



Complete Financial Management Solution for the Web

They all planned for it.



A vertical collage of four images on the left side of the slide. From top to bottom: 1. A man in a suit sitting at a desk with his hand to his chin, looking thoughtful. 2. Two men in business attire sitting at a table, looking at documents. 3. A man and a woman in business attire looking at a laptop screen. 4. A close-up of a fountain pen resting on a newspaper or document with the word 'ADULT' visible.

IntelliOffer targeted marketing tool

- Reach the right customers at the right time
- Save 60 to 80% on marketing costs (estimate based on average spending per customer by FIs, source: Forrester Research, Jun 2000)
- Highly personalized offers greatly improve click through
- End to end tracking - track user demographics, what offers were displayed to a particular group and what offers were clicked on. You can even track what offers were taken to closure, the total amount of sales and ROI by simply linking in your sales DB using **E-Mine**



IntelliOffer AD and Offer manager allows a FI to target the right demographics using an easy to use "rule" generator. APIs can be used to extend the functionality and build custom offering and reporting capabilities....



Tue, Jul 03, 2001

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[Offer Manager](#) | [AD Manager](#) | [Reports](#) | [Profile](#)

fnCentral Pro

Offer Manager

What do you want to do?

[Add new offer](#)

Create a new credit, loan, investment or savings offer.

[Preview offer](#)

See how the offer will be presented to the customers.

[Enable or Disable offers](#)

Change the status of an offer.

[Track offer](#)

See how many times the offer was displayed and how many times users clicked on them.

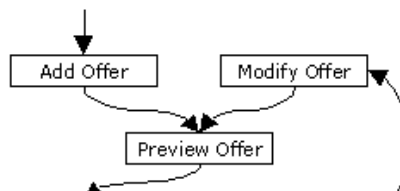
[View or modify existing offers](#)

View or modify offers. You can also enable or disable offers.

[View open offers](#)

View offers that are currently active.

Workflow



Easy to use workflow



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Create new offer

Offer details

Name

Start date

3 Jul 2001

End date

3 Jul 2001

Offer Title (what customers will see)

Offer URL (link to web page with offer information)

Offer Text



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fnCentral Pro

Preview offer

Refinancing

Dimension: Medium (160 x 80)
 Meet your budget!
 Refinance your debts and save money. The savings can help you meet your budget goals.
 Tell me [more](#)


Dimension: Large (400 x 80)
 Meet your budget!
 Refinance your debts and save money. The s meet your budget goals.
 Tell me [more](#)

Preview offers


Preview AD

Datek

Dimension: Small (80 x 80)



Dimension: Medium (160 x 80)



Preview ADs

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Track offers

Displaying current offers Show offers

Name	Start Date	End Date	Active?	# Display	# Visited	% Visited
Platinum Card 2	06/28/01	08/28/01	Y	2	0	0.00 %
Platinum Card III	06/28/01	10/28/01	Y	1	0	0.00 %
Test45	06/29/01	10/29/01	N	0	0	? %
Refinancing	06/29/01	08/29/01	N	0	0	? %

Deploy and track results



fnCentral Personal Finance Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail

Address C:\temp\admin\admin3.htm Go

Links Search The Web Finance Gambling Shopping Sports Travel Wells

Expenses under budgeted limits

Automobile:Car Payment	0.00	100.00	100.00
Automobile:[all other]	0.00	555.00	555.00
Charitable Donations:[all]	0.00	55.00	55.00
Test:Test->SubCat1	0.00	15.00	15.00
Income			
Wages & Salary:Commission	0.00	5500.00	(5500.0)
Wages & Salary:Employer Matching	0.00	500.00	(500.0)





Summary	Actual	Budgeted	Difference
Income	\$ 0.0	\$ 6000.0	\$ (6000.0)
Expense	\$ 0.0	\$ 725.0	\$ 725.0
Total	\$ 0.0	\$ 5275.0	\$ (5275.0)

You exceeded your budget by \$5275.0. You may want to cut down on discretionary expenses so you don't exceed your budget. You may also want to review your budget and make necessary changes.

fnCentral estimates that you can save \$43.24 a month on long distance, \$159.23 by consolidating your credit cards and \$455.00 by cutting down on discretionary expenses.
[Click here to find out how](#)

Done Internet

Customers get a targeted, personalized offer



Need to provide your call center representatives with the right offers to sell? Want to make your static pages display dynamic and personalized offers? Want to add personalized offers and Ads from within your applications without requiring months of development effort? Now you can, with E-Offer from Jexp

➤ **E-Offer**

- Use the full functionality of IntelliOffer to serve personalized ADs to users from within your application (like home banking, call center, etc.) or static pages - with just the addition of two lines of code!