

life & pension extranet functional data sheet

focus:360° life & pension extranet is an agile multi-channel extranet framework that facilitates electronic trading enabling providers to reach a number of distribution channels more cost effectively. The key steps of the sales process, such as quote and apply, can be built once and deployed many times allowing you to avoid time consuming, bespoke e-commerce developments for each new distribution initiative.

product features

- single client view
 - case management
 - client summary
 - valuations
- distribution management tools
 - user registration process (intermediary & consumer)
 - maintain user profile
 - consumer portal
 - intermediary portal
 - organisational agency management
 - meta data administration
 - user group & security management
- quote & apply
 - extranet linking
 - product selection process
 - quote capture
 - quote output
 - re-quote process
 - pre-populated application platform process
 - call centre quotation
- post sale product services
 - case tracking
 - commission statements
 - valuations
 - proposal tracking information
 - intermediary management information

technology

- web browser based .NET2 solution
- scalable SOA architecture
- enterprise security
- SQL server 2005 database platform
- on/offline deployment

non functional features

- highly configurable
- flexible look & feel
- autosave