 'Compile Failed' error. The Copilot assistant is active, providing a message and four steps to resolve the issue.

Compile Failed

[Resolve using Copilot](#)

Availability **Checked Out**

Effective 01/01/2020 **Renewal**

Rate Plan TEST / AUTO / CA **Status**

Note

Current Revision 3 (QA)

Last Modified On Thu, 20 Feb 2025 at 08:21:00 by Kaval.Patel@decisionresearch.com

File History

Revision	Time	User
2	01/28/25 11:18 AM	Kaval.Patel@decisionresearch.com
1	01/28/25 11:07 AM	Kaval.Patel@decisionresearch.com

Copilot Active

Error! No worries—just follow the steps below to resolve the issue.

Step 1: Open the TEST_AUTO_CA_20200101_20200101.xlsx file

Step 2: Click the Formulas Tab, then click the Name Manager box.

Step 3: Find the name Coll_DedFactor and refactor the name so that there is NO double underscores in it.

Step 4: Save the spreadsheet and compile it again.

Just now

Use an example or ask me anything else

Copilot uses AI. Check for mistakes. [Terms and conditions](#)



Majesco Copilot for Enterprise Rating Product Studio

Rapid Error Resolution

Designed to streamline rate development and error resolution for insurers. By automating complex processes and providing intelligent insights, it accelerates decision-making, reduces manual effort, and enhances accuracy, saving rate analysts hundreds of hours while improving operational efficiency.



Capabilities

- **AI-Powered Error Resolution** – Compiled errors are sent to **Majesco Copilot**, which analyzes root causes and provides real-time solutions, reducing manual effort and troubleshooting time.



Business Value Add

- **Seamless Integration & Accuracy** – Works within **DRC Product Studio**, ensuring a smooth workflow while refining rate models with precise, AI-driven recommendations.

The screenshot displays the Majesco Copilot interface within the DRC Product Studio. The interface is divided into several sections:

- Workbooks:** A sidebar on the left showing a file tree with folders like QA, Analyzer, Billing, COMPT, DRC, DRCIC, Global, pa2, SIC, TEST, AUTO, CA, FL, BOP, Truck2, and UHPC. A date range filter is set to 01/01/2020 - 01/01/2020.
- Note:** A section on the right showing the current revision (3 (QA)) and the last modified date (Thu, 20 Feb 2025 at 08:21:00 by Kaval.Patel@decisionresearch.com).
- File History:** A table showing the history of file revisions.
- Compile Summary:** A section showing the results of a compilation, indicating that one or more errors occurred.
- Copilot Chat:** A chat window on the right showing a message from the Copilot, stating: "The error related to the workbook path indicates that there is an issue with the Name Manager in the workbook. Specifically, the error message states that the Name Manager contains a double underscore in the name 'Coll_DedFactor' located in cell SL511 of the 'main' sheet. This naming convention is causing the compiler to exit with an error [1]."

Revision	Time	User
2	01/28/25 11:18 AM	Kaval.Patel@decisionresearch.com
1	01/28/25 11:07 AM	Kaval.Patel@decisionresearch.com

Compile Summary: Errors occurred.

One or more errors occurred (*)
error running C:\majesco\er\compile\compile.exe -pscomment New file from upload. -psrevision 3 -ldflags -s -w -catalogupdate-fa
o C:\majesco\er\compile_781067347 C:\majesco\er\compile_1876105508.xlsx: Majesco Enterprise Rating Compiler
serializing...took 1.3658483s
parse workbook..
error: Name Manager contains double underscore: Coll_DedFactor=main!\$L\$11
error: exiting
with 1 error

Copilot Chat:

QA\TEST\AUTO\CA\TEST_AUTO_CA_20200101_20200101.xlsx
6 minutes ago

The error related to the workbook path indicates that there is an issue with the Name Manager in the workbook. Specifically, the error message states that the Name Manager contains a double underscore in the name "Coll_DedFactor" located in cell SL511 of the "main" sheet. This naming convention is causing the compiler to exit with an error [1].

1 reference v
1 Citation-1

Use an example or ask me anything else



Product Schema Enhancements

No-Code Schema for Rapid UI Development

Capabilities

- Key information about the insurance product is specified in the workbook, such as the input details, their data types, validation ranges, formatting, user comments, Product Studio metadata and more.
- The no-code Enterprise Rating import process creates a product schema document that persists this critical information.

Business Value Add

- Developers that interact with Enterprise Rating will be able to use tooling to read the product schema, enabling them the automatically generate UI views and validation rules, greatly accelerating the process of building front-end applications that utilize Enterprise Rating as a back-end service.

```

"$id": "http://decisionresearch.com/schemas/majesco_auto_fl_20250101.schema.json",
"$schema": "http://json-schema.org/draft-07/schema#",
"comment": "Revision specific comment from Product Studio",
"edits": [ ...
],
"inputs": {
  "BiLimit": {
    "column": 5,
    "enum": [
      "",
      "25/50",
      "50/100",
      "100/300",
      "250/500",
      "500/1000"
    ],
    "errorTitle": "BICoverage",
    "example": "100/300",
    "name": "BiLimit",
    "prompt": "BI Limit",
    "row": 9,
    "type": [
      "string",
      "null"
    ]
  }
}

```

	BI Limit	PD Limit	MedPay Limit	UM Limit	Comp Deductible	Coll Deductible
	100/300					
	88					
	1.47					
	1.38					
	1					
	1					
	0.57					
	1.1					
	1.18					
	132.08	11				

Data Validation

Settings | Input Message | Error Alert

Validation criteria

Allow: List ☐ Ignore blank ☒ In-cell dropdown ☒

Data: between ☐

Source: 25/50,50/100,100/300,250/500,500/1000

☐ Apply these changes to all other cells with the same settings

EcoExchange Preintegration – Building Code Effectiveness Grading Schedule

BCEGS Data Integration




Capabilities


- Enterprise Rating customers can incorporate the EcoExchange based Verisk BCEGS service into their rating process with near-zero implementation effort.

Business Value Add

- Enterprise Rating property insurance clients can augment their rating process by incorporating the BCEGS information directly into rating to improve their underwriting results.
- Overall implementation cost is lowered with the integration to Enterprise Rating already built.

 EcoExchange

← App Details - Building Code Effectiveness Grading Schedule (BCEGS®)



Building Code Effectiveness Grading Schedule (BCEGS®)

Verisk

LOCATION offers a fast and accurate way to get information on building code enforcement, including Building Code Effectiveness Grading Schedule (BCEGS) codes, for more than 20,000 communities around the country.

Overview

Verisk collects and analyzes information from communities about their building code adoption and enforcement practice to assign a Building Code Effectiveness Classification from 1 to 10, with grade 1 representing an exemplary commitment to building code enforcement.

Website
www.verisk.com

Support
Email: leads@verisk.com

Categories
Quoting, Underwriting

Billed By
Verisk

A background image of a lavender field with two hands gently touching. The image is overlaid with several semi-transparent geometric shapes in shades of teal, blue, and green. The text 'MAJESCO LOSS CONTROL' is centered in white, bold, uppercase letters.

MAJESCO LOSS CONTROL

Loss Control Highlights

Copilot

Copilot is now able to generate overviews of form data as well as Description of Operations details for properties.

Audit Trails

Additional Audit Trail logging has been added to improve transparency and accuracy of configuration data.

Prior Carrier

New Data Science integrations have been built to leverage AI-driven data extracts of Prior Carrier reports to ensure streamlined data input.





Assess Survey results efficiently



- ## Business Value Add

-

Your next now	40
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Copilot – Description of Operations


Generate Description of Operations

Capabilities

- Loss Control Copilot is now able to generate complete Description of Operations details based upon details of a property
 - These details are driven directly from information input into data collection forms already present on a survey
 - No configuration is necessary to generate the Description of Operations
- Loss Control Copilot is also now able to directly query any other data collected in existing data collection forms


Business Value Add

- **Increased Efficiency:** Auto-generates Description of Operations from existing data, saving time and effort.
- **Improved Accuracy:** Ensures consistency and reduces errors by using pre-collected data.
- **Cost Savings:** Eliminates the need for additional configuration and manual data entry.
- **Enhanced Data Utilization:** Queries any collected data for better decision-making.


 Copilot

Inspection #: 1391

Request a description of operations



A minute ago


 Sure, let me generate that for you


The property, named Lacrosse Storage Warehouse, operates as a commercial entity with a single occupant. It spans an area of 5000 square feet and is a three-story building constructed in 1972 with non-combustible materials. The building is in fair condition and has no external exposures. The roof, which is 25 years old and made of asphalt shingle, is in good condition and has been recently assessed. The water supply comes from a public water main and the building is located 10 miles away from the nearest fire department.


In terms of safety measures, the property is equipped with a fire alarm system, fire extinguishers, and a sprinkler system that covers 75% of the area. All these systems have been inspected and are in working condition. Smoke detectors are also present, however, there is no security or burglar alarm system installed.

The operations at the property are well-managed with excellent risk assessment and good maintenance. There are no hazards or environmental/occupational exposures noted. Safety procedures and training are adequate and there are no hazard warnings. A quality control system is in place along with proper food storage/refrigeration and waste

Use an example or ask me anything else

 Examples

 About

 Start over

Audit Trails

Additional Configuration Audit

- Additional auditing has been added to track the major areas of configuration, including:
 - Work Item Type Configuration
 - Correspondence and Notifications
 - Generic Fields
 - Single Sign On Configuration
 - Languages
 - Localizations / Translations
 - Currencies
 - Permissions
 - Users
 - Outgoing Integration Settings
 - System Settings
 - And more!





