

# Legal Entity Management Software Portal for Employee Benefits

Timspark built **legal entity management software** that replaces spreadsheet-driven operations with a centralized web portal. The solution streamlines the quote-to-policy journey, unifies employers, plans, and policies in one place, and automates policy issuance via integration with external systems. Internal teams now work from a single source of truth instead of scattered Excel files.



## Client\*

A US-based employee benefits provider offering an easy-to-use legal services platform for corporate employees. Their business relies on accurate handling of legal entities, employers, quotes, benefit forms, and add-ons — and turning them into active policies with minimal manual work.

\*Certain details are covered by an NDA and cannot be disclosed.

## Project in numbers

- DURATION**  
8–12 months
- TEAM**  
2–4 specialists
- INDUSTRY**  
Insurance, Legal

## Highlights

- Excel-based legal entity management replaced with a secure web portal
- Integrated **legal entity management system** and quote-to-policy workflows
- Policy lifecycle management supported via APAS integration
- Box.com integration for centralized, secure document storage
- Built as a scalable **enterprise web portal development** project using .NET, Angular, and DevExtreme

## Challenge



Before the project, legal entities and related data were managed in Excel workbooks shared across teams.

At the same time, the new policy lifecycle management software had to follow existing UI standards built with DevExtreme and be adopted without disrupting day-to-day work.

- The client needed a secure web portal that would:
- Act as a single, reliable legal entity management system
  - Support the complete quote-to-policy journey
  - Integrate with APAS and Box.com
  - Fit into their corporate UX standards and delivery processes

## Solution & functionality

Timspark implemented a browser-based portal that centralizes legal entities, employers, quotes, and policies in a robust legal entity management software layer. The solution was delivered in iterations, gradually replacing Excel workflows with a structured web interface.

### Centralized legal entity management

- The new portal provides a single source of truth for all legal entities:
- Create, view, and edit entities in a structured web interface
  - Compare entities side-by-side and quickly review key details
  - Track statuses (draft, pending, active, cancelled) across the quote-to-policy lifecycle
- This transformed fragmented Excel files into a unified, governed **legal entity management system**.

### Quote-to-policy workflow

- The portal supports the end-to-end process from initial quote to active policy:
- Capture employers, benefit plans, and add-ons in one place
  - Update statuses as information is collected, reviewed, and approved
  - Ensure policies are only issued when all required data and documents are complete
- In practice, the portal works as **quote to policy software**, enforcing business rules and reducing manual handovers.



Document-heavy workflows are supported by tight integration with **Box.com**



To automate policy issuance and synchronize data, the portal integrates with the APAS system.



User management and notifications improved control over who can do what, and when, inside the **enterprise web portal development** output.



To avoid disrupting daily work, the transition from Excel was incremental.

This approach let users adopt the new legal entity management software gradually, without a “big bang” cutover.

## Tech stack

### Technologies used

.NET, Angular, DevExtreme



The team followed SCRUM with daily stand-ups, sprint planning, demos, and retrospectives. This cadence kept requirements aligned with real-world usage and supported iterative rollout of the Excel-replacement features.

## Results and business value

The client moved from spreadsheet-driven processes to a structured, maintainable **legal entity management software** platform.

01

Legal entities, employers, and policy-related data now live in a single system instead of multiple Excel files.

02

Automated workflows, clear status tracking, and integrations with APAS and Box.com reduced manual data entry and the risk of inconsistencies.

03

Role-based access and centralized document management give teams clearer oversight of the quote-to-policy lifecycle and simplify audits.

04

Built with modern technologies and DevExtreme UI standards, the portal is easy to extend with additional features, modules, or integrations — a solid example of scalable **custom legal software development**.

Do you have a similar project need?