



Rise to the
FRONTIER

FALL '26 RELEASE

P&C Release Kit

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.



We are **advancing the frontier on the intelligence-to-outcome curve**, ensuring every insurance and retirement organization can turn AI into measurable business results. Fall '26 brings together three forms of intelligence, defining the future of core platforms. Generative AI extracts insight from complexity and surfaces what matters. Agentic AI orchestrates execution at scale, freeing teams from routine tasks to focus on judgment and strategy. Immersive AI launches a new user experience designed for the intelligence era, enabling human and AI to collaborate natively within workflows. The result is a modern intelligent core platform that empowers users to move beyond efficiency gains into competitive advantage. This is our most advanced step in enabling our customers to be frontier firms of the future.”

-Manish Shah, President & Chief Product Officer, Majesco



Agenda Overview

Discover how Majesco Fall '26 has intelligence immersed throughout the P&C platform to improve the metrics that matter, reduce costs, and help customers become frontier firms.

Fall '26
Release



01

P&C Intelligent Core

Intelligence immersed across workflows to accelerate confident decisions.

02

CoreConnect

Build product foundations faster with less implementation friction.

03

Enterprise Rating

Build, analyze, and deploy pricing changes faster with greater confidence.

04

Loss Control

AI-powered insights and connected workflows improve risk visibility.

Fall '26 Release



P&C INTELLIGENT CORE

Intelligence immersed. Progress accelerated.

A connected, intelligent foundation that helps P&C insurers transform with confidence, improve the metrics that matter, and move toward the frontier.



Fall '26 Theme Map

Themes across four areas of investment

P&C Reimagined

- Immersive AI Experience
- Experience Modernization and Redesign
- Usability, Task Management, and Communications Enhancements
- What's New Redesigned

Intelligence and AI

- ML Models
- AI Core and Copilot across the P&C Suite
- Analytics Anywhere
- MCP Server and Agent API
- Self-Serve AI Agent Authoring

P&C Operations

- Claims Operations and Market Needs
- Large Transactions and Operational Throughput
- Premium Audit Integration
- Bureau and Regulatory Currency

Platform & Delivery

- Cloud and Platform Modernization
- Quality and Delivery Engineering

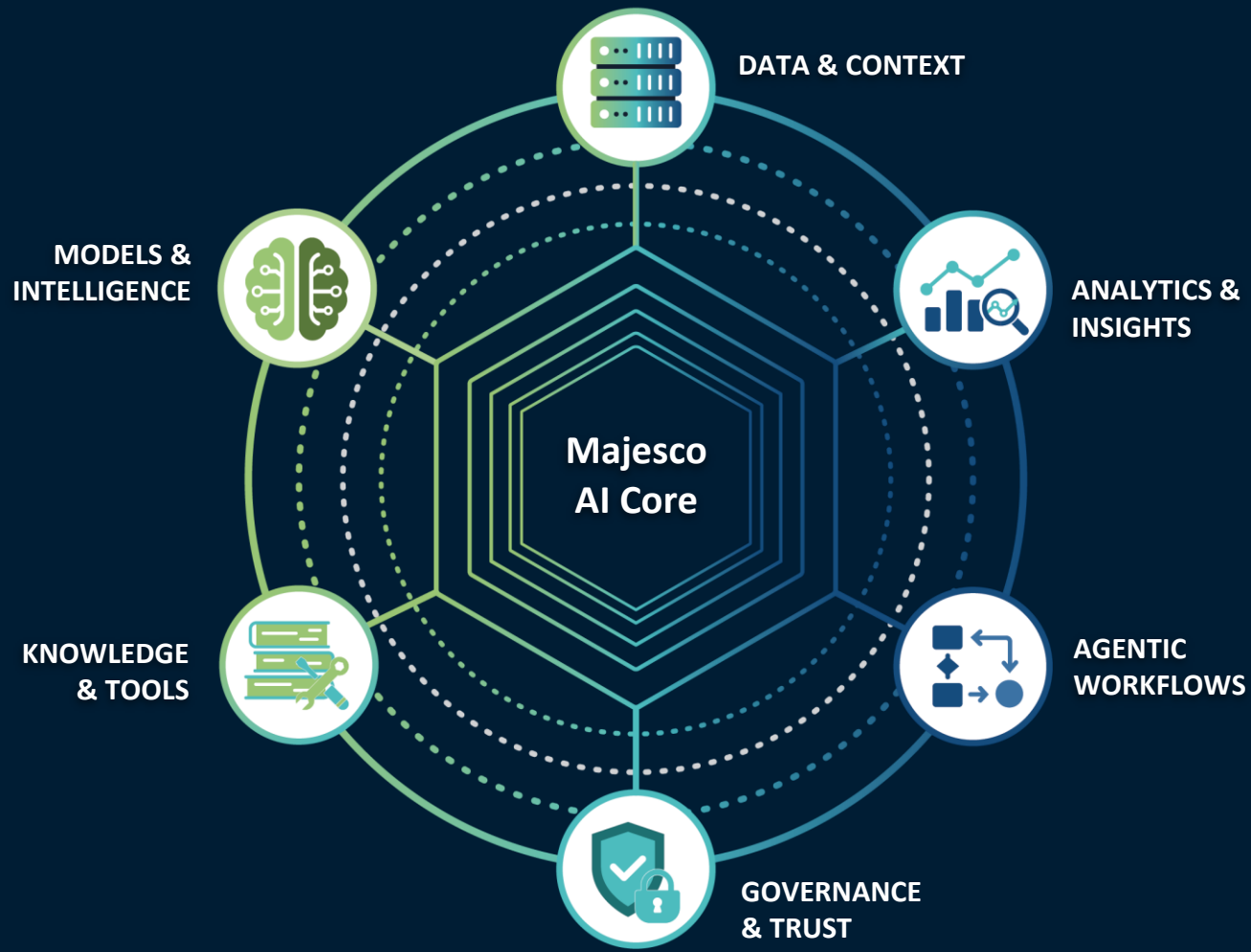
Intelligent Core

One shared intelligence engine
powering every Majesco product.

Built on complete transactional data, Majesco AI Core connects models, analytics, knowledge and agentic workflows to bring governed intelligence directly into the flow of work

BUSINESS VALUE

- Understand Faster
- Decide Smarter
- Act Sooner



AI OFFERINGS IN ACTION

Complete Transactional Data Access	Analytics Anywhere	GenAI	Agentic AI	ML Models	Majesco MCP Gateway	Immersive AI

More than just a framework

*Two sides of the same coin – **AI powering the core**, **Flexibility to Build & Extend***

AI IN ACTION

Ready to use, in the core

- **Copilot across the Majesco Suite**
- **Ready-to-use agents**
71 Ready-to-use agents
- **Agentic workflows**
underwriting, policy, billing, claims
- **Immersive AI**
users and agents on the same case

AGENTIC FRAMEWORK

Build & Extend, within & beyond the core

- **Agent Studio**
low-code builder; customer-facing coming soon
- **Framework APIs**
config-driven agents via REST and MCP
- **Agent Console SDK**
embed the experience in any app
- **MCP gateway**
governed tools for external AI clients

Both grounded in one governance and trust spine: identity and entitlement, audit and logging, telemetry and metering

Immersive AI

One intelligent experience across Policy, Billing, and Claims

Immersive AI senses what is happening, predicts what is likely, recommends the next best action, and executes routine work within guardrails. Users remain in control and focus on judgment and critical decisions.

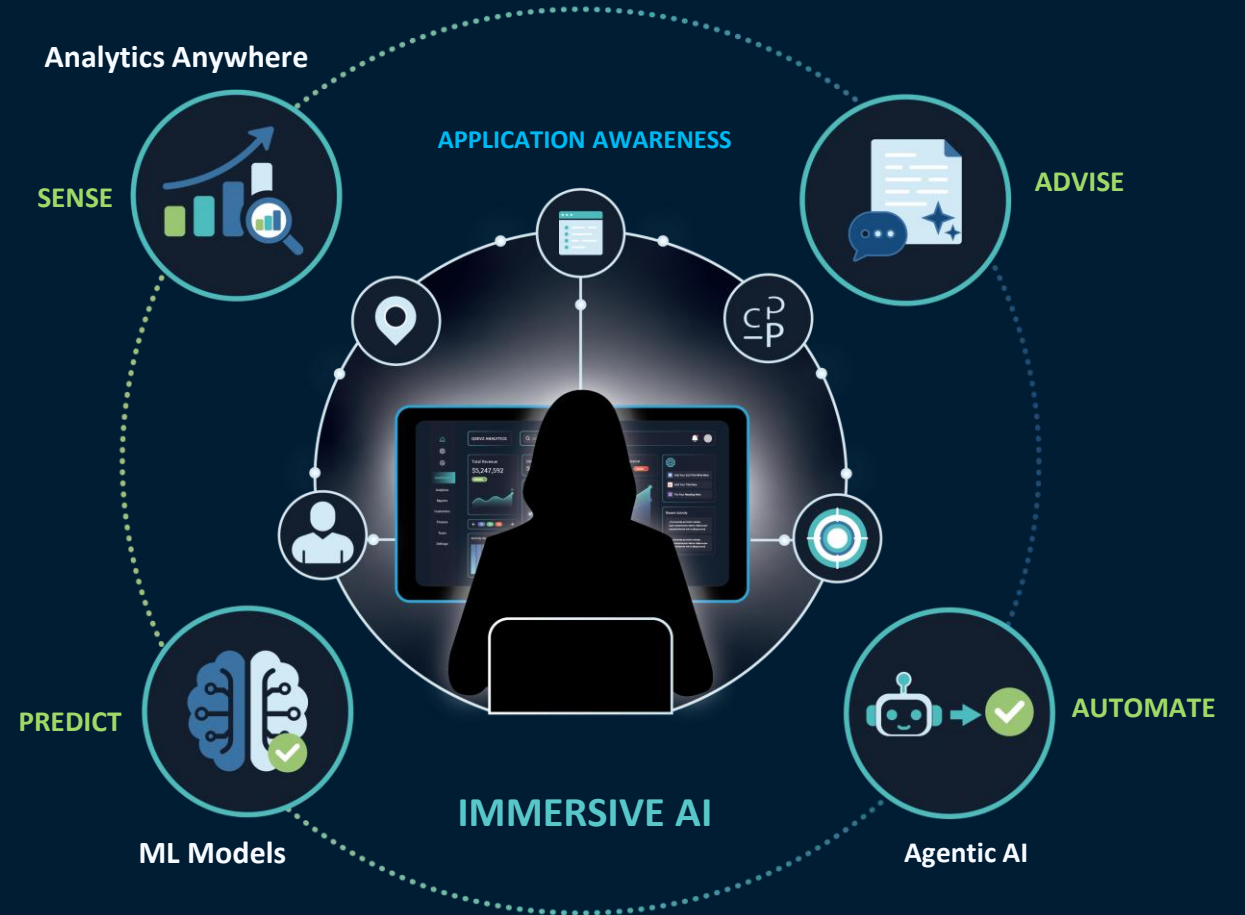
THE IMMERSIVE EXPERIENCE

Contextual • Conversational • Connected

ONE IMMERSIVE EXPERIENCE ACROSS THE LIFECYCLE

• QUOTE • UNDERWRITE • BIND & ISSUE • BILL & SERVICE • CLAIM • RENEW

Can I proceed? • What is blocking me? • What changed? • What should I do next?



Understands screens, navigation, workflow, roles, human intervention, and exception routing.

Rise to the Frontier with P&C Intelligent Core

Themes across the Fall '26 P&C release



Immersive AI Experience

AI-centric, AI-guided quote-to-issuance and common layer experience throughout the Policy Administration workspace.



