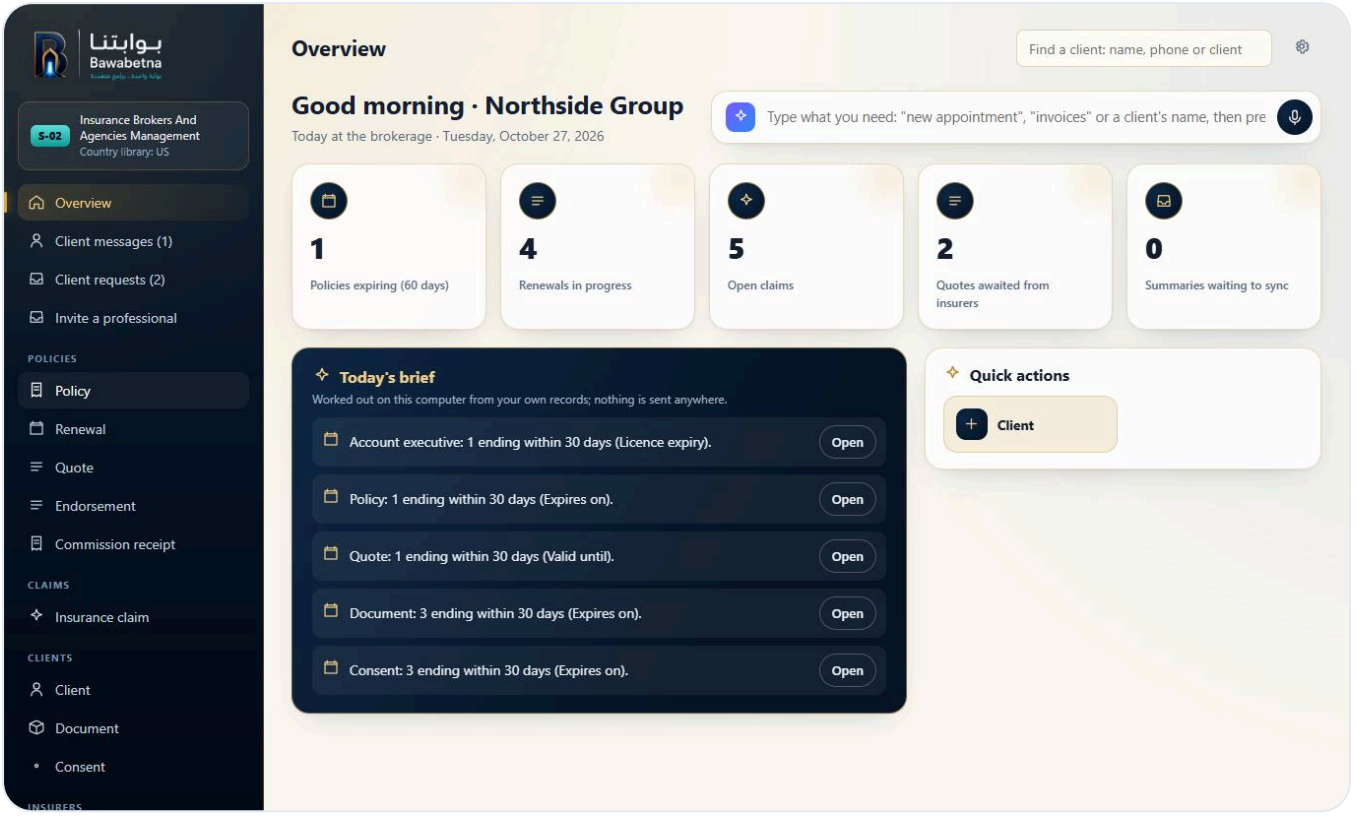
Bawabetna · User guide

Insurance Brokers And Agencies Management

Every screen and every button, with real screens from the program.

Guide version 2026-10-27



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Getting started

Download the program from bawabetna.com or the Microsoft Store and install it. On first opening, sign in with your Bawabetna account. The first month is free with every feature.

