



USER GUIDE

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miCPQ Addon

Creatio

Creatio is a low-code software-as-a-service solution for process management and CRM. Creatio solution stack included Studio Creatio, a low-code platform, Sales Creatio, a sales force automation program, Marketing Creatio, and Service Creatio. It can be utilized to automate company processes, implement rules into place, and create third party connectors. The framework was built in .NET, customizations and scripts are built either in C# (server-side code) or JavaScript (client-side code).

The Creatio Partner Network is a global network of more than 700 businesses located in 110 nations. Recently, Creatio is launching the No-code Magic Campaign to Promote the Power of No-code. Creatio is a next-generation CRM that can be the ideal instrument to help businesses become customer-centric enterprises by giving customers a seamless, consistent experience as they transition from leads to loyalty.

CPQ for Insurance

This is Creatio's marketplace CPQ addon, (Configure. Price & Quote) which is mainly targeted and prepared for the insurance industry companies that seek a quick and efficient platform that can make their processes more effective, like creating opportunities and preparing and sending quotations to customers, easier. By automating and simplifying the process, the company and its clients can more easily communicate, create new insurance contracts, and conduct business as usual.

And this was created by Mitra Innovation (PVT) Ltd., a renowned global system integrator for Creatio.

What business needs its solving?

- Improving quote accuracy
- Streamlining the sales process
- Lead to proposal
- Increasing efficiency
- Reducing costs

Features

- Generates proposals including the full installment and the monthly installment.
- Add / Manage Products
- Generate unique pricing rules and add them to the proposals.
- Add features, attributes, and covers for proposals.

Why this marketplace addons?

By using this, the user or the Insurance company can benefit following,

- Increasing Sales Effectiveness, Efficiency, and Velocity
- Convenient Products/Services configuration and pricing
- Enhance Workflow and Approvals
- Boost correspondence with carriers and agents.
- Better data security
- Overall expenditures can be decreased with compliance management.
- Reduced Costs in Sales Operations
- Facilitate a smoother flow for all parties.

Setting up the Addon

Active Directory App Setup

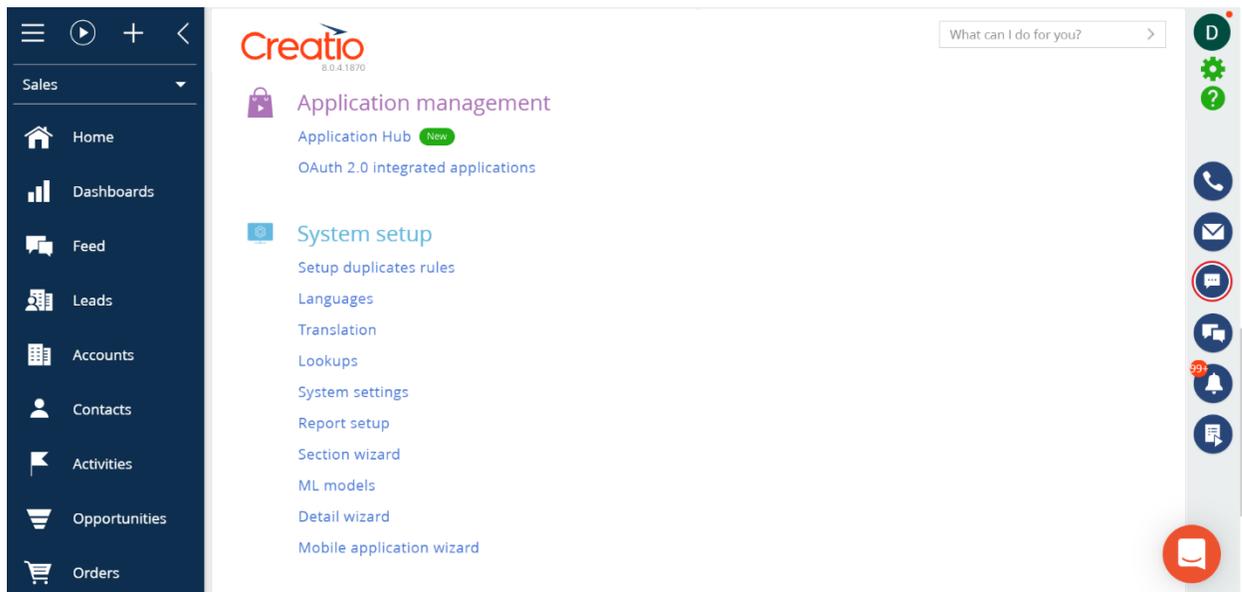
Note: This process is mandatory for all the users before start using the Addon.

To use this addon, the client or user must have the Creatio license and Creatio web portal instance.

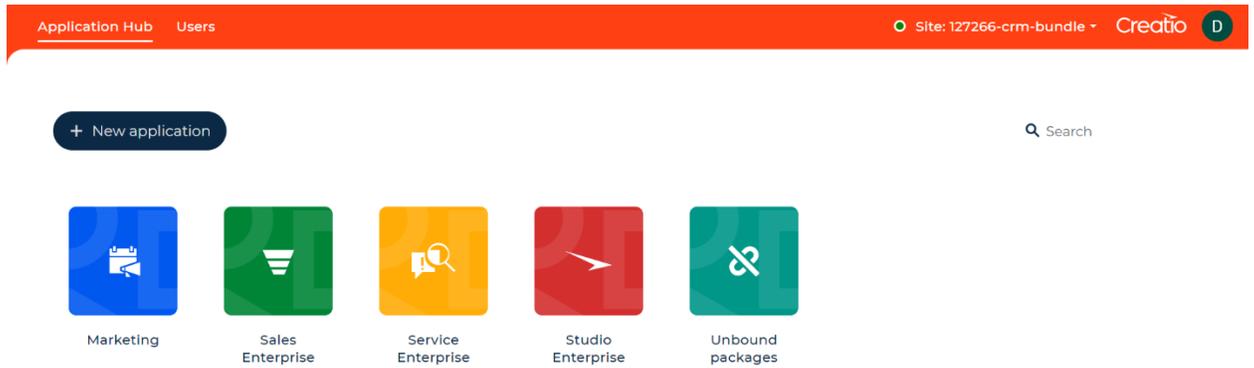
To setup a web portal, visit Creatio website and purchase your own instance.

Once received please go to settings and follow the below instructions.

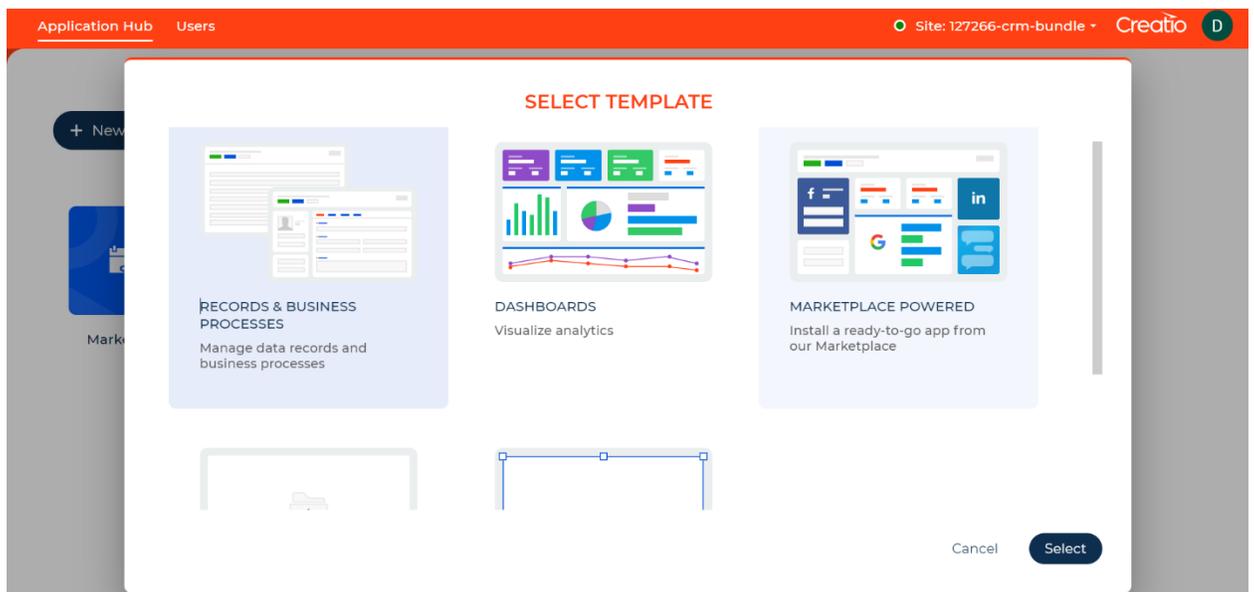
1. Go to setting icon in  the right-side corner next to profile icon.
2. Go to Application hub



