

BIMA MITRA – A TOOLKIT FOR LIC AGENTS

Bima Mitra is an innovative software tool designed to help LIC professionals to maintain their client profiles, prepare proposals, calculate premium (as per data fed), keep track of the premium due dates, etc. It works like an Office Assistant of the LIC Professional.

A) KEY FEATURES

- a) It runs on standalone Windows environment with a minimum configuration
- b) User-friendly with no training required. Help files are included in the kit.
- c) User can install the software themselves referring to the Installation guide that comes with the software
- d) Free maintenance of new Plans for a period of 1-year

C) FUNCTIONAL MODULES

- **Preloaded Branch Master** – Contains information of all LIC branches of Eastern India. This could be manually updated by the user with scope of adding the doctors as well.
- **Special Calculations:** Anmol Jeevan 1, Annuity Plans, Bima Nivesh 2005, Jeevan Adhar, Jeevan Rekha and Jeevan Viswas.
- **Presentation Of Plans To The Prospects:**
 1. Children Plans (All Plans)
 2. Annuity Plans (All Plans)
 3. Standard Plans (Quotation of Plans other than Plans for special calculations).
 4. Keyman Presentation
- Revival Quotation
- Surrender Value Calculation
- Paid - up Value Calculation
- Agents & Client Loan Management

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- DO Report for Agent's Details; Comparative Business Analysis; Agent Ranking Report;
- Agency Organization Report
- Development Officer Target
- Agent Target
- Reports of Proposal register; Premium Due;
 - a. Unpaid Premium; Policy Register; Maturity
 - b. List; Agent List; Comprehensive Policy
 - c. Register; Comprehensive Commission Statement
- Advance against appraisals & ACA
- Appraisal of DO Salary
- **Meeting Expenses:**
 1. Structured
 2. Un – structured
 3. Competition
 4. Prize Expenses
- Agent Advance
- Commission Bill Entry
- Client Loan
- Client Loan Repayment
- Policy Alteration
- BOC Adjustment
- Bonus Chart Generation
- Outstanding Commission List
- Actual Commission Summary
- Recovery Summary
- Deduction Summary

D) Add-ons

- Premium Calculator
- Yield Calculator
- Surrender value Calculator
- Opening Policy Entry
- Attractive Cover page of Marketing Presentation.
- One year Free Upgrades.