The first-run assistant asks for a few details, then the program is ready:

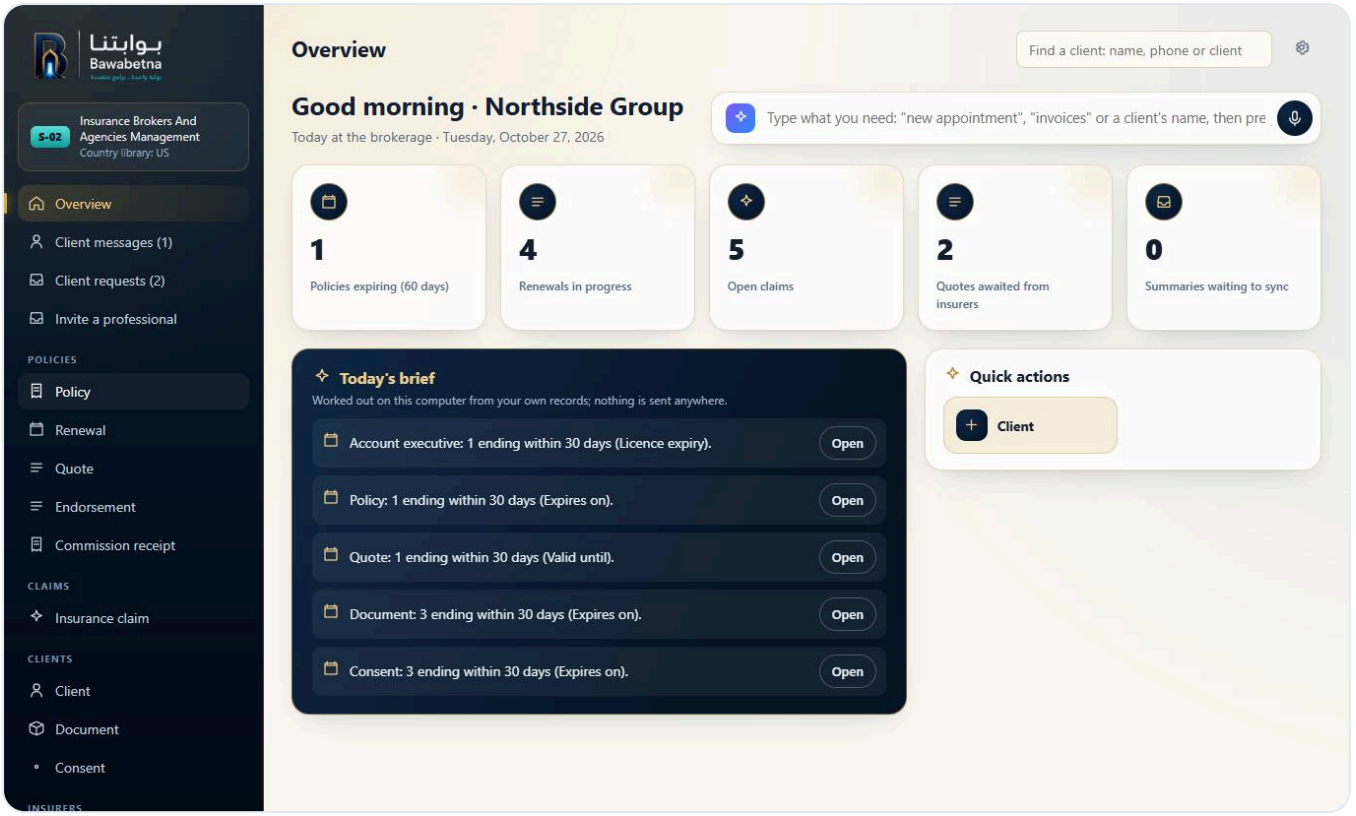
1. **Brokerage**: Name, License number, Country, Default currency
2. **Branch**: Name, Phone
3. **Account executive**: Full name, License number

Each person signs in with their own role and sees only the screens of that role:

- Account executive
- Accountant
- Broker owner
- Claims officer
- Manager

The home screen

The home screen shows today's work at a glance: counts, today's schedule, what is waiting and requests from clients. The command bar at the top opens any screen from a short sentence, such as a client's name or "new appointment".