Experience Modernization and Redesign

Entirely modernized Policy Administration screens to bring the right data and next steps to the right place for increased operational efficiency.



ML Models

Machine Learning (ML)-powered scoring, classification, extraction, risk intelligence, loss comparison, and pricing signals.



AI Core and Copilot across the P&C Suite

New AI Core and Copilot capabilities across Suite. Including MCP connectivity and self-serve agent creation and configuration.



Claims Operations and Market Needs

Claims enhancements for limits erosion, OFAC payment screening, CCC integration, claim files, notes, and workbench operations.



Analytics Anywhere

Operational datasets, report packs, and suite-level Policy and Billing data.



Large Transactions and Operational Throughput

Large schedule processing, Excel download/update/re-upload, OOSE processing, and high-volume Billing inquiry.



Premium Audit Integration

Premium Audit ordering, lifecycle management, and results flowing into Policy and Billing.



Usability, Task Management, Communications, What's New

Customer-driven usability enhancements, task management, & two-way communications improvements; revamped What's New.



Cloud and Platform Modernization

Containerization, technology currency, CI/CD modernization, faster upgrades, SSO, security, and telemetry.

P&C Immersive AI Experience

Give Underwriters one AI-guided work surface from quote creation through policy issuance.

Business Challenge

- Underwriters move between screens, documents, notes, emails, tasks, and policy data.
- Quote decisions and bind-readiness work require repeated searching and context switching.
- Users need intelligence embedded in the work rather than separated into another tool.

Fall '26 Capabilities

- AI-guided quote creation with an immersive underwriting decision and bind-readiness flow.
- Quote and Policy lifecycle timelines with Billing and Claims activity shown in context.
- Work lists for Insureds, Quotes, and Policies with search, filters, favorites, and lifecycle views.
- Global search and voice search across the experience.
- Documents, notes, emails, and tasks managed with Immersive AI assistance.
- Personalized, role-aware home page with recent-activity awareness.
- Integration with existing screens to support phased adoption.

Business Value Add

- Keeps Underwriters working in one connected experience.
- Reduces context switching and manual information gathering.
- Helps users move faster from quote creation to issuance.
- Improves adoption through a more intuitive, AI-native experience.

The screenshot displays the 'P&C Suite' application interface. The top navigation bar includes the 'P&C Suite' logo, a search bar with the query '01-CA-000010031-0', and navigation icons. The left sidebar contains a vertical menu with icons for Home, Activity, Favorites, Policies, Quotes (highlighted), Tasks, Submissions, AI Agents, and Insureds. The main content area is titled 'Quote details' and shows the quote number '01-CA-000010031-0' with a 'Rating - Suspended' status. It also indicates the 'Current version: Revision 0' and the 'Customer: WestBridge'. A 'Quote briefing' section provides recent activity for the quote, including a quote redo and a vehicle schedule confirmation. Below this, an 'At a glance' section displays key financial metrics: Transaction premium of \$11,331, Commission of \$679.86, and Billing of \$0. The 'Do next' section offers action buttons like 'Inquire Quote', 'NotWritten', 'Purge Quote', 'Redo Quote', 'Revise Quote', and a 'More' dropdown. The 'Proactive signals' section shows 'Property score' and 'Recommendations' coming soon. The bottom section, 'What matters now analytics', includes a 'Rate vs prior term' chart.

Experience Modernization and Redesign

Replace legacy Policy screens with a consistent modern experience across the quote-to-issuance journey.

Business Challenge

- Legacy screens create navigation and training overhead.
- Policy users experience inconsistent interaction patterns across lines of business.
- Modernization must preserve core Policy capabilities while making work faster and clearer.

Fall '26 Capabilities

- Redesigned and modernized screens across the Policy quote-creation-through-issuance journey.
- Consistent modern Policy experience across all Policy Lines of Business.
- Modernized experience delivered to P&C Policy Intelligent Core customers.
- AI intelligence tiers – insights, recommendations, Copilot, and agents – activated where enabled.
- Non-AI and non-agent workflows remain available when those capabilities are not enabled.

Business Value Add

- Gives Policy users a cleaner and more intuitive experience.
- Reduces training and navigation effort.
- Creates a consistent foundation for AI-enabled and non-AI work.
- Improves productivity without requiring users to work in legacy screens.

The screenshot displays the P&C Suite interface for a quote-to-issuance journey. The top navigation bar shows the P&C Suite logo, a search bar with the ID 01-CA-000010031-0, and a progress indicator with steps: 1 Intake, 2 Review, and 3 Issuance. The main content area is titled 'Quotes > 01-CA-000010031-0 > Intake (Edit)'. Below this, there's a section for 'WestBridge Logistics' with a 'Rating - Suspended' status and a 'Ready' button. The left sidebar contains a navigation menu with icons for Home, Activity, Favorites, Policies, Quotes (selected), Tasks, Submissions, AI Agents, and Insureds. The main content area is divided into two columns. The left column, titled 'DATA ENTRY & DOCUMENTS', lists various data entry points with checkboxes: Files, Quote Information, Producers, Commercial Auto, Additional Coverages, State Coverage Limits, Covered Auto Symbols, Locations, Drivers, Vehicles, Additional Interest, Experience Rating, Premium Summary (selected), and Forms. The right column, titled 'General', contains a 'General' dropdown menu and a notification: 'The same rated figures the classic premium summary shows, presented in the work'. Below this, there are sections for 'General Information' (Insured Name: WestBridge Logistics, Effective Date: 08/01/2026, Coverage: Business Auto, Pro-Rate Factor: 1), 'Premium Information' (Total Transaction Premium: \$11,331.00), and 'Surcharge Information' (State: NY, Surcharge Name: New York Motor Vehicle Law Enforcement Fee). At the bottom, there's a section for 'Total Coverage Premiums (6)' with a table listing coverages: Liability, Personal Injury Protection Coverage, Uninsured Motorist Coverage, Business Interruption, and Repossessed Auto - Collision. The bottom of the screen shows a section for 'Illinois' and 'IL Coverage Premiums (1)'.

Machine Learning (ML) Models

Bring predictive signals and recommendations directly into Policy decisions.

Business Challenge

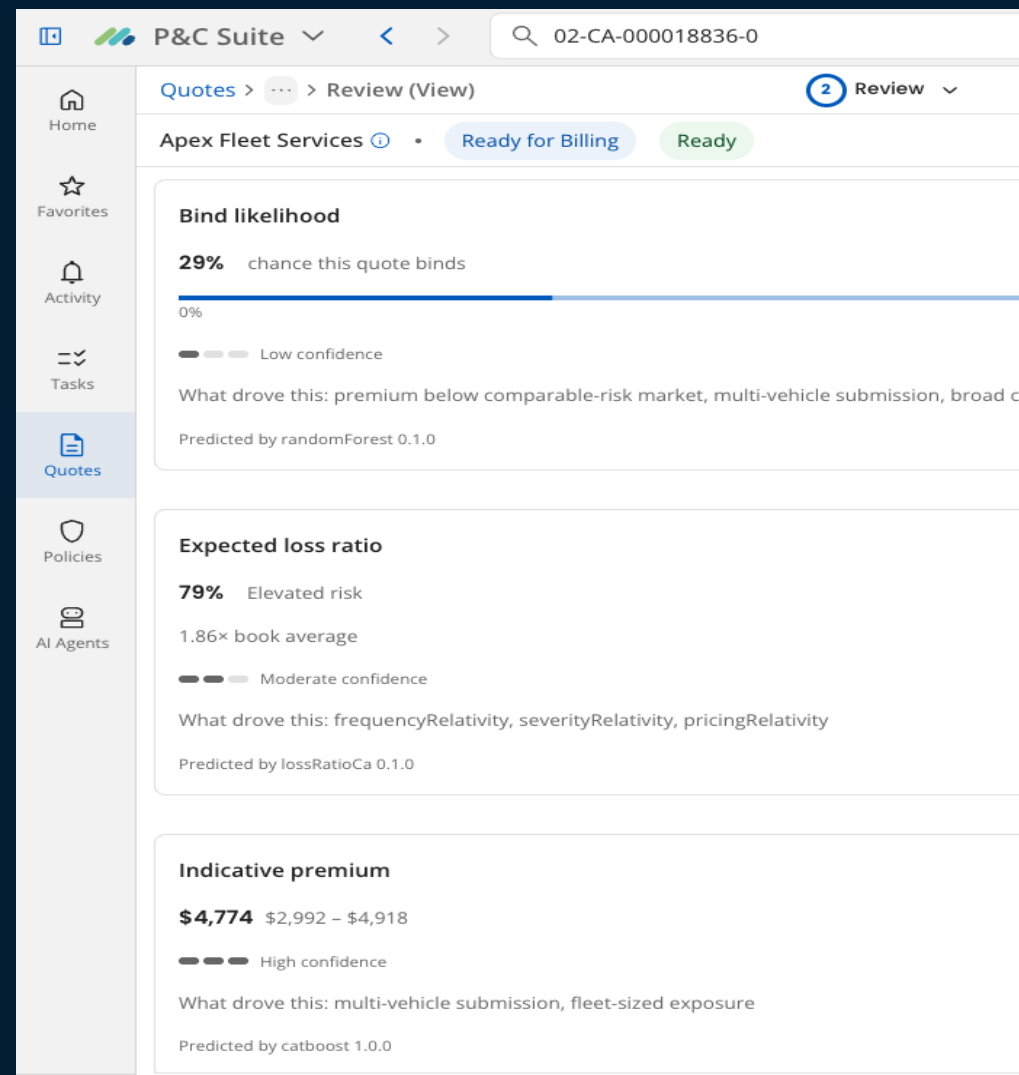
- Underwriters spend time inferring patterns from raw documents and data.
- Risk, pricing, and portfolio signals can be difficult to compare consistently.
- Models must support professional judgment rather than replace it.

Fall '26 ML Capabilities

- Predictive scoring, classification, and ranking.
- Document and data extraction.
- Risk profile intelligence.
- Expected loss and cohort comparison.
- Pricing insight and exception signals.
- Source-grounded model outputs surfaced in the relevant Policy workflow.

Business Value Add

- Reduces manual inference and extrapolation.
- Helps Underwriters identify relevant risk signals faster.
- Supports more consistent risk and pricing decisions.
- Keeps recommendations in context with the underlying data.



Quiet Intelligence Alongside Rules and People

Models learn from history and outcomes, then score risk, price, fit, or the next best action.



LEARN → SCORE → IMPROVE



Read the risk

Loss Ratio scores each submission against the book and shows the drivers behind it.



Recommend

Coverages, limits, and forms arrive ranked, for the underwriter to confirm.



Price and prioritize

Price direction arrives before rating, and bind likelihood shows which quotes to work first.



Powers Immersive AI

The models answer in the Immersive AI quote flow, right where the decision is made.

THE POINT

Not to replace rules or people — to make every handoff between them better informed.

Expanding the ML Models Portfolio

Focused models that improve risk, quote, and follow-up decisions. One model, one decision, one outcome.

01

RISK

Loss Ratio

Risk vs. the book, with tier and drivers.

**02**

COVERAGE

Coverage Recommendation

Coverages, limits, and deductibles that fit.

**03**

FORMS

Forms Recommendation

Ranked forms for the underwriter to confirm.

**04**

PRICING

Indicative Premium

Annual premium with a range, before rating.

**05**

CONVERSION

Bind Likelihood

Likelihood to bind, with the top drivers.