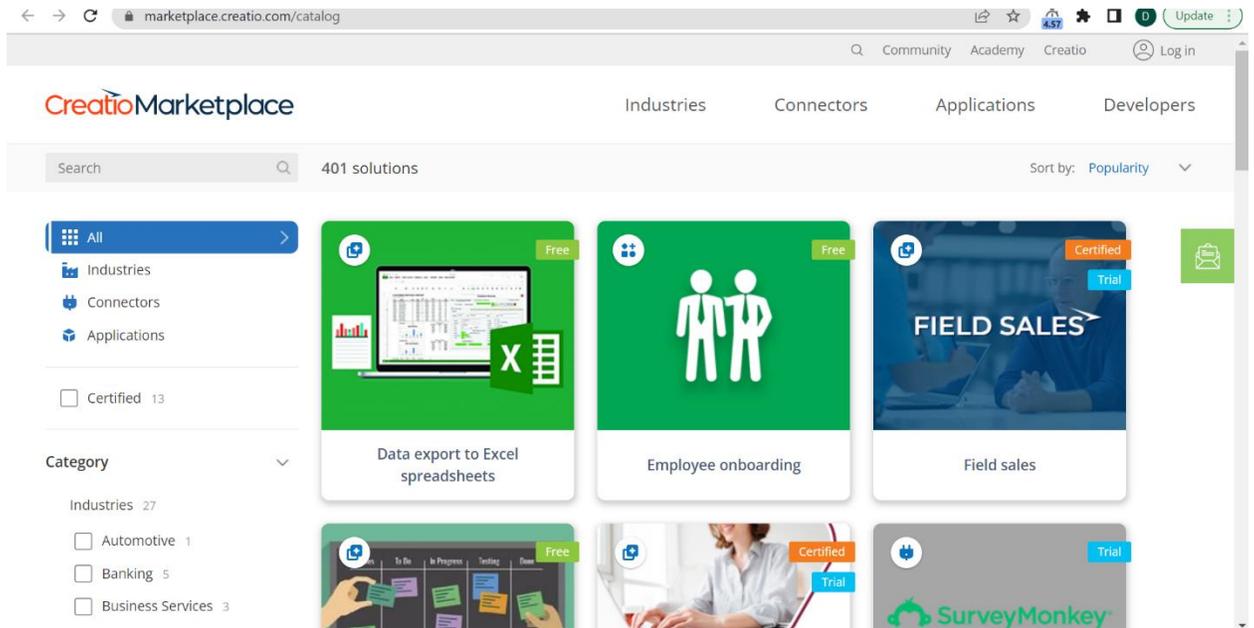
3. Click on the New Application



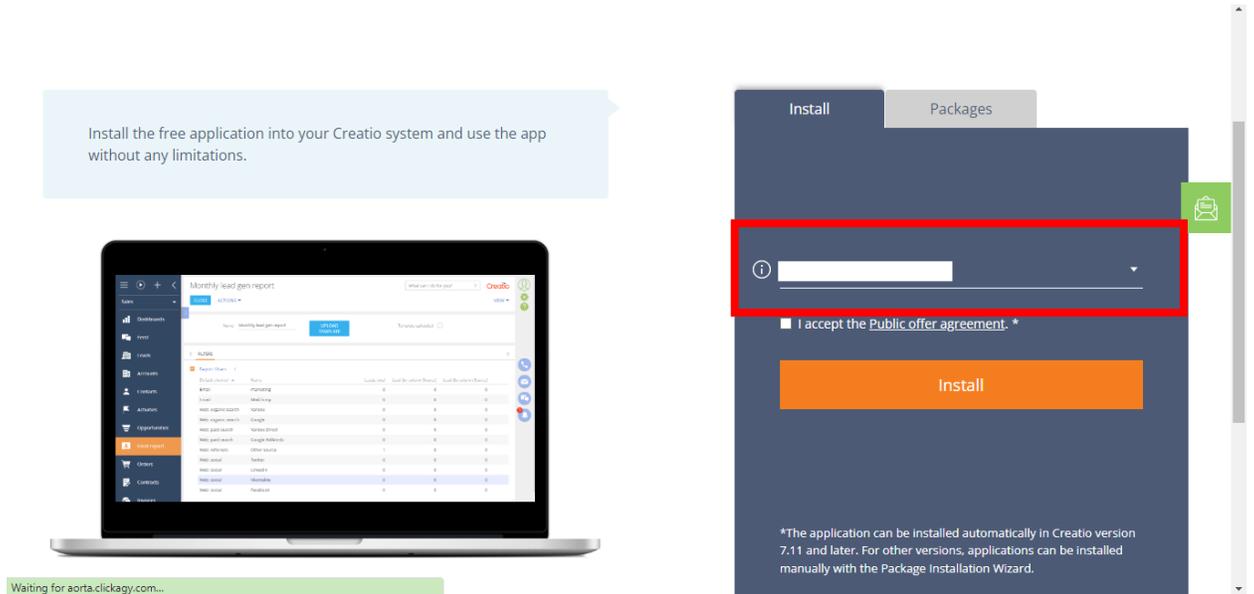
4. Select template from Marketplace Powered



5. Search *(name for the product) in the bar



6. And select the CPQ product and install it by providing your Instance id



7. And refresh the application hub page and ensure whether the application installed there.

Method of using

Before starting the process, user should go through fundamental setups and make sure the product is ready with their products and business. The relevant steps need to be done as follows,

1. CPQ Products & Covers

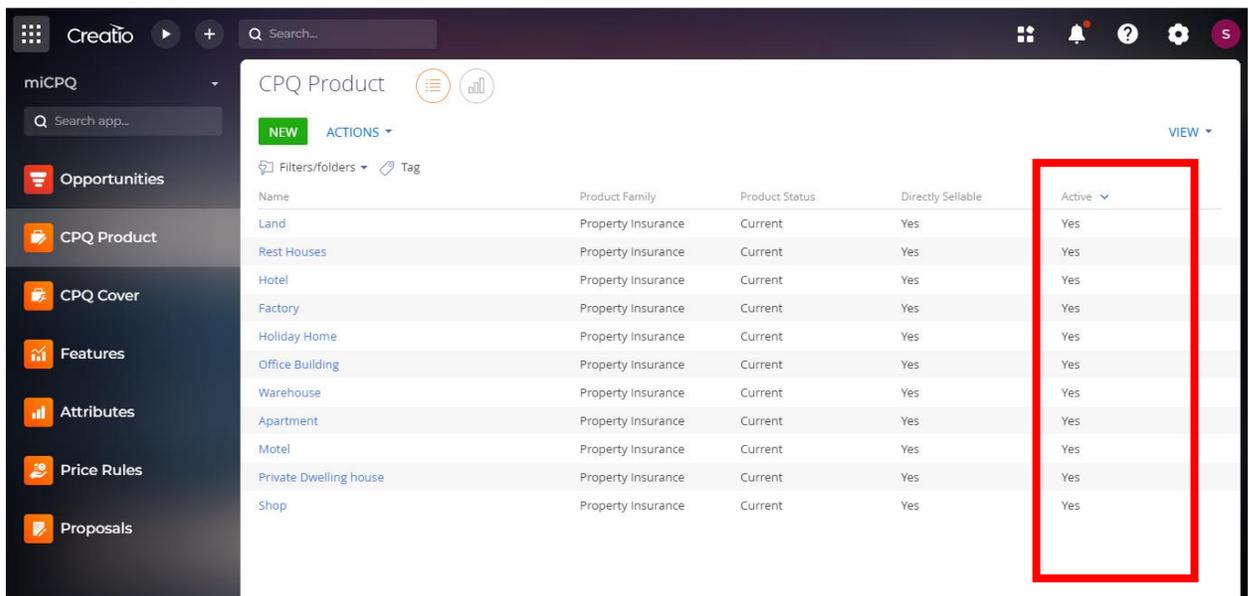
Initial section, where the user should create and make available the products that are currently available and being served to the customers. We have added some sample products here,

- Holiday Home Insurance
- Office Building Insurance
- Hotel Insurance
- Shop Insurance

Covers – The covers that can be insured by the company.

- Earthquake
- Flood
- Electrical Inclusion
- Terrorism

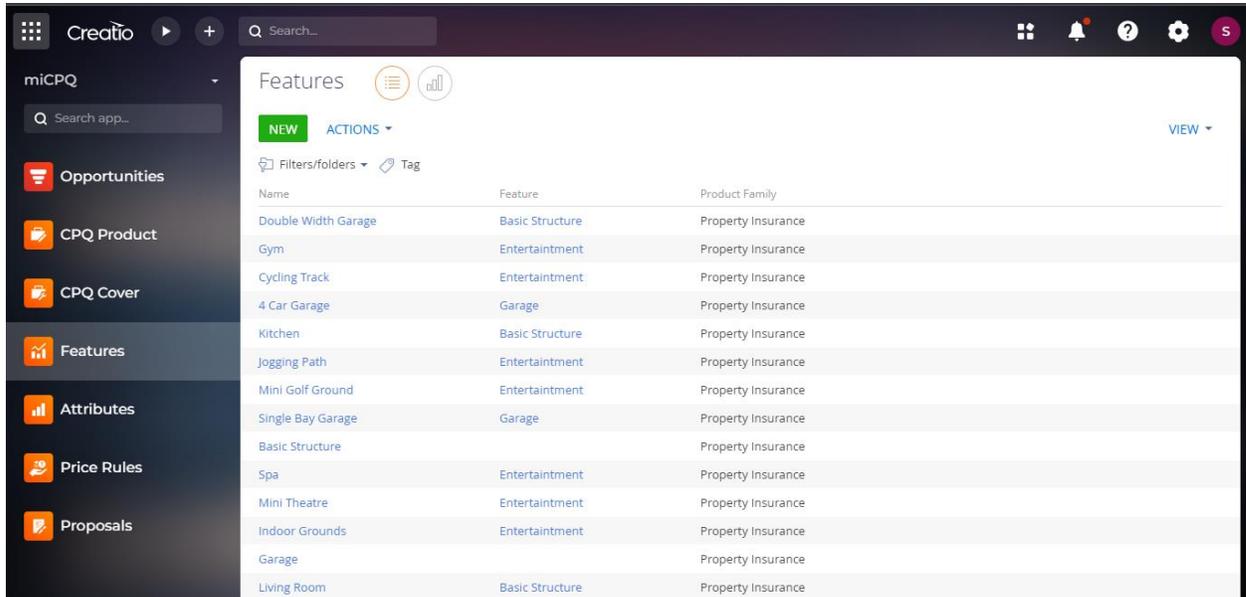
If "no" is mentioned in the 3rd column, that comes under product and "yes" for covers



Name	Product Family	Product Status	Directly Sellable	Active
Land	Property Insurance	Current	Yes	Yes
Rest Houses	Property Insurance	Current	Yes	Yes
Hotel	Property Insurance	Current	Yes	Yes
Factory	Property Insurance	Current	Yes	Yes
Holiday Home	Property Insurance	Current	Yes	Yes
Office Building	Property Insurance	Current	Yes	Yes
Warehouse	Property Insurance	Current	Yes	Yes
Apartment	Property Insurance	Current	Yes	Yes
Motel	Property Insurance	Current	Yes	Yes
Private Dwelling house	Property Insurance	Current	Yes	Yes
Shop	Property Insurance	Current	Yes	Yes

2. Features

Users should be able to create features that they provide under each of the products and classify them based on the product family in this section.