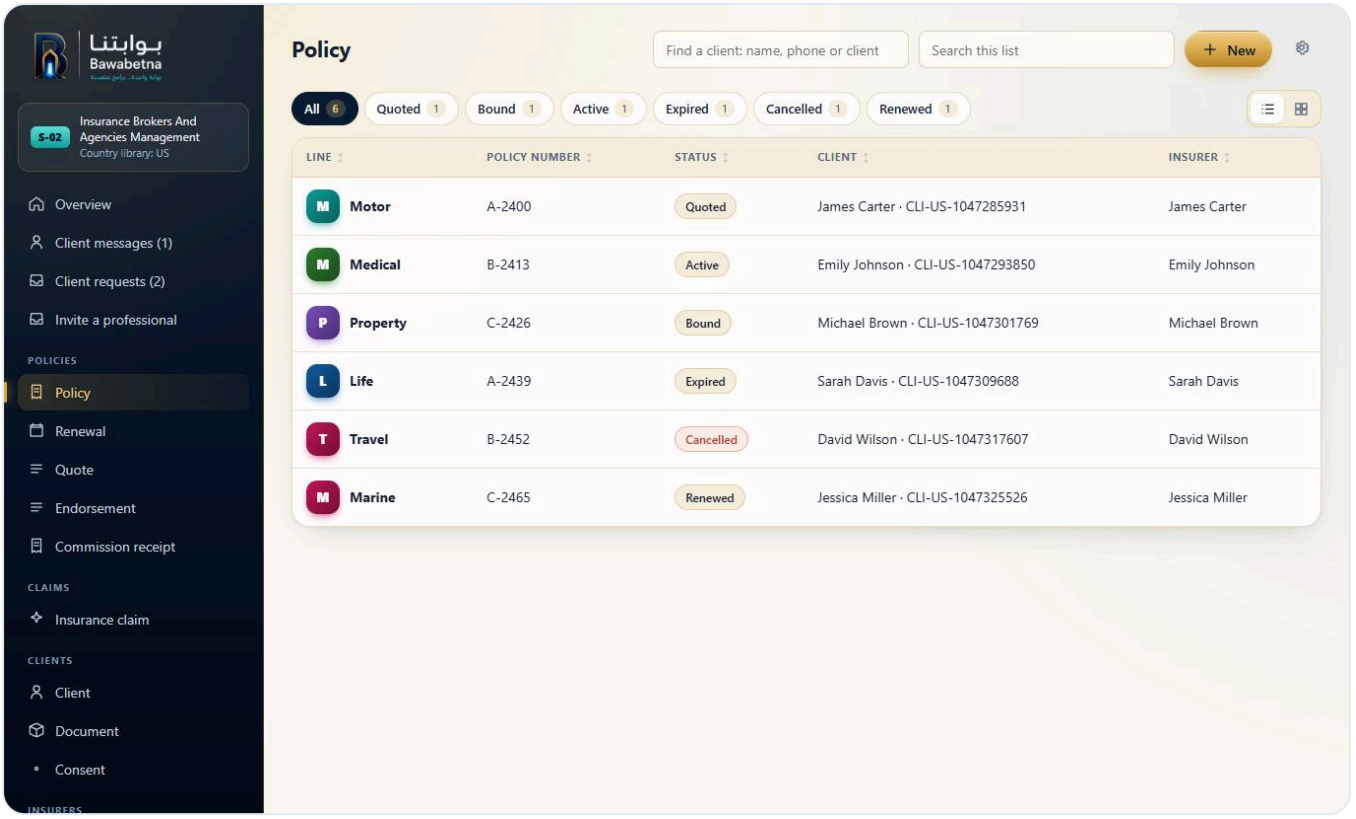


The home screen

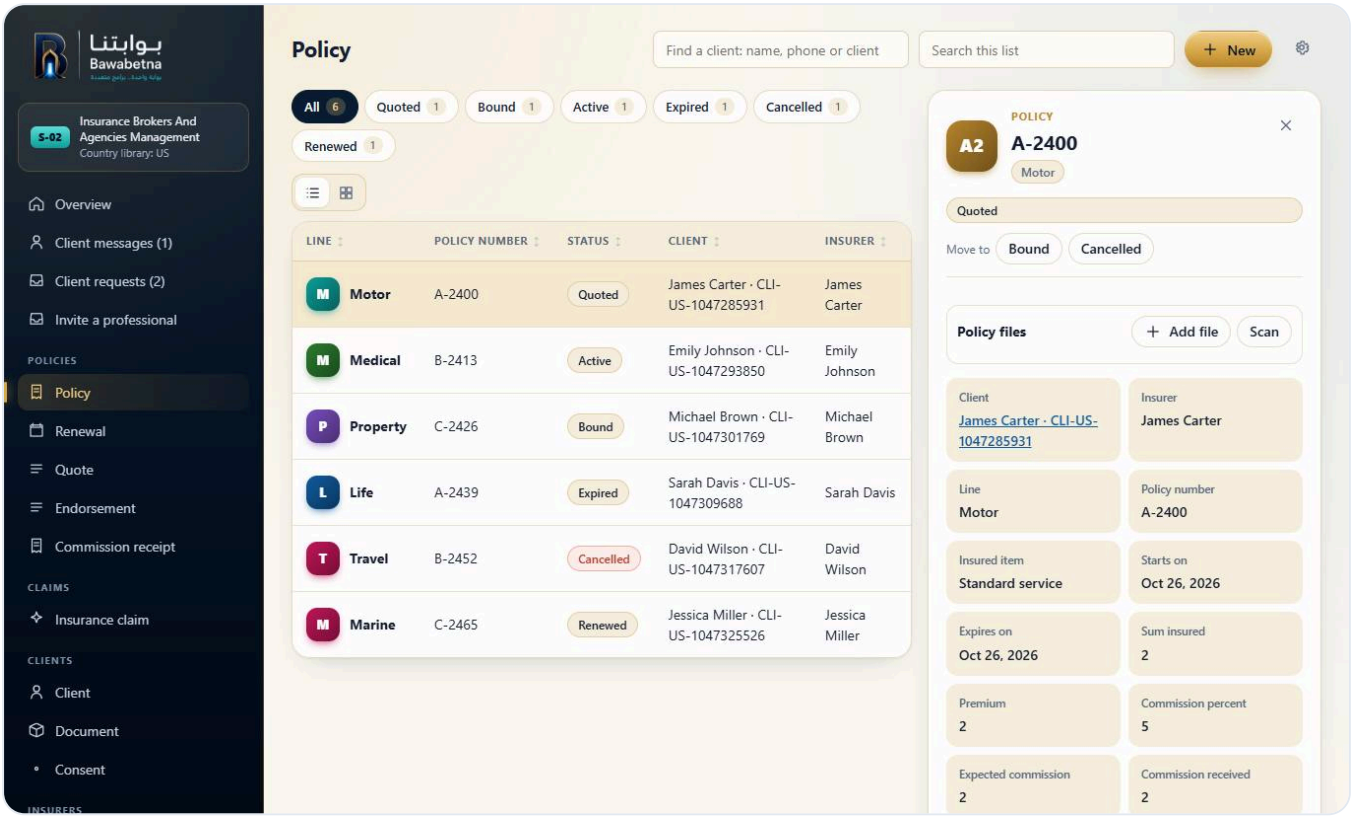
Screens and what you record in them

The side menu groups the screens by kind of work. Each screen lists its records: New adds one, a click opens it, and the buttons at the bottom of a record move it to its next stage.

Policies



Policy



A record open for editing

Policy

What you record: Client (required), Insurer (required), Line (required), Policy number (required), Insured item, Starts on (required), Expires on (required), Sum insured, Premium (required), Commission percent, Expected commission (worked out by the program), Commission received (worked out by the program), Commission gap (worked out by the program), Claims count (worked out by the program), Account executive, Policy files, Status (required)

Stages: A new record starts as "Quoted".

Active → Expired | Active → Cancelled | Active → Renewed | Bound → Active | Bound → Cancelled | Quoted → Bound | Quoted → Cancelled

Renewal

What you record: Policy (required), Client (worked out by the program), Expires on (worked out by the program), Account executive, Notes, Status (required)

Stages: A new record starts as "Opened".

Opened → Quoting | Opened → Lost | Presented → Bound | Presented → Quoting | Presented → Lost | Quoting → Presented | Quoting → Lost

Quote

What you record: Client (required), Renewal, Insurer (required), Line (required), Premium (required), Sum insured, Deductible, Cover notes, Valid until, Status (required)

Stages: A new record starts as "Requested".

Presented → Accepted | Presented → Declined | Received → Presented | Received → Declined | Requested → Received | Requested → Declined