**06**

SUBMISSIONS

Submission Prioritization

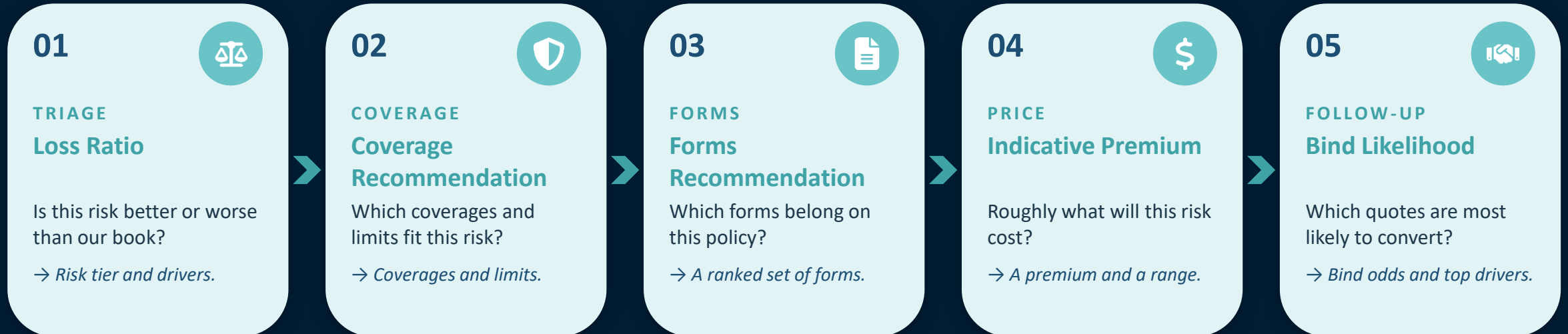
Ranks new submissions, best fit first.

**PORTFOLIO PRINCIPLE**

Designed to be consumed by journeys — not admired in isolation.

Read the Risk, Shape the Quote, Focus the Follow-up

Five models work through one quote, each answering the question an underwriter asks at that step.



OPERATING SIGNALS TO WATCH



THE CHANGE

Risk, coverage, forms, price, and follow-up answered without leaving the quote.

MCP Server and Agent API

Give external AI experiences a governed integration path into Majesco capabilities.

Business Challenge

- External assistants and agents need consistent ways to connect to core-system actions.
- Point-to-point integrations increase maintenance effort.
- AI integrations need a reusable interface rather than custom connections for every use case.

Fall '26 Capabilities

- MCP Server support that exposes AI agents as APIs for integrations.
- Agent API access for connecting external assistants and agent experiences.
- Integration path for approved Policy, Billing, Claims, document, knowledge, and cross-suite actions.
- Support for the assistant and application-triggered agent scenarios in the AI Core and Copilot capability set.

Business Value Add

- Simplifies connection between external AI experiences and Majesco capabilities.
- Reduces duplicated integration work.
- Supports reuse of governed actions.
- Enables carriers to extend AI into the tools their teams already use.

How an outside call reaches an approved P&C action



Self-Serve AI Agent Authoring

Let carriers create, configure, deploy, and manage their own AI agents with minimal engineering effort.

Business Challenge

- Every new agent requirement should not require a separate engineering project.
- Business teams need to adapt AI support to their operational workflows.
- Self-service must remain connected to approved actions and governance.

Fall '26 Capabilities

- Self-serve creation of customer-specific AI agents.
- Agent configuration using approved Policy, Billing, Claims, document, knowledge, and cross-suite actions.
- Agent deployment with controlled access and workflow configuration.
- Agent management as business needs evolve.
- Reuse of the shared tools catalog established for AI Core and Copilot.

Business Value Add

- Shortens the path from operational need to usable agent.
- Reduces dependency on specialized engineering resources.
- Helps carriers tailor AI to their own workflows.
- Expands the value of the shared P&C AI platform while preserving control.

From a plain-language request to a governed, live agent



01 · DESCRIBE

Say what the agent should do

Plain business language from any authorised user — no tool names, no code, no engineering ticket.



02 · CONFIGURE

Configured from approved actions only

Drawn from the same governed action catalog as AI Core and Copilot.

Policy

Billing

Claims

Document

Knowledge

Cross-suite



03 · CONTROL

Access control, not new permissions

Authoring composes rights that already exist.

Who may author

Who may publish



04 · DEPLOY & MANAGE

Publish, version, disable, roll back

Going live stays a deliberate human step — and every change is reversible.

Email-Driven Agent Automation

Turn shared business mailboxes into monitored intake channels that screen, route, and respond without manual triage.

Business Challenge

- Claims, submissions, and service requests arrive as unstructured email.
- Shared mailboxes are triaged manually, message by message.
- Volume causes delays, misrouting, and missed requests.
- Email is also the carrier's largest attack surface.

Fall '26 Capabilities

- Scheduled mailbox polling via secure Outlook connection.
- Ten-point safety screening before any AI runs.
- Hard blocks on dangerous attachments, policy violations, and malicious links.
- Request classification with entity extraction from email and attachments.
- Routing limited to the approved agents bound to each mailbox.
- AI-labeled reply in the same thread, under one tracking ID.
- Operations view with per-mailbox status and stuck-email detection.

Business Value Add

- Removes manual triage from shared mailboxes.
- Work starts when mail arrives, not when someone opens it.
- Separates unsafe and uncertain mail automatically.
- Makes every message traceable from intake to reply.

• Every message screened before any AI model sees it



01 · COLLECT

Mailboxes polled on their own schedule

Secure Outlook connection via Microsoft Graph — sender, body and attachments stored under one tracking ID.



02 · SCREEN

10-point safety gate, scored 0–100

Runs **before** any AI model touches the message. Three categories are hard blocks regardless of score.

× Dangerous attachments

× Policy violations

× Malicious links



03 · FILTER

Noise suppressed by fixed rules

Auto-replies, empty messages, bulk senders and newsletters drop out before any AI runs.



04 · UNDERSTAND

Classified, extracted, confidence scored

Entities pulled from the email and its attachments — no retyping into the suite.



05 · ACT

Routed only to an approved agent

Chosen from the agents an administrator bound to that mailbox — never one it invented.



06 · REPLY

Answered in the same thread

Clearly labelled "AI-Generated Response", with the full trace preserved.



One tracking ID from intake to reply — unsafe mail blocked outright, low-confidence mail held for a human.

Extended Copilot Agents and Approved Actions

Out-of-the-box agents and one approved action catalog across Policy, Billing, and Claims.

Policy

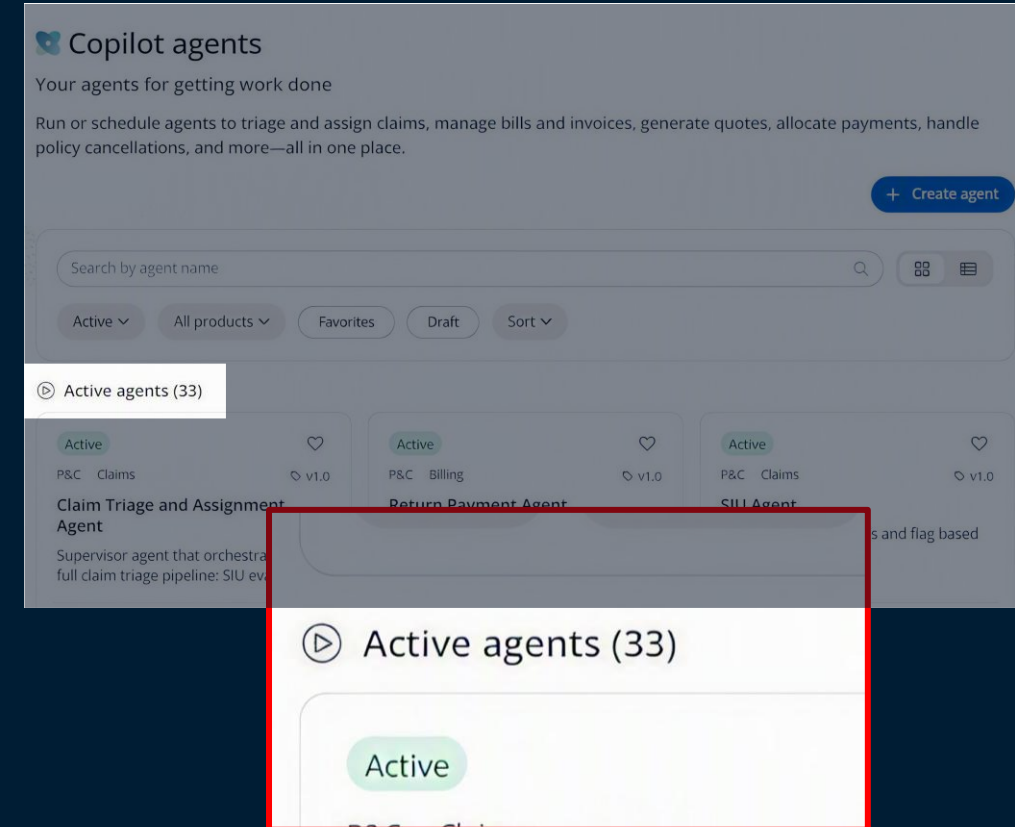
- **Out-of-the-box agents:** Quoting for Commercial Auto, Workers' Compensation, General Liability, and Commercial Property, plus cancellation assist, reinstatement, and certificates of insurance.
- **Shared approved actions:** Policy and coverage retrieval, cancellation, reinstatement, certificate generation, and Policy task creation.

Billing

- **Out-of-the-box agents:** Payment allocation, cash allocation, refunds, write-offs, and bulk hold release.
- **Shared approved actions:** Account and agency billing overviews, open balances, payment and cash allocation, payment-plan changes, refunds, write-offs, hold placement and release individually or in bulk, and billing task creation.

Claims

- **Out-of-the-box agents:** Triage and assignment, SIU referral, and complexity and severity evaluation.
- **Shared approved actions:** Claim search, unified search, claim detail, notes and flags, ownership and assignment updates, closure, and claim task creation.



Analytics Anywhere Extended

Put operational datasets and reports directly into P&C decision-making.

Business Challenge

- Users leave core workflows to locate reports and interpret operational data.
- Lines of business need different operational views.
- Leaders and practitioners need self-service insight without exporting data.