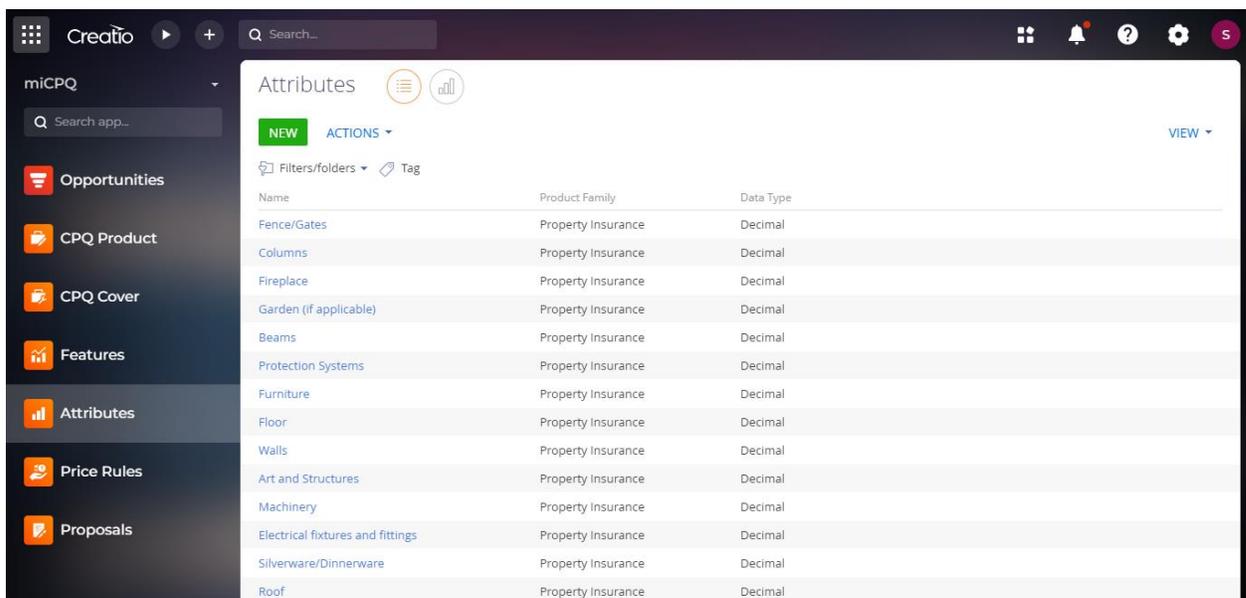


The screenshot displays the 'Features' section of the miCPQ application. The sidebar on the left contains navigation options: Opportunities, CPQ Product, CPQ Cover, Features (selected), Attributes, Price Rules, and Proposals. The main content area shows a table with the following data:

Name	Feature	Product Family
Double Width Garage	Basic Structure	Property Insurance
Gym	Entertainment	Property Insurance
Cycling Track	Entertainment	Property Insurance
4 Car Garage	Garage	Property Insurance
Kitchen	Basic Structure	Property Insurance
Jogging Path	Entertainment	Property Insurance
Mini Golf Ground	Entertainment	Property Insurance
Single Bay Garage	Garage	Property Insurance
Basic Structure		Property Insurance
Spa	Entertainment	Property Insurance
Mini Theatre	Entertainment	Property Insurance
Indoor Grounds	Entertainment	Property Insurance
Garage		Property Insurance
Living Room	Basic Structure	Property Insurance

3. Attributes

The user can specify which attributes are covered by their insurance policy and can be included in an insured product.



The screenshot displays the 'Attributes' section of the miCPQ application. The sidebar on the left contains navigation options: Opportunities, CPQ Product, CPQ Cover, Features, Attributes (selected), Price Rules, and Proposals. The main content area shows a table with the following data:

Name	Product Family	Data Type
Fence/Gates	Property Insurance	Decimal
Columns	Property Insurance	Decimal
Fireplace	Property Insurance	Decimal
Garden (if applicable)	Property Insurance	Decimal
Beams	Property Insurance	Decimal
Protection Systems	Property Insurance	Decimal
Furniture	Property Insurance	Decimal
Floor	Property Insurance	Decimal
Walls	Property Insurance	Decimal
Art and Structures	Property Insurance	Decimal
Machinery	Property Insurance	Decimal
Electrical fixtures and fittings	Property Insurance	Decimal
Silverware/Dinnerware	Property Insurance	Decimal
Roof	Property Insurance	Decimal

4. Price rules

The basic pricing rules for each of the products are based on the added features and attributes in the policy, and they can set it as active or not. The pricing rules are set for both default and minimum and maximum prices, which can be customized by the user.

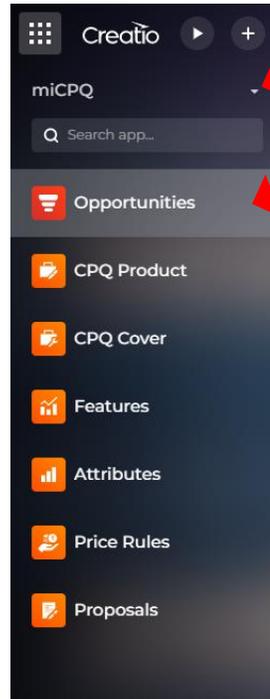
Name	Rule Type	Is Active
Set maximum value to Parent Attribute (Roof)	Maximum Value Validation	Yes
Set maximum value to Parent Attribute (Furniture)	Maximum Value Validation	Yes
Set maximum value to Parent Attribute (Floor)	Maximum Value Validation	Yes
Set maximum value to Parent Attribute (Machinery)	Maximum Value Validation	Yes
Set maximum value to Parent Attribute (Protection Systems)	Maximum Value Validation	Yes
Set maximum value to Parent Attribute (Electrical fixtures and fittings)	Maximum Value Validation	Yes
Set minimum value to Parent Attribute (Protection Systems)	Minimum Value Validation	Yes
Set maximum value to Parent Attribute (Art and Structures)	Maximum Value Validation	Yes
Set minimum value to Parent Attribute (Art and Structures)	Minimum Value Validation	Yes
Set minimum value to Parent Attribute (Furniture)	Minimum Value Validation	Yes
Set minimum value to Parent Attribute (Floor)	Minimum Value Validation	Yes
Set minimum value to Parent Attribute (Machinery)	Minimum Value Validation	Yes
Set minimum value to Parent Attribute (Electrical fixtures and fittings)	Minimum Value Validation	Yes

5. Contact & Roles

Here, users can create contacts for their employees, especially those who will engage in the process of creating opportunities, the valuation team, and the supervisor. Those rules need to be assigned in the following areas that can allow them to do their activity or task when it is required.

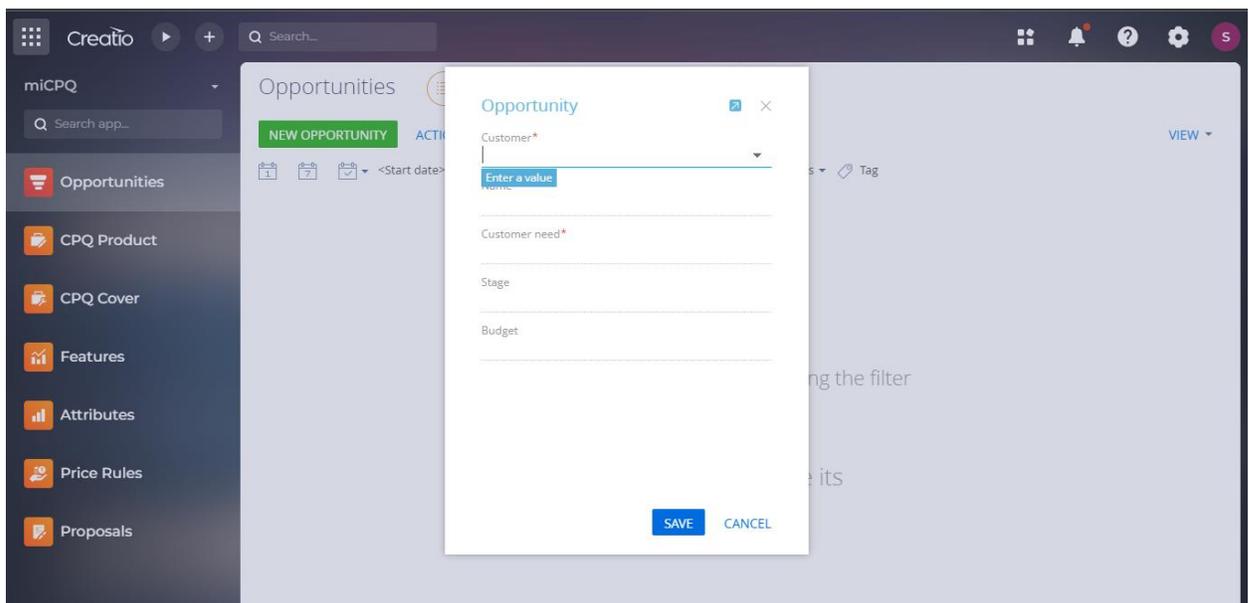
The process and how it works

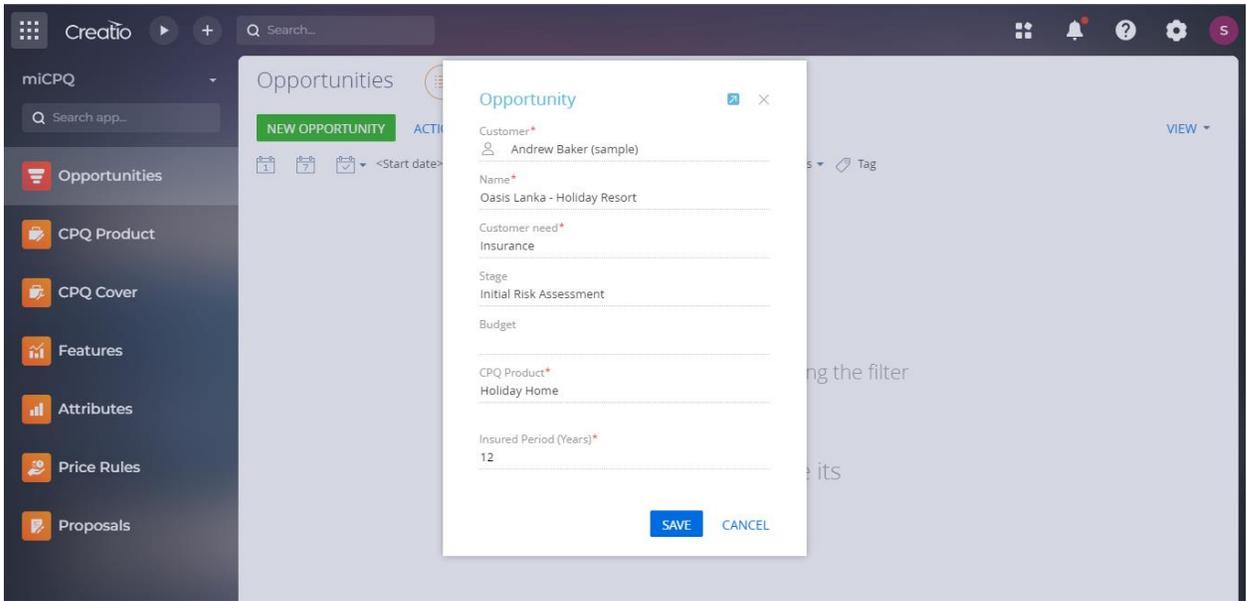
1. In the left side there is a drop down, from there find “MiCPQ” and once the workplace loaded click on “Opportunities” section.



