eGlobal 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 *e*Global database or compromising security.

Customer Self Service creates a one-way information feed from your *e*Global 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.

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

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. *e*Global 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 *e*Global 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.