Applied

Keep your agency open after hours

Service Portal in Applied Epic® lets clients pull documents, pay invoices and request certificates on the web or your branded app, so staff hours go where they're needed.

60M certificates sent annually

4M clients self-served certificates

How it works

Let clients pull their own docs

Service Portal gives clients access to their policy documents, auto ID card or certificate on demand

Take payments without a staff touch

Full or partial payments made online post to the right invoice.

See claims and changes with the account

First notice of loss or policy change comes in alongside the account details

Why it belongs in Applied Epic®

Your team has nothing to sync

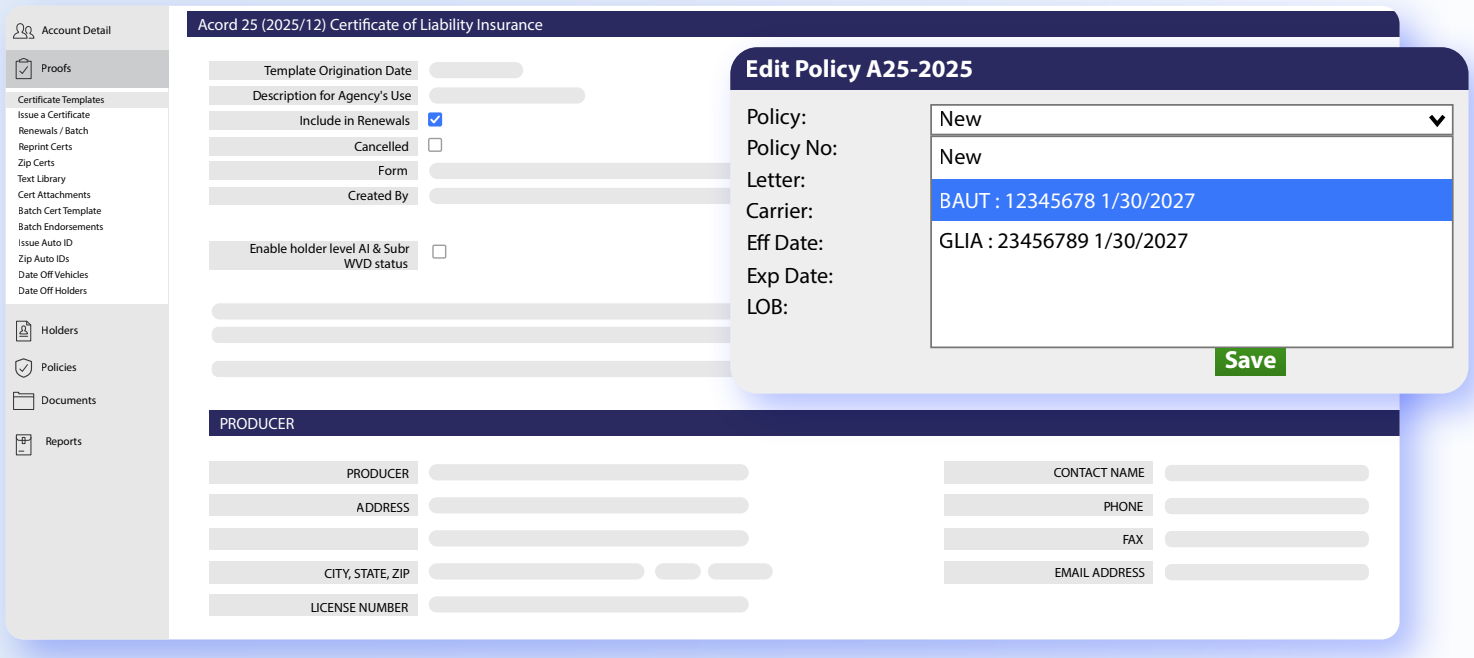
Clients see the same live account your team already services in Applied Epic.

Clients see your agency's brand

Your colors and logo appear on every certificate issued through the web portal or the iOS and Android apps.

Setup stays inside Applied Epic.

Your team creates portal access from the client's contact record in Applied Epic, and the client sets credentials from there.



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