And there will be a green button visible called, “**New Opportunity**”. Once the user clicks it, system will pop up a mini page requiring some details to be filled.

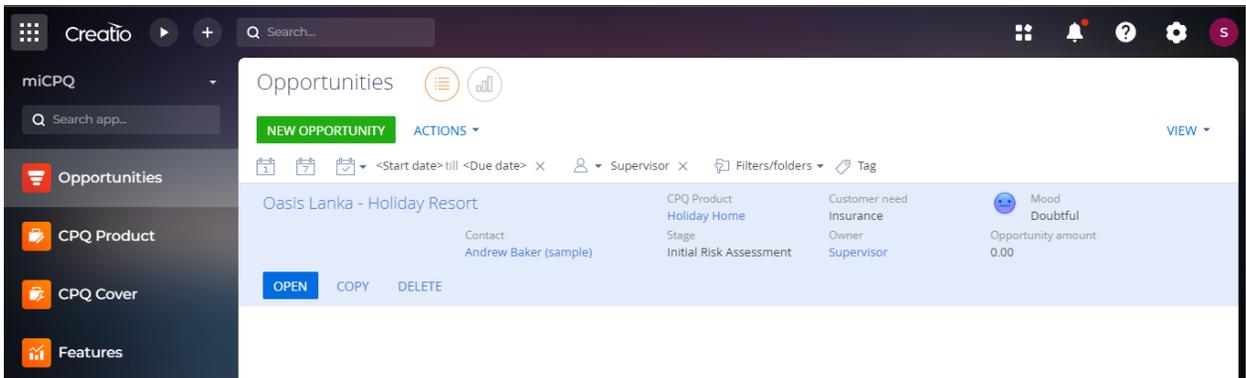
*** Fields with a red asterisk (*) are required and must be completed. ***



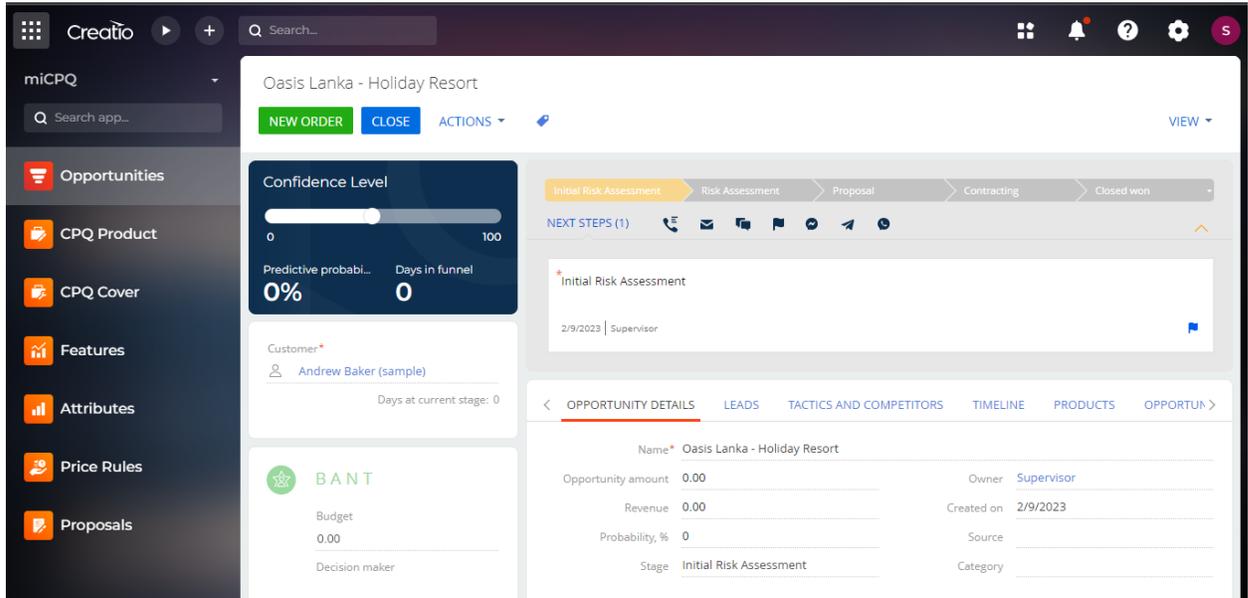


Here, you can find an example, and once you click the save button, a new opportunity record will be created and be available in the section.

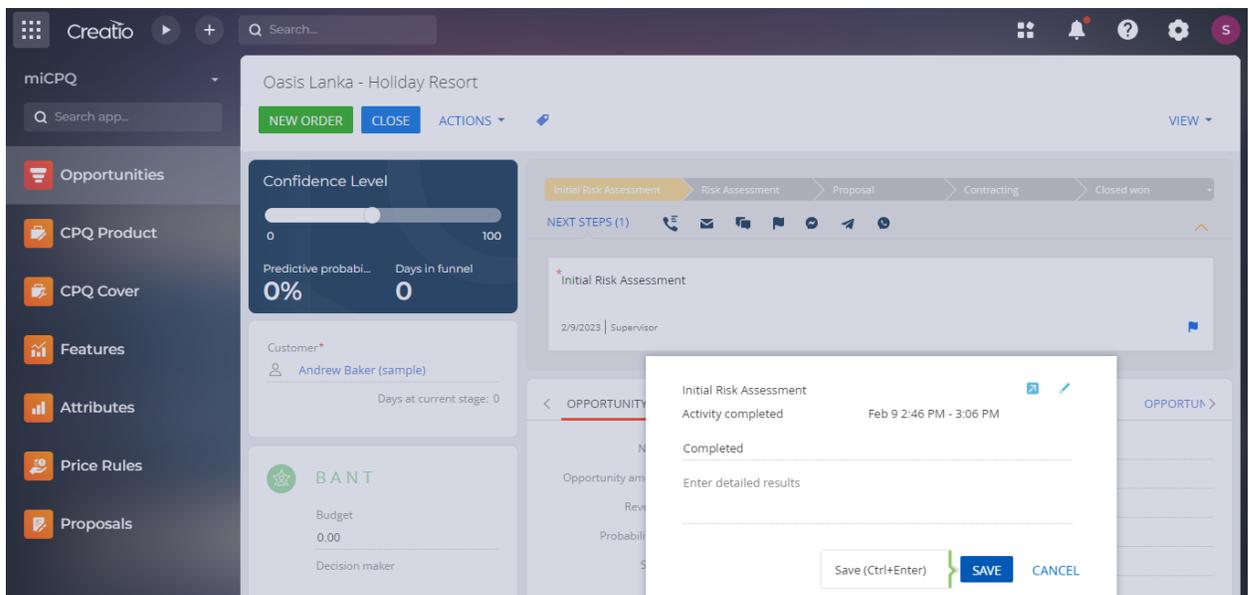
*** Fields with a red asterisk (*) are required and must be completed. ***



2. And now they can open the record which they want to proceed and can start up the process.

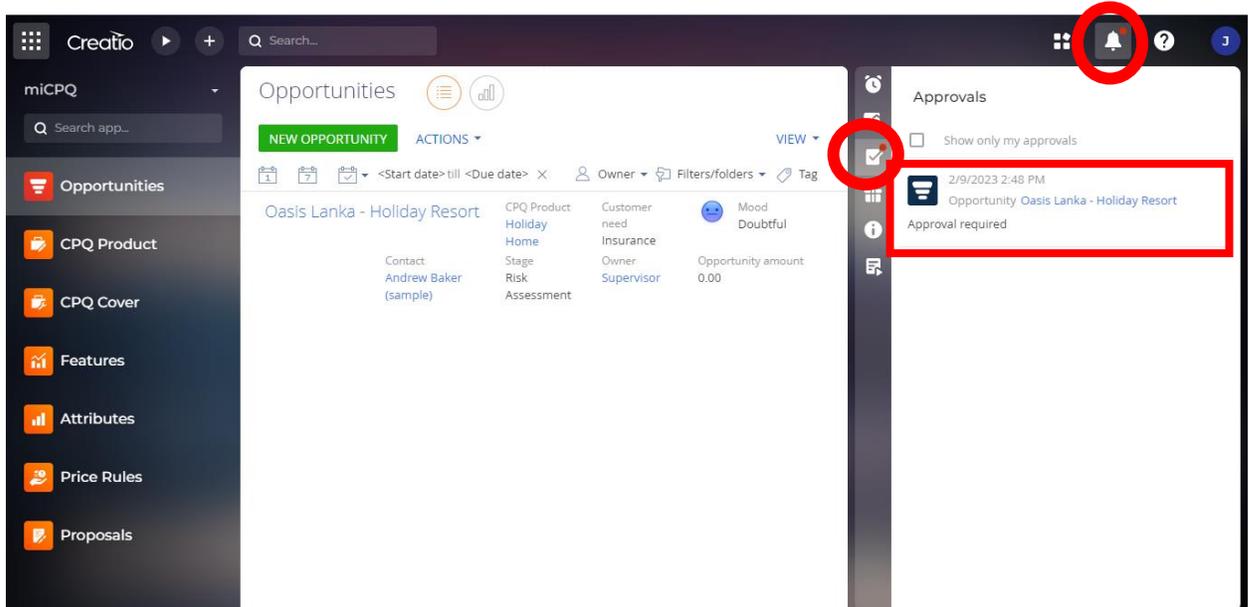


3. In the beginning, the process started with a stage called "**Initial Risk Assessment,**" with a task that needed to be done by the user. The tab "Opportunity Details" populates some data from the mini page, while other fields must be filled out by the user.