Fall '26 Capabilities

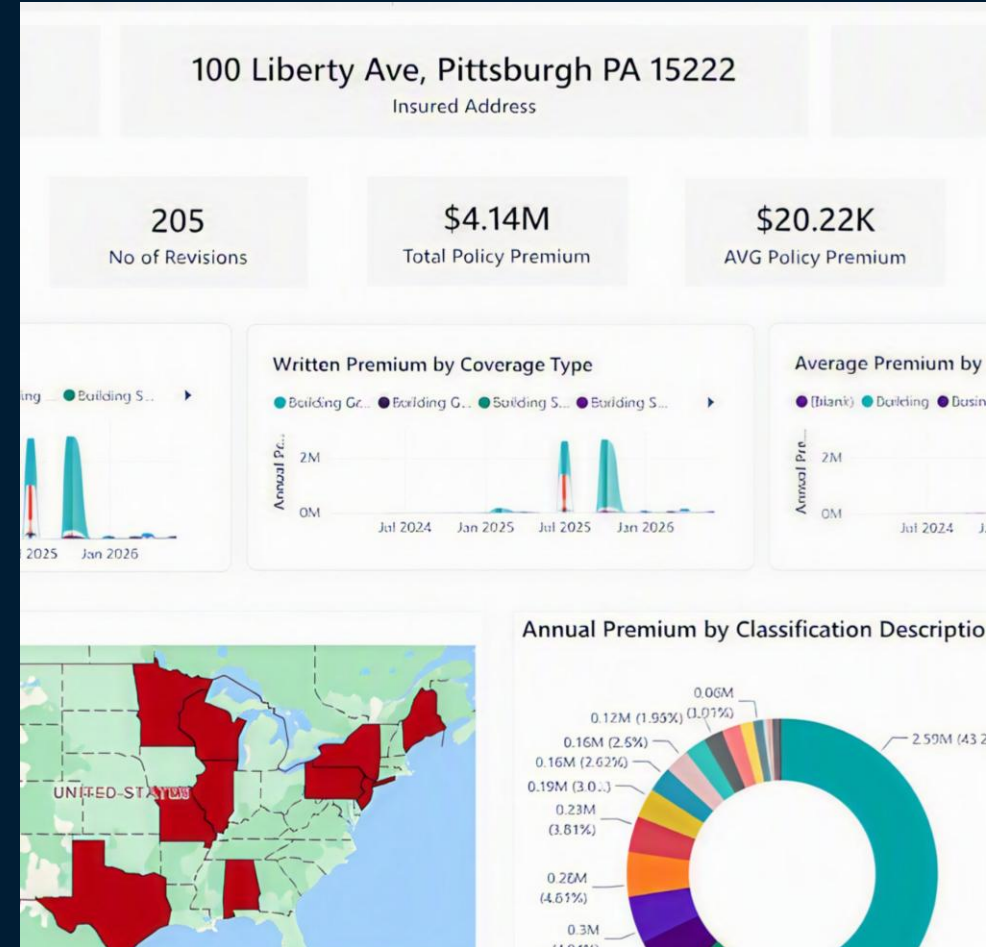
- **Commercial report packs:** Commercial Property, General Liability, Inland Marine, Crime & Fidelity, Commercial Package, and Businessowners.
- **Workers' Comp and personal-lines report packs:** Workers' Compensation, Personal Auto, Homeowners, and Dwelling Fire.
- Suite-level operational dataset spanning policy and billing.
- Role-based, self-service analytics embedded in the flow of work.
- Report and data access without leaving the core workflow.

Business Value Add

- Makes operational trends and KPIs easier to access.
- Reduces dependency on manual report preparation.
- Helps users act on information while they are doing the work.
- Extends analytics across commercial, personal, policy, and billing use cases.

11 Datasets

18 Reports



Bureau and Regulatory Currency

Deliver bureau and regulatory changes as maintained product content.

Business Challenge

- Bureau circulars and state requirements change throughout the release cycle.
- Manual maintenance increases compliance effort and implementation risk.
- Carriers need current rules, forms, endorsements, taxes, and surcharges available in the product.

Fall '26 Capabilities

- Monthly ISO and NCCI circular update waves from April through September 2026.
- State-specific loss-cost revisions, rule changes, revised endorsements, and revised forms across commercial lines.
- State tax-code updates for Commercial Auto, Businessowners, and Commercial Package.
- State audit-regulation support in billing.
- State surcharge implementations aligned to regulatory effective dates.

Business Value Add

- Reduces custom regulatory maintenance.
- Improves product currency and compliance readiness.
- Helps carriers adopt bureau changes on a predictable cadence.
- Reduces the operational risk of missing effective-date requirements.

OVER-ALL BUREAU STATISTICS

119,083

Base-product resources to date

RESOURCE COUNTS

Data Fields	33,640
Rules	70,352
Rating Algorithms	3,160
Rate Tables	1,822
Forms	10,109
TOTAL	119,083

SPRING → FALL '26

258 CIRCULARS

Loss Costs	146	Latest Eff 3/1/2027
Forms	67	Latest Eff 3/1/2027
Rules	45	Latest Eff 3/1/2027

130+ Tickets

Small Enhancements	32
IPD - Stat Related Enhancements	100+

Large Schedule Upload & Offline Processing

Support large schedule upload for national programs & offline processing for large policy transactions New import process reduced total time by 25% for WC

Business Challenge

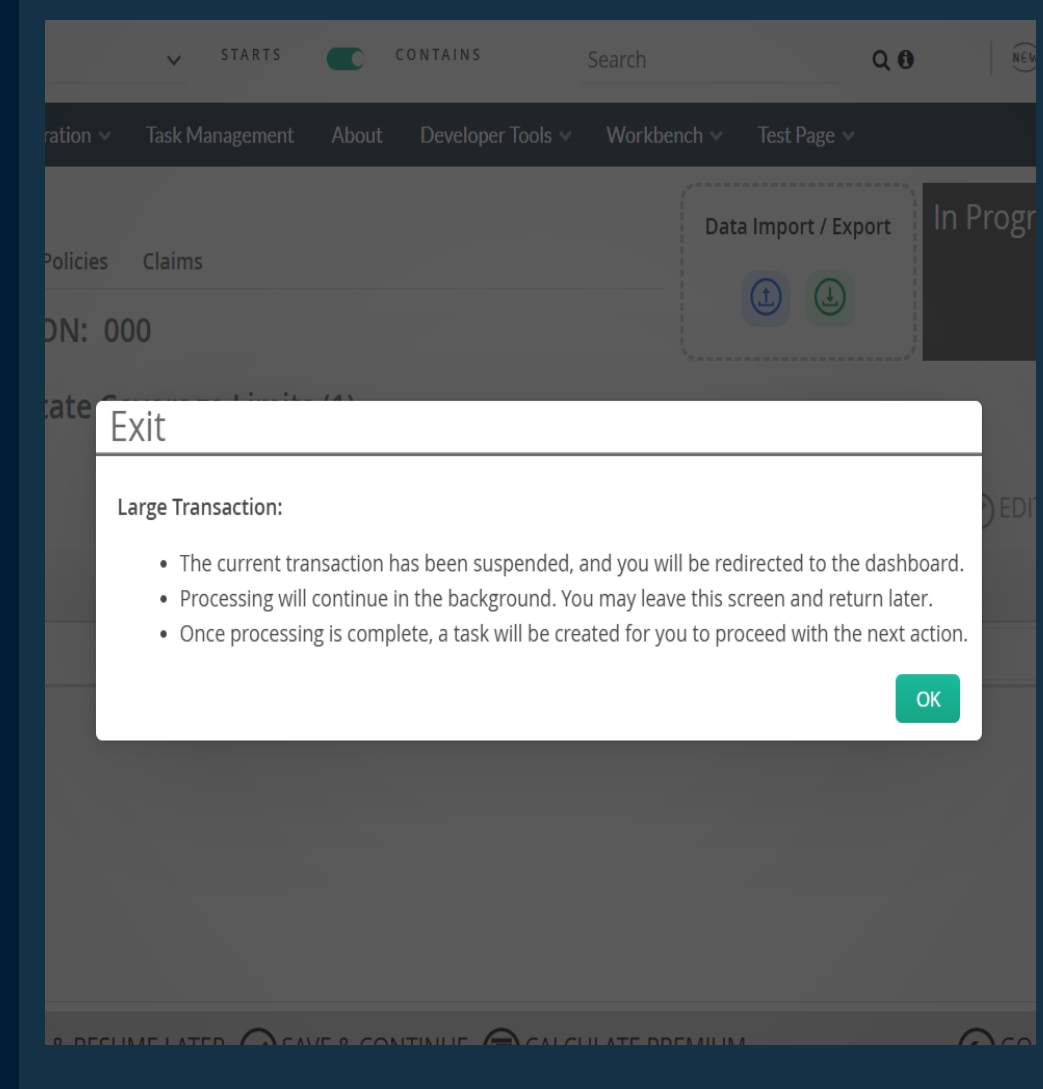
- Large schedules and national accounts create data-entry and processing bottlenecks.
- Large & resource-intensive policy transactions results in degrading the performance of online, interactive workloads.

Fall '26 Capabilities

- **Large schedules:** Download to Excel, bulk-update, and re-upload for Workers' Compensation, General Liability, and Commercial Auto, with performance optimization for large schedules and transactions.
- Processing of large policy transactions efficiently via Smart Load Balancer
- Supports dynamic resource scaling to handle spikes in large transaction volumes without manual intervention.
- Large transactions are processed in the background, allowing the application to remain available for regular transactions without disruption.

Business Value Add

- Helps carriers manage large accounts and national programs
- Prevents large, resource-intensive transactions from degrading the performance of online, interactive workloads.
- Enables predictable, stable user experience for regular users by isolating heavy jobs.



Out of Sequence Endorsements – Operational Improvement

Support complex Policy–Billing transactions without throughput limits.

Business Challenge

- Out-of-sequence endorsements can create inconsistencies across policy and billing.
- Traceability and reviewing is difficult especially when large number of revisions are created as part of the OOSE.

Fall '26 Capabilities

- **Out-of-sequence endorsements:** New Billing API processes all OOSE revisions as one transaction;
- Optimized OOSE processing and inquiry across the policy–billing boundary
- Endorsements distinguished by source revision; trace billing activity back to the originating PAS transaction
- Optimized high-volume billing inquiry and APIs.

Business Value Add

- Reduces manual schedule maintenance.
- Improves consistency across policy and billing.
- Increases throughput for high-volume inquiry and transaction processing.

The screenshot displays the Majesco Billing system interface. At the top, the 'Billing' tab is selected. Below the navigation bar, the 'Insured Info' tab is active, showing details for Mike Ross, 123 mark q123e, USA Los Angeles CA 90001. The 'Transactions' tab is also visible, showing a table of transactions. The table has columns for POLICY #, TRANSACTI..., ENTRY DATE, ACTION, EFFECTIVE DATE, and EXPIRY DATE. A red box highlights a specific transaction row.

POLICY #	TRANSACTI...	ENTRY DATE	ACTION	EFFECTIVE DATE	EXPIRY DATE
01-WK-000...	Endorsement	12/29/2026	Action	12/15/2026	09/17/2026
01-WK-0001286...	Non Money ...	10/30/2026		11/30/2026	09/17/2026
01-WK-0001286...	Out of Sequ...	10/30/2026	Action		
01-WK-0001286...	Non Money ...	10/30/2026		11/30/2026	09/17/2026
01-WK-000...	Endorsement	10/30/2026	Action	10/30/2026	09/17/2026

Claims Operations and Market Needs

Improve Claims control, payment integrity, documentation, and daily workflow efficiency.

Business Challenge

- Adjusters manage information across claim files, notes, vendor content, tasks, and communications.
- Claims workflows must support market, regulatory, and operational requirements.

Fall '26 Capabilities

- **Payment integrity:** Verify claim payment recipients through OFAC.
- **Vendor content in context:** View CCC estimates, appraisals, and photos directly from the claim.
- **Claim files and Notes:** Outputs with attachments, letters, and emails embedded; rich-text and larger Notes; managed visibility of system-authored Notes.
- **Workbench operations:** Claim task templates, new claims workbench retention, inbound-email task assignment to the claim owner, and bulk financial-authority updates.

Business Value Add

- Improves payment and coverage-limit control.
- Reduces manual movement between claims and vendor information.
- Makes claim files and notes more usable.
- Helps adjusters manage daily work with fewer handoffs.

Add New Note

Feature: [Dropdown] Salvage: [Dropdown] Subrogation: [Dropdown]

Subject: [Dropdown] Notes for: [Dropdown]

Copilot

Note Text

Normal [B] [I] [U] [Link] [Text Color] [Background Color] [List] [Table] [Table of Contents] [Undo] [Redo]

Enter your formatted note text here...

Attach Documents

Upload or Attach Document

Drag and drop file here, or click to upload

[User Icon] Internal [Link Icon] Attachments (0) [Pencil Icon] Edit [Trash Icon] Delete

[Print Icon] Print visible notes

[Sort Icon] Sort

Premium Audit Integration

Move Premium Audit information through the Policy and Billing lifecycle with fewer handoffs.

