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Chao et al.

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(54) **METHOD AND SYSTEM FOR MANAGING DISTRIBUTOR INFORMATION**

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(57) **ABSTRACT**

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An embodiment of the invention provides a system that enables financial services companies to manage and track information about a sales force. The system includes components for managing distributors information, for validating and tracking licenses and credentials, for creating customized contracts, and for maintaining compensation structures. The system allows for configuring compensations, providing financial services companies a toolkit for creating and modeling their complex commission schedules used to compensate their sales force. The system also provides modeling tools for agreements and contracts between a financial services company or provider and the distributors who sell products. The system has a multi-component architecture comprising multiple modules, multiple data processing engines, a backbone and multiple data sources. The processing modules carry out information processing using one or more data processing engines. The data processing provides the tools to fetch data from the databases and process it.

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G06F 17/30 (2006.01)

(52) **U.S. Cl.** **707/945**; 235/376; 705/7

(58) **Field of Classification Search** 707/9, 999.001, 707/999.009, 923, 930, 944, 945, 950, 999.945, 707/999.93; 711/1; 705/7, 10, 26; 235/375, 235/376

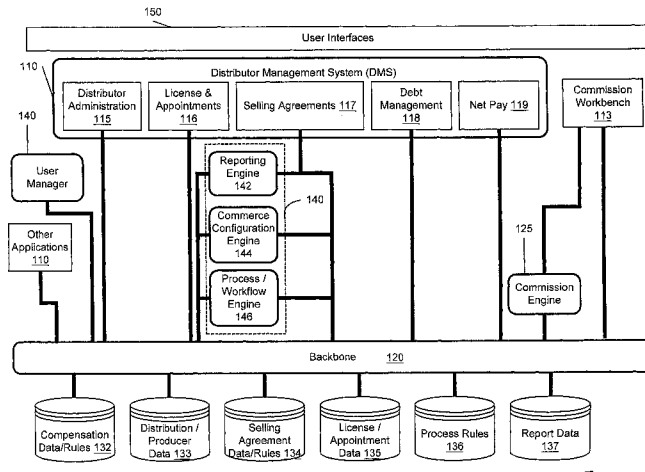
See application file for complete search history.