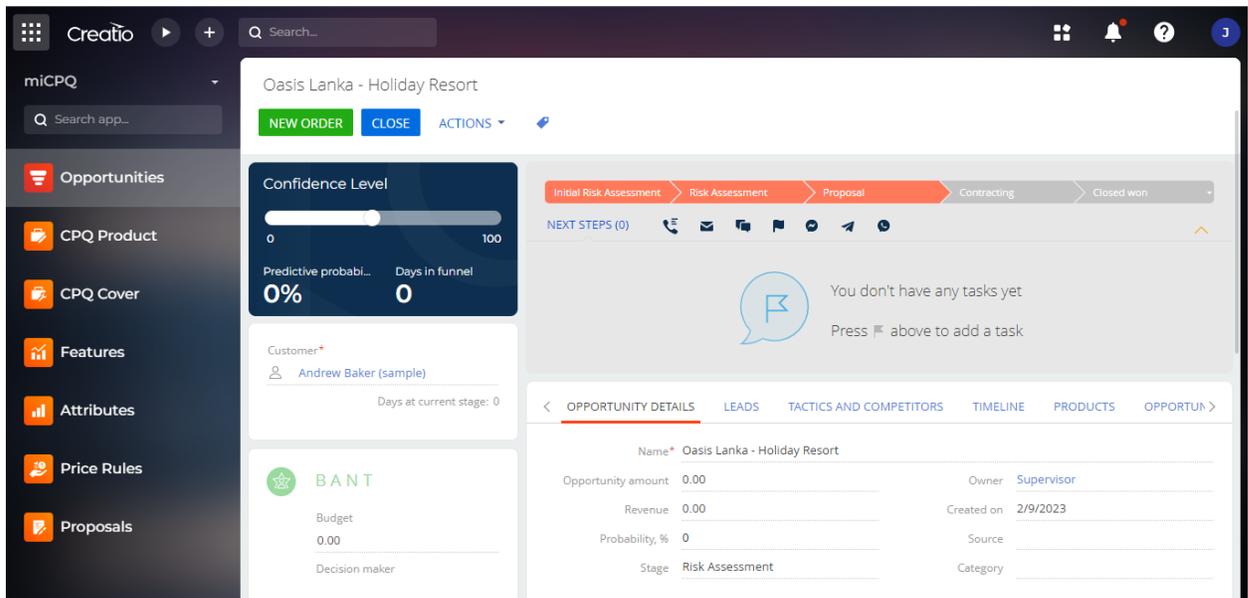


Once the task is completed, a notification will be sent to the valuation team for approval.

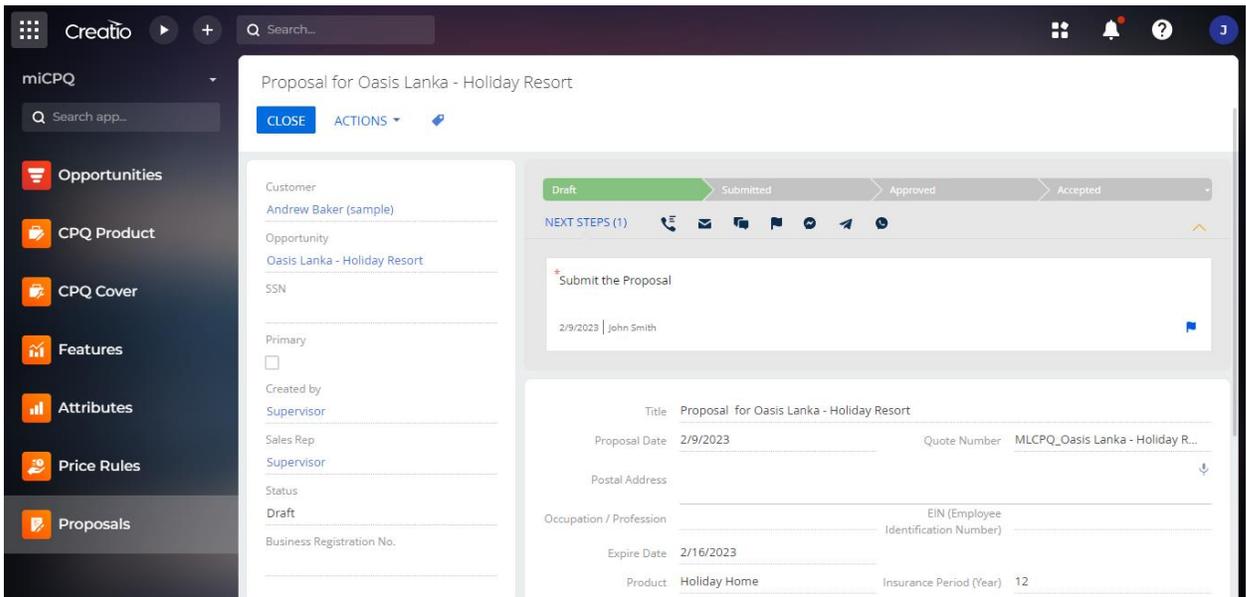
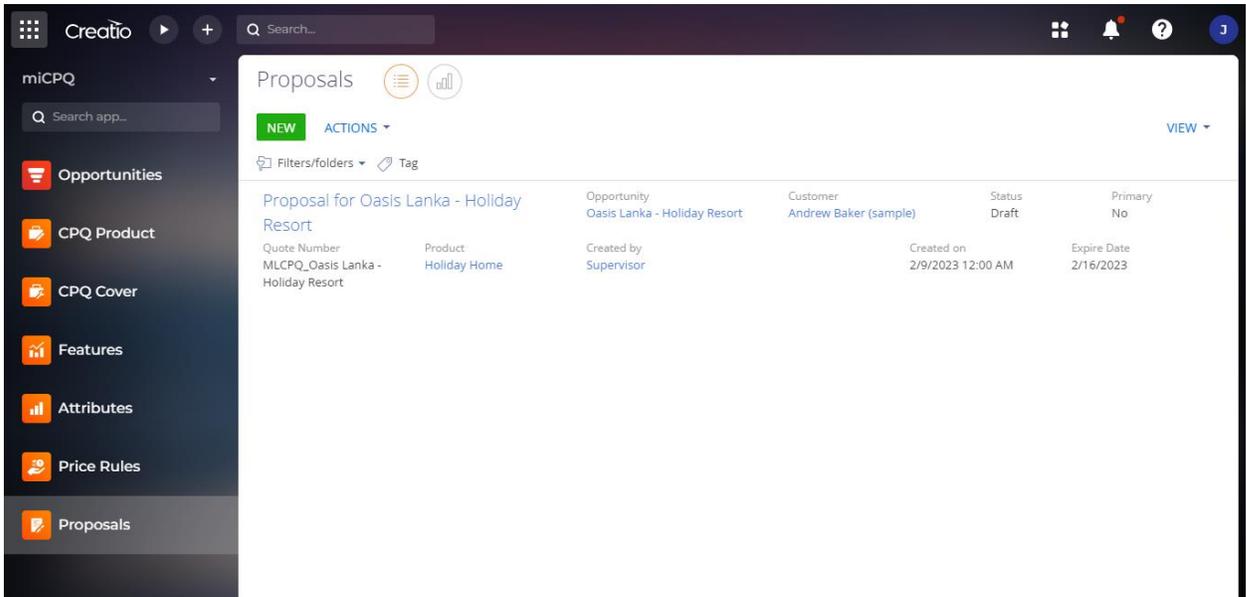
*** The notifications can be seen under the **bell** icon, which flows along the right side. In the different tabs, they can find their relevant notifications.



4. Once it is approved by the relevant person, the stage moves to "**Proposal**" with the creation of a new activity, "**Open proposal.**"



In that stage, the user should move to the **"Proposals"** section and can find the created proposal under the customer's name.



- In proposals, the default details connected to the product will be automatically populated in both "features", "covers", and "pricing rules" tabs. If a user wants to add additional features or covers, they can add new details with relevant amounts, on each of the tabs. Based on the added details, both the insured amount and the monthly installment will be calculated accordingly.

Proposal for Oasis Lanka - Holiday Resort

Supervisor: _____
 Status: Draft
 Business Registration No.: _____

Postal Address: _____
 Occupation / Profession: _____ EIN (Employee Identification Number): _____
 Expire Date: 2/16/2023
 Product: Holiday Home Insurance Period (Year): 12
 Insured Amount: 270,000.00 Monthly Installment: 1,875.00

FEATURES COVERS PRICING RULES ATTACHMENTS AND NOTES FEED APPROVALS

Features in Proposal + :

Feature (L1)	Feature (L2)	Attribute 1	Attribute 2	Attribute 3	Value
Bedroom		Furniture	Cupboards		100,000.00
Basic Structure		Floor	Cement		120,000.00
Kitchen		Machinery	Toaster		50,000.00