Business Challenge

- Audit ordering and follow-up can require manual coordination.
- Audit status is difficult to manage when it is separate from the policy lifecycle.
- Audit results need to reach downstream policy and billing work accurately.

Fall '26 Capabilities

- Automated ordering of audits from the policy lifecycle.
- Audit status and lifecycle management within Intelligent Core.
- Audit results flowing directly into policy and billing.
- Connected policy and premium audit context for applicable workflows.

Business Value Add

- Reduces manual audit coordination.
- Improves audit visibility and follow-through.
- Reduces errors and premium leakage caused by disconnected handoffs.
- Helps downstream policy and billing work use audit results sooner.

Warning! This is an In Parallel Self-Survey Inspection. Inspection data may be lost or overridden if changes are made outside of the standard workflow.

Audit Info

Customer	Majesco	Division	Premium Audit
Policy Number	01-GL-000010412-0	Audit Type Category	Commercial
Current Premium	\$ 3,758.00	Audit Type	General Liability All
Underwriter	Unassigned	Audit Number	5022
Underwriter Phone	Unassigned	Auditor	Andy Zaprzal
Underwriter Email	Unassigned	Auditor Phone	
Rush	No	Order Method	Import Inspection API
Requires QA	No	Ordered By	Demo3 User
QA Rush	No	Assigned By	Majesco Policy (Manager)
Status	Complete	Auditor Special Attention	No
Company Name	Mala GL Test 1	Underwriter Alert	No
Audit Language	English	Currency	US Dollars
Production Weight	0		
Carrier ID	P01GL0000104120000-0		
Recommendation Follow-up Users	Andy Zaprzal		
Reviewer	Unassigned		
Is Reviewed	No		
Duplicate	Yes		

Hide From Client Portal No (Inferred from Inspection Type)

Contact Info

Address to be Audited: 4016 Doane St

Quick Login: <https://MajescoPolicy.losscontrol360.com/jm>

Status
In Force (OrderAudit - Complete)

Cloud and Platform Modernization

Make Intelligent Core faster to deploy, easier to upgrade, and more stable at scale.

Business Challenge

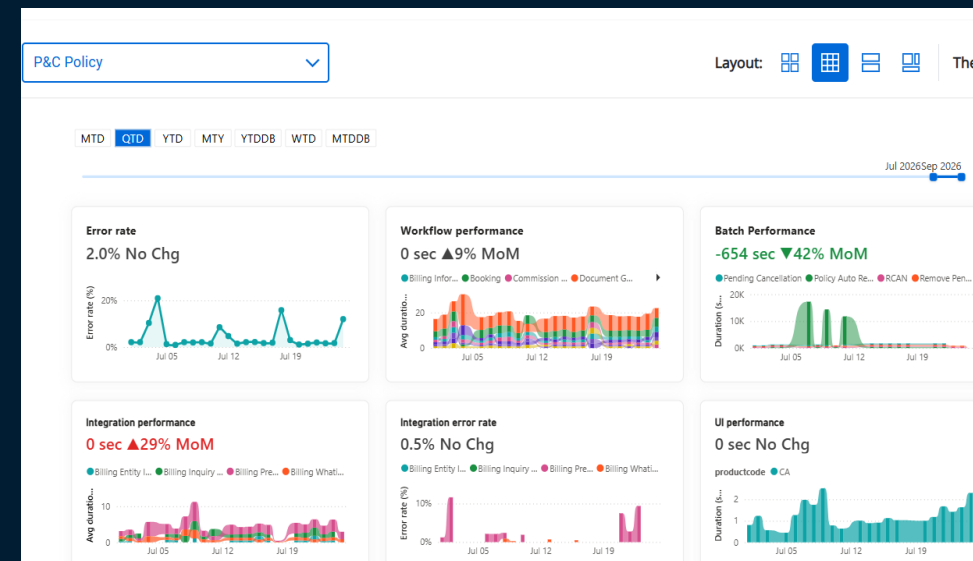
- Customers need predictable deployment and upgrade paths across policy, billing, and core services.
- Technology currency and security work must continue without disrupting delivery.
- Cloud operations require consistent telemetry and support for multiple deployment models.

Fall '26 Capabilities

- Containerization parity with VM deployments, including certification and migration paths across policy, billing, and core services.
- Technology currency updates across the suite, including Java, WildFly, and Hibernate.
- CI/CD modernization with pre-built pipeline patterns for repeatable delivery.
- Deployment-time reduction (45% improvement) and upgrade simplification, including Fast Upgrade work in billing.
- Single sign-on for the P&C Suite and ongoing security upgrades.
- Telemetry instrumentation and dashboards for cloud installations.

Business Value Add

- Reduces upgrade and deployment effort.
- Improves operational consistency across deployment models.
- Strengthens security and platform currency.
- Gives teams better visibility into cloud installation health.



Build & Deployment Time Improvement

Module	Build (Old → New)	Build Gain	Deploy (Old → New)	Deploy Gain
Policy	60 → 40	33.3%	120 → 60	50.0%
Core Services	45 → 25	44.4%	25 → 15	40.0%
Claims	120 → 60	50.0%	90 → 60	33.3%
Billing	90 → 50	44.4%	45 → 45	0.0%
Total	315 → 175	44.4%	280 → 180	35.7%



Build time reduced **44.4%** overall



Deployment time reduced **35.7%** overall

Usability, Task Management, and Communications Enhancements

Remove everyday friction through customer-driven usability, task, and communication improvements.

Business Challenge

- Small workflow obstacles accumulate across policy, billing, and suite operations.
- Users need better sorting, notes, task coordination, and communication continuity.
- Improvements must reflect actual customer feedback and observed user behavior.

Fall '26 Capabilities

- **Billing:** Sorting across pages of key grids; timestamped notes and agent information in the inquiry header; off-cycle invoicing after rescission; enhanced account APIs.
- **Policy rating:** Rating worksheets that show increased-limit and deductible factors separately; enhanced composite rating.
- **Commercial lines:** Export and import improvements; graceful error handling for prefill and VIN integrations.
- **Task Management:** Manual task templates; Unified Task Management dashboard and workbench improvements with international date support and report summaries; cross-application task integration across the Suite.
- **Communications:** Further enhancement to two-way email communication in Unified Email Services

Business Value Add

- Reduces daily navigation and administration.
- Makes Policy and Billing information easier to interpret.
- Improves task visibility and cross-application coordination.
- Creates clearer communication continuity for users and customers.

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P&C Core Suite

Home

Workbench

Email

Configuration Management

Create/Update Email Template

Template Name

Claim Acknowledgement

Product

Claim

Email Account

Claims Application Account

Description

This template will enable user to send claim acknowledgements through email.

☒ Include Attachments in Email

To

{{Insured Email}} x

Cc

Bcc

Reply To

Subject

Claim Acknowledgement

Message

B

U

12

Helvetica

A

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Dear {{Insured Full Name}},

Thank you for contacting {{Company Name}}. We are dedicated to assisting you through the claim process.

Our Claim Center has received your recent {{(Line of Business)}} claim, which has been assigned to the claim professional identified

Centralized What's New Insights

A standalone, centralized capability designed to highlight product improvements, relevant features, and recognize the value of upgrading.

Business Challenge

- Limited visibility into newer capabilities
- Weak upgrade motivation
- Difficult and inconsistent content consumption

Fall '26 Capabilities

- Move beyond release-only notes
- Tailored content based on the customer's installed version, entitled products
- One consistent experience across policy, billing, claims, and Copilot through a common portal and reusable integration model
- Improved content quality

Business Value Add

- Encourages upgrades
- Improves feature adoption
- Reduces customer and implementation effort
- Makes release information easier to consume
- Preserves historical product knowledge

Policy POLICY · 16

Product version POLICY @ Fall '26 ▾

Fall '26 · 16

- Policy** **New**
Configurable Default Attachment Selection for...
Administrators can configure Unified Email Service (UES) Email Templates to... determine whether available documents
[Details >](#)
- Policy** **Enhanced**
All-or-None Out of Sequence Endorsement Integration Acro...
Out of Sequence Endorsement bookings are processed consistently across Polic... and Billing using an all-or-none
[Details >](#)
- Policy** **New**
Policy Dashboard Tab-Spe Column Filters
Users can reposition column filter independently within each Policy Dashboard tab, allowing the dash...
[Details >](#)
- Policy** **New**
Out of sequence Endorsement Control for Non-Premium-...
This enhancement introduces a new non-monetary correction transaction b... which out-of-sequence endorsement is
[Details >](#)
- Policy** **Enhanced**
Flag-Based Booking Confirmation
Users can configure a confirmation prompt before the Book action finalize... a policy, helping prevent accidental
[Details >](#)
- Policy** **Enhanced**
Unified Task Management Templates, Claims Visibili
This enhancement streamlines ta management across Policy, Billing Claims bringing real-time claims f...
[Details >](#)

[← Back to features](#)

Claims **New** MCL-4177

Ability to verify payment recipients through OFAC

Overview

Adds an out-of-the-box OFAC screening capability to MCAS.
Helps carriers prevent payments to payees listed on sanctions lists.

Why it matters

- Screens payees before payments are processed.
- Routes potential OFAC matches for review instead of allowing immediate processing.
- Prevents the payment queue from advancing until financial and OFAC validations are resolved

Quality and Delivery Engineering

Improve release quality through healthier code, AI-assisted engineering, and stronger delivery assets.

Business Challenge

- Complex P&C releases require quality across policy, billing, core services, and integrations.
- Technical debt can slow delivery and increase production risk.
- Customers need dependable product documentation and ecosystem integrations.

Fall '26 Capabilities

- Technical-debt reduction across policy, billing, and core services.
- AI-assisted engineering applied to Line of Business delivery.
- Product-documentation improvements and automation.
- EcoExchange applications and integrations for commercial lines.
- Cloud scalable storage (Azure blob) with Industry grade security for Document storage.
- Billing and claims upgraded to JDK 21 to align with long term support of execution stack.

Business Value Add

- Reduces recurring defects and maintenance friction.
- Improves delivery speed and engineering consistency.
- Makes product information easier to maintain and use.
- Expands integration options for commercial-line customers.



Fall '26 Release



CORECONNECT and ENTERPRISE RATING

Launch faster. Price smarter.

A release focused on reducing the manual work, implementation effort, and change friction that slow insurers and MGAs down.



Fall '26 Theme Map

Faster time to value across the product lifecycle

CoreConnect

- Establish environments and product foundations faster with CoreConnect Fast Installs.
- Start from a production-ready line-of-business MGA foundation.
- Use AI to accelerate new line-of-business creation.

Enterprise Rating

- Evaluate pricing changes before deployment with next-generation Rate Analyzer.
- Significantly reduce rating and custom UI development for new and changing products.

One Connected Journey from Build to Price to Quote

Fall '26 connects product creation, pricing analysis, deployment, and quoting.

CONNECTED JOURNEY

- Build faster with AI-assisted Enterprise Rating workbook creation.
- Measure pricing impact with Rate Analyzer.
- Deploy consistently through CoreConnect Fast Installs.
- Put the result to work through CoreConnect quoting and policy workflows

A faster path to quoted business

More consistency. More confidence. Less friction.



Rise to the Frontier with CoreConnect

Together, these enhancements help insurers and MGAs launch faster, make better-informed decisions, and scale Personal Auto with less effort and risk.



Fast Installs

Automates and standardizes environment provisioning to accelerate implementation, reduce delivery risk, and speed time to value.



Driver Insight

Brings MVR data directly into Personal Auto workflows, reducing rekeying and enabling faster, better-informed underwriting decisions.



Expanded MGA Model Office

Gives MGAs a production-ready Personal Auto foundation in as little as 11 weeks, reducing implementation effort and accelerating launch.

