



Scribe PDF

FOR INSURANCE AGENTS

32 TOOLS · POLICIES, CLAIMS & RENEWALS

The policy quote, the claims file, *the renewal deadline.*

Policy quotes, claims files, endorsements, renewal notices: every PDF that moves through an insurance office, handled on-device in one app, without emailing files between six different tools.

32

TOOLS IN ONE APP

0

FILES LEAVE YOUR DEVICE

1

APP, QUOTE TO RENEWAL

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scribepdf-tools.netlify.app

iOS & macOS · App Store & Mac App Store

Built for the paperwork behind the policy.

An insurance office runs on PDFs: quotes drafted for prospects, policies bound at effective date, claims filed after a loss, renewals sent every year. Scribe PDF covers what happens to every one of those documents from quote to renewal.

Why on-device matters here: policy numbers and claims details are exactly the files that shouldn't round-trip through someone else's server. Every tool below runs locally, inside Apple's app sandbox. Nothing is uploaded to process a PDF.

● Create & Organize	8 tools
● Read & Extract	7 tools
● Protect & Secure	6 tools
● Sign & Mark Up	5 tools
● Present & Listen	4 tools
● Optimize	2 tools

32

tools, organized
into six clear
workflows

2

platforms:
iPhone, iPad,
and Mac

0

servers your
client data
touches

1

app, from quote
to renewal

Create & Organize

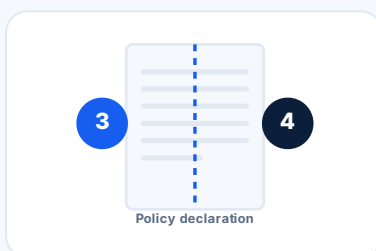
Assemble the policy file from whatever the carrier portal actually produced.



Merge PDFs

Create & Organize

The renewal packet needs one file, not six exports. Merge the policy declaration, the endorsements, and the claims history into a single PDF for the client.



Split PDF

Create & Organize

A 50-page policy packet needs the coverage section pulled out for the client and the exclusions pulled out for the underwriter, without re-exporting from the carrier portal.



Images to PDF

Create & Organize

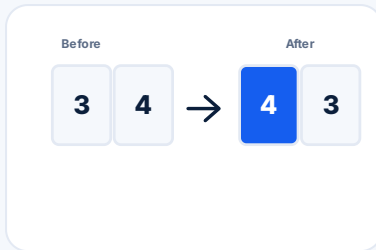
Twenty photos of storm damage become one clean PDF for the claims file, with no separate scanner and no re-typing the notes.



Clipboard to PDF

Create & Organize

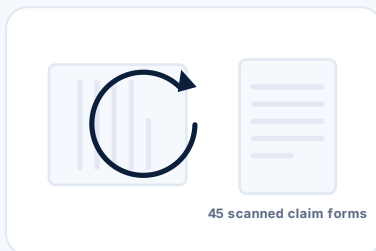
Copy a coverage comparison table straight out of the rating software and paste it into a one-page PDF for the client update, without a screenshot tool in between.



Page Organiser

[Create & Organize](#)

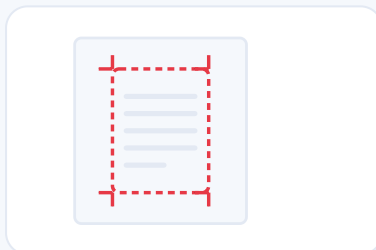
The claims file came back from the adjuster with the estimate ahead of the photos; reorder the pages to match the carrier's checklist before submission.



Rotate Pages

[Create & Organize](#)

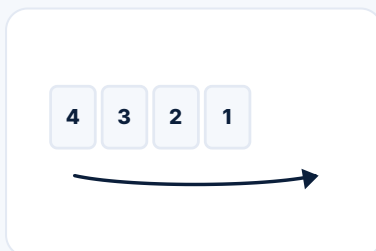
Half of the 40 scanned damage photos arrived sideways. Rotate every page back to portrait in one pass before they go into the claims file.