Proposal for Oasis Lanka - Holiday Resort

Status: Draft
 Business Registration No.: _____

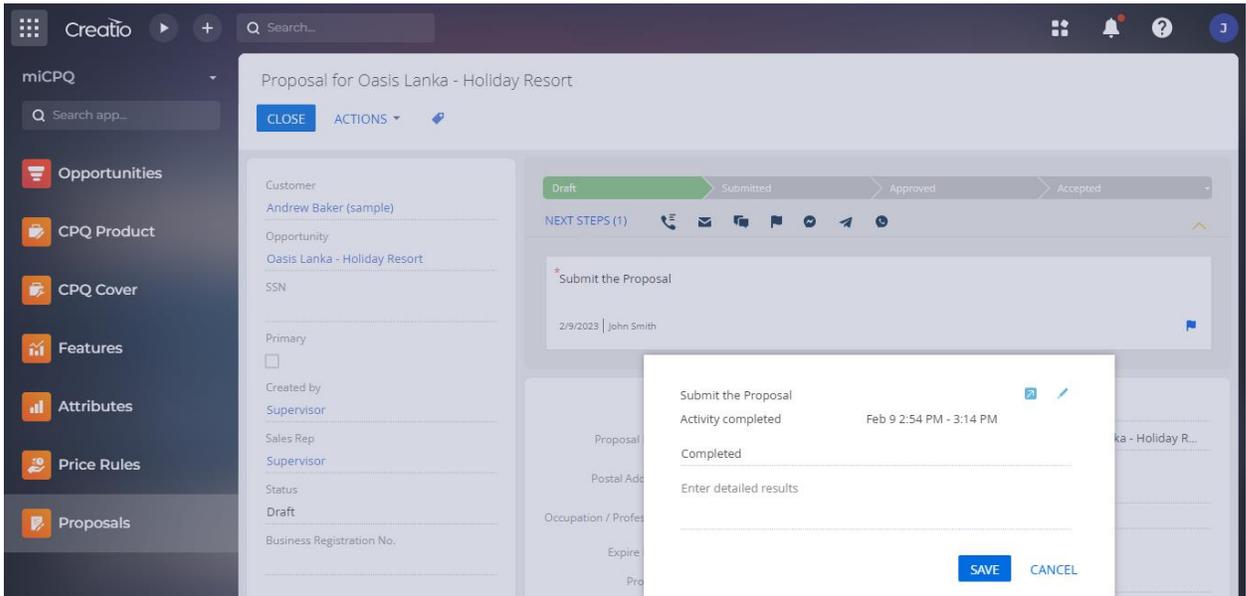
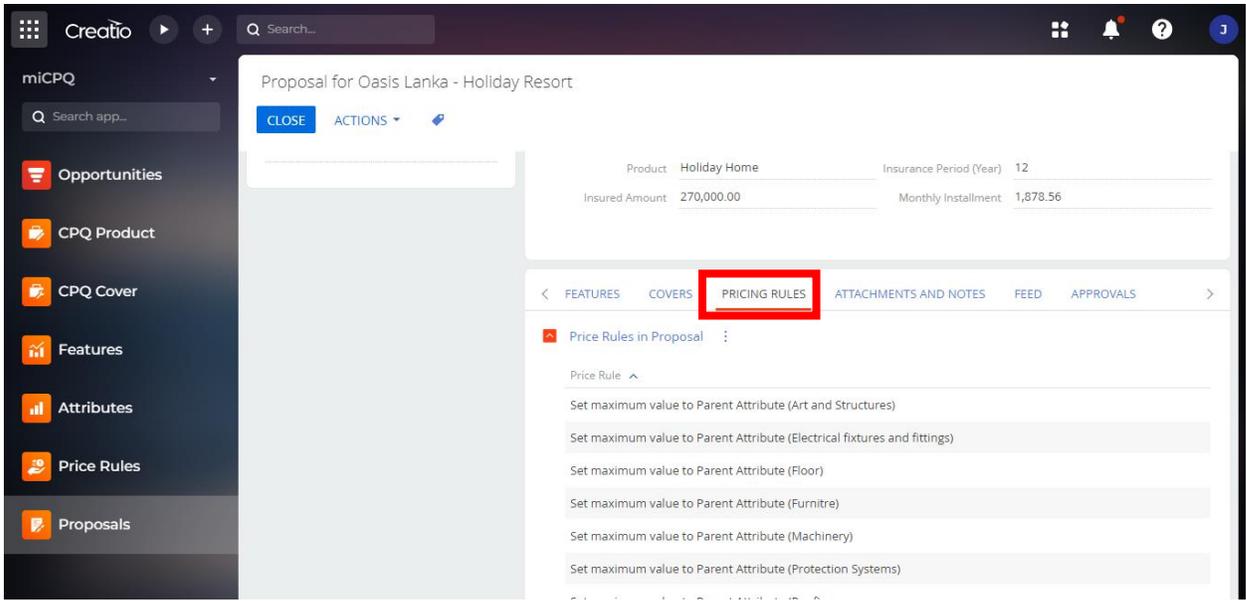
Postal Address: _____
 Occupation / Profession: _____ EIN (Employee Identification Number): _____
 Expire Date: 2/16/2023
 Product: Holiday Home Insurance Period (Year): 12
 Insured Amount: 270,000.00 Monthly Installment: 1,878.56

FEATURES COVERS PRICING RULES ATTACHMENTS AND NOTES FEED APPROVALS

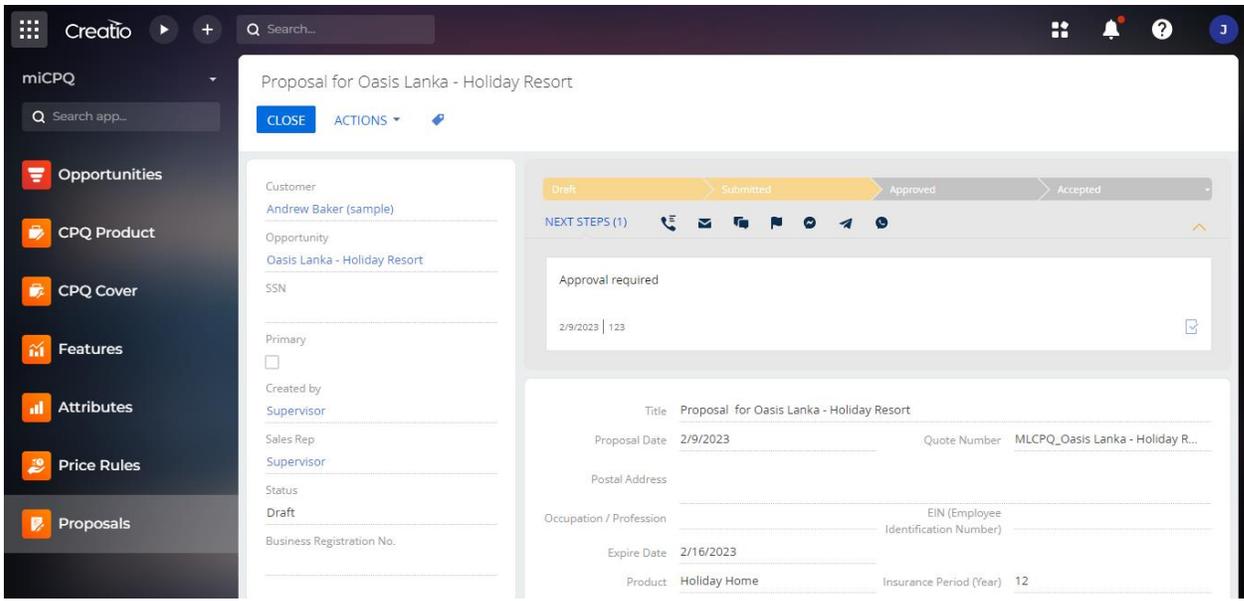
Covers in Proposal + :

CPQ Cover	Active	Pricing %	Value
Earthquake	Yes	0.06	162.00
Explosion	Yes	0.05	135.00
Riot	Yes	0.08	216.00

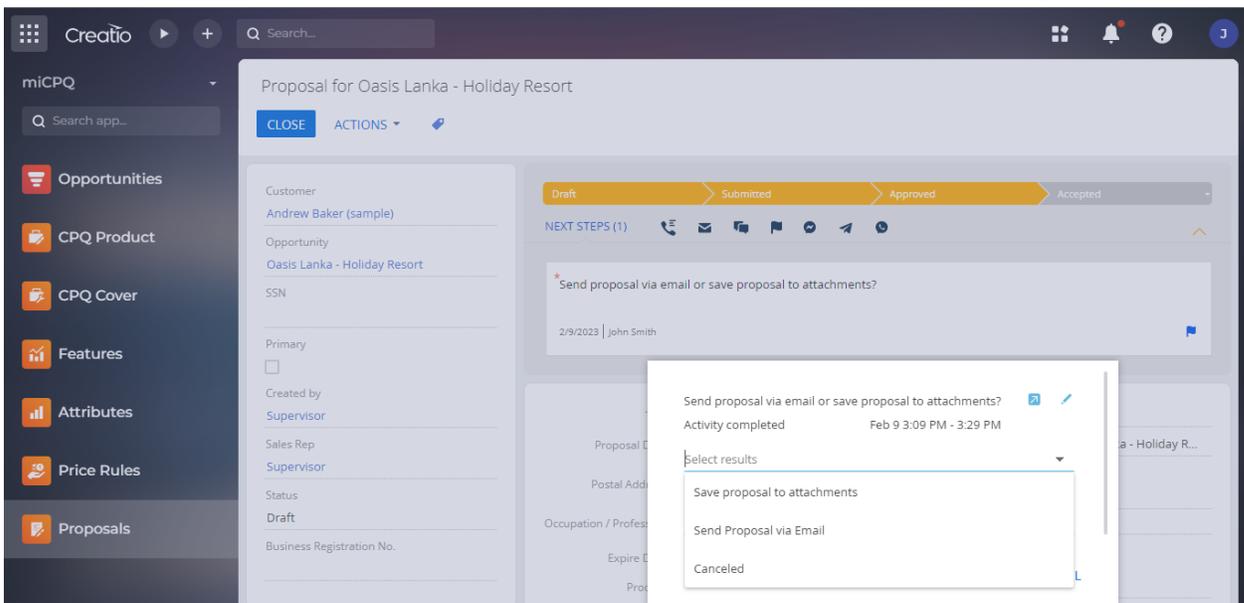
In the "Covers" tab, the relevant covers need to be checked as Active, if those are covered in the product. Otherwise, the Insurance amount will be invalid.