Prior Carrier Data Collection

Powerful, Configurable & Fully Transparent

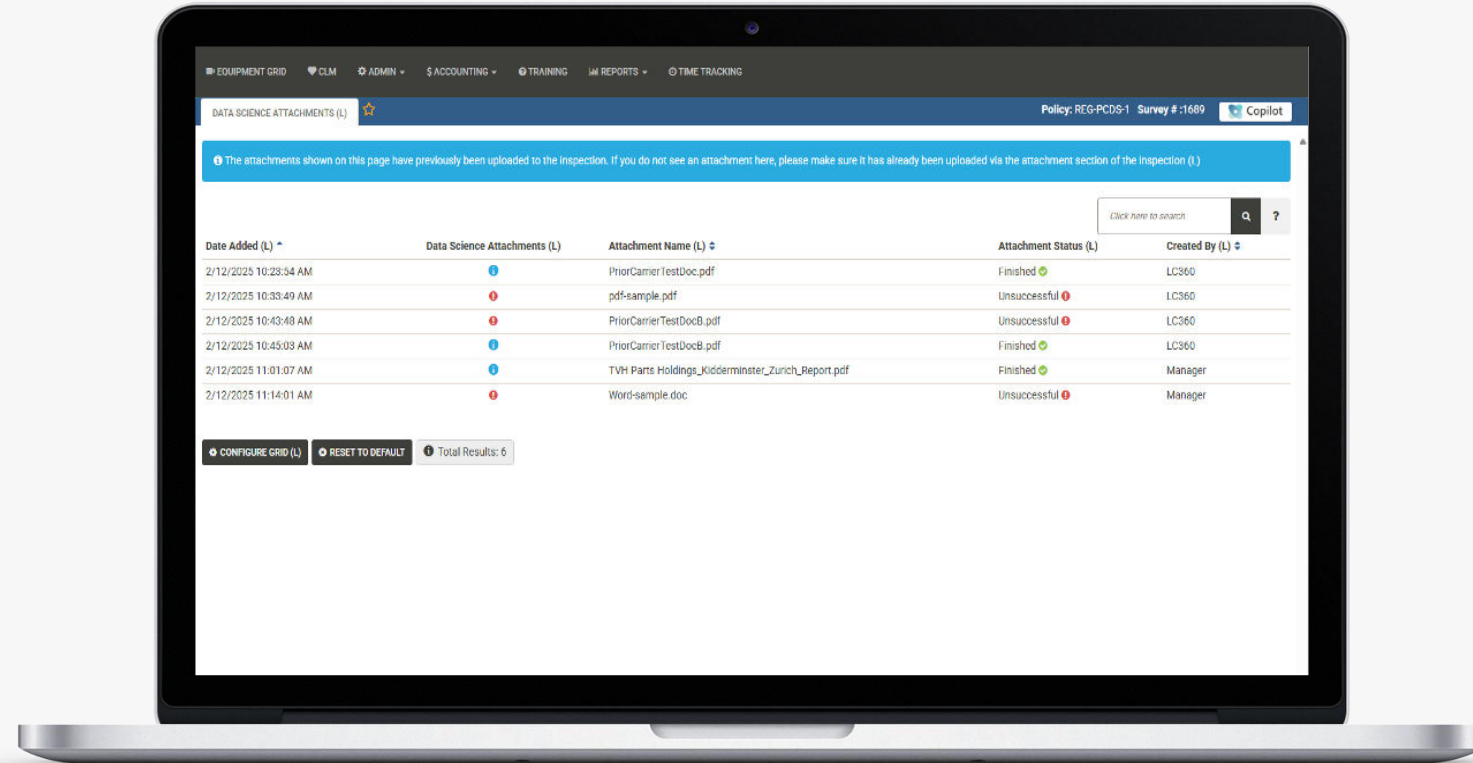
Upload documents directly to a Loss Control inspection and have those documents sent to a proprietary AI tool. This tool will then scan these documents for relevant data and return the data back in a format usable by your existing data collection tools in Loss Control













Capabilities




- The tool can take DOCX or PDF files for consumption, and can be configured directly within Loss Control to extract the data that is relevant to your business

Business Value Add

- The new module allows for visibility into what documents were sent and what our tool was able to determine from the documents, including where the relevant data was discovered within the documents.



Date Added (L) ^	Data Science Attachments (L)	Attachment Name (L) ^	Attachment Status (L)	Created By (L) ^
2/12/2025 10:28:34 AM		PriorCarrierTestDoc.pdf	Finished 	LC360
2/12/2025 10:33:49 AM		pdf-sample.pdf	Unsuccessful 	LC360
2/12/2025 10:43:48 AM		PriorCarrierTestDocB.pdf	Unsuccessful 	LC360
2/12/2025 10:45:03 AM		PriorCarrierTestDocB.pdf	Finished 	LC360
2/12/2025 11:01:07 AM		TVH Parts Holdings_Kidderminster_Zurich_Report.pdf	Finished 	Manager
2/12/2025 11:14:01 AM		Word-sample.doc	Unsuccessful 	Manager

 CONFIGURE GRID (L)  RESET TO DEFAULT  Total Results: 6

A background image of a lavender field with two hands gently touching the flowers. The image is overlaid with large, semi-transparent geometric shapes in shades of teal, blue, and green. The text 'MAJESCO L&AH INTELLIGENT CORE' is centered in white, bold, sans-serif font.

MAJESCO L&AH INTELLIGENT CORE

L&AH Intelligent Core Suite Highlights

Market Ready Features

Individual market enhancements and out-of-the-box AD&D solutions.

Smarter Claims & Billing

AI-driven adjudication and automated data reconciliation.

Faster Upgrades & Resilience

Accelerate updates while ensuring system stability.

Next-Gen Analytics

Automated Reporting, Secure Access & Tailored Insights.

Operational Efficiency & Resiliency

Introducing advanced telemetry, instrumentation, and rollback/recovery options.



Individual Market Readiness

Illustrations, Cash Value transactions to support & differentiate Individual retail products in Sales pursuits



Capabilities

- **Engaging Visuals:** Illustrate benefit projections of Individual Whole life product across the policy lifecycle.
- **Ready-to-Use Calculations & Documents:** Generate illustrations instantly at policy issuance.
- **Comprehensive Support:** In-force quotes, policy loans, repayments, surrenders, payouts & more.
- Process all changes to policy with recalculation of premiums where applicable.

Business Value Add

- **Enhance** client understanding with clear benefit projections, improving transparency and trust.
- **Speed up** policy issuance and reduce processing time, ensuring a seamless customer experience.
- **Simplify** financial transactions, making policy adjustments easy for both clients and carriers.

Policyholder Dashboard | Alden Miller

Demographics: Not Disabled, Non Smoker, Male, Birth Date: 10/25/1993

Coverages: Showing Coverages (1)

Billing: Modal Premium: \$0, Upcoming PTD on: -

Transactions: 0 In Last 6m, 0 Pending, Last Transaction on: -, Next Transaction on: -

UW & Claims: No UW, \$0 Claimed Amt., \$20K Total SAR, Total Claims: 00, Total Insured: 01

Policyholder Information: ID: MINCG00010023143, Tax ID Number: XXX-XX-7688, Phone No.: --

Rate Tier-Update: Add Dependent, Terminate Depend

Individual Policy: Individual Whole Life, C00011460, Showing Policy

Coverage Details: Coverage Name: Individual Whole Life, Insured Name: Alden Miller, Coverage Amount: 20,000.00

Policy Illustration Summary: For Policy Identification Number: C00011460. The following illustrates the Death Benefit, Contract Premium, Account Value and Cash Value as a guaranteed as well as non guaranteed basis. The assumptions used in these calculations are: Interest Assumption: The Guaranteed interest rate is 3%. The Current interest rate is 3%. The mid-point interest assumption is 3%.

Mortality Charge: Mortality Charge, the cost to provide basic death benefit, varies each year. The charge is computed at the beginning of each Policy Year and is defined in your policy contract.

Expense Charge: Per your policy contract, a flat expense charge may be levied each year up to a maximum of . For purposes of illustration, is used in the calculation of Current Cash Value and Surrender Value. is used in the mid-point calculation of these values. There is also a policy fee and a premium expense charge, both of which are guaranteed.

Traditional Cash Value: This unique policy also provides a secondary guarantee equivalent to the minimum cash value of a traditional endowment at age 95 (policy). This secondary minimum often preempts the guaranteed, current and mid-point calculations.

Summary Illustration: The following is a summary illustration showing both Guaranteed and non guaranteed elements of a \$20,000.00 Interest Sensitive Endowment at Age 95 Policy. Contract issued premium \$0.00.

Summary Year	Guaranteed	Non Guaranteed Cash Value	
		Mid Point	Current
YEAR 5			
Surrender Value	183.53	229.41	260.00
Death Benefit	20000.00	20000.00	20000.00
YEAR 10			
Surrender Value	695.76	864.71	980.00
Death Benefit	20000.00	20000.00	20000.00
YEAR 20			
Surrender Value	2018.82	2523.53	2660.00
Death Benefit	20000.00	20000.00	20000.00

NOTE: THE ABOVE ILLUSTRATION ASSUMES NON GUARANTEED ELEMENTS WILL CONTINUE UNCHANGED, BUT THIS IS NOT LIKELY TO OCCUR. ACTUAL RESULTS MAY BE MORE OR LESS FAVORABLE. THIS ILLUSTRATION IS NOT A POLICY CONTRACT. I have received a copy of this illustration and understand that any non-guaranteed elements illustrated are subject to change and could be either higher or lower. (The agent has told me that they are not guaranteed.)

Notice: 126 (8/2010) LKY2A

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Time Zone: GMT-5:00 hours

Standalone AD&D

Ready-to-use product & workflows from new business to claims reducing implementation costs and time.



Capabilities

- **Rapid Sales** with Market-Ready Product Templates for Standalone AD&D product.
- **Effortless Quote to Issue** to Swift certificate Issuance with business checks & Pre-designed Policy documents.
- **Empower Sales** teams with a 360° Dashboard for Servicing, Billing, and Payments
- **Comprehensive** end-to-end Claims Support.& promotes straight through process.

Business Value Add

- 80 to 90% conformance expected with AD&D rollout for new customers, reducing time and cost for new implementations, providing faster revenue recognition.
- **Streamlined Administration** with Integrated End-to-End Administration Platform.

L&AH Suite RFP Dashboard

RFP ID: R0100014182 (New Business)

Classes: 5, Class Groups: 0, Plan Designs: 1, Quotes: 0

RFP ID	RFP Type	Group Number	Group Name	Group Type	Tax ID	Effective Date	Situs State	Status
R0100014182	New Business	6507581	Google Inc	Employer	96-9869869	03/01/2025	California	Plan Design

Group Demographics

Group Name	Group Number	Group Type	Tax ID
Google Inc	6507581	Employer	96-9869869

RFP Details

RFP ID	RFP Status	RFP Type	No. of Employees
R0100014182	Plan Design	New Business	55

Products Included in RFP

Product	Issue Type	Source	Status
Group Accident Death and Dismemberment	Non Trust	Internal	Plan Design

Available Census

Census ID	Description	File Type	Status
C0100015460	cs1	CSV Upload	Draft

Plans

Plan ID	Product	Description	Effective Date	Status
---------	---------	-------------	----------------	--------

Quote Details

Number	Description	Product	Quote Date	Status
--------	-------------	---------	------------	--------

