

# Correspondence Management

“Applied Relay offers another significant development that improves broker efficiency. We would encourage all brokers to utilize eDocX.”

Siobhan Briscoe  
Sheridan Insurances

A multitude of ways to contact and keep in touch with your customers easily via the Applied Relay back office.

## INTEGRATED EMAIL

- > Our Microsoft Outlook integration allows you to send and receive email using your own familiar email application and all correspondence can be saved within your client portfolio
- > Forward policy documentation in electronic format at the point of sale and email customers a reminder to return required ID or documentation automatically

## SMS MESSAGING

- > Create your own SMS message templates and store them as you would any letter template
- > Send using the SMS option in Add Letter and as well as sending the message, a copy is stored in Applied Relay documents for future reference

## CAMPAIGN MANAGEMENT

- > Applied Relay provides all of the tools you need to effectively execute successful marketing campaigns
- > Our Leads Management solution allows users to capture the right cross selling information at the most appropriate juncture in the sales process
- > Using Applied Profit Relay, you can interrogate and filter your rich store of existing client and leads data to create highly targeted outbound campaigns

## EDOCX – ELECTRONIC DOCUMENT EXCHANGE

- > Applied eDocX securely and efficiently delivers insurer policy documentation to our brokers’ desktop applications
- > Providing a two-way electronic document exchange for both insurers and brokers along with accurate and assured delivery of files
- > eDocX supports the distribution of all client documentation for all lines of business, therefore, eliminating the need for paper