

MARSHCONNECT DOCUMENTS



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CONVENIENT ACCESS TO YOUR PLACEMENT FILES

THE CHALLENGE:

The insurance placement process can generate a lot of documentation: submissions, proposals, binders, policies, endorsements, invoices, contracts, and more. Files can be a challenge to manage and locate when needed.

- Do you rely on email to find important files?
- Do you have a single place to reliably find placement documentation?
- Are you looking at the most current version of the file you need?

Type	Name	Version	Date	Created	Modified Date	Client/Insured	Document Type	Document Sub-Type
				By				
	Demo Company Location and Value Listing	1.0,CURRENT	02 Apr 2012	Paul Harvey	26 Jan 2015	Demo Company	PLACEMENT DOCUMENT	Risk Information
	MarshConnect Test	1.0,CURRENT_NEW	17 Oct 2014	Harvey, Paul	17 Oct 2014	Demo Company	CLIENT DOCUMENT	BOR Thank You Letter
	Mexican Office Package	1.0,CURRENT	04 Feb 2014	Paul Harvey	23 Feb 2014	Demo Company	POLICY DOCUMENT	Policy
	Client Service Agreement	1.2,CURRENT	21 Jan 2014	Kuhn, Mary E	21 Jan 2014	Demo Company	CLIENT DOCUMENT	CSA/EU/SOW
	2012 Director and Officer Liability Policy	1.0,CURRENT	09 Sep 2013	Kit KK LI	28 Sep 2013	Demo Company	POLICY DOCUMENT	Policy
	2012 EC policy	1.0,CURRENT	09 Sep 2013	Kit KK LI	28 Sep 2013	Demo Company	POLICY DOCUMENT	Policy
	2012 EC policy	1.0,CURRENT	09 Sep 2013	Kit KK LI	28 Sep 2013	Demo Company	PLACEMENT DOCUMENT	Proposal
	Sample Doc A.docx	1.0,CURRENT	16 Sep 2013	Kuhn, Mary E	17 Sep 2013	Demo Company	PLACEMENT DOCUMENT	Engineering Report
	Demo Company - Service Team	2.0,CURRENT	29 Apr 2013	Sebastian Kretz	27 May 2013	Demo Company	CLIENT DOCUMENT	Team Chart
	Demo Company - Service Team .xlsx	2.0,new Marsh PPT format,CURRENT	09 May 2013	Harvey, Paul	09 May 2013	Demo Company	CLIENT DOCUMENT	Team Chart

EASY, CONVENIENT ACCESS

24/7



TO THE LATEST VERSION OF YOUR FILES

THE SOLUTION:

MARSHCONNECT DOCUMENTS¹

The Marsh Portal provides easy, convenient access to a comprehensive repository of account-ready documents generated in Marsh's account servicing and placement process. These files are stored on Marsh's document management system of record that enables reliable 24/7 online access to the latest version of the files you need.

Documents

WHO IT'S FOR

- Risk managers and all those in the client team involved in the insurance placement process
- Claims managers who need access to policies and endorsements

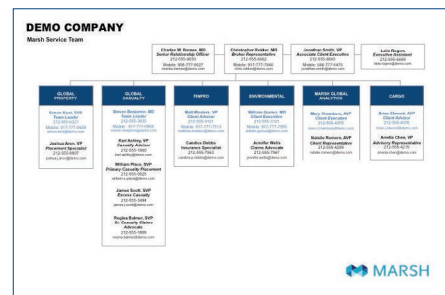
1. Available to U.S. clients only. Alternative tools for sharing documents are available in other countries.



FEATURES

- **Online Access:** View or download account-ready documents generated by the Marsh servicing process.
- **Powerful Search:** The ability to search by line of business, carrier, date, creator, or document type and subtype.
- **Latest File Version:** The most current file version is always displayed.
- **Team Charts:** Lists each member's role and contact information.
- **Invoices:** Account statements and invoices are displayed as created by the billing system in a separate view so you can restrict access as needed.

TEAM CHARTS



Team Charts list each member's role and contact information.

SEARCH FILTERS

To find a specific document, simply apply search criteria to filter the results.

INVOICES

Invoice documents are displayed on a separate tab in date order as created by the billing system. Invoices access is separate from Documents so you can restrict access as needed.

Invoices		Demo Company		Created		Modified Date
Type	Name	Version	Date	By		
	ACCTSTMNT 9203300000 20150831 230701 <small>NEW</small>	1.0,CURRENT	01 Sep 2015	SRC_SYS_CD_RMB_US		01 Sep 2015
	ACCTSTMNT 8235400000 20150831 230701 <small>NEW</small>	1.0,CURRENT	01 Sep 2015	SRC_SYS_CD_RMB_US		01 Sep 2015
	INVOICE 920332220706 0 20150824 124217 <small>NEW</small>	1.0,CURRENT	24 Aug 2015	SRC_SYS_CD_RMB_US		24 Aug 2015
	INVOICE 920333666735 0 20150824 124217 <small>NEW</small>	1.0,CURRENT	24 Aug 2015	SRC_SYS_CD_RMB_US		24 Aug 2015
	ACCTSTMNT 9203300000 20150731 230354	1.0,CURRENT	01 Aug 2015	SRC_SYS_CD_RMB_US		01 Aug 2015
	ACCTSTMNT 8235400000 20150731 231635	1.0,CURRENT	01 Aug 2015	SRC_SYS_CD_RMB_US		01 Aug 2015
	INVOICE 920337732781 0 20150731 104222	1.0,CURRENT	31 Jul 2015	SRC_SYS_CD_RMB_US		31 Jul 2015



For more information about MarshConnect Documents, please contact your client executive or visit our website at <http://marsh.com/clientmarkettech>.

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