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Time Zone: GMT-5:00 hours



Smarter Claims – AI driven Adjudication

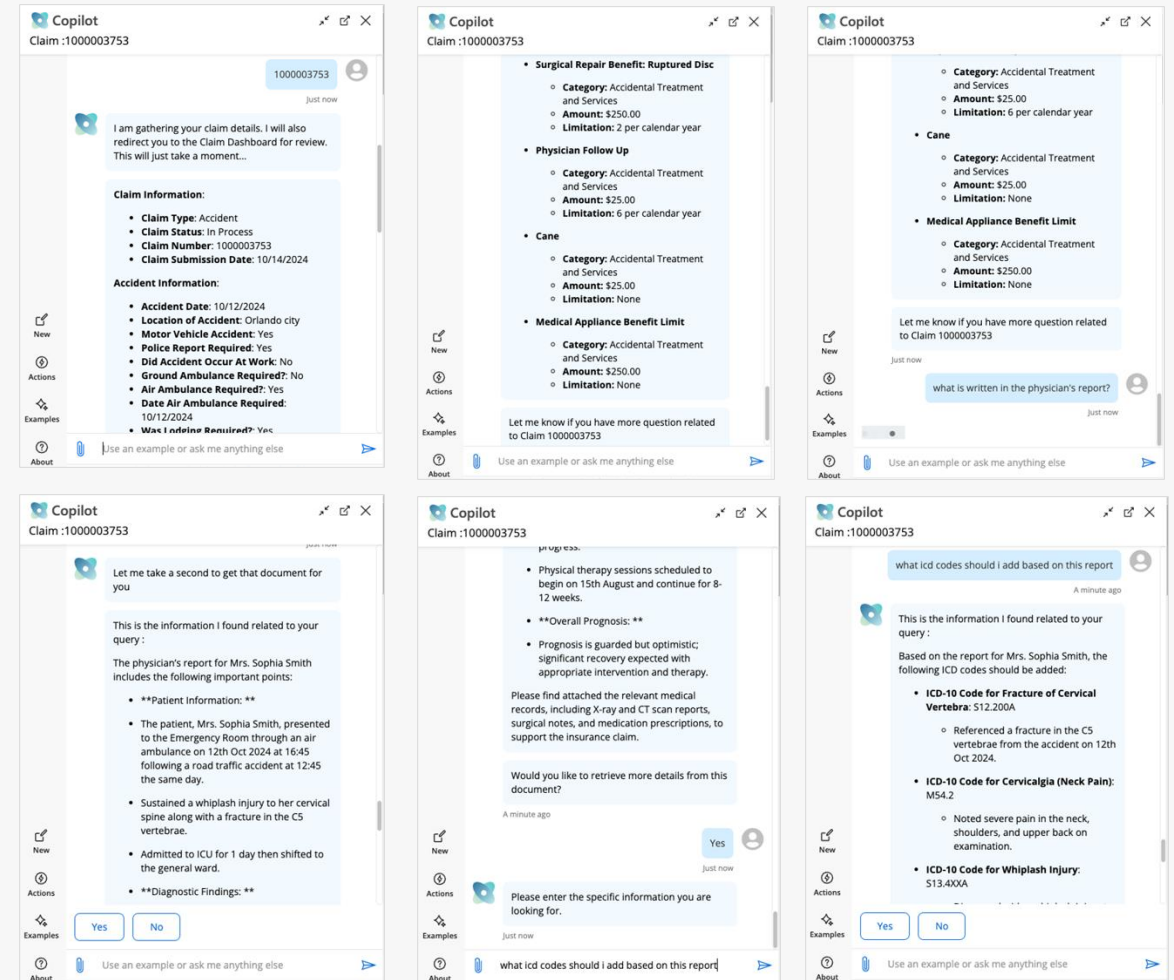
Automates claim document reviews and prior claim analysis, cutting decision time by 70%

Capabilities

- **AI-Driven Adjudication:** Accelerate A&H claims processing with Gen AI and Copilot.
- **Faster Turnaround:** Reduce decision time significantly with intelligent automation.
- **70% Efficiency Boost:** Automate interpretation of unstructured data, past claims, and notes.
- **Streamlined Review:** Generate pre-approved decisions for quick finalization.

Business Value Add

- **Operational Efficiency:** Reduce manual effort with AI-driven claims adjudication.
- **Faster Claims Processing:** Accelerate decision-making, improving turnaround time
- **Quicker Payouts:** Faster claims approval means reduced waiting times.
- **Improved Accuracy:** AI-driven decisions lower errors and disputes.





Billing Data Reconciliation & Correction

Automatically aligns billing, policy, and claims data, reducing support tickets.

Capabilities

- **Data Alignment Reports:** Ensure consistency between Billing, Policy & Claims for system integrity.
- **Prevent Operational Issues:** Detect and correct system errors, data patches, and failed integrations.
- **Avoid Billing & Payment Mismatches:** Reduce discrepancies that impact customer experience
- **Minimize Support Tickets:** Proactively address data issues to decrease customer complaints.

Business Value Add

- **Seamless Data Integrity:** Automatic identification and correction of mismatches in Billing, Policy & Claims.
- **Reduced Operational Issues:** Arrest affected records and prevent downstream impacts.
- **Lower Support Ticket Volume:** Enhance self-sufficiency, decreasing customer complaints.

The screenshot displays the L&AH Suite interface, divided into two main sections: Member Search and Billing Dashboard.

Member Search Section:

- Search filters: Group Number (dropdown), Last Name (text input: scott).
- Results: (First 250 out of 695 records retrieved). Retrieve max. 250 records.
- Table with columns: Member ID, Employee ID, Name, Id, Date of Birth, Group Name, Member Status, Phone Number, Actions.
- Table data:

Member ID	Employee ID	Name	Id	Date of Birth	Group Name	Member Status	Phone Number	Actions
M65080730029731	709143135	Scott P. Scott650807312	XXX-XX-5976	03/01/1963	Test-D	Active	8761849507	Endorse
M65080730029730	709043131	Scott P. Scott650807311	XXX-XX-5875	03/01/1963	Test-D	Active	8070952415	Endorse
M65080730029729	709043130	Scott P. Scott650807310	XXX-XX-5774	03/01/1963	Test-D	Active	8761849507	Endorse

Billing Dashboard Section:

- Location: ABSA Life New Corp2, Location #: 6500153, Effective Date: 01/01/2024, Location Status: Active, Situs State: Florida, Special Handling: No.
- Billing: Yes, Frequency: Monthly, Bill Method: List Bill, Bill To TPA: No, Hold Bill / Lapse: No.
- Suspense: (1,970.85), Member Suspense: 0.00, Balance: 0.00, Unbilled Fees: 0.00, Unidentified: 0.00, Group Lapsed: No.
- Tabs: Bill Transactions, Bill Reconciliation, Bill Balance, Product PTD, Member Details (selected), Unbooked Members, Hold / Release, View Billing Documents.
- Member Search filters: Member Name, Member ID, Certificate #, Certificate Status (dropdown), Search button.
- Table with columns: LOCATION NAME, MEMBER NAME, MEMBER ID, CLASS, CERTIFICATE #, EFFECTIVE DATE, CERTIFICATE STATUS, TERMINATION DATE, PRODUCT, MODAL AMOUNT, WOP, COBRA INDICATOR.
- Table data:

LOCATION NAME	MEMBER NAME	MEMBER ID	CLASS	CERTIFICATE #	EFFECTIVE DATE	CERTIFICATE STATUS	TERMINATION DATE	PRODUCT	MODAL AMOUNT	WOP	COBRA INDICATOR
ABSA Life New Co...	ron king	M65001530003811	All Active Full-time...	C00002175	03/04/2024	Issued		Group Short Term...	22,950.00	No	No
ABSA Life New Co...	PartTL PartTL	M65001530003812	All Active Full-time...	C00002176	03/04/2024	Issued		Group Term Life	58.30	No	No
ABSA Life New Co...	abc test	M65001530003814	All Active Full-time...	C00002179	03/04/2024	Terminated	08/01/2024	Group Short Term...	0.00	No	No
ABSA Life New Co...	partTL2 xyz	M65001530003815	All Active Full-time...	C00002180	03/04/2024	Active		Group Term Life	29.15	No	No
- Records: 1 - 4 of 4, Go to page: 1 of 1.
- Tabs: Contact Details (selected), Bill Setup, Deduction Schedule, Entities, Transaction History, View Scheduled Jobs.
- Table with columns: ADDRESS TYPE, USE FOR BILLS, USE FOR OTHER DOCUMENTS, CONTACT PERSON, CONTACT #, ADDRESS1, ADDRESS2, CITY, STATE, ZIP CODE.
- Table data:

ADDRESS TYPE	USE FOR BILLS	USE FOR OTHER DOCUMENTS	CONTACT PERSON	CONTACT #	ADDRESS1	ADDRESS2	CITY	STATE	ZIP CODE
Business Address	No	No			Florida Mall Avenue		Orlando	Florida	32809
Primary Address	No	Yes			Florida Mall Avenue		Orlando	Florida	32809
Billing Address	Yes	No			Florida Mall Avenue		Orlando	Florida	32809



Fast Upgrade

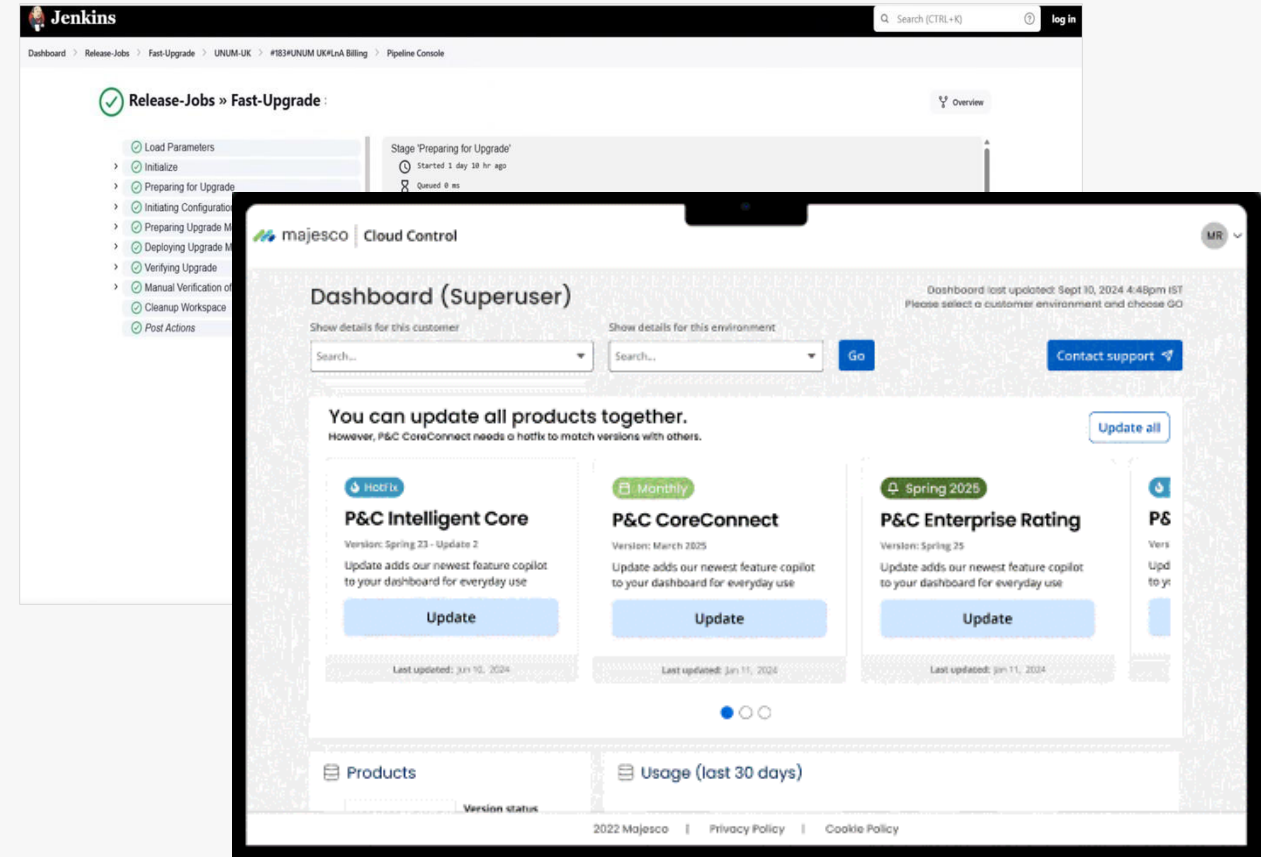
Streamline the upgrade process, minimizing the time and effort to complete an upgrade.

