

Indio™

is an application  
and submissions  
management platform.



**Indio is the industry's leading application and submissions management platform that streamlines the application and renewal process by turning the data capture and submission process into a modern, digital experience.**

It uses "smart" form technology to auto-map data from one form to another, alleviating the need for you and your clients to rekey the same information repeatedly.

A progressive TurboTax® like experience lets you hide application questions that don't apply or mark specific questions required. You can even collaborate with clients directly in the application so you no longer have to send one-off emails, calls and texts.

And once you're ready to submit, you can send the application to insurers directly from the Indio platform rather than wasting time navigating separate individual systems.

Simplify the insurance application process to make it faster, more collaborative, easier, and minimize errors and omissions. It will save you and your clients time and money.

## Allows your agency to

- Reduce time and operating costs and remove friction from the submission process
- Easily automate the exchange of data between systems
- Keep your staff happy and customers renewing

*"We sent an application to a client [using Indio] and within 12-minutes we had back the completed application signed."*

– Allan Morton Jr., President, Morton Insurance & Risk Management

**indio**

## Core Capabilities

### Send Insurers/Underwriters Submission Packets

Lets you send forms/applications to a specific underwriter from within the Indio platform, along with a custom message, once your customer has reviewed, signed, and submitted their submission packet back to you.

### eSignature

Allows customers to sign their applications natively within the Indio platform so they no longer need to download, print, scan, fax, email, and/or snail mail the many forms that are required to be signed during the application and renewal process.

### Extensive Application Library

Provides access to more than 14,000 insurance applications, including common forms, supplemental insurer applications, custom agency applications and questionnaires. Using online, digital applications creates a single data capture process and simplifies data mapping to automate application completion.

### Intelligent Activity Tracking

Notifies you when customers log into the Indio platform, fill out information, sign forms, and submit data. Intelligently shows you which changes the client made so you no longer have to search line by line.

### Collaborative Environment

Grants multiple teammates from your agency and your customer's organization access to specific applications for an online, collaborative experience. Clients can easily leave comments and questions on any part of an application that they are unsure about to help facilitate a streamlined process.



**Indio shortens the application and renewal process for brokers by up to 50%.**

Source: Indio

### Renewal Verification

Auto populates data from the prior year into the new application when creating a renewal packet for customers, alleviating the need to rekey duplicate data year over year. Clients then simply verify which information has remained the same and edit what has changed from the prior year. All your client's verifications and edits are logged in the Indio platform to mitigate your agency's error and omissions exposure.

### Bi-Directional Integration with Applied Epic

Allows you to seamlessly exchange data between Indio and your Applied Epic® management system to ensure information is accurate within both platforms.

### Schedule Workbooks

Uploads existing schedule workbook data into the platform and then instantly turns it into an interactive online table so you and your clients can collaborate without having to share large Excel files and documents.

---

### Have Questions?

**Call 800.999.5368**

**Visit [appliedsystems.com](https://appliedsystems.com)**