eData Services: New Business Tracking

For advisers only. Not for use with customers.

A guide to FRIENDS eServices

Our new business tracking eData service enables you to keep track of your pipeline business electronically, rather than manually checking for updates via the telephone or the Friends Provident extranet.

Your clients' information is updated daily within your back office system, allowing you to stay informed every step of the way, from the initial application to the policy going live.

how

How does it work?

The content of our pipeline tracking service conforms to the standard set by Origo, the industry standards body. This means that the data format (XML - Extensible Mark-Up Language) will be compatible with your back office system. The message covers all new business applications on savings, investment, pension and protection products as well as annuities.

Updates are sent to your system daily when there is a change in the status of your pipeline applications or commission awaiting payment.

How can I use the data?

Having new business tracking data available to you will enable you to keep track of your pipeline business and commission streams within your own back office records. You can use the data to reconcile commission and the status of business coming onto your books. It also enables you to keep clients informed and to follow up on any outstanding information such as declarations or GP requests that are required to progress a case.

If you want to drill down further into individual cases or view correspondence trails, the pipeline tracking feature on the Friends Provident extranet provides you with the depth of information you need to do this quickly and easily.

FRIENDS PROVIDENT

benefits

What are the benefits?

- You can save valuable time spent on manual administration, streamlining your business processes and cutting unnecessary costs.
- You can strengthen relationships with clients and meet some of your TCF requirements by keeping your customers informed throughout the new business process.
- Data is fed through to you direct so you're only running one client management system.
- Improved process automation through automatic matching of adviser case reference numbers with Friends Provident policies.

start

How do I get started?

To start taking advantage of our eData services, you'll firstly need to be a registered user of Friends Provident's online services.

1. Visit our website at www.friendsprovident.com/adviser/register. You can either choose to register with Unipass, if you currently hold a Unipass certificate, or register without Unipass by completing our online registration form and choosing a login ID and password.
2. The new business tracking service is currently available through selected back office system providers. To find out whether your provider supports our service, please contact your back office system administrator or email the Friends Provident eAdoption team at eadoption@friendsprovident.co.uk. The team can also offer you an eBusiness Review, where they'll work with you to make sure you're getting the most out of your eBusiness systems.

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