Capabilities

- **Faster Upgrades:** Reduce upgrade time to under 14 days, with a future goal of 1-3 days.
- **Simplified Process:** Eliminate lengthy, complex, and error-prone upgrades
- **Accelerated Feature Access:** Minimize delays in new features and fixes.
- **Maximize product value to customers**

Business Value Add

- **Operational Efficiency:** Faster upgrades and automated issue resolution reduce system downtime.
- **Get new features** and fixes with minimal delays.
- **Faster Time-to-Market:** Quick access to new features enhances competitiveness.



Next-Gen Analytics

Contextual Reports & Comparative Dashboards for Group, Member, Bills & Payments and Claim Settlements.

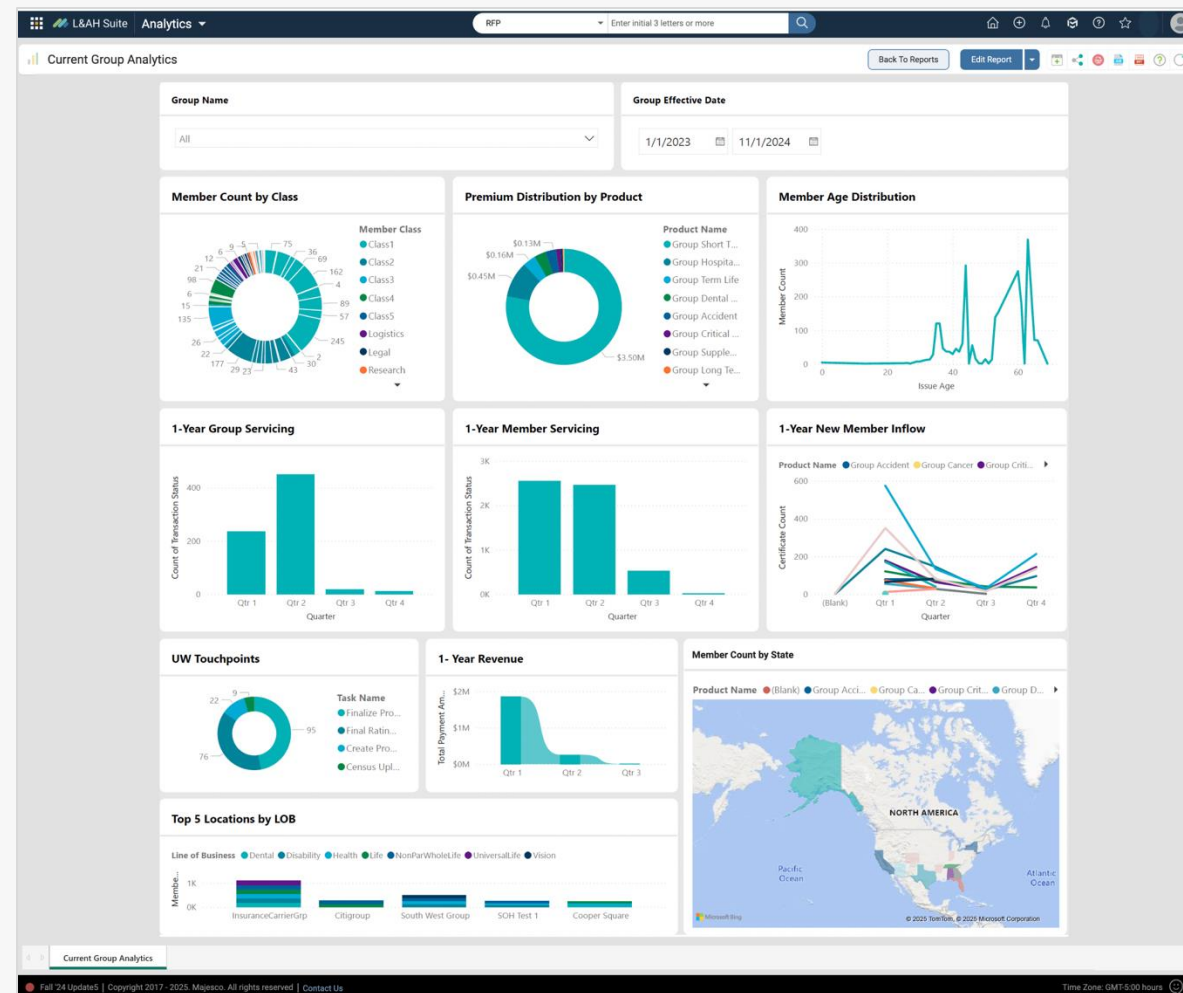


Capabilities

- **Automated Report Delivery:** Schedule and send reports via email for easy access to multiple recipients.
- **Multiple Export Options:** Download reports in PDF, PPT, or Excel for convenience.
- **Role-Based Access Control:** Assign view/edit permissions by category.
- **Contextual Insights:** Generate reports for Groups, Members, Bills & Payments, and Claim Settlements.

Business Value Add

- **Enhanced Decision-Making:** Gain insights into key metrics linked to user actions.
- Improves operational efficiency, provides visibility & understanding into the data that results in lower tickets in production, better workflow optimization and improved user experience



Operational Efficiency & System Resilience

Introducing advanced telemetry, instrumentation and rollback/recovery option.



Capabilities

- **Robust System Resilience:** Automatic scalability, throttling, recovery, and rollback mechanisms.
- **Failsafe Integrations:** Support regeneration and re-triggers for seamless processing.
- **Handling Production Challenges:** Exception management as a norm in high-adoption environments.
- **Reducing Operational Roadblocks:** Minimize production tickets caused by stability issues.

Business Value Add

- **Real-Time Monitoring:** Track business and operational metrics proactively
- **Lower Downtime:** Minimize disruptions and enhance system availability.
- **Eliminate Data Patches & Escalations:** Enhance system stability and reliability.
- **Better Customer Experience:** Improve satisfaction with seamless operations.

Event Name	Process Type	Event Detail	Remark	Status	Group Number	Member ID	Retry Count	Actions
HI Claim Calculation	Transaction	{'EntityDifference': {'EntityPK': '303094890', ...	groovy.lang.MissingMethodException: No signature of met...	Failed	6503901	M65039010017590	0	Retrigger
Pending Eligibility	Entity Changed	{'EntityDifference': {'EntityPK': '303094901', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503901	M65039010017590	0	Retrigger
Pending Adjudication	Entity Changed	{'EntityDifference': {'EntityPK': '302997465', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6501094	65010940011	0	Retrigger
Acc Claim	Transaction	{'EntityDifference': {'EntityPK': '190005691', ...	groovy.lang.MissingMethodException: No signature of met...	Failed	6501094	65010940011	0	Retrigger
Pending Eligibility	Entity Changed	{'EntityDifference': {'EntityPK': '190005649', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6501094	65010940011	0	Retrigger
Tax Rep Pending Issue	Entity Changed	{'EntityDifference': {'EntityPK': '302997322', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Payment Pending Issue	Entity Changed	{'EntityDifference': {'EntityPK': '302997322', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Claim Payout	Transaction	{'EntityDifference': {'EntityPK': '302734913', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Tax Rep Pending Issue	Entity Changed	{'EntityDifference': {'EntityPK': '302997110', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Payment Pending Issue	Entity Changed	{'EntityDifference': {'EntityPK': '302997110', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Lump sum	Transaction	{'EntityDifference': {'EntityPK': '302963792', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6504010	M65040100017761	0	Retrigger
Settled	Entity Changed	{'EntityDifference': {'EntityPK': '302996460', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6504010	M65040100017761	0	Retrigger
Acc Claim	Transaction	{'EntityDifference': {'EntityPK': '302996500', ...	groovy.lang.MissingMethodException: No signature of met...	Failed	6504010	M65040100017761	0	Retrigger
Claim Payout	Transaction	{'EntityDifference': {'EntityPK': '302734981', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Claim Payout	Transaction	{'EntityDifference': {'EntityPK': '302734964', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger
Claim Payout	Transaction	{'EntityDifference': {'EntityPK': '302734947', ...	java.lang.IllegalArgumentException: No query defined for th...	Failed	6503856	M65038560016765	0	Retrigger

MAJESCO DISTRIBUTION MANAGEMENT

Distribution Management Highlights

Ready Digital Experiences

New self-onboarding portal for producers and agencies. e-Onboarding & Producer self-service.

Copilot for DM

Streamline producer onboarding and inquiries with AI-powered Copilot.

Next-Gen Analytics

Leverage Power BI and Data Lakehouse for seamless OOTB producer compensation reporting.



Digital Experience for Producer e-Onboarding

Introducing New self-onboarding portal for producers and agencies.




Capabilities

- **Self-Onboarding:** Enables producers to initiate their own onboarding process with optimized data capture.
- **Maximum Automation:** Automatically retrieves most producer information from NIPR's Producer Database.
- **Majesco DM Integration:** Ensures seamless data flow between the Portal and DM via enhanced APIs.
- **Third-Party Integrations:** Connects with NIPR for data fetch, IBR for background checks, and DocuSign for e-signing consent and agreement forms.

Business Value Add

- **Boost Efficiency:** Automates applicant data entry, reducing back-office workload.
- **Minimize Errors:** NIPR integration ensures accurate producer data.
- **Flexible Use:** Works with Majesco DM or carrier's legacy system.

