



INWIZY

INSURIZY · PRODUCT BROCHURE

● Cloud SaaS for Motor Insurance Agents

INSURIZY Renewals, Handled

Every motor policy expires in twelve months. Every expiry you miss is income that walks to another agent. INSURIZY keeps your whole book in one register, shows you who is due next, and chases them for you.



INWIZY GLOBAL VENTURES LLP

Gurugram, Haryana, India · www.inwizy.com

1800 891 8669

info@inwizy.com

ABOUT INSURIZY

Purpose-built for motor insurance renewals.

INSURIZY exists for the one thing that decides an agent's year: getting to the renewal before anyone else does. The register, the pipeline, the reminders and the payout maths all point at that.

30/60/90

Day renewal pipeline

4-step

Reminder ladder

Per-insurer

Payout rates

24/7

Cloud access



Renewal Pipeline

Opens on who expires in the next 30, 60 and 90 days, with the premium value attached.



Automatic Reminders

A 30 / 15 / 7 / 1 day ladder by email, SMS and WhatsApp. Every message logged.



Vehicle-Aware Records

Brand, model, variant and year from a built-in Indian catalogue, plus registration and chassis.



Agent Payouts

Rates per insurer, per month. Each policy settles on its own term, so switching insurer just works.



NCB & History

Each term chained to the one before it, with No Claim Bonus carried forward.



Excel Import

Bring your existing register across with column mapping and an error log.



Document Vault

RC, old policies, Aadhaar, licence and PAN per customer and vehicle, auto-compressed.



Customer Renewal Page

A private link showing cover, expiry and outstanding. No login, nothing to install.



Roles & Access

Admin, staff and read-only, with a per-person list of which sections they can open.



GST Tax Invoices

Pay by UPI, card or net banking and download a proper invoice with the correct tax split.



Full Audit Trail

Field-level history on every record, so a disputed change always has an answer.



Collections & Reports

Pending premium, monthly collections, renewal conversion and an agent leaderboard.

FROM EXCEL TO RENEWED

Six steps, then it runs itself.

①

Load your book

Import your Excel register with column mapping built in, and an error log for anything odd.

②

Watch the pipeline

Policies move themselves through Active, Expiring Soon and Expired as dates pass.

③

Let it chase

The ladder fires automatically with the expiry date, cover details and your number.

④

Renew the term

One click creates the next term, chained to the last, with NCB carried forward.

⑤

Record payment

Cash, cheque, bank or UPI against the policy, with pending tracked to zero.

⑥

Settle the payout

What each insurer owes you this month, from that term's own rate.

BEFORE VS AFTER

Turn a diary into a system.

✗ Without INSURIZY

- 📅 A spreadsheet and a phone diary
- 🗣️ "Whose policy expires this week?"
- 📞 Remembering to call, one by one
- 📁 Policy PDFs lost in WhatsApp
- 📊 Guessing what the insurer owes you
- 🕒 Finding out a year late they left

✓ With INSURIZY

- 📊 A pipeline that opens on what is due
- 📅 30, 60 and 90 days at a glance
- 🔔 Reminders that send themselves
- 📁 A document vault per vehicle
- 💰 Per-insurer payout rates, calculated
- ✓ Renewals you get to first

Who it is for

- 👤 Individual motor insurance agents
- 🏢 Small sub-broker offices and agencies
- 📊 Anyone running renewals on a spreadsheet

What you need

- 📱 A phone or computer with internet
- 📄 Your policy list (Excel is fine)
- 💳 No card for the 7-day free trial



WHY INSURIZY

Four reasons to choose us.

1

Built for motor, not adapted

A generic CRM does not know what a No Claim Bonus is. Vehicle catalogue, NCB and per-insurer payouts are native here.

2

It chases so you do not

The reminder ladder runs whether or not you remember. That is the product in one sentence.

3

Effortless to adopt

If you can use WhatsApp, you can use this. Import your register and the pipeline is live in minutes.

4

One partner, room to grow

INWIZY also builds CRM, inventory, recruitment and bureau software on the same platform.

Ready to see INSURIZY live?

Start a 7-day free trial — no card required — or book a free demo. Import your existing register and your renewal pipeline is live in minutes.

[Start Free Trial →](#)

[Book a Demo](#)



EMAIL

info@inwizy.com
support@inwizy.com



PHONE

1800 891 8669
Mon–Sat, 10am–7pm IST



REGISTERED OFFICE

INWIZY GLOBAL VENTURES LLP
Sector 44, Gurugram – 122003,
Haryana



ONLINE

insurizy.com
INVENTIZY · HOSTIZY · MATCHIZY ·
CAREERIZY