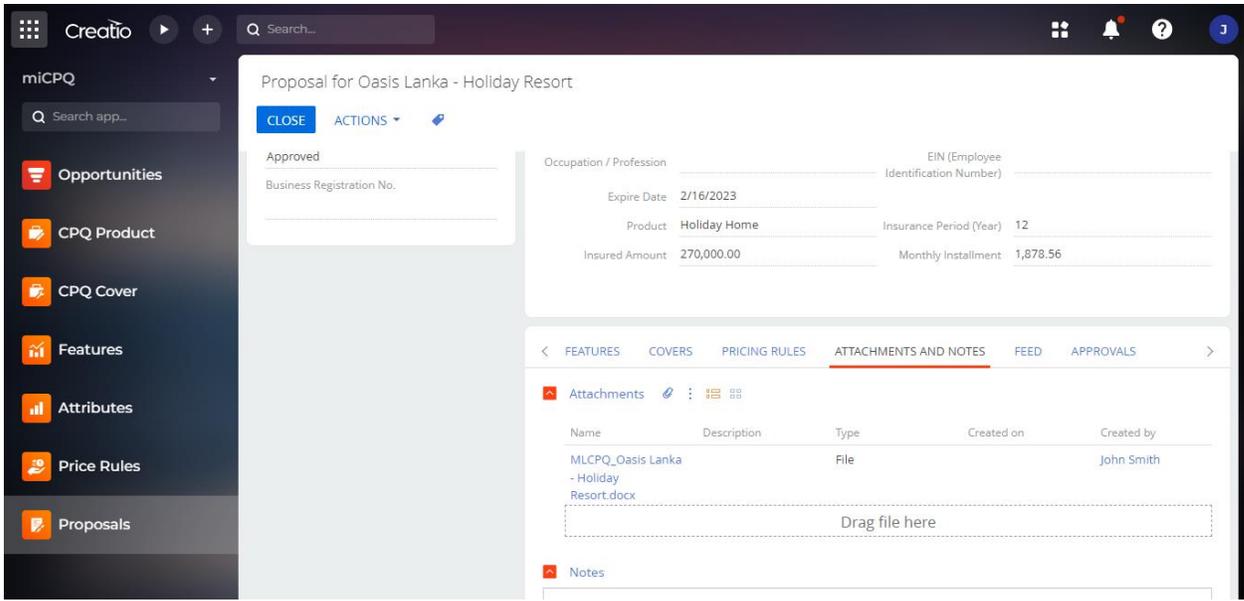
And once it is also completed, it moves on to the next stage, "**Submitted**" for approvals.



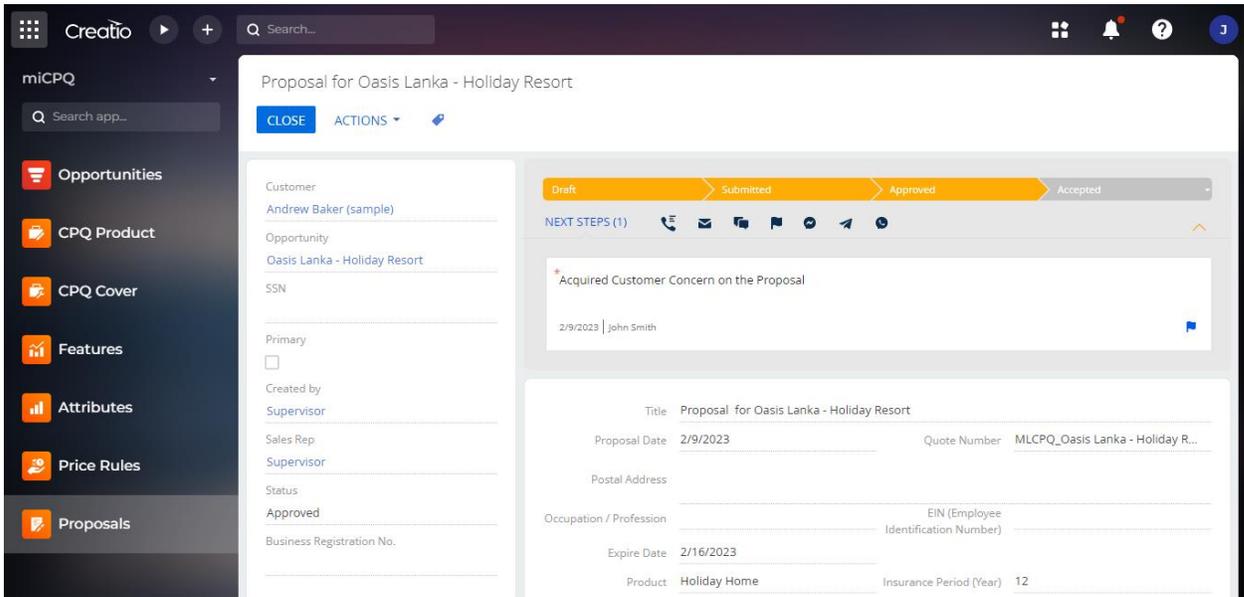
When it is approved, it moves to the next stage, “Approved” and there is a task, whether send the proposal via email or save it as an attachment.



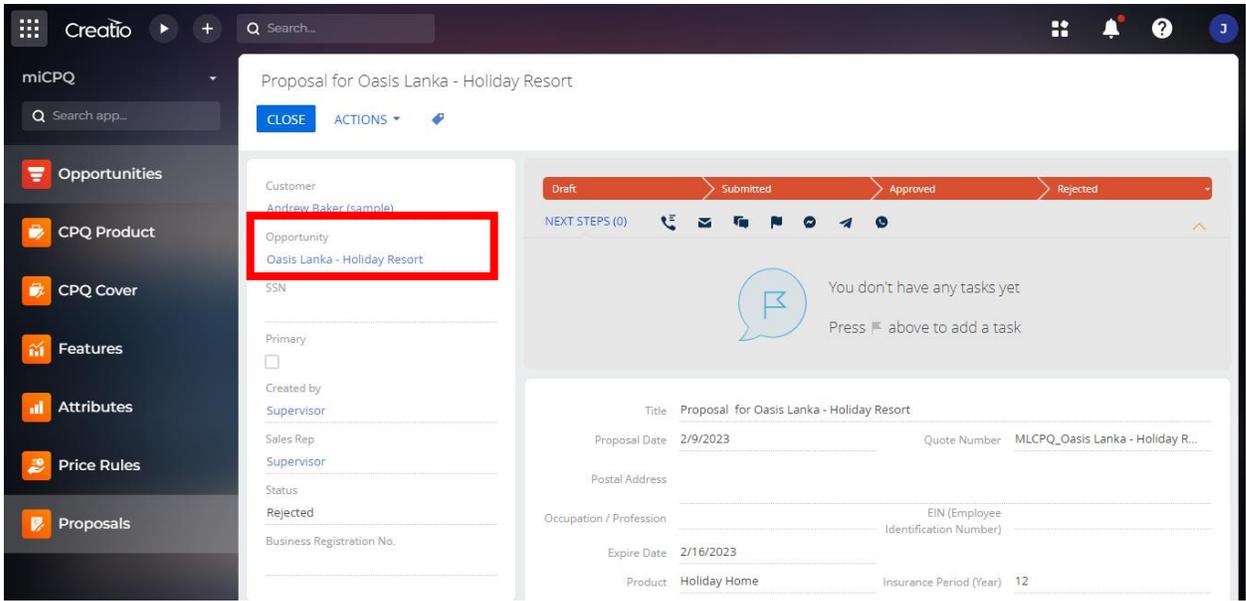
A created proposal will be available under the "**Attachments and Notes**" tab if the option "**Save proposal as attachments**" is clicked. If the email is clicked, it will send the proposal directly to the customer through the email ID.



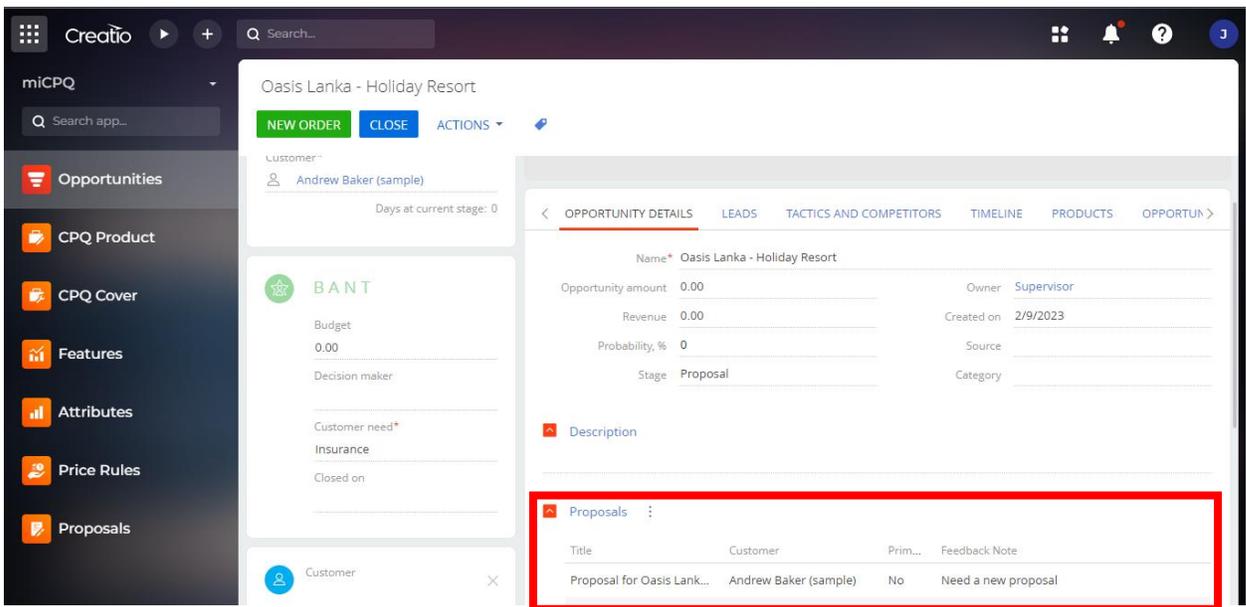
6. Here, you can send or communicate to the customer with the proposal generated. And based on their feedback or discussion, you can complete the task by saying “**Completed**” or “**Rejected**” in the dropdown on the pop-up.



If the proposal gets rejected by customer, user can add feedback under the Feedback Note field.