 Onboarding

Agent Onboarding

Success! We've retrieved your agent information from the National Insurance Producer Registry (NIPR). [What's NIPR?](#)

Review agent information

CR

Chris Reynolds

NPN: 2285214

(212) 448-3754

chris.reynolds@email.com

The following addresses are associated with the agent. Please feel free to make any changes.

Residential address

☒ 2505 West Side Ave, River Edge, NJ 07649

☐ 326 Lafayette Ave, Hawthorne, NJ 07506

☐ 60 Columbia Road, Morristown, NJ 07960

Mailing address

☒ 2505 West Side Ave, River Edge, NJ 07649

☐ 326 Lafayette Ave, Hawthorne, NJ 07506

Need to provide a different mailing address?

☐ Yes

☒ No

Business information

Reporting manager or agency name

Joining role

Select role

Are you going to do business in all of the states you are licensed?

☒ Yes

☐ No

Your next now | 55

Digital Self-Service Portal for Producers

Self Service Portal for producers to provide a comprehensive view of their business with the carrier.

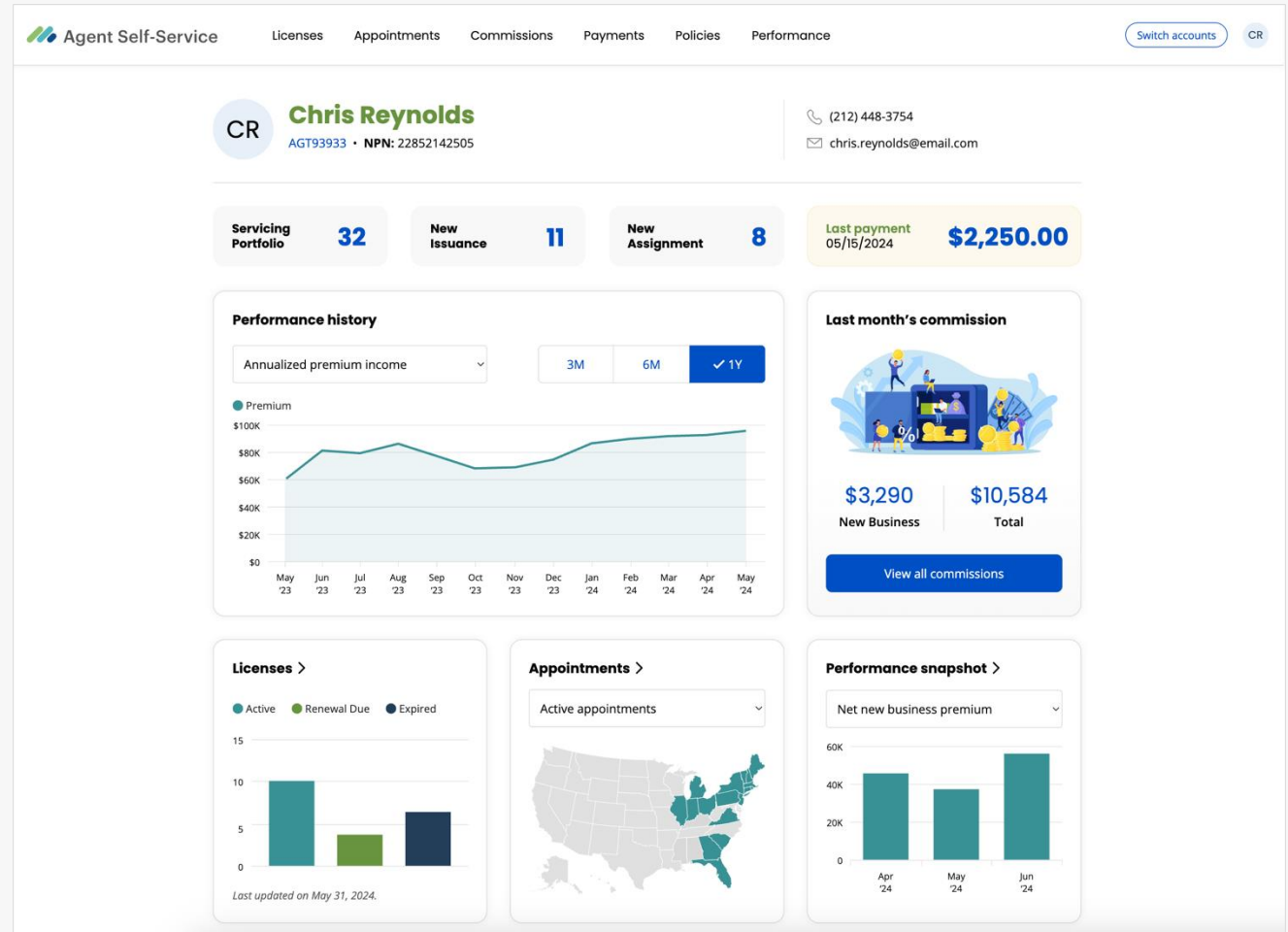


Capabilities

- **Pre-Integrated:** Allows producers to access business details in Majesco DM.
- **Single & Multiple Contracts View:** View details for one or multiple contracts with consolidated data.
- **Comprehensive Information:** View commission, payments, performance, licensing, appointments, policies, and more.
- **Agency Hierarchy View:** Agencies can access their details and those of their direct downlines.

Business Value Add

- **Enhance Operational Efficiency:** Reduces producer queries to the carrier's back office on commissions, payments, and other details.
- **Boost Producer Engagement:** Producers gain easy access to their data, staying informed about their business with the carrier.



Copilot for DM

Streamline producer onboarding and inquiries with AI-powered Copilot.

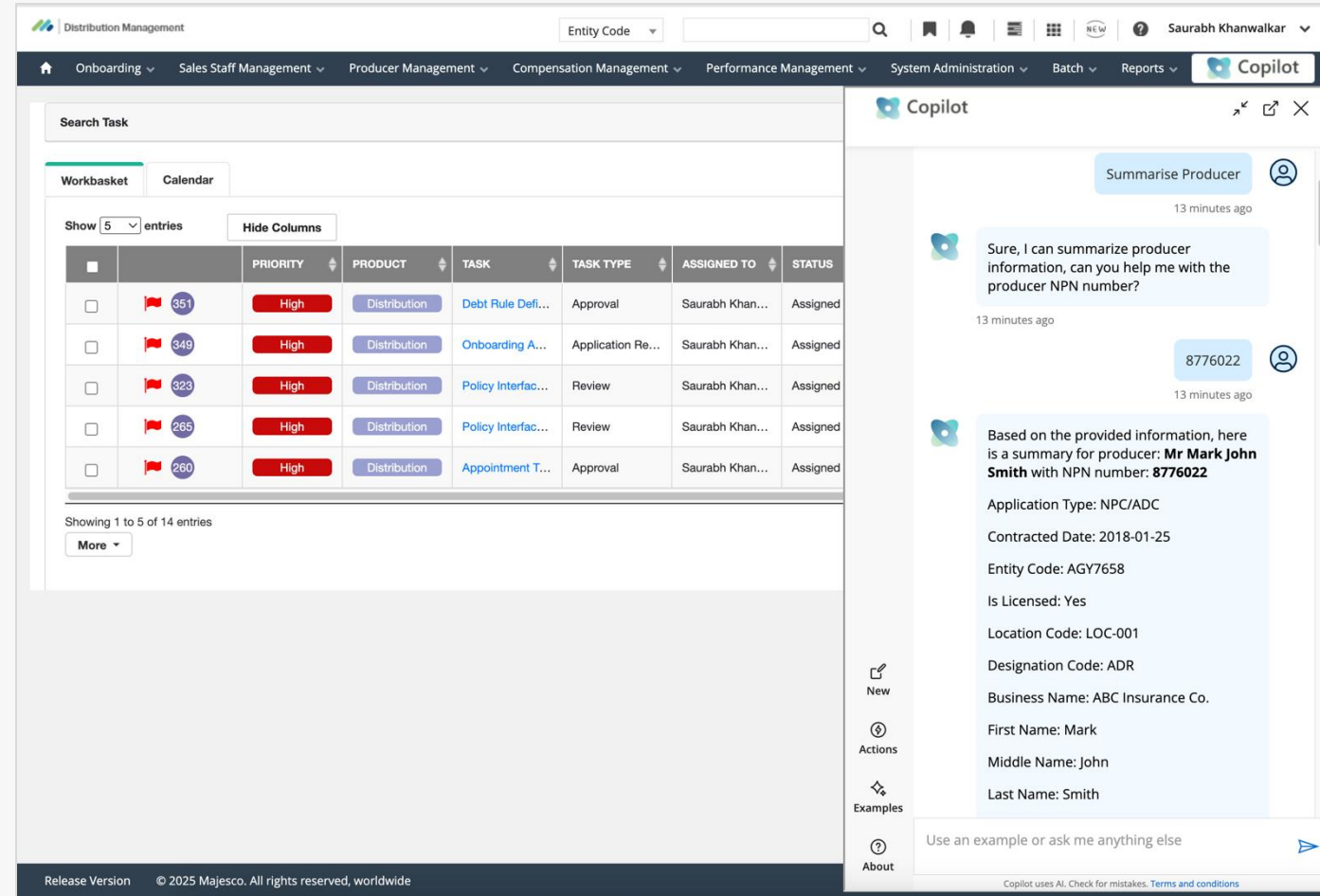


Capabilities

- **Faster Onboarding:** Quick and accurate producer onboarding in DM, minimizing manual effort and errors.
- **Minimal Data Capture:** Onboard producers with minimal data input required.
- **Automated Applicant Details:** Producer information is automatically fetched from NIPR's database during onboarding.
- **Easy Data Inquiry:** Back-office users can inquire about producer data via Copilot using natural language.

Business Value Add

- **Boost Operational Efficiency:** Copilot reduces producer onboarding time, enhancing operational efficiency
- **Seamless Copilot Access:** Invoke Copilot directly from the DM application for a smooth user experience.
- **Effortless Data Inquiries:** Copilot helps back-office users inquire key producer data in one place, even beyond standard inquiry screens.



The screenshot displays the Majesco Distribution Management (DM) application interface. The top navigation bar includes tabs for Onboarding, Sales Staff Management, Producer Management, Compensation Management, Performance Management, System Administration, Batch, and Reports. A search bar and user profile (Saurabh Khanwalkar) are also present. The main content area shows a 'Search Task' section with a table of tasks. The table has columns for checkboxes, flags, IDs, priorities, products, tasks, task types, assigned users, and statuses. Below the table, it indicates 'Showing 1 to 5 of 14 entries' with a 'More' button. On the right side, a Copilot chat window is open, showing a conversation where the user asks for a summary of producer information, and the Copilot responds with a detailed summary for 'Mr Mark John Smith'.

