



# Streamlining Insurance Claims Processing with Sage Intacct Integration

## Company Background

This project was done for a leading insurance claims facilitator which specialising in managing complex claims efficiently. To ensure seamless operations, this claims facilitator implemented Sage Intacct as its core financial and project management platform. However, the organisation needed additional automation to streamline its claims processing workflow.

Company:  
**Insurance Claims Facilitator**

Location:  
**South Africa**

Industry:  
**Insurance**

Solution:  
**SynergAutomate WebApp**

Sage Partner:  
**SynergERP**

## The Challenge

### Enhancing Efficiency in Claims Management

While Sage Intacct's Projects Module effectively handled billing and administrative tasks, the business faced challenges in efficiently managing claims-related expenses and allocations. Each claim was structured as a "Parent Project," with "Child Projects" representing various claim components, such as household contents, building repairs, and fire damage.

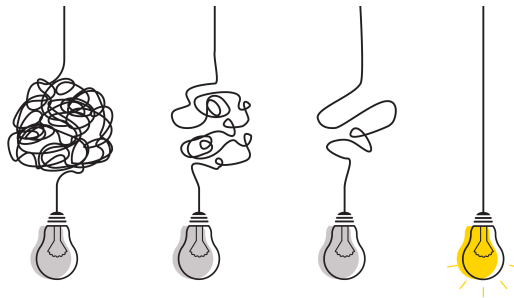
The manual nature of handling these allocations and invoicing processes posed several issues:

**Time-Consuming Workflows:** Manual data entry and expense allocation led to inefficiencies.

**Error-Prone Processes:** Managing high claim volumes without automation increased the likelihood of errors.

**Scalability Limitations:** The existing process was not sustainable as claim volumes grew.

To scale effectively, ALA required an automated solution capable of managing claims processing within the Sage Intacct ecosystem.



## The Solution

### Custom WebApp for Intelligent Claims Automation

To meet requirements of this claims business, SynergERP developed a fully tailored WebApp by leveraging Sage Intacct's Open API. This innovative solution automated claim management workflows, eliminated manual tasks, and ensured seamless data integration.

Key Features of the Custom Solution:

#### **Data Extraction:**

Retrieved project details directly from the Parent Project within Sage Intacct.

#### **Automated Allocation:**

Automatically divided claims-related expenses (e.g., hours, mileage, and employee costs) into designated Child Projects based on predefined rules.

#### **Accurate Assignments:**

Allocated claims and ensured invoicing accuracy for service providers.

#### **Real-Time Integration:**

Processed data was updated in Sage Intacct without disrupting existing workflows, enabling real-time accuracy and transparency. Through seamless integration, this WebApp enhanced the company's operations, allowing for improved efficiency, error-free processing, and scalable claim management.

## Key Results

The implementation of SynergERP's custom WebApp delivered tangible business benefits to this claims business. These included:

### **Automated Claims Processing:**

Eliminated manual tasks, significantly reducing processing time and boosting operational efficiency.

### **Seamless Integration:**

Worked within Sage Intacct's capabilities while providing a tailored layer of automation.

### **Error-Free Allocations:**

Strengthened accuracy in claims categorisation and invoicing.

### **Scalability and Efficiency:**

Enabled the business to effectively handle higher claim volumes without additional resource requirements.

## The Impact

This tailored solution not only solved the claims facilitator's immediate challenges but also provided a scalable framework for future growth. By automating a previously manual process, the company achieved new levels of operational efficiency while maintaining flexibility to handle complex claims.

### **Setting the Standard for the Industry**

The success of this implementation has created a benchmark for automation in claims processing. Businesses across the insurance sector can look to this project as an example of how tailored AI-driven solutions can modernise outdated workflows.

### **Partner with SynergERP**

At SynergERP, we specialise in designing and implementing innovative solutions to improve efficiency through process automation, system integration, and ERP optimisation.

If your organisation is seeking to enhance operations and reduce manual effort, contact SynergERP today to explore how we can help transform your workflows.

Get in touch with us here to learn more.



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