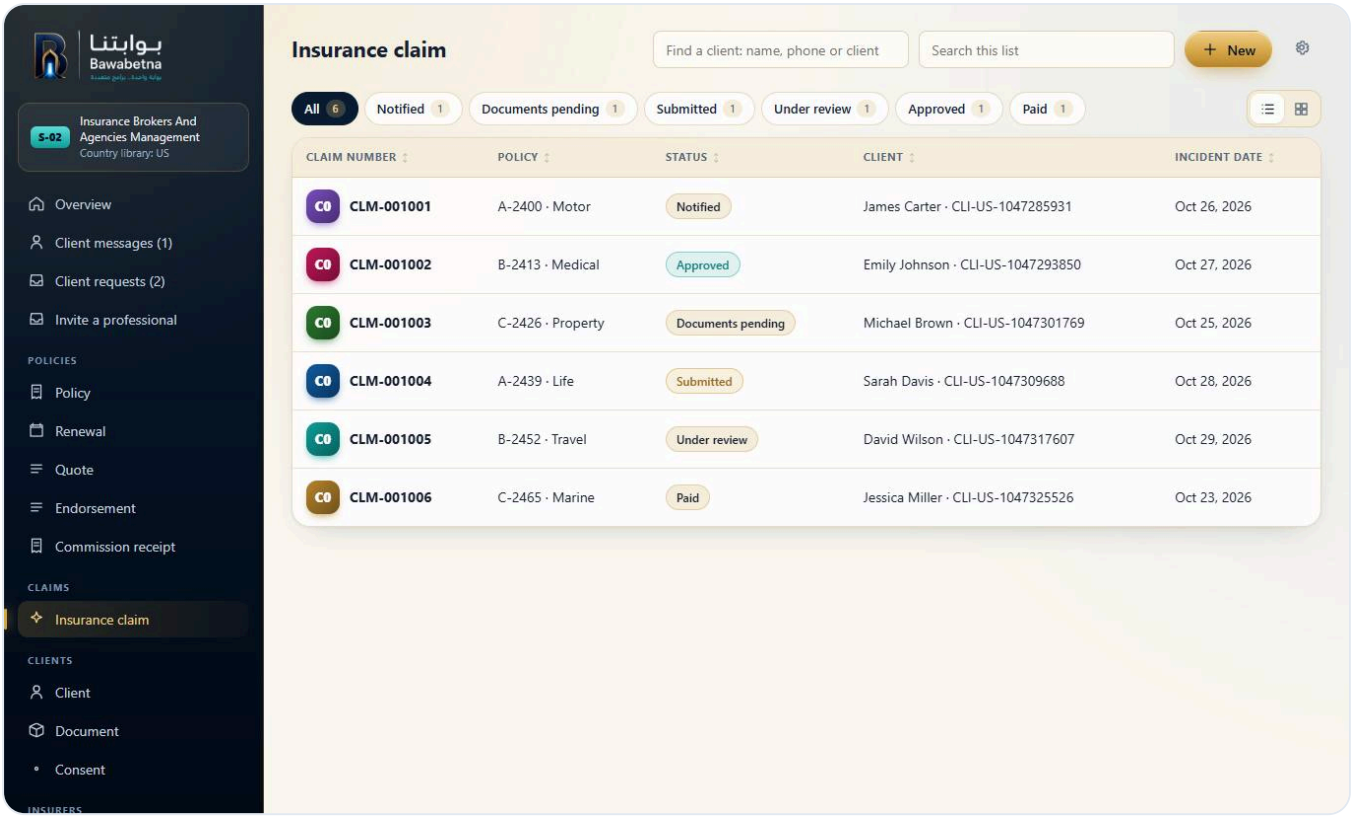
Endorsement

What you record: Policy (required), Effective on (required), Change type (required), Description (required), Premium change, Files

Commission receipt

What you record: Policy (required), Received on (required), Amount (required), Statement reference

