

Composite Application for Customer Engagement and Contract Office Workplace



Applies to:

All Banks/ Financial Institutions.

Summary

This Composite Application is a single point of entry, offering Loan Officers all required information, tasks, and simplified navigation for their daily work on an intuitive and easy-to-use user interface.

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Created on: 24 September 2008

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Benefits & Features

Benefits:

- Streamline multiple business operations under one roof
- User friendly Interface covering maximum functionality from the backend
- Improved service level and customer satisfaction
- Flexible for customizing

Features:

- Business Partner and related contract search
- Disbursement (Mortgage/Consumer)
- Skip Payment
- Payoff
- View Payment Plan

Function or role that would use this composite

Customer Engagement and Contract Office (Loan Officer)

Technical Information and System Requirements

The Customer Engagement and Contract Office comprises a Web Dynpro for Java User Interface (UI), which runs in SAP Net Weaver Composition Environment 7.1 portal, and whose backend system is SAP Loans Management 6.0 and ERP 2005 as due item management system.

Additional technical information

- User interface: SAP NetWeaver Portal, WD Java.
- Back-end: Enterprise services for SAP Loans Management 6.0 connectivity and RFC's in order to connect the Open Item Management system.

Customer Engagement and Contract Office Workplace

Business Scenario

During the lifecycle of a loan several business operations like disbursement, skip payment and payoff has to be executed by a Customer Engagement and Contract Office in the bank. Therefore, the employee of the bank needs information from different components (open items, contract information, etc.) and the possibility to process the business event in an easy and efficient way to do so.

Relevant information, which is required for a Customer Engagement & Contract Office to understand the contract situation and to perform a disbursement, skip or extension, must be easily available.

The Customer Engagement and Contract Office Workplace is a single point of entry, providing you with all the information, tasks, and simplified navigation required for your daily work.

You can use the Customer Engagement and Contract Office Workplace to streamline multiple business processes that are typically required by a Loan officer. You are provided with a user interface that taps the functions available in the system, but which is more intuitive and more aligned to concepts with which the typical banking business user is familiar.

Business Process

The Customer Engagement and Contract Office Workplace offers process-oriented access to the business processes for loans business operations. The User searches for Business Partner, and related contracts

The screenshot displays the SAP Customer Engagement & Contract Office interface. The main content area is titled "Contract Management For Business Partners" and features a "Business Partner Search" section. Below this, the search results are displayed in a table format, showing details for a specific business partner and their associated contracts.