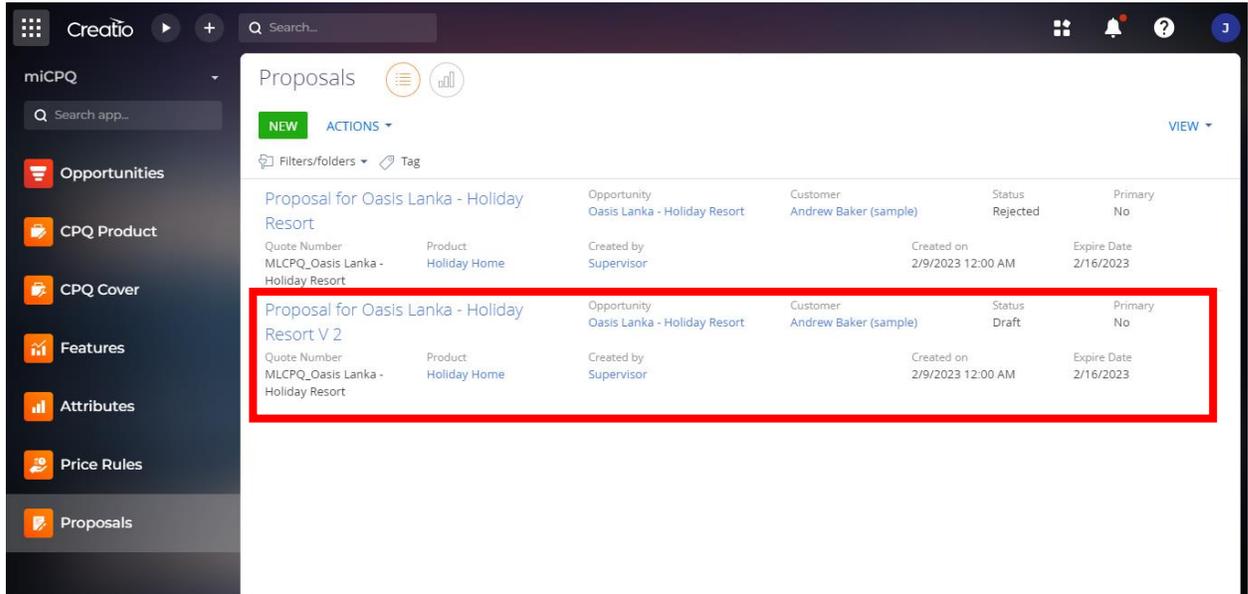


Now can go to the Opportunity section and create a new proposal with the feedbacks received. And now the stage has moved to the previous step of Risk Assessment Approval. And here, under **Proposals** details in **Opportunity Details** tab can find the generated proposal and the reason for the rejection.

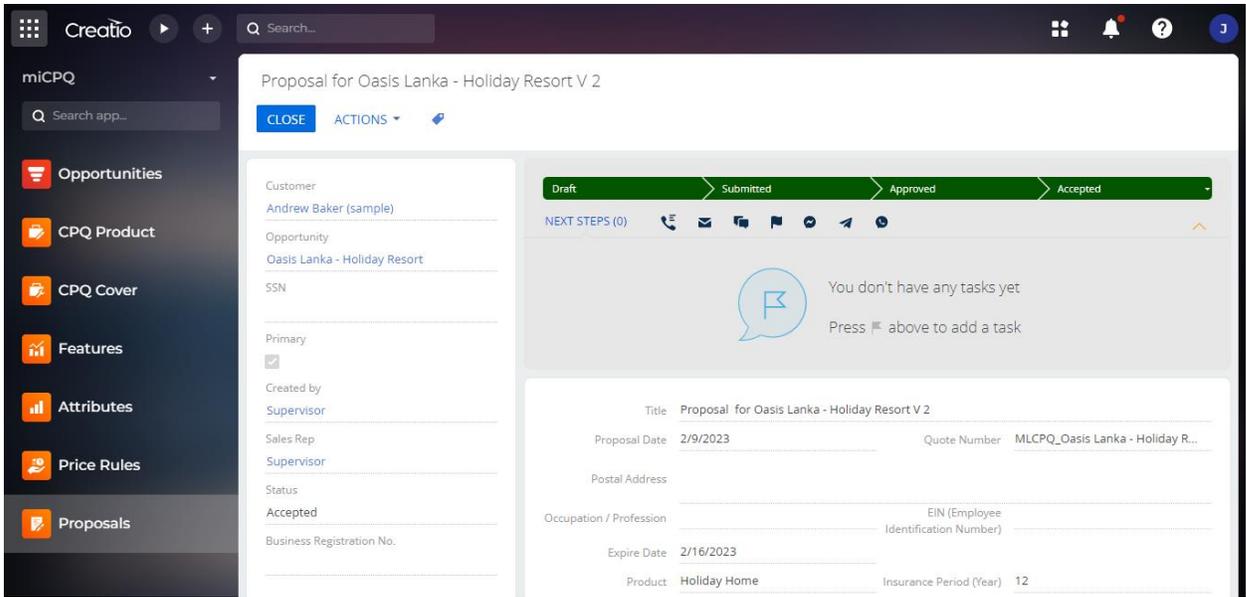


After giving approval to the Risk Assessment, again go to proposals and user can find a newly generated proposal under the same customer's name ending with "V2".

***The digit comes after V, and states that the proposals were created multiple times.

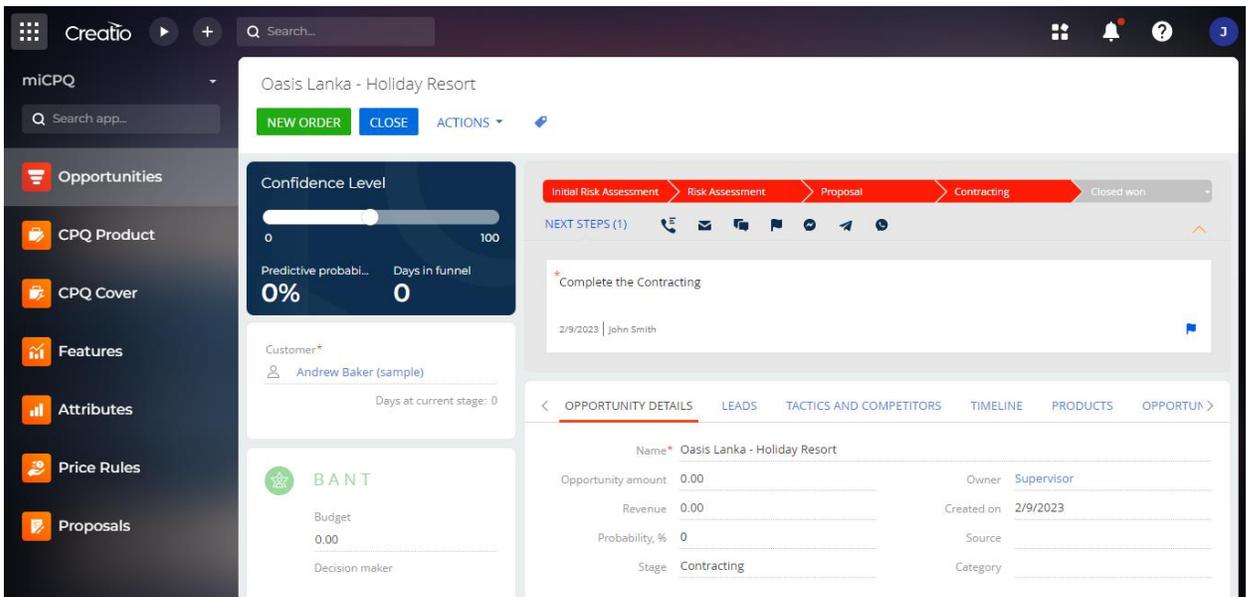


And again, opening the proposal and go through the each of the stages task and "Complete" it. If customer okay with the proposal at the Approved stage. Once it approved the whole chevron will become greenish.

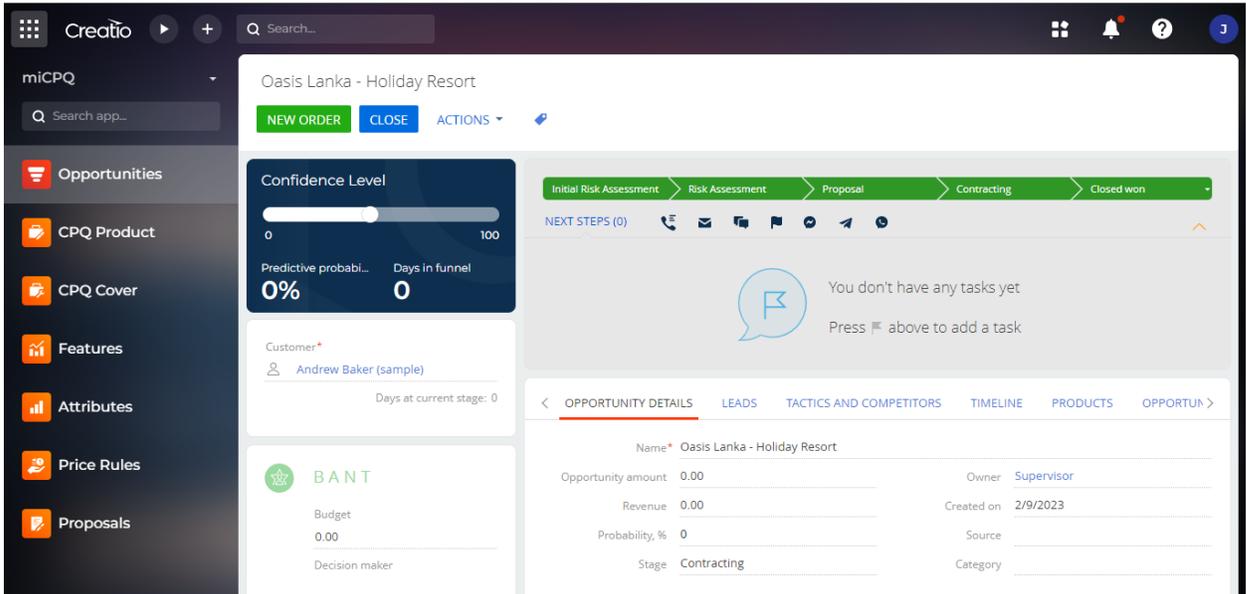


At that time, user can move to opportunity section and can follow rest of tasks.

7. After completing, and approving the proposal, the user can complete the task in Complete the task. “The Contracting at Contracting stage”.



Once it is completed, the chevron will become greenish, and move to **Closed won** stage. Here, the user can confirm that the process went well, and it was successful.



Now, user can create a new opportunity for new or for the same customer by following the above flow.

***END**

Help

If more clarification is needed about the process and the flows, please contact us. We can provide assistance with clear guidance.

And we can configure more modifications and customization based on your process and requirements, if needed.

For more details, please contact us.

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