Crop Pages

[Create & Organize](#)

A scanned police report has a wide margin from the precinct printer; crop it to match the rest of the bound claims file.



Reverse Pages

[Create & Organize](#)

The scanner fed 30 pages of signed endorsements in reverse order. Flip the page order back to chronological sequence before the file review.

Read & Extract

Get the coverage limits, the exclusions, and the words out of a PDF and into something usable.



OCR

[Read & Extract](#)

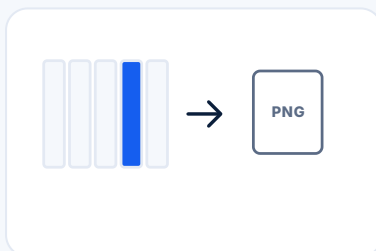
A five-year-old paper policy has to be referenced for a coverage question, but it's a photocopy. OCR turns it into real, selectable, searchable text before it goes in the file.



Extract Text

[Read & Extract](#)

Pull just the exclusions paragraph out of a 30-page policy document into plain text, ready to drop into the client email without retyping.



Extract Pages

[Read & Extract](#)

Export only the declarations page from a 40-page policy packet as a clean PNG for a client text message, with no screenshotting and no re-opening the full packet.

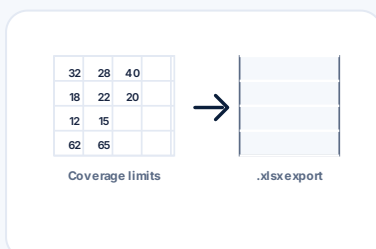


Table Extraction

[Read & Extract](#)

A coverage limits table is buried in a PDF export from the carrier portal. Pull it straight into a real spreadsheet, cell by cell, instead of re-keying every line.



Find in PDF

[Read & Extract](#)

Find every reference to "flood exclusion" across a 120-page policy manual before the client call: every match, across every page, in seconds.

Policy packet, 22 pp.



Document Stats

[Read & Extract](#)

Check the page count and read time on a draft policy packet before it goes to the client, a quick sanity check before the real review.



PDF to Markdown

[Read & Extract](#)

Convert a carrier bulletin PDF into clean Markdown so it drops straight into the internal knowledge base, headings and bullet points intact.

Protect & Secure

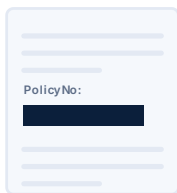
Lock what's confidential, remove what shouldn't travel, and prove what changed.



Password

Protect & Secure

Encrypt the client's policy application before it's emailed to underwriting: real password protection, not a folder that just looks locked.



Redact

Protect & Secure

Black out the policy number and SSN before a claims file is shared for a training review: gone for good, not just covered.



Watermark

Protect & Secure

Stamp "DRAFT, NOT BOUND" across every page of the preliminary quote before it's shared with the client.

TITLE
Policy Declaration

AUTHOR
Agency Name

RENEWAL DATE
2026

Metadata

Protect & Secure

Set the Title, Author, and Renewal Date fields correctly on the final policy declaration before it's archived: the details a file search actually reads.

AUTHOR
agency@agency.com

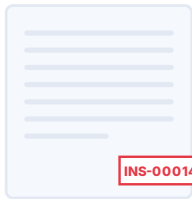
FILE PATH
7Policies/2026/renewal_draft.pdf

Removed before external release

Strip Metadata

Protect & Secure

Strip the agent's name and internal file path out of a PDF before it's shared externally with the client.



Bates Number

Protect & Secure

Stamp INS-000001 through INS-001500 across every page of a claims file production, sequential and consistent, the way the carrier expects it.

Sign & Mark Up

Sign it, stamp it, mark it up, ready for the client or the carrier.