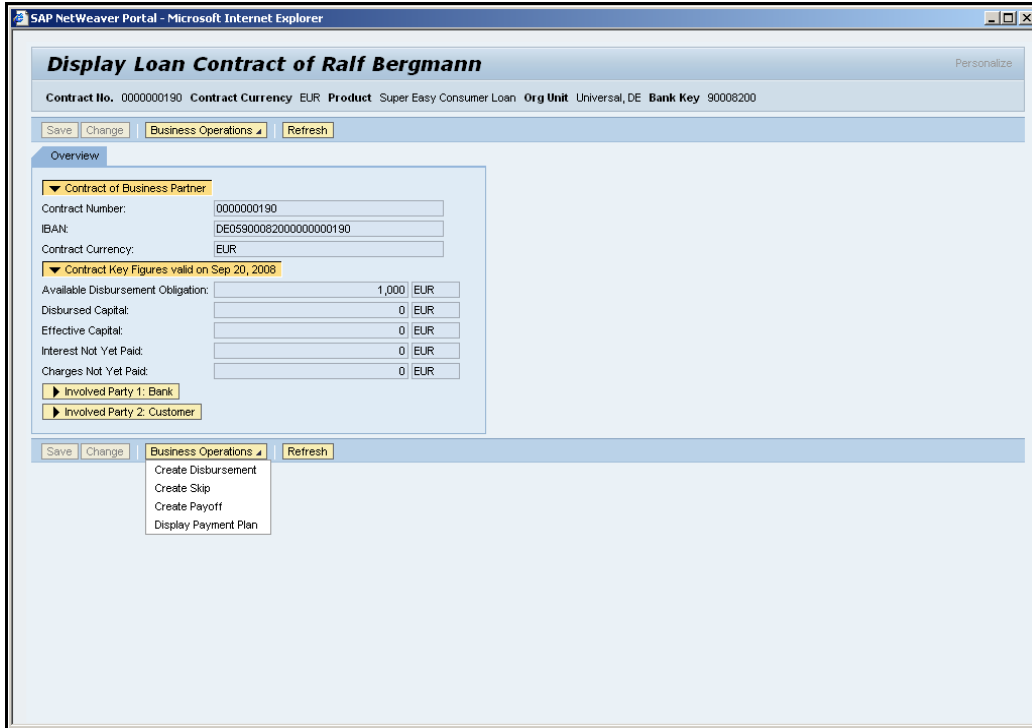
Business Partner Search Results

ID	Last Name	First Name	Date of Birth	Street	Residence No.	Postal Code	City	Country	Region
0000003073	Bergmann	Ralf	04/1965	Detmer-Hopp-Allee	16	69190	Waldbrunn	Deutschland	Baden-Württemberg

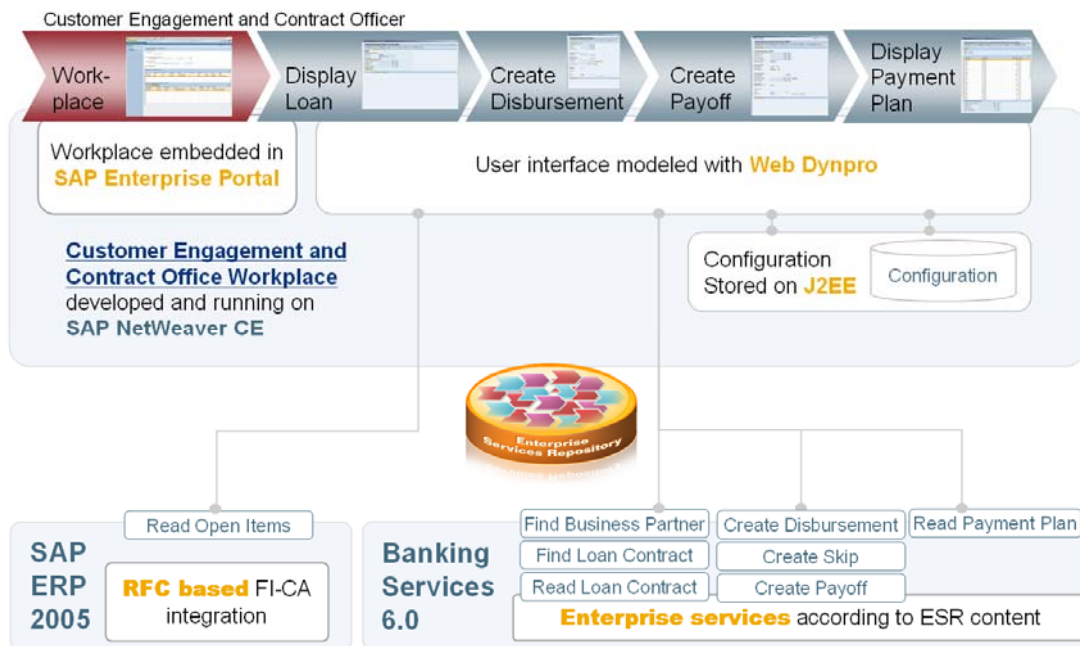
Contracts of Business Partner 0000003073: Ralf Bergmann

Product	Contract No.	Org. Unit	Bank Key	IBAN	Type	Currency	Start Date
Super Easy Consumer Loan	0000000190	Universal, DE	90006200	DE05900082000000000190	Loan Account	EUR	01/12/2008
Super Easy Consumer Loan	0000000174	Universal, DE	90006200	DE49900082000000000174	Loan Account	EUR	01/12/2008
Super Easy Consumer Loan	0000000209	Universal, DE	90006200	DE04900082000000000209	Loan Account	EUR	01/12/2008
Super Easy Consumer Loan	0000000158	Universal, DE	90006200	DE39900082000000000158	Loan Account	EUR	01/12/2008
Super Easy Consumer Loan	0000000183	Universal, DE	90006200	DE27900082000000000183	Loan Account	EUR	01/12/2008
Super Easy Consumer Loan	0000000216	Universal, DE	90006200	DE79900082000000000216	Loan Account	EUR	01/12/2008

1. The User selects the Display/Change button to open the Contract Key Figures
2. After checking the Contract Key Figures User selects the one Business Operation from the menu, available Business Operations are
 - Disbursement
 - Skip Payment
 - Payoff
 - Display Payment Plan



Rough Architecture Overview and Backend Access



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