		PRIORITY	PRODUCT	TASK	TASK TYPE	ASSIGNED TO	STATUS	
<input type="checkbox"/>		351	High	Distribution	Debt Rule Defi...	Approval	Saurabh Khan...	Assigned
<input type="checkbox"/>		349	High	Distribution	Onboarding A...	Application Re...	Saurabh Khan...	Assigned
<input type="checkbox"/>		323	High	Distribution	Policy Interfac...	Review	Saurabh Khan...	Assigned
<input type="checkbox"/>		265	High	Distribution	Policy Interfac...	Review	Saurabh Khan...	Assigned
<input type="checkbox"/>		260	High	Distribution	Appointment T...	Approval	Saurabh Khan...	Assigned

Showing 1 to 5 of 14 entries
[More](#)

Copilot Chat:

User: Summarise Producer (13 minutes ago)

Copilot: Sure, I can summarize producer information, can you help me with the producer NPN number? (13 minutes ago)

User: 8776022 (13 minutes ago)

Copilot: Based on the provided information, here is a summary for producer: **Mr Mark John Smith** with NPN number: **8776022**

Application Type: NPC/ADC
Contracted Date: 2018-01-25
Entity Code: AGY7658
Is Licensed: Yes
Location Code: LOC-001
Designation Code: ADR
Business Name: ABC Insurance Co.
First Name: Mark
Middle Name: John
Last Name: Smith

Use an example or ask me anything else

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Next-Gen Analytics for DM

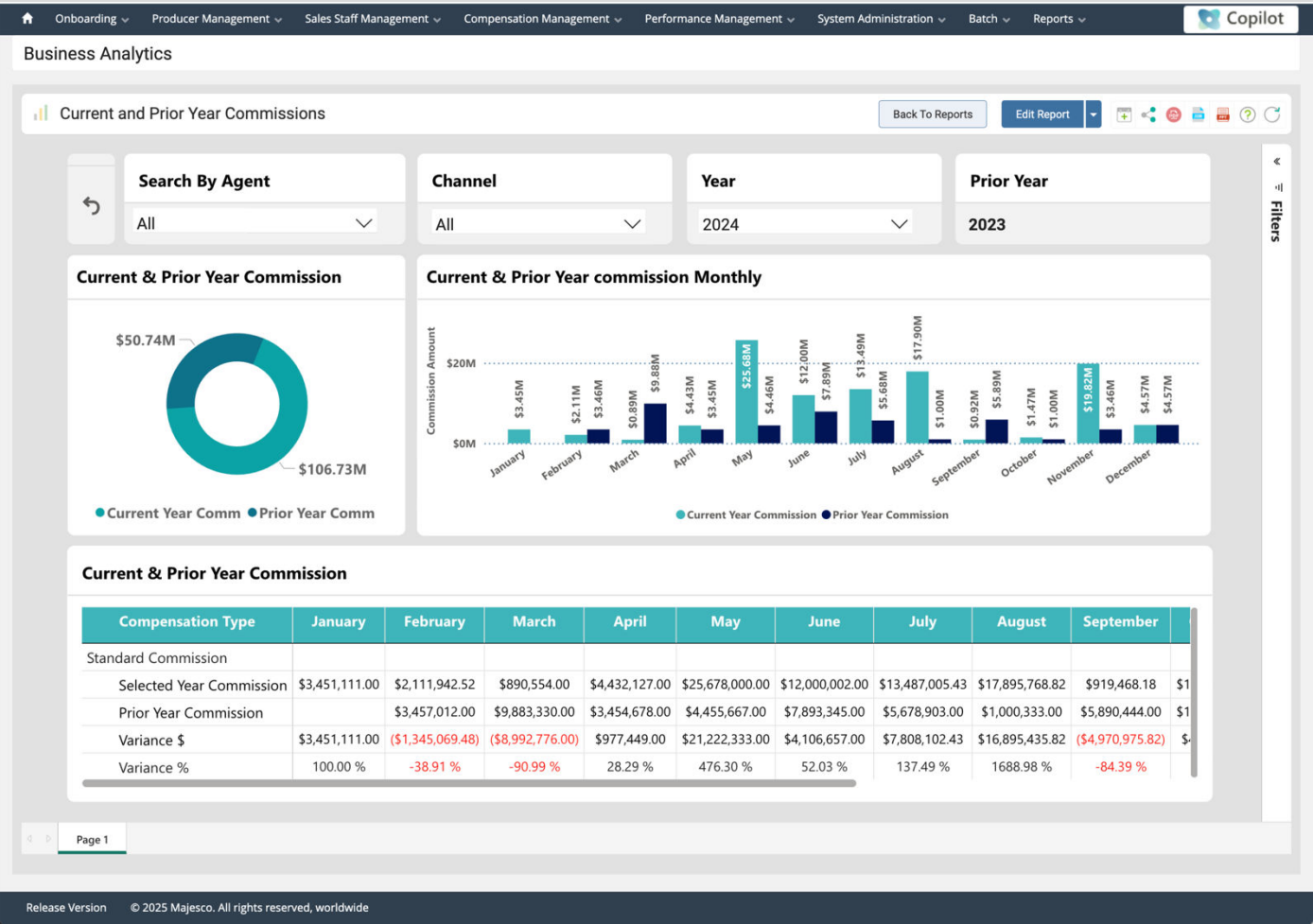
Leverage Power BI and Data Lakehouse for seamless OOTB producer compensation reporting.

Capabilities

- **Out-of-the-Box Compensation Reports:** DM offers several pre-built compensation reports, highlighting key producer compensation data.
- **Custom Report Creation:** Carriers can build custom reports using existing datasets.
- **Interactive Dashboards:** Users can choose from a wide range of visual charts to display data.
- **Pre-Built reports** in DM for Top Producers, Commission reports – annual, By product, Current & Prior Year.

Business Value Add

- **Supports Decision Making:** These reports provide carriers with better visibility into producer compensation data, aiding informed decisions.
- **Custom Report Creation:** Allows the creation of new reports based on existing datasets.



A background image of a lavender field with two hands reaching towards the flowers. The image is overlaid with several semi-transparent geometric shapes in shades of teal, blue, and green. The text 'MAJESCO CLAIM VANTAGE SOLUTION' is centered in white, bold, uppercase letters.

MAJESCO CLAIM VANTAGE SOLUTION

ClaimVantage Highlights

Vertex Tax Integration

Offers plug-and-play tax solution with automatic updates and critical capabilities for the Canadian market.

Delaware Paid Family Medical Leave

The new statutory PFML benefits ensure compliance and support with comprehensive plan administration and ongoing updates.

Compliance Updates

Enhances leave management flexibility, compliance, and efficiency by refining eligibility, adjusting CO PFML, improving holiday tracking, and reducing manual processes.

Foundational Performance Optimization

The enhancements boost scalability, optimize queries, and accelerate releases, increasing efficiency and reducing errors





Vertex Tax Integration for the Canadian Market

Comprehensive Plug-and-Play Tax Solution

Capabilities

Full Tax Solution

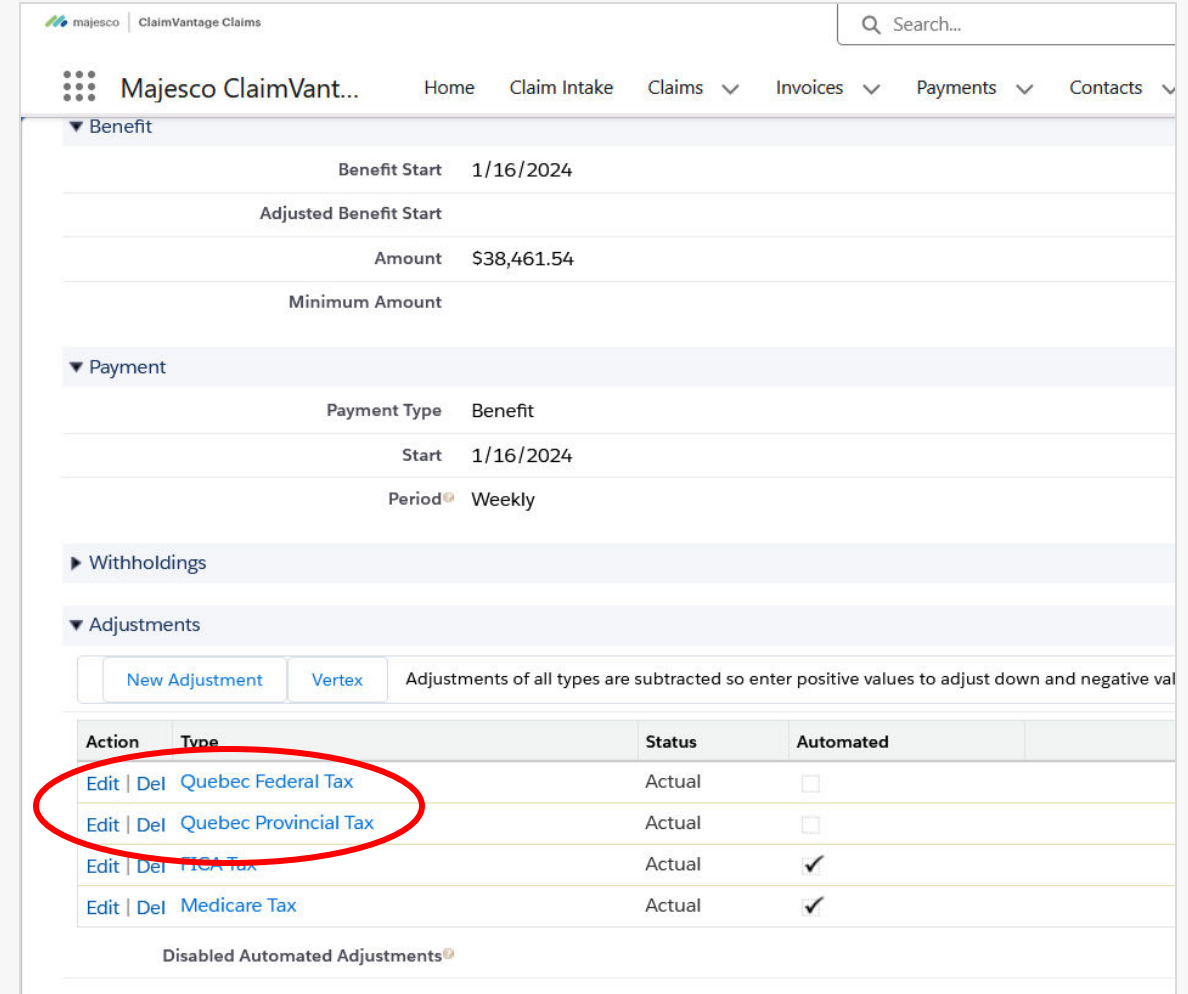
- Previous CV tax capabilities were incomplete, difficult to maintain, and a constant pain point.
- Vertex integration w/CV is already built and ready for a plug and play implementation.
- This solution offers full, robust tax capabilities automatically updated each year.