Claims



Insurance claim

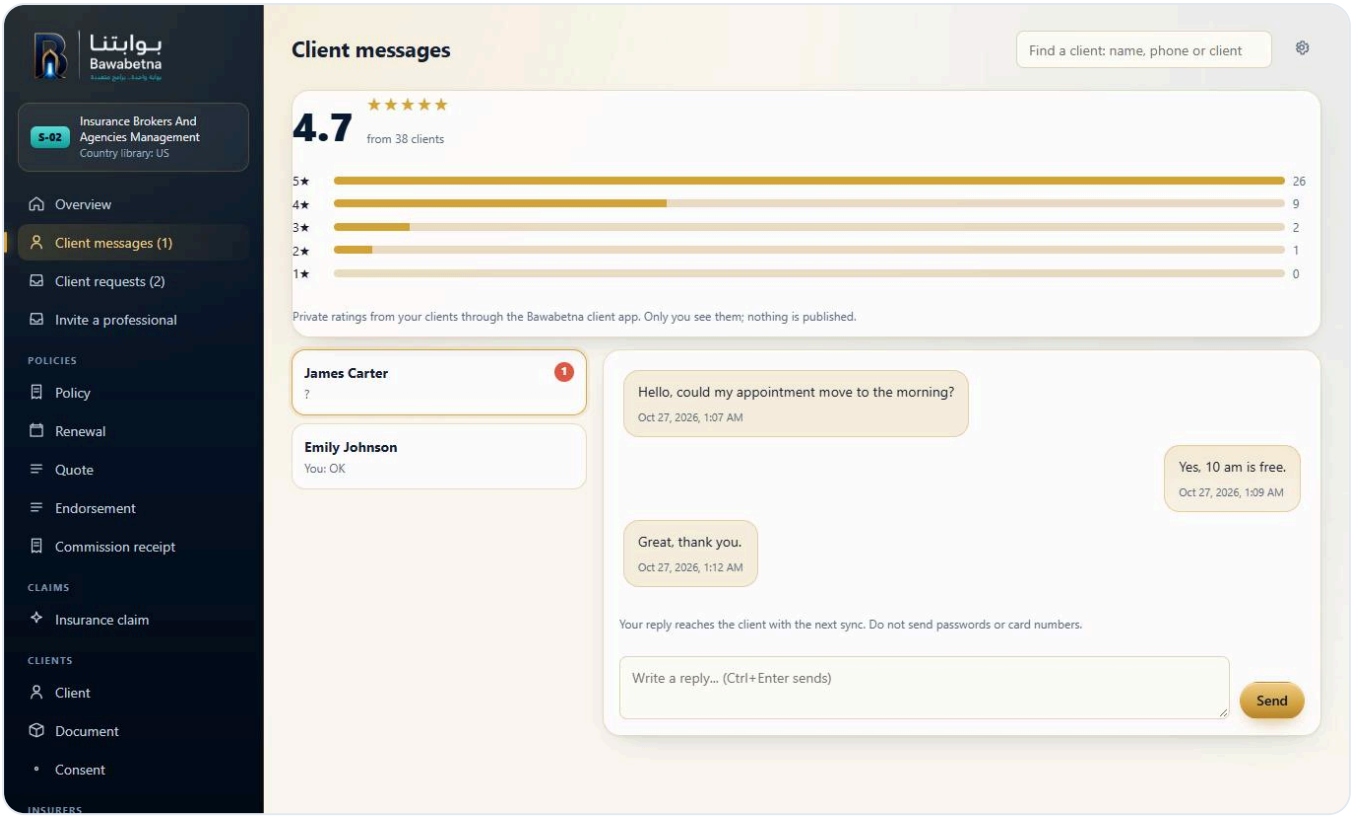
Insurance claim

What you record: Claim number (worked out by the program), Policy (required), Client (worked out by the program), Incident date (required), Notified on (required), Description (required), Claimed amount, Insurer reference, Settled amount, Files, Status (required)

Stages: A new record starts as "Notified".

Approved → Paid | Documents pending → Submitted | Documents pending → Withdrawn | Notified → Documents pending | Notified → Submitted | Notified → Withdrawn | Submitted → Under review | Under review → Approved | Under review → Rejected

