



CBS Customer Self Service



Overview

In an increasing Internet aware world many clients expect flexibility when dealing with financial institutions. Insurance has lagged behind banks and other financial institutions in the use of web technology. Ebix powered Customer Self Service (CSS) websites can change this.

A large number of client inquiries could be resolved if your clients had online access to relevant policy information.

Ebix has developed web solutions for some of the world's leading insurance organisations. Now utilising the latest available technologies, Customer Self Service delivers a powerful, functional web tool to empower your website.

Information Access

Using Web Service technology Ebix can provide your clients with selected policy, claims and accounting information without exposing your CBS database or compromising security.

Customer Self Service creates a one-way information feed from your CBS database to your website to allow clients to view policy details, check the status of a claim or view account information.

Functionality can be extended to provide options for clients to actively manage aspects of their insurances and reduce the associated administration costs. Importantly, you decide what your website will provide. For example, you could allow clients to print Certificates of Cover, pay invoices, download policy schedules or lodge a claim.

Security

A flexible security model caters for various client access needs – access by an individual client to their data only or access to multiple clients with a single login. The latter is ideal for authorised representatives requiring access to all of the clients in their portfolio.

Further functional level controls can be applied to restrict access to specific areas of the database or specific system functions. For example a client could be given access to policy information but not claims details.



Customisation

The Customer Self Service module can be extensively customised to complement your existing website. Customisation extends to mode of access, desired functionality, logos, colours, style sheets and navigation.

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The base Customer Self Service module is configured to allow secured access for individual clients or provide authorised representatives with access to all of their clients. The module can then be customised to determine what is presented to the online user once logged in.

Standard Functionality Access

- Client Profile
- View or Print a Current Statement
- List Active Policies and Drill Down to View the Coverage Summary and Payment Details
- View and Reprint Policy Documents
- List Claims and View Loss Details and Loss Amounts
- View and Reprint Claims Documents

Search options and navigation can additionally be customised to ensure ease of access to data and consistency with your website standards.

The screenshot shows the Ebix web interface. At the top, there is a search bar with 'Search Type' and 'Search String' dropdowns, and a 'Search' button. Below the search bar, there is a user profile for 'John Semerville' and 'Australian Pharmaceutical Association' with a 'Logout' button. The main content area shows a 'Client Profile' for 'Bicycle Assis Australia Assn Inc.' with a table of client details and contact information.

Client Number	DEPS/D80032	Short Name	BICYCLE ASSIST
Full Name	Bicycle Assis Australia Assn Inc.	Address	The Treasurer
Broker	type	FSRA Type	
Statement			
Street Address		Postal Address	
4 Wilson Grove			
CROWS NEST NSW 2065			
Business	02 9919 4049	Private	02 9418 6585
Mobile		Fax	
eMail	info@bicycleassist.com	Fax 2	
ABN			

Other modules in the Ebix web suite can be integrated to offer an even more comprehensive solution. Integrating the Online Payments module with your website is a simple way of adding an e-commerce capability that ensures your clients visit your website more often. It is just one of the ways a Customer Self Service powered website can reduce your administrative overheads.

Add even more e-commerce functionality to your web site by allowing your clients to generate quotes or even process policies online. CBS is e-commerce enabled making it the perfect tool to interact with an online web portal. This is ideal for schemes or specialised products.

Again you decide the level of functionality to provide on your e-commerce site. It might be a simple case of handling quotes or it could be a fully automated website allowing clients to accept a web site generated quote and pay for the policy online.

Ebix can show you how to automate all aspects of policy processing from data capture, to rating, to placing cover and printing the necessary documentation. Renewals and ongoing client and policy management can also be catered for.

Technical Information

Customer Self Service is developed in Microsoft .Net for easy integration with most websites. Information is retrieved from your CBS database using .Net Web Services. A web server configured with Microsoft IIS will be required.

The Customer Self Service module is a module that can be added to an existing website as a plug-in. For further information, contact your local Ebix office.