Canadian Market

- Key capability needed to expand CV market into Canada.
- Canadian taxes included in Spring release, targeting US taxes for Fall '25 Release.

Business Value Add

- Full, robust tax solution for CV customers
- Out-of-the-box plug and play
- Always up-to-date with current rates
- Critical capability for Canadian market



The screenshot displays the Majesco ClaimVantage Claims interface. The top navigation bar includes links for Home, Claim Intake, Claims, Invoices, Payments, and Contacts. The main content area is divided into sections for Benefit, Payment, Withholdings, and Adjustments. The Adjustments section is currently active, showing a table of tax adjustments. A red circle highlights the 'Quebec Federal Tax' and 'Quebec Provincial Tax' entries. The table columns are Action, Type, Status, and Automated. The 'Quebec Federal Tax' and 'Quebec Provincial Tax' entries are both marked as 'Actual' and 'Automated'. The 'FICA Tax' and 'Medicare Tax' entries are also marked as 'Actual' and 'Automated'. A 'New Adjustment' button and a 'Vertex' button are visible above the table. A note states: 'Adjustments of all types are subtracted so enter positive values to adjust down and negative values to adjust up.'

Action	Type	Status	Automated
Edit Del	Quebec Federal Tax	Actual	<input type="checkbox"/>
Edit Del	Quebec Provincial Tax	Actual	<input type="checkbox"/>
Edit Del	FICA Tax	Actual	<input checked="" type="checkbox"/>
Edit Del	Medicare Tax	Actual	<input checked="" type="checkbox"/>

Disabled Automated Adjustments



- Benefits effective date 1/1/26.
- Ability to administer basic state plan or equivalent / richer private plan.
- Manage complex entitlement sharing rules between Medical, Family, and Parental leave reasons (coming in a Spring Update release).
- Spring Release includes core functionality to enable customers to begin testing; Additional requirements will be included in Spring Update releases.



- Customers rely on Majesco to remain compliant and support their customers with new PFML regulations.
- New state PFMLs are the highest profile regulations enacted, ensuring customers are prepared on time and with quality functionality is critical.





Compliance Functional Updates


Enhanced Leave Management and Compliance Improvements

Capabilities

- **Add Time Independently to Leaves** – When multiple leave specs on one leave, ability to add time to leaves individually.
- **Approvability** – Refine what has historically been “eligibility” into more accurate “eligibility” and “approvability”.
- **CO PFML Inclusion** – Ability for CO PFML to be added/removed during the physician statement addition.
- **Eligibility Year** – Foundational structure for eligibility year concept (additional work remaining).
- **Holidays** – Phase two of work to appropriately account for holidays in entitlement tracking (one more phase remaining).

Business Value Add

- These enhancements address some **foundational compliance concepts** to provide required flexibility and/or granularity.
- **Raises the level of overall compliance** of ClaimVantage product.

 **Add Time**

Weekly Schedule

	Sunday	Monday	Tues
Remove	<input type="text"/> h <input type="text"/> m	<input type="text"/> h <input type="text"/> m	<input type="text"/> h
Add Week to Schedule			

Change schedule by name

Schedule begins on [3/14/2025]

Dates [New](#) [Remove All](#)

[Remove](#) From [3/14/2025] to [3/14/2025]

for hours and minutes each day ☒ or S ☐ M ☐ T ☐ W ☐ T ☐ F ☐ S ☐

for --None--

Check against intermittent dates ☒

Contains Overtime ☐

All Leaves

--All--
Federal FMLA
Massachusetts Paid Family and Medical Leave
Massachusetts Parental



Compliance Rules Updates

Streamlined Compliance and Efficiency Enhancements

Capabilities


- **CO PFML Inclusion** – Ability for CO PFML to be added/removed during the physician statement addition.
- **NY PFL / DBL Sharing** – Update to ensure accurate entitlement sharing rules between the two NY PFML regulations.
- **CA Victims of Crime** – Updates based on changes in regulations (additional work needed in Spring Update).
- **OR PFML Pregnancy & Bonding** – Addressing additional entitlement scenario based on changes in regulations (additional work needed in Spring Update).

Business Value Add

- ClaimVantage's compliance with federal and state regulations are **critical for customers' claims handling to ensure accuracy.**
- Reduces the need for manual processes based on regulatory requirements, **increasing efficiency and reducing errors.**

Majesco ClaimVant...

HomeClaims ▾Claim Intakes ▾Organizations

 ABSENCE SPECIFICATION

Colorado Paid Family and Medical

Add this leave to applicable organizations by default?

☒

Labels

fmla-leave,paidleave

Only add to an employee when a claim is made for this leave?

☐

What calendar will be used by this leave?

The entitlement is per claim

☐

Rolling Forwards

The leave will last 1 year(s) ▾



Foundational Performance Optimization

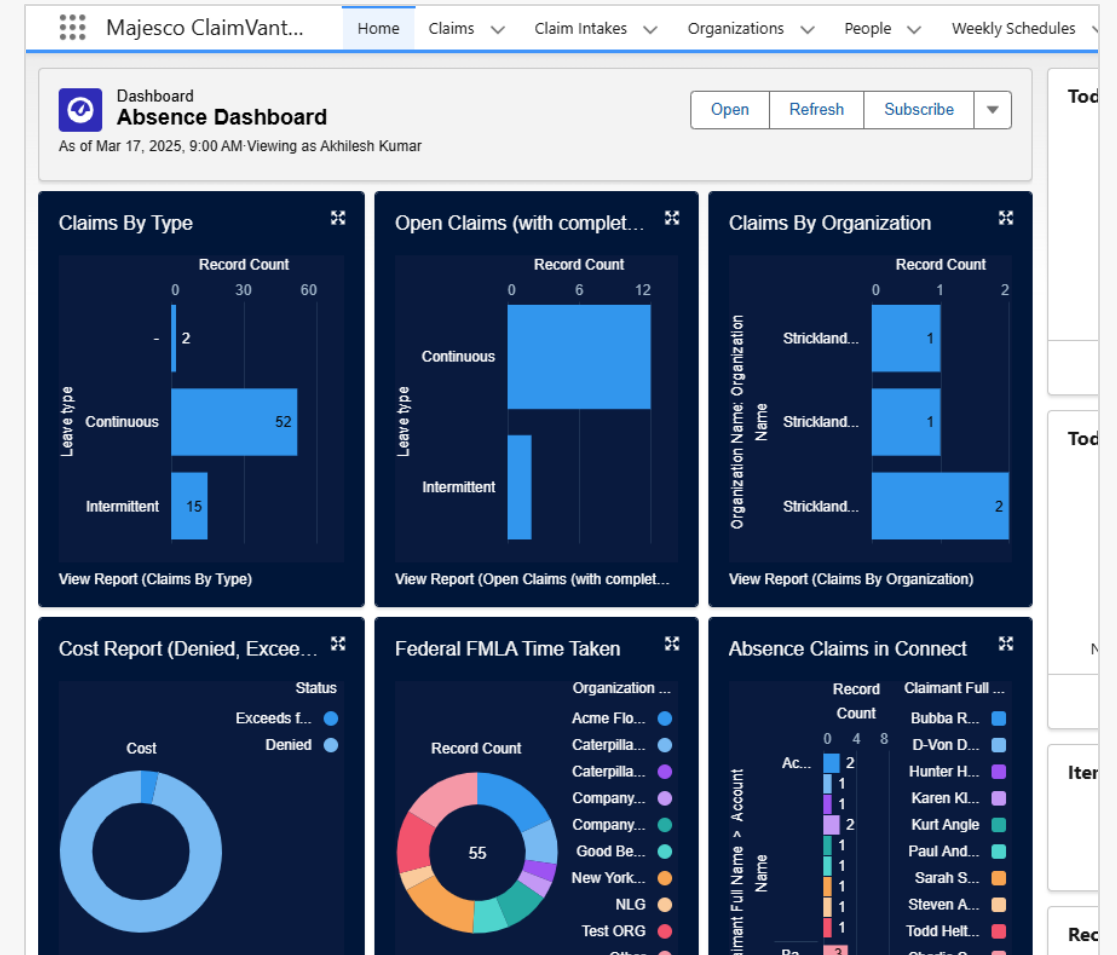
Scalability and Efficiency Enhancements

Capabilities

- **Performance Optimization** – GenAI-powered CPU efficiency boosts scalability.
- **Salesforce Query Optimization** – Optimizing CV code to reduce the amount of unnecessary data being retrieved from Salesforce during processing to improve performance.
- **Test & Build Automation** – Automated testing and deployment accelerate releases.

Business Value Add

- Increases ClaimVantage processing speed and end user performance, providing **increased efficiency** to customers.
- Reduces manual testing required for releases, **reducing effort and errors** via automated testing.



A background image of a lavender field with two hands reaching towards the flowers. The image is overlaid with several semi-transparent geometric shapes in shades of teal, blue, and green. The text 'MAJESCO DATA, ANALYTICS & AI' is centered in white, bold, sans-serif font.

MAJESCO DATA, ANALYTICS & AI

Data, Analytics & AI Highlights

AI Interrogation

Large Document AI interrogation generates fast, reliable and efficient answers based on a broad range of insurance document types.

Copilot

Majesco Copilot for DRC Product Studio dramatically shortens error resolution times and saves rate analysts hundreds of hours.

Reimagined Data

Reimagined data replication for Majesco L&AH and LC360. Faster, more features, lower infrastructure footprint.

Reporting

Modernized Reports for Majesco P&C Intelligent Core, powered by Power BI.





Introducing Copilot Majesco DocScribe

AI innovation that reads and understands documents of any type or size to automate high-impact business processes.

Smart Recognition – Accurately extracts and interprets text, even from complex, unstructured documents

Seamless Integration – Automatically maps extracted data to relevant fields in Majesco Policy, Billing, and Claims applications.

Universal Compatibility – Works across a wide range of document types and sizes with precision.

AI-Driven & Intuitive – Embedded with Majesco Copilot for an enhanced, interactive user experience.

Lightning-Fast & Scalable – Plug-and-play architecture with parallelized processing for rapid implementation and effortless scalability.

From Documents to Decisions – Seamlessly

The screenshot displays the Majesco DocScribe dashboard and a Copilot chat window. The dashboard includes a 'Welcome to Majesco DocScribe' message, a description of the system as an 'Intelligent document processing and management system', and three main action buttons: 'Upload documents', 'Search documents', and 'System status'. The Copilot chat window is titled 'Copilot Digital 1st' and shows a 'Status' section for 'Accord WC Application.pdf'. It lists 'Pages(5)' with a breakdown: 'Complete(3)', 'Error(0)', and 'Skipped(2)'. A table below shows the status of each page, including the 'Accord form' and 'Confidence Score'. The chat also displays a 'Success' message with a quote summary, including details like 'Product: WK', 'Quote #: 570051880', 'Insured name: John Smith', 'Insured address: Main street, NJ USA', and 'Total Premium: \$100'. A 'Generating quote now...' status is also visible.