Clients



Client

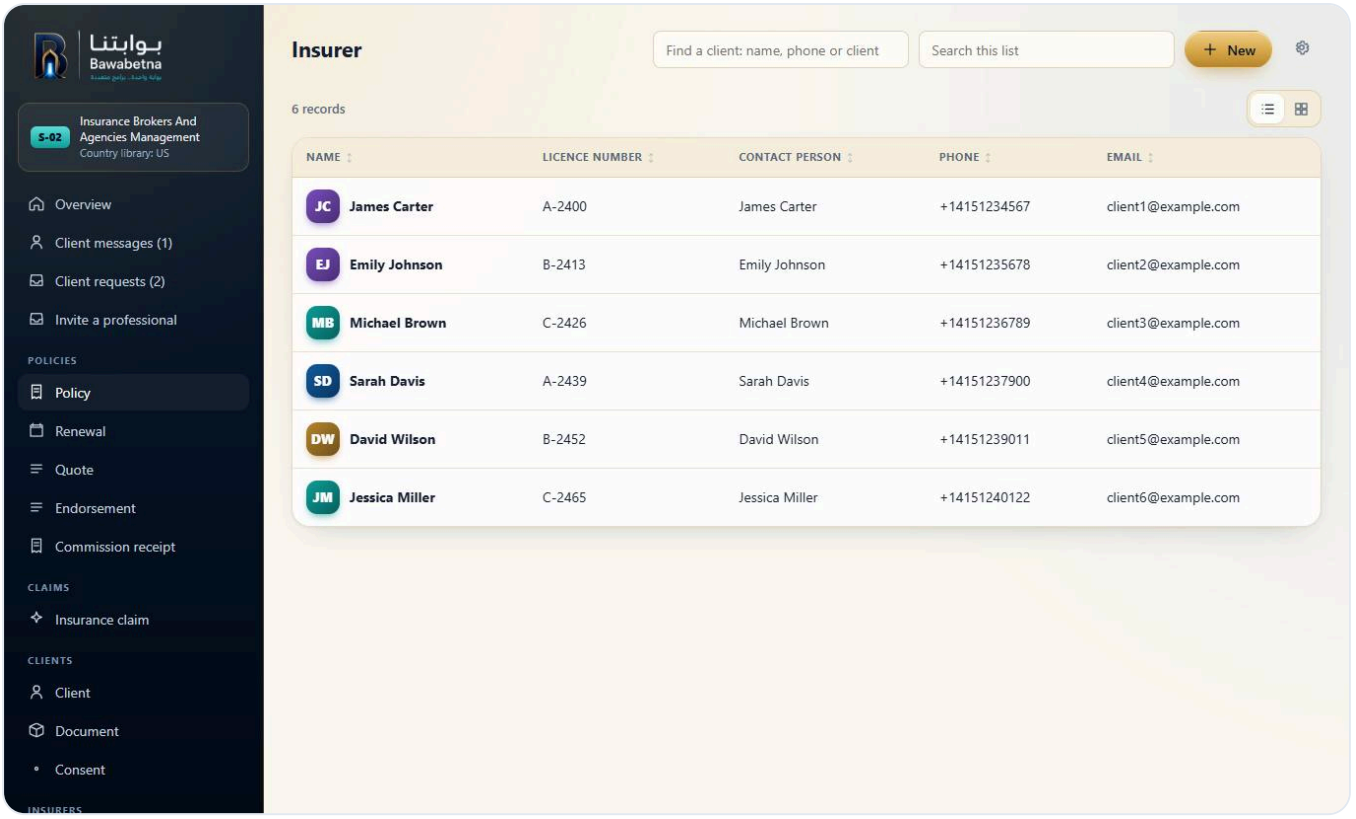
Client

What you record: Full name (required), Email, Client type, Company registration, Phone, Client code, Ecosystem registration, Identity country, Official identity number (required), Notes

Document

What you record: Client (required), Policy, Category (required), Title (required), Reference number, Issued on, Expires on, Files