CoreConnect Fast Installs

Reduce the effort and risk of setting up new environments

BUSINESS CHALLENGE

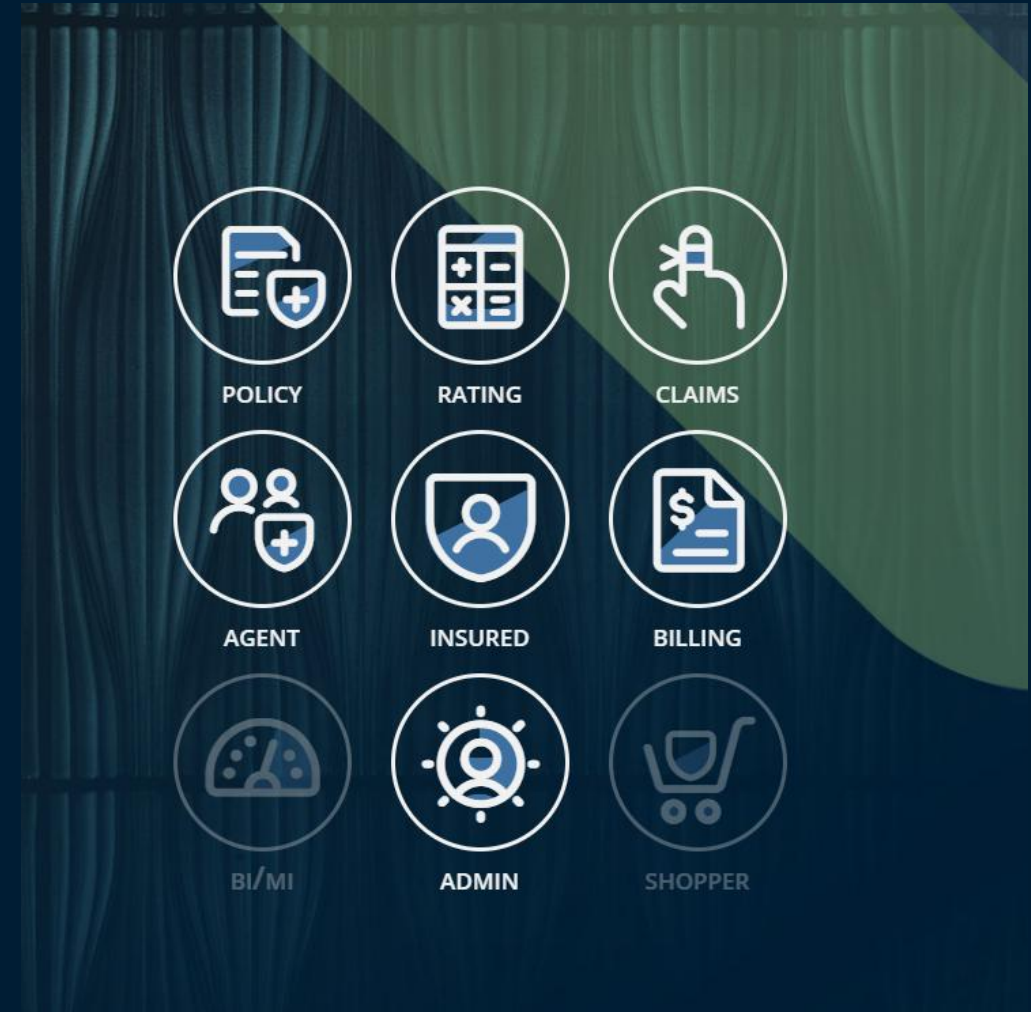
- Environment provisioning depends on manual, repetitive steps.
- Dev, QA, UAT, and production setup can vary across implementations.
- Inconsistent setup increases services effort and delivery risk.

CAPABILITIES

- Automates deployment across CoreConnect portals, Enterprise Rating, Product Studio, and shared services.
- Standardizes environment setup and provisioning.
- Supports a repeatable path from a blank environment to a working foundation.

BUSINESS VALUE ADD

- Faster implementation starts.
- Less manual provisioning effort.
- Lower delivery risk and faster time to value.



CoreConnect Driver Insight

Put driver risk information directly into the Personal Auto workflow

BUSINESS CHALLENGE

- Underwriters and agents need MVR information during policy and quoting activities.
- Manual lookups and rekeying slow decisions and create opportunities for error.
- Risk information is not always available in the context where it is needed.

CAPABILITIES

- Capture driver and license information needed for MVR processing.
- Order reports through an integrated exchange.
- View current MVR status, processing details, and driver violations in context.

BUSINESS VALUE ADD

- Less rekeying.
- Better-informed underwriting decisions.
- Faster, more connected Personal Auto workflows.

Transaction 2

Status Complete (Amendment)

Total Term Premium

\$60.00

Premium Difference

\$0.00

Order 3 MVRs

License Number	License Status	Date Licensed	MVR Status	MVR Processed Date	
XXX4857	Valid	03/14/1983	Hit - Activity Found	08/11/2026	
XXX0319	Valid	01/10/1982	Not Ordered		
XXX1418	Valid	02/10/1988	Not Ordered		
XXX1117	Valid	11/09/1980	Not Ordered		

Expanded MGA Model Office

Give MGAs a production-ready Personal Auto starting point

BUSINESS CHALLENGE

- Building products, portals, workflows, forms, and rating from scratch takes significant time.
- New MGA programs face implementation risk before they can begin writing business.
- Teams need flexibility without creating an unmanageable custom foundation.

CAPABILITIES

- Preconfigured Personal Auto products, portals, workflows, forms, and rating.
- Priority integrations such as VIN and MVR services.
- A proven, upgrade-friendly foundation that can be tailored to customer needs.

BUSINESS VALUE ADD

- Production-ready in as little as 11 weeks.
- Faster launch without building products, portals, workflows, forms, and rating from scratch.
- Lower implementation effort and risk with a proven, upgrade-friendly foundation.

The screenshot displays the CoreConnect MGA Model Office interface. At the top, a navigation bar includes the CoreConnect logo and icons for home, user, settings, and a plus sign. Below the navigation bar, a breadcrumb trail reads: [Customers](#) > [AQUA, YURIKO](#) > [Policy Number: 032016458](#).

The main content area is divided into two sections. The top section, titled "Policy Details", contains a table with the following information:

Policy Number 032016458	Effective Period 05/07/2026 - 05/07/2027	Term Current Policy (1)
Insured AQUA, YURIKO	Risk Location California	Address 4220 Irving St San Francisco, CA 94121, US
Billing Cycle New Billing	Current Due Date 05/07/2026	Current Amount Due \$708.85
Autopay Method None		

The bottom section, titled "Policy Details", contains a sidebar with a list of links: General Policy Info (selected), Drivers, Vehicles, Coverage, Questionnaire, Designee, UW Updates, and Correspondence. The main content area of this section displays the following information:

Custom Policy Number 032016458	Date Converted 10/09/2025
Term Twelve Months	Effective Date 05/07/2026
Group Acc Num 2	Market Code Fitness Retail

Below this table, the "Insured Information" section is partially visible.

Rise to the Frontier with Enterprise Rating

Together, these enhancements help insurers move from approved filings to informed pricing decisions faster, reducing manual effort, accelerating product launches, and increasing confidence in rate changes.



AI-Powered Workbook Generation

Transforms approved filing content into a structured rating workbook in as little as 30 minutes, reducing manual entry, transcription risk, and time to launch new products.



Next Generation Rate Analyzer

Helps insurers evaluate proposed pricing changes against in-force portfolio data, providing earlier visibility into premium and loss impacts before deployment.

AI-Powered Workbook Generation

Turn approved filing content into a faster starting point for rating

BUSINESS CHALLENGE

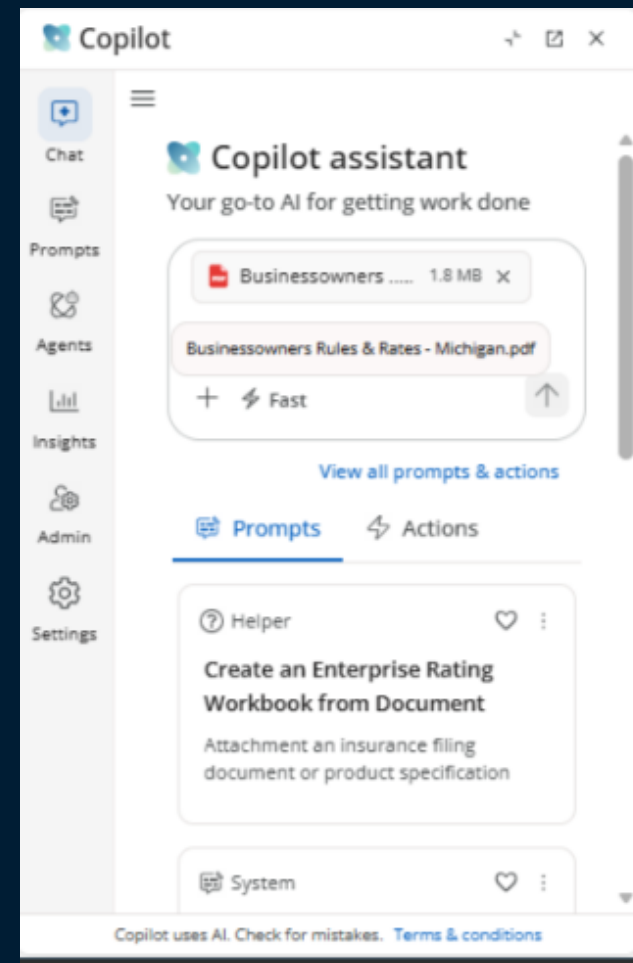
- Translating filing documents into rating workbooks requires manual interpretation and data entry.
- Rekeying rating information increases transcription risk.
- New product implementation can take weeks.

CAPABILITIES

- Use filing documents as an input for extracting rating data.
- Generate a structured Enterprise Rating workbook.
- Create a faster starting point for a new product.

BUSINESS VALUE ADD

- Create a structured Enterprise Rating workbook from a product filing or other requirements document in as little as 30 minutes.
- Reduce a process that previously took weeks to minutes.
- Reduce manual data entry and transcription risk.