Policy Application

Marcus Webb

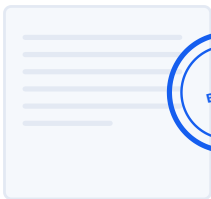
Due: 10/01/2026



Fill & Sign

Sign & Mark Up

Fill in the policy application fields and add a signature before the effective date, with no printing, signing, or re-scanning.



Stamp Library

Sign & Mark Up

Stamp BOUND across the completed application the moment coverage is confirmed, before it moves to the client file.



Limit
changed:
confirm w/ carrier

Annotate

Sign & Mark Up

Highlight the limit that changed since the last renewal and leave a comment for the underwriter, directly on the declaration.



Headers & Footers

[Sign & Mark Up](#)

Add "Confidential: Claims File" and automatic page numbers across a 45-page claims packet before it goes out for distribution.



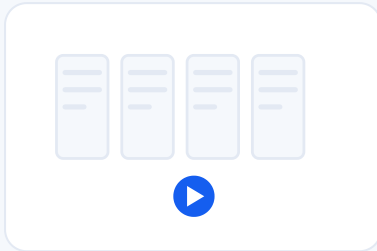
Compare PDFs

[Sign & Mark Up](#)

See exactly what changed between the prior policy and the renewal, side by side, before presenting it to the client.

Present & Listen

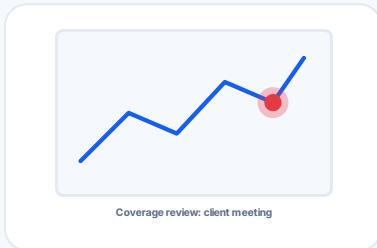
Take the coverage review into the client meeting, or into your commute.



Slideshow

Present & Listen

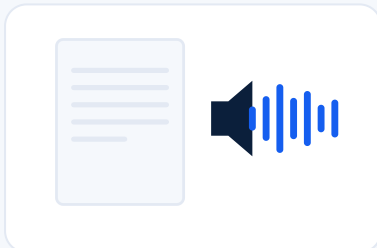
Present the coverage review full-screen to the client, straight from the PDF, with no separate deck to keep in sync with the declaration.



Presenter Mode

Present & Listen

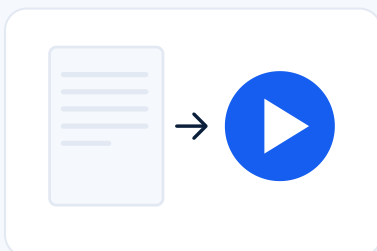
Walk the client through the coverage comparison with on-slide markup, pointing straight at the limit that matters.



Read Aloud

Present & Listen

Have a 12-page policy manual read aloud on the commute in, instead of squeezing the reading in before the client call.



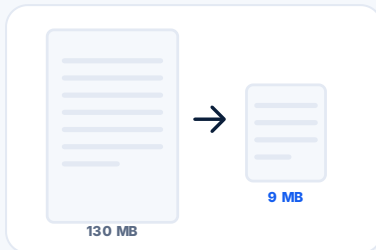
PDF to Audiobook

Present & Listen

Turn the license renewal reading into an MP3 for the commute, with the continuing education deadline closing in.

Optimize

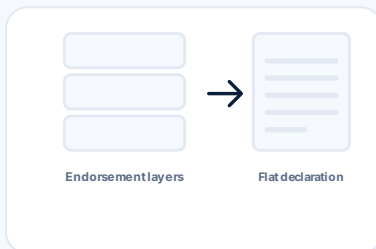
Same files. A file size that actually attaches to an email.



Compress PDF

[Optimize](#)

A 100MB scanned claims file won't attach to an email. Compress it down to something that actually sends, without losing legibility.



Merge Layers

[Optimize](#)

Flatten the optional-content layers the rating software leaves behind in its PDF export, so the comparison chart prints clean for the file instead of blank.



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