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46 Claims, 4 Drawing Sheets



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Figure

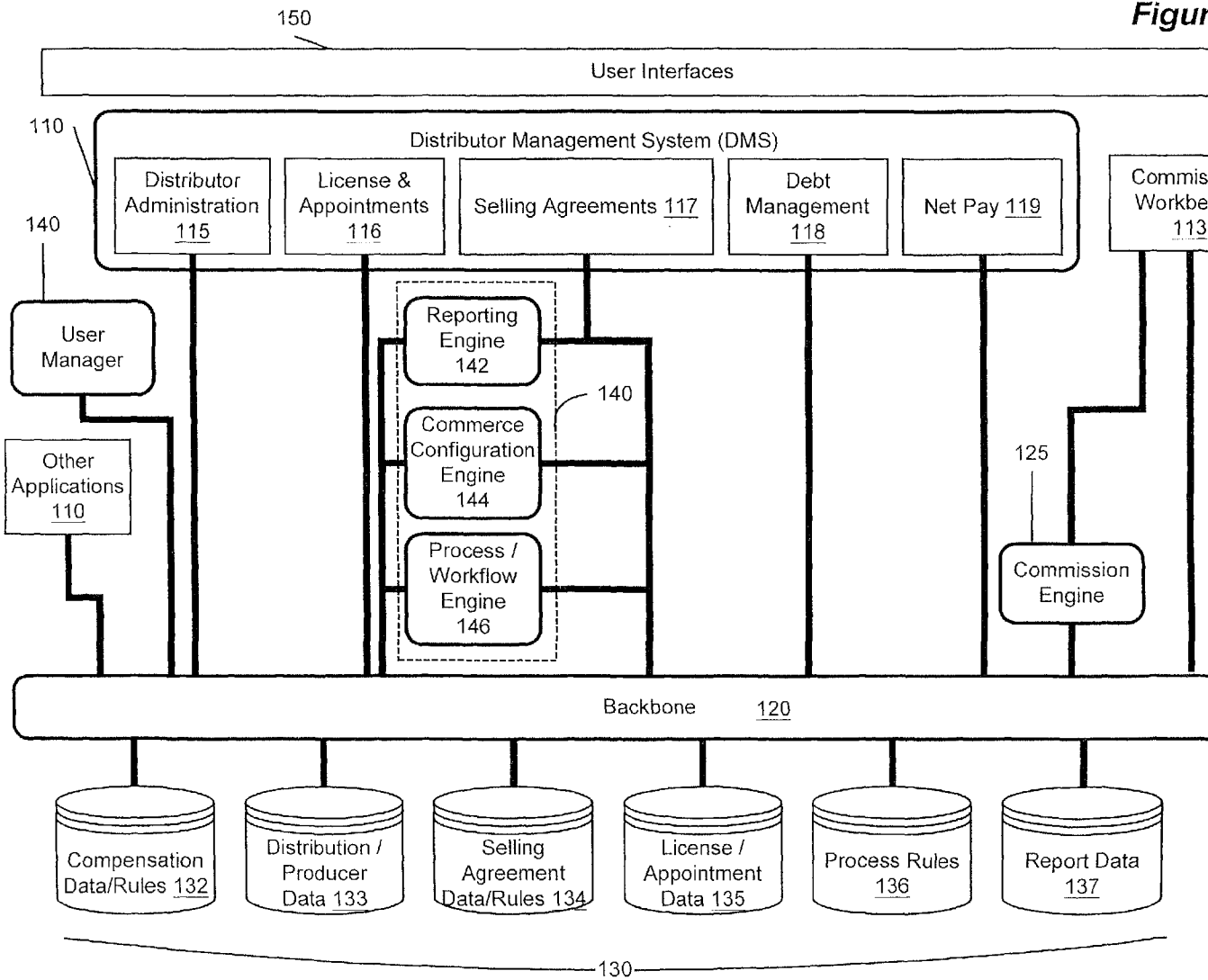
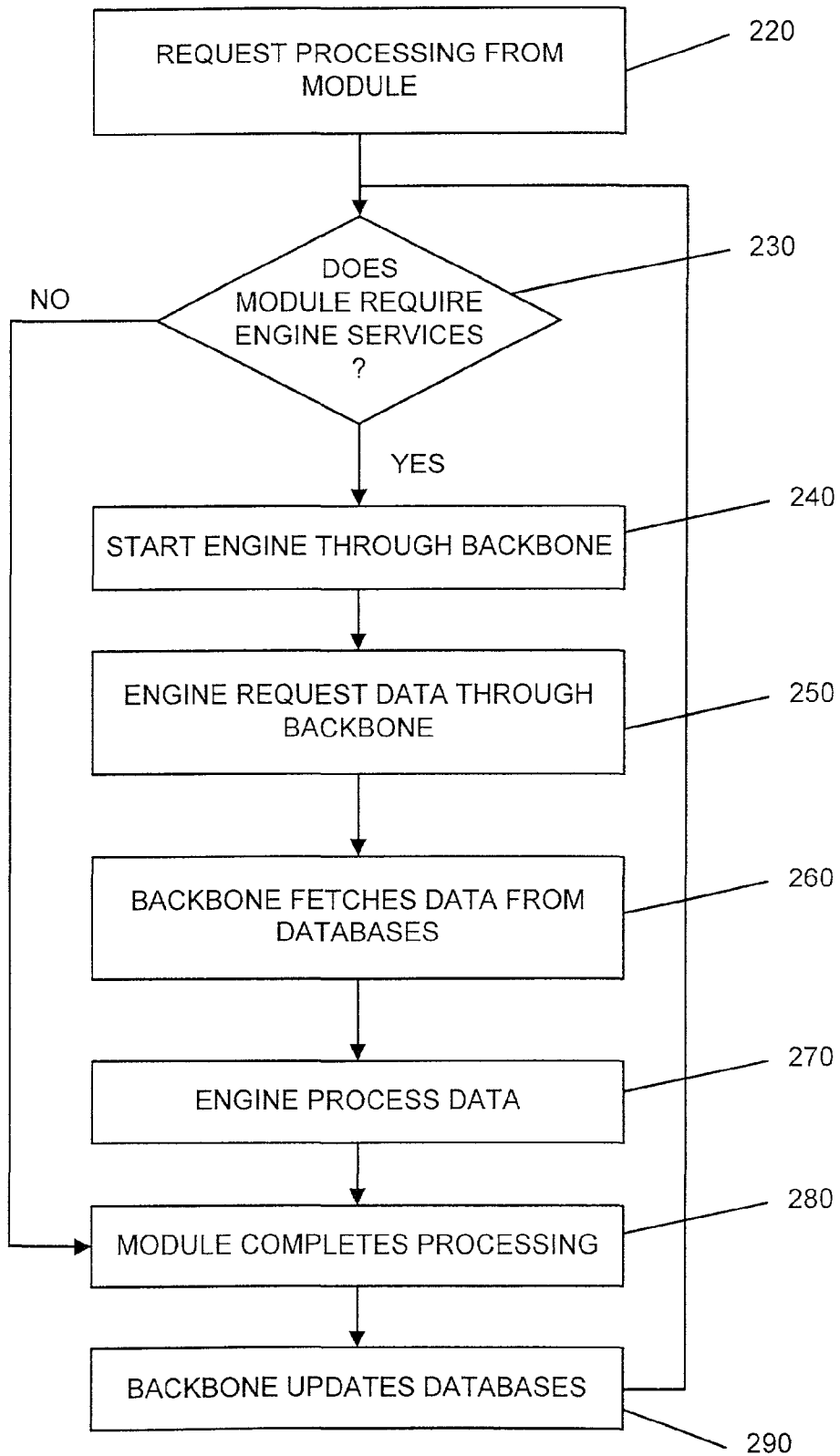


Figure 2



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