Next-Generation Rate Analyzer

Measure the impact of proposed pricing changes before deployment

BUSINESS CHALLENGE

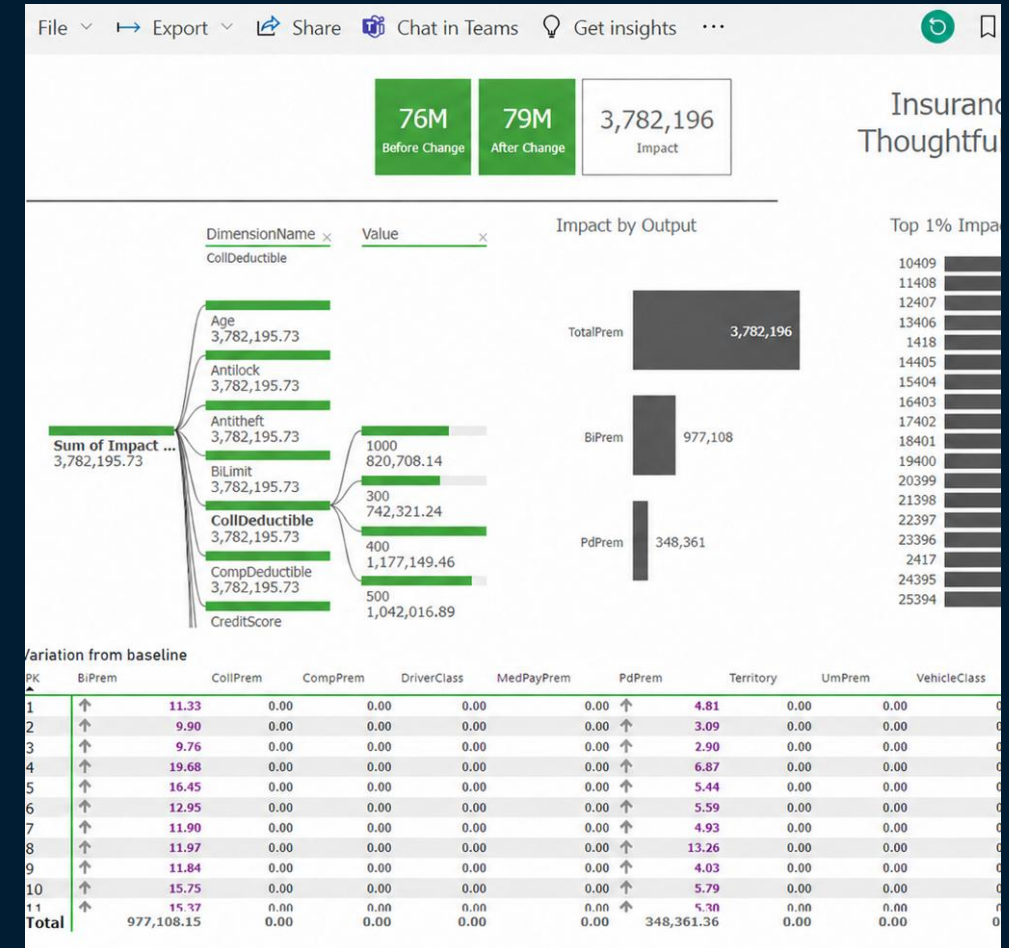
- Pricing changes need to be evaluated against real portfolio behavior before promotion.
- Product and actuarial teams need insight into premium and loss impacts.
- Decision-makers need evidence before approving a change.

CAPABILITIES

- Compare current and proposed rate programs.
- Analyze impact using in-force policy data.
- Support portfolio-level review before deployment.

BUSINESS VALUE ADD

- Better-informed pricing decisions.
- Earlier visibility into potential portfolio impact.
- More governed rate-change decisions.



LOSS CONTROL

Smarter, more connected Loss Control

Fall '26 brings AI-powered insights, streamlined workflows, enhanced analytics, and stronger platform capabilities to help insurers improve risk visibility, operate more efficiently, and make better-informed decisions.

Fall '26 Theme Map

Themes across four areas of investment

Intelligence and AI	Copilot on Majesco AI Core	Property Resiliency	IC Credit Tracking
User Experience	GuideStream Observer Audio Functionality	Fast Form Builder	Customer-Driven Enhancements
Carrier Operations	Policy Integration for Premium Audit – GL	Analytics Anywhere Enhancements	Inspection APIs
Platform and Delivery	Majesco AI Core Migration	Quality, Security, and Platform Readiness	Library Upgrades

The AI Portfolio

Agents that take routine work off your team's plate. One agent, one job, one clear result.



01 RISK MONITORING

Natural Catastrophe Agent

Matches live weather alerts to insured locations before the storm hits.



02 INSPECTIONS

Transcription Agent

Turns inspection conversations into notes in GuideStream or the mobile app.



03 DOCUMENTS

Document Intelligence

Reads uploaded documents and answers survey questions from them.



04 ASSISTANT

Majesco Copilot

Ask questions and get work done in LC360 through a simple chat.

PORTFOLIO PRINCIPLE

Every agent works inside LC360, right where the work already happens.

Rise to the Frontier with Loss Control

Ten capabilities across four areas of investment



Copilot on Majesco AI Core

LC360 Copilot rebuilt on Majesco AI Core, with a new conversational experience and full telemetry.



Property Resiliency

Property resiliency assessments run inside LC360 for catastrophe and residential risk review.



Intelligent Core AI Credit Tracking

Tracking of how many AI credits have been used, both per operation and total for an entire license.



GuideStream Observer Audio Functionality

All observers, internal and external, can now speak in a session using their own microphones, with host-controlled access.



Fast Form Builder

Richer question configuration, table questions, drag-and-drop reordering, and import and export.



Customer-Driven Enhancements

Ten promoted Idea Portal requests across grids, dashboards, forms, and outputs.



Policy Integration for Premium Audit – GL

General Liability audits ordered, completed, and synced back to Majesco Policy.



Analytics Anywhere Enhancements

Power BI report subscriptions with scheduled email delivery, plus report editing directly within LC360.



Inspection APIs

New MLC APIs to help support getting, adding, and updating data directly within an inspection.



Quality, Security, and Platform

Penetration test follow-ups, rewritten regression coverage, and AI-enabled engineering.

Copilot on Majesco AI Core

A more connected, governed Copilot experience that carries context across the client lifecycle.

BUSINESS CHALLENGE

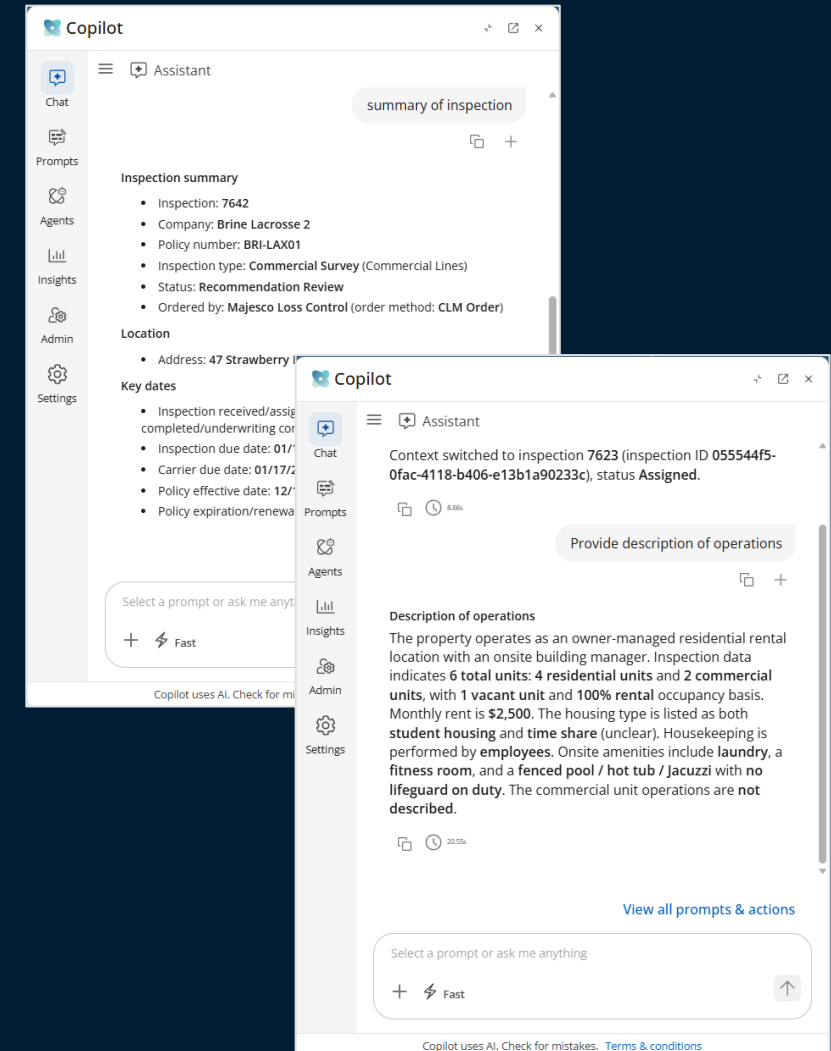
- LC360 Copilot runs on Microsoft Copilot Studio, which limits connectors, flow design, and visibility into what the assistant is doing.
- Users restate context every time they move between inspections, recommendations, and reports.
- New AI capability takes too long to build and deploy because each addition needs its own plumbing.

FALL '26 CAPABILITIES

- LC360 Copilot rebuilt on Majesco AI Core, using LangGraph and LangChain orchestration in place of Copilot Studio topic trees.
- New conversational Copilot interface with persistent chat history and session memory.
- Shared AI Core platform services: product, agent, and tool registries, prompt gallery, knowledge bases, and configuration.
- Agents exposed through a consistent API layer, so Copilot capability is not tied to one screen or chat component.
- Full telemetry on agent behavior, including model calls, tool use, reasoning traces, token usage, and latency.
- Majesco AI governance applied consistently: moderation, rate limiting, authentication, role-based access, and knowledge base controls.
- Foundation to extend Copilot past inspections into the broader client lifecycle.

BUSINESS VALUE ADD

- Reduces context switching for consultants and reviewers.
- Let Majesco build and deploy new Copilot tools inside a release cycle instead of across releases.
- Gives carriers visibility and governance over how AI is used on their data.
- Removes dependence on a third-party Copilot roadmap and lowers platform cost.



Intelligent Core AI Credit Tracking

Make AI usage visible, traceable, and easier to manage across sites and timeframes.

BUSINESS CHALLENGE

- Credit consumption across Answer Agent, Audio Transcription, and Nat Cat needed a single site-level view within a selected timeframe.
- Existing AI logs may be removed by retention settings, making historical usage difficult to calculate on demand.
- Administrators needed clear usage traceability without keeping a “Credits Charged” column on Data Science Logs.

FALL '26 CAPABILITIES

- New AI Credit Usage admin page, available only to users with IsSuperUser permission.
- Persistent usage records captured with each agent process; multiple Nat Cat runs on the same day roll into the existing daily row.
- Standardized metering: 2 credits per Answer Agent page, 3 credits per audio transcription, and 5 credits per new unique Nat Cat event alert.

BUSINESS VALUE ADD

- Gives carriers a dependable view of AI consumption by site and timeframe.
- Preserves usage history even when underlying AI logs age out.
- Improves operational visibility into how AI capabilities are being used.



GuideStream Multi-Speaker Sessions

Enable collaborative, multi-speaker sessions directly within LC360.

BUSINESS CHALLENGE

- GuideStream sessions support one active microphone, which limits them to one-way presentations.
- Multi-person workshops, interviews, and panel formats are hard to run.
- Hosts fall back on outside conferencing tools to get everyone into the conversation.

FALL '26 CAPABILITIES

- Host can grant and revoke microphone access to individual participants during a live session.
- Multiple concurrent active speakers, with a configurable maximum.
- Visual indication of who has microphone access and who is currently speaking.
- Quick mute for all participants or for a specific person.

BUSINESS VALUE ADD

- Supports collaborative sessions, interviews, and panel formats inside LC360.
- Removes the need for a separate conferencing tool during a session.
- Makes remote inspection and training sessions more interactive.



Fast Form Builder

Simplify form configuration, accelerate revisions, and reduce implementation effort.

BUSINESS CHALLENGE

- Routine form work still requires dropping into the full DynForm builder for basic validation settings.
- Large forms are slow to reorder and slow to update question by question.
- Carriers with hundreds of configured inputs carry real setup and revision cost on every implementation.

FALL '26 CAPABILITIES

- Richer question configuration: required flag, min and max values, textbox rows, answer tags, and prefix or suffix content such as units and currency symbols.
- New table question type for grid-style capture on inspection and valuation forms.
- Drag-and-drop question reordering.
- Import form definitions from Markdown and Excel to bootstrap or bulk-update large forms.
- Export form definitions to Markdown and JSON for version control, documentation, and moving forms between environments.

BUSINESS VALUE ADD

- Cuts configuration time on implementations and revision cycles.
- Reduces validation and mapping errors on large forms.
- Lets carrier admins manage more of their own forms without deep builder expertise.
- Makes form definitions portable across DEV, UAT, and production.