Insurers

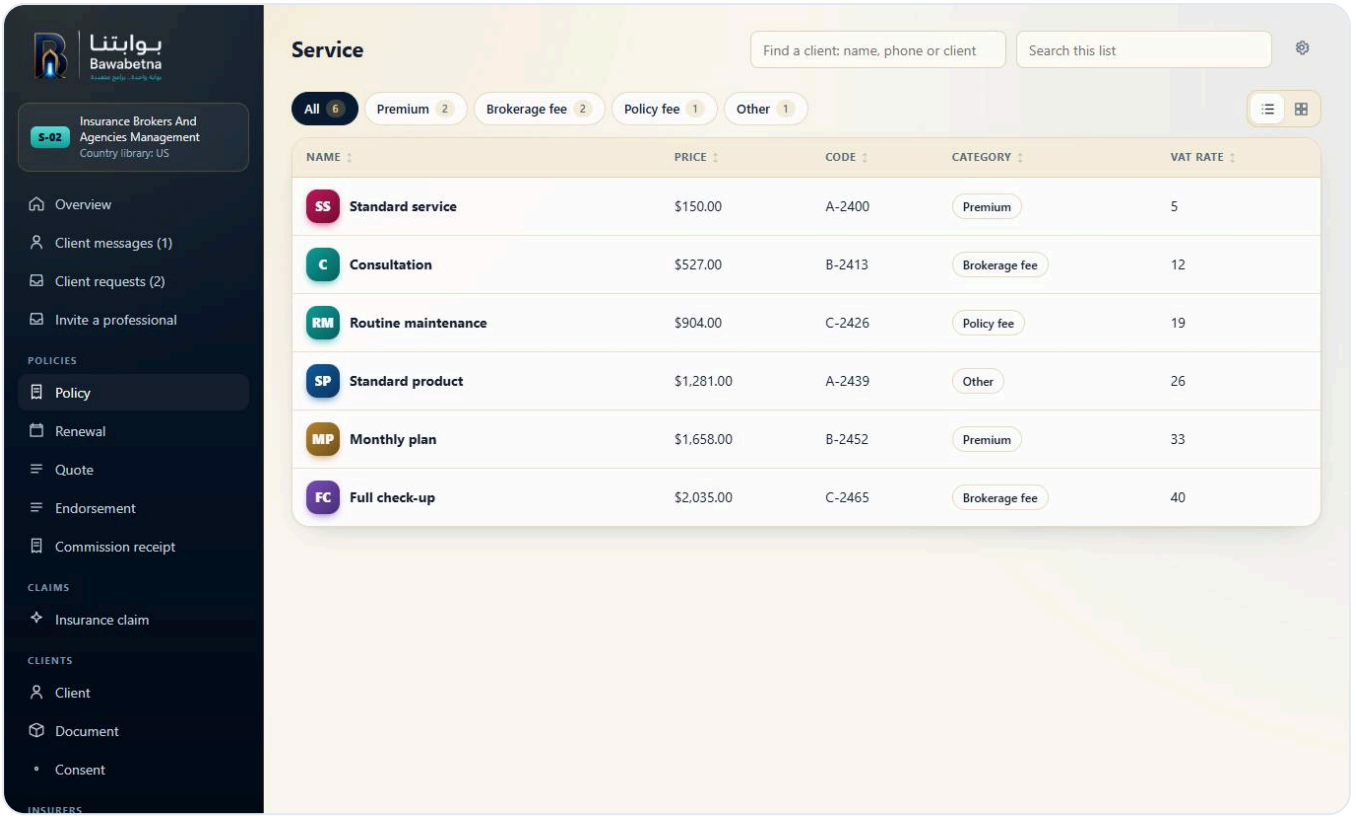


Insurer

Insurer

What you record: Name (required), Licence number, Contact person, Phone, Email, Default commission percent, Active

Billing



Service

Service

What you record: Code, Name (required), Category, Price (required), Vat rate (required), Active

Invoice

What you record: Invoice number (worked out by the program), Client (required), Policy, Currency (required), Issued at (worked out by the program), Subtotal (worked out by the program), Tax total (worked out by the program), Total (worked out by the program), Paid (worked out by the program), Refunded (worked out by the program), Net paid (worked out by the program), Balance (worked out by the program), Status (required), E invoice reference, Notes

Stages: A new record starts as "Draft".

Draft → Issued | Draft → Voided | Issued → Voided | Refunded → Reconciled | Settled → Reconciled

Invoice line

What you record: Invoice (required), Service, Description (required), Quantity (required), Unit price (required), Discount, Vat rate (required), Line net (worked out by the program), Line tax (worked out by the program), Line total (worked out by the program)

Payment

What you record: Receipt number (worked out by the program), Invoice (required), Amount (required), Method (required), Transaction reference, Paid at (worked out by the program)

Refund

What you record: Refund number (worked out by the program), Payment (required), Invoice (worked out by the program), Amount (required), Reason (required), Refunded at (worked out by the program)

Setup

Brokerage

What you record: Name (required), License number, Country (required), Tax number, Default currency, Whatsapp enabled, Online meeting link, Payment link, Review link, Ai assistant enabled, Ai model, Ai endpoint

Branch

What you record: Brokerage (required), Name (required), Address, Phone

Account executive

What you record: Branch (required), Full name (required), License number, Phone, Licence expiry, Active

Reports

Reports are worked out on your computer from your records. Choose a period, see the chart and the table, then print or export them. The reports of this program:

- Premium by line

- Commission expected and received by insurer
- Renewals by status
- Damage claims by status
- Revenue by month
- Revenue by service
- Collections by payment method
- Outstanding balances by client
- Receivables aging (days since issue)

Working with your clients

A client with a Bawabetna Client Code can, from the free client app: book an appointment, write to you, send requests and documents, sign documents, see what they owe and pay you directly, tell you they have arrived, ask for an earlier time and see their points. Everything reaches this program with its next sync.

Your data

Your records are kept encrypted on your own computer; only a short summary of each transaction is sent to Bawabetna. Make a backup from Settings; it is encrypted with your recovery key.

Help

Write to info@bawabetna.com or use the contact page at bawabetna.com/contact.