DocScribe Document Hub System Config Admin Console

Welcome to
Majesco DocScribe
Intelligent document processing
and management system

Upload documents
Start Processing New document
Upload now

Search documents
Find and manage processed documents
Search now

System status
Monitor system health and performance
View now

majesco Dashboard Quotes Policies Billing Reports Search By Policy# / Insured Name / FEIN Copilot JD

Copilot Digital 1st

BACK

Status

Accord WC Application.pdf
Upload date 03/18/2025, 04:33 PM
Confidence Score 91.40%

Pages(5)
Complete(3) Error(0) Skipped(2)

Hide details

Status	Page	Accord form	Confidence Score
✓	Page 1 null	ACORD_130_APPLICATION_I NFO	93.3%
✓	Page 2 null	ACORD_130_STATE_RATIN G_WORKSHEET	89.9%
✓	Page 3 null	ACORD_130_PRIOR_CARRI ER_LOSS	91%
✗	Page 4 null	ACORD_130_GENERAL_INF O	55.4%
✗	Page 5 null	ACORD_125_CONTACT_INF O	14.1%

Recent Quotes & Policies

New Quotes

532 Total

In Progress (504)
Quoted (15)
Referred (13)

Get a new Workers Compensation quote

Start a new Quote

Generating quote now...

Success

Here is your quote summary.
Document name: Accord WC Application.pdf
Product: WK
Quote #: 570051880
Insured name: John Smith
Insured address: Main street, NJ USA
Total Premium: \$100

Review later Review now

(Please note: Review quote will open in application window)

A minute ago

Type your message

Copilot uses AI. Check for mistakes. Terms and conditions

Large Document AI Interrogation

AI-Powered Document Answers



Majesco AI leverages extracted knowledge to provide accurate, context-aware responses, enhancing decision-making and efficiency across insurance processes.

Capabilities

- **Intelligent Responses** – Extracts and applies knowledge for accurate, context-aware answers.

Business Value Add

- **Enhanced Efficiency** – Speeds up decision-making and streamlines insurance processes.

Answer Agent Extracted Knowledge

State of Rating
California (CA)

Employees (Number / Full-Time / Part-Time)
142 / 22 / 120

Estimated Payroll – Primary Location
\$4,415,905

Estimated Payroll – Add'l Locations
\$2,309,685

Experience or Merit Modification
88

Remarks
None added. Upload ACORD 101 attachments for more

STATE RATING SHEET OF SHEETS AGENCY CUSTOMER ID:
STATE RATING WORKSHEET
FOR MULTIPLE STATES, ATTACH AN ADDITIONAL PAGE 2 OF THIS FORM
RATING INFORMATION - STATE: CA

LOC #	CLASS CODE	DECR CODE	CATEGORIES, DUTIES, CLASSIFICATIONS	FULL TIME	PART TIME	SIG	RANGE	ESTIMATED ANNUAL REMUNERATION PAYROLL	RATE	ESTIMATED ANNUAL MANUAL PREMIUM
1	9080		RESTAURANTS - FULL SERVICE	9	7.0			\$187,443		
1	9870		Clerical Office	9	0			\$258,462		
2	9080		RESTAURANTS - FULL SERVICE	7	4.11			\$258,462		
2	9870		Clerical Office	5	0			\$258,462		
1	9081		Restaurants NOC					If Any		
2	9081		Restaurants NOC					If Any		

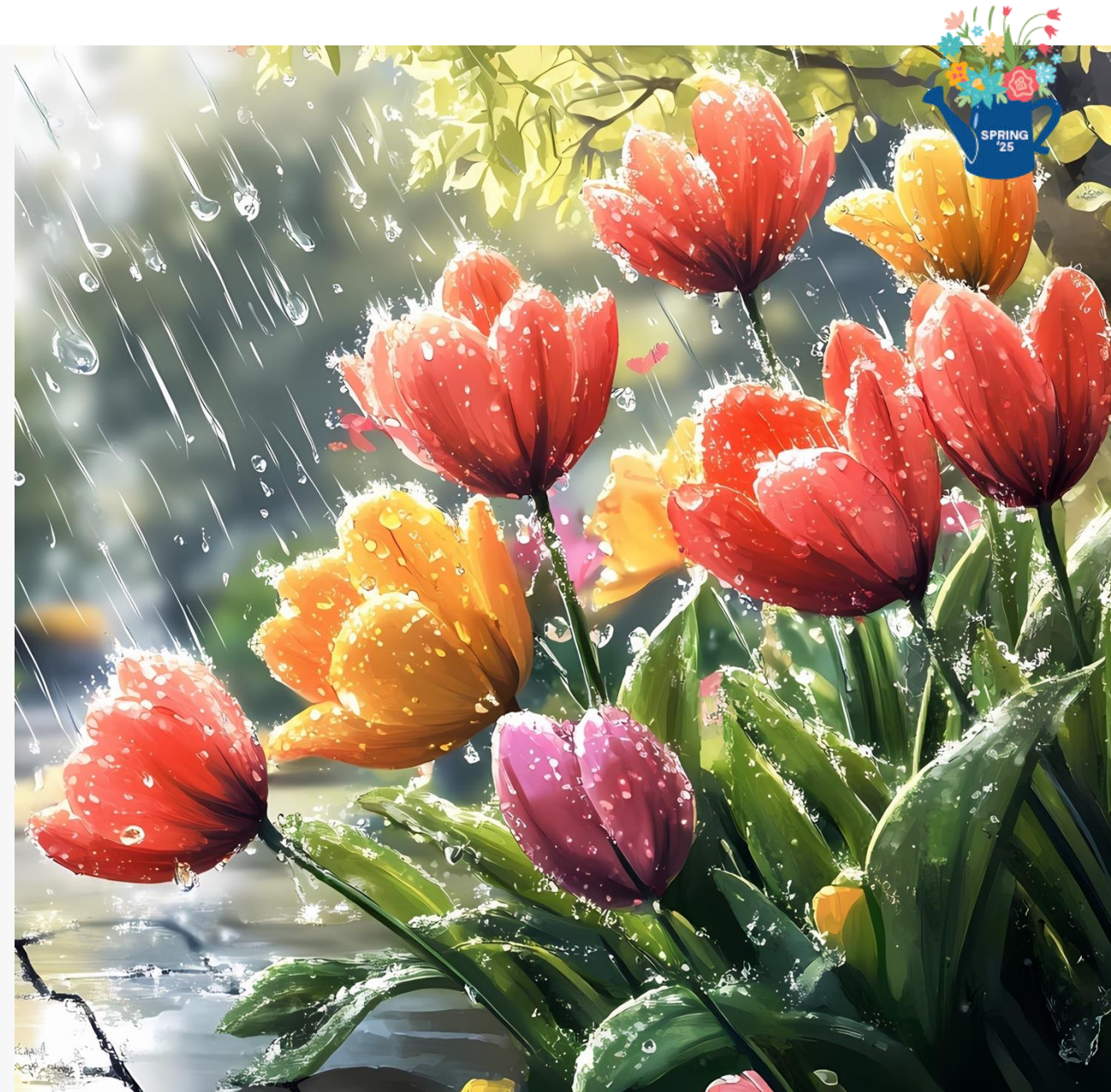
PREMIUM STATE	FACTOR	FACTORED PREMIUM	FACTOR	FACTORED PREMIUM
TOTAL	N/A	\$		\$
INCREASES/LIMITS	\$		SCHEDULE RATING	0.55
DEDUCTIBLE	\$		COOP	\$
EXPERIENCE OR MERIT MODIFICATION	\$		STANDARD PREMIUM	\$
TERMINISM	N/A	\$	PREMIUM DISCOUNT	\$
CATASTROPHE	N/A	\$	EXPENSE CONSTANT	N/A
ASSIGNED RISK SURCHARGE	\$		EXCESS/ASSESSMENTS	N/A
ADDP	\$			\$
N/A if None				
TOTAL ESTIMATED ANNUAL PREMIUM		\$	DEPOSIT PREMIUM	\$
REMARKS (ACORD 101. Additional Remarks Schedule, may be attached if more space is required)				

ACORD 101 CA (2023/01) Page 2 of 4

Reimagined Data Replication for Majesco L&AH and LC360

Reimagined data replication for Majesco L&AH and LC360 offers faster performance, enhanced features, and a reduced infrastructure footprint, improving efficiency and scalability.

- **Faster Performance** – Speeds up data replication for improved efficiency.
- **Enhanced Features** – Provides advanced capabilities for better data management.
- **Lower Infrastructure Footprint** – Optimizes resource usage, reducing costs and complexity.
- **Improved Scalability** – Supports growing data needs with seamless expansion.





Reporting for Majesco P&C Intelligent Core, Powered by PowerBI

Modernized Reporting for Enhanced Analytics

Modernizing reports for Majesco P&C Intelligent Core with Power BI enhances analytics, decision-making, and operational efficiency. Migrating legacy reports enables real-time insights, interactive dashboards, and AI-driven analytics, seamlessly integrating with Majesco’s cloud ecosystem.

Capabilities

- This transformation ensures seamless integration with Majesco’s cloud-based ecosystem, enabling users to access customized, drill-down reports with improved accuracy and speed.

Business Value Add

- Supports automated data refreshes, self-service analytics, and advanced reporting capabilities, empowering insurers to stay competitive in a rapidly evolving industry.

Billing – Disbursement Register Report

Analytics

Billing - Disbursement Register Report ⓘ

Back to report list

EditShareExportSubscribe to report

Refund/Void Date

Underwriting Company

Accounting Month

1/16/201511/8/2024AllAll

Disbursement Register

Operating Company Code	Operating Company	Underwriter Company Code	Underwriting Company	Policy No	Policy Effective Date	Payment Id
01	MajescoMastek Insurance Company	002	Majesco Insurance Exchange			1
01	MajescoMastek Insurance Company	002	Majesco Insurance Exchange			1
01	MajescoMastek Insurance Company	003	Nautilus	01-CA-000010139-0	1/1/2015	1
01	MajescoMastek Insurance Company	003	Nautilus	01-CA-000010139-0	1/1/2015	1
01	MajescoMastek Insurance Company	003	Nautilus	01-CA-000010139-0	1/1/2015	1

Disbursement Register Report

A photograph of a lavender field at sunset, with rows of purple flowers stretching towards distant mountains. The scene is overlaid with large, semi-transparent geometric shapes in shades of teal, blue, and green. A bright sun is visible on the left, creating a lens flare effect.

For questions, please contact
melis.carroll@majesco.com.