The screenshot displays the Fast Form Builder interface. At the top, there are five buttons: 'SAMPLE MARKDOWN', 'EXPORT', 'IMPORT', 'BACK', and 'SAVE'. Below these, the form configuration is shown for five text input fields: 'Interviewee First Name', 'Interviewee Last Name', 'Interviewee Title', 'Interviewee Email', and 'Interviewee Work Phone'. Each field has a 'Prefix', 'Suffix', 'Min Len', and 'Max Len' configuration area. Below the text fields, there is a table configuration section. It shows a 'Table Name' field with a red error message: 'You must provide a name for this table.' Below this, there are two 'Column Name' fields, each with a 'Text - Ir' label. At the bottom of the table configuration, there is an 'ADD COLUMN' button.

Customer-Driven Enhancements: Visibility and Workload

Give teams the context and visibility they need to manage workloads with less navigation.

BUSINESS CHALLENGE

- Dashboard widgets show a task and policy number but not the account, so users click into each item to find out whose it is.
- Managers have no quick way to see who last changed a client record or how due dates have moved.
- Filtering on the client grid does not cover the fields users search on.

FALL '26 CAPABILITIES

- Policyholder name displayed in the New, Assigned, and Overdue dashboard widgets.
- Original Carrier Due on the main grid, so date changes stay visible while managing workload.
- Last Modified By field on the client and location screens, visible to Super User and Manager roles.
- Service Cycle link in the Client and Location Information section of the inspection general information screen.
- Client grid agent filtering extended past agency name to other agency fields such as Parent Broker ID and Access Number.

BUSINESS VALUE ADD

- Gives consultants meaningful context on the dashboard without opening each item.
- Helps managers spot date movement and follow up with the right person.
- Cuts navigation steps out of everyday work.
- Comes directly from promoted Idea Portal requests.

Client and Location Information

Client: Utilant (1234567)

Client Contact: Bobby Smith

Account Manager:

Additional Account Managers:

Client Address: 155 Chandler St Suite #6
Buffalo, NY, 14207 US, Eire

Client Carrier ID: Utilant-1234567

Location: Main Warehouse Name(Main Warehouse)

Service Cycle: Service Plan Name - High Value (3/3/2026 - 5/4/2027)

Location Notes:

Location Service Instructions:

CLIENTS / UTILANT DETAILS

Utilant - Client Details

Client Details

Lookup ID: 1234567

Client Name: Utilant

Client Carrier ID: Utilant-1234567

Primary Account Mana...

Additional Account Ma...

Division: Commercial Division

Producing Branch: New York

Servicing Branch: New Jersey

Policy Number:

Default Currency: US Dollars

Default Language: English

Last Modified: Loss Control Admin (Manager) - 8/25/2026 10:45 AM

Deleted: No

Client Address

Street 1: 155 Chandler St

Street 2: Suite #6

City, State: Buffalo, New York

Zip Code: 14207

Logo:

Assigned

9/6/2019

Inspection #: 1039

Policy Number: 123456789

Policy Holder: Emanuele Utilant

Address: 1738 Elmwood Ave Buffalo, NY, 14207, US

9/7/2019

Inspection #: 1034

Policy Number: 123456789

Policy Holder: Emanuele Utilant

Address: 1755 Elmwood Avenue Buffalo, NY, 14207, US

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Rise to the Frontier | 49

Customer-Driven Enhancements: Forms and Outputs

Create consistent forms and outputs faster with reusable rules and richer formatting.

BUSINESS CHALLENGE

- Building an intricate rule that applies to several questions or sections means rebuilding it every time.
- Rich text boxes in forms do not support the formatting some content requires.
- Survey and output configuration options are not consistent across survey types.

FALL '26 CAPABILITIES

- Copy pre-existing DynForm rules instead of rebuilding them per question or section.
- TinyMCE rich text enhancements, including subscript and superscript in form rich text boxes.
- Manage Forms Add Forms dropdown enhancements.
- Inspection currency output node for consistent currency handling in outputs.
- Show Company Name available on Closeout survey types, so duplicate and common surveys are easier to spot.

BUSINESS VALUE ADD

- Cuts rule-building time on complex forms.
- Gives form authors the formatting they asked for.
- Makes survey and output configuration behave consistently.
- Comes directly from promoted Idea Portal requests.

Premium Audit for General Liability

Extend automated audit workflows to General Liability and keep policy data connected.

BUSINESS CHALLENGE

- Majesco Policy carries all General Liability sublines on one policy, while LC360 uses separate forms for Payroll, Sales, and more.
- Combining data from multiple audit forms to sync one policy adds complexity and risk of error.
- Carriers need General Liability audits to move through the same workflow that already works for Workers’ Compensation.

FALL '26 CAPABILITIES

- General Liability policy integration with the LC360 audit workflow.
- One form per audit order: GL Payroll when all exposure basis is payroll, GL Other when it is mixed, so every exposure basis is handled in a single form.
- Policy extraction, endorsement, audit retrieval, and final audit update calls mapped for General Liability alongside the existing Workers’ Compensation flow.
- Subline stored on the exposure, so General Liability data ties back correctly to Majesco Policy.

BUSINESS VALUE ADD

- Extends automated audit ordering and result sync to a second major line.
- Removes manual reconciliation between multiple audit forms and one policy.
- Reduces premium leakage caused by disconnected audit handoffs.
- Reuses the Workers’ Compensation workflow carriers already know.

Audit Info

Customer	Majesco	Division	Premium Audit
Policy Number	01-GL-000224455-0	Audit Type Category	Commercial
Current Premium	\$ 625.00	Audit Type	General Liability Payroll Only
Underwriter	Unassigned	Audit Number	5054
Underwriter Phone	Unassigned	Auditor	Devin Kelley
Underwriter Email	Unassigned	Auditor Phone	
Rush	No	Order Method	Import Inspection API
Requires QA	No	Ordered By	Loss Control Admin
QA Rush	No	Assigned By	Loss Control Admin (Manager)
Status	Complete	Auditor Special Attention	No
Company Name	Utlant	Underwriter Alert	No
Audit Language	English	Currency	US Dollars



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Reports Administration Workbench Task Management Start New Account Develop

CUSTOMER: David Smith

Customer Submissions Insureds Quotes Proposals Policies Claims

POLICY: 01-GL-000224455-0 REVISION: 002 Analytics View

Transaction Premium \$0.00	Taxes, Fees, Surcharges \$0.00	Written Premium \$324.00
-------------------------------	-----------------------------------	-----------------------------

Choose Next Action

Endorse	Extract
Cancel Order Audit	Extract All
Reopen Order Audit	Extract As Is
Inquire	Export for Integration
Quote for Renewal	Extract All As Is
Renew	Import Audit Worksheet
Revise Final Audit	Export Revise Final Audit Worksheet
Unbook Override	Mark As Non-Renewable
Reverse Endorsement	Custom Sample Transaction

LifeCycle (3) Email Activities Emails Notes Files Refer

SEARCH Activity Go

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE
Policy 01-GL-000224455-0	002	Audit	01/01/2027
Policy 01-GL-000224455-0	001	Endorsement	01/01/2026
Policy 01-GL-000224455-0	000	New Business Policy	01/01/2026

Analytics Anywhere Enhancements

Automate recurring reporting and manage Power BI insights without leaving LC360.

BUSINESS CHALLENGE

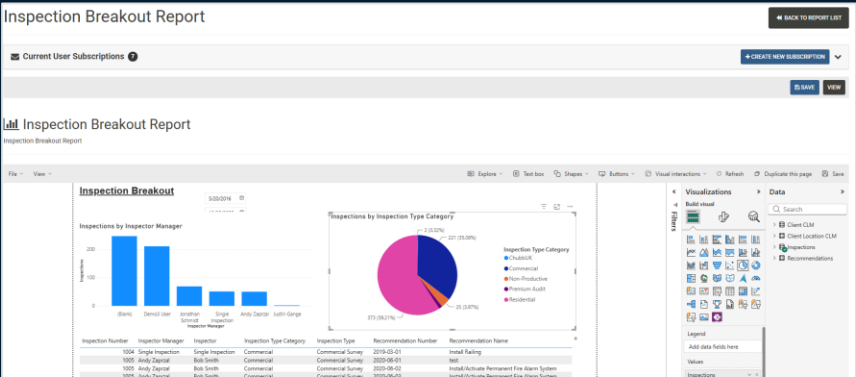
- Users log in and navigate to a report to see numbers that change on a predictable cadence.
- Report changes require a separate Power BI session outside LC360.
- Carriers moving off SSRS expect the subscription behavior they already had.

FALL '26 CAPABILITIES

- Power BI report subscriptions created and managed from the Reports page, with a Current User Subscriptions section showing subject, schedule, last and next generation dates, and audit detail.
- Scheduled email delivery to one or more recipients, with To, CC, BCC, subject, and HTML body.
- Export format selection for delivered reports: PPTX, PDF, and PNG.
- Subscription management including edit, delete, show deleted, grid export, and pagination.
- Built to be reused across the Reports page, Client Portal, and a Power BI Subscriptions admin page.
- Edit Power BI reports within LC360.

BUSINESS VALUE ADD

- Puts recurring reporting in the inbox instead of requiring a login.
- Gives carriers subscription behavior comparable to what SSRS provided.
- Reduces the manual work of preparing and sending recurring reports.
- Keeps report authoring in the same platform as the data.



Add New Power BI Subscription

Please configure the below to subscribe to the current report. Subscriptions will send out a hyperlink for users to click and view the report without having to log into the site. This schedule will run as indicated between the specified start and end dates.

Email Details

* To:

To is required

Click enter space or tab after each email is typed

CC:

Click enter space or tab after each email is typed

BCC:

Click enter space or tab after each email is typed

* Subject:

* Body:

Edit Insert Format Tools Table

↶ ↷ Paragraph B I ...

Subscription Details

* Start Date: 9/17/2026 End Date:

Schedule Type:

Daily/Weekly

* Schedule Time:

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

* Days: ☐ Mon ☐ Tue ☐ Wed ☐ Thur ☐ Fri ☐ Sat ☐ Sun

CANCEL

SAVE

majesco

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Inspection APIs

Standardize inspection data access with secure, flexible APIs built for interoperability.

BUSINESS CHALLENGE

- LC360 needed a consistent API layer to retrieve inspection, coverage, and inspection-date data.
- The APIs needed common standards for security, versioning, pagination, JSON/XML responses, documentation, and testing.
- Inspection data required filtering and projections via APIs.

FALL '26 CAPABILITIES

- Added APIs for residential coverages, commercial coverages, inspection dates, and inspection information.
- Added commercial coverage query and projection endpoints with filtering, ordering, pagination, selected-property support, validation, and detailed failure responses.
- Added API Help support, including request examples and JSON/XML payloads, with permission and versioning controls.

BUSINESS VALUE ADD

- Provides a standardized way to access inspection, coverage, and inspection-date data through APIs.
- Improves interoperability through consistent formats, versioning, pagination, endpoint documentation, and test collections.
- Enables consumers to retrieve only the data and fields they need through query and projection capabilities.



Quality, Security and Platform Readiness

Strengthen platform security and readiness with a more robust Copilot foundation.

BUSINESS CHALLENGE

- Current Copilot workflow is on a dated platform.
- Carriers hold Majesco to security review and penetration test findings on a defined timeline.

FALL '26 CAPABILITIES

- Penetration test result follow-ups completed and closed out.
- Library upgrades on behalf of security vulnerabilities.

BUSINESS VALUE ADD

- Copilot is on a more robust framework.
- Supports carrier security review and audit requirements.





Thank You!

