Atik Howlader

Action Item #1

07/19/20

Domain: <http://www.chase.com/>

Business Process #1 – Scheduling a meeting

E2E : Click on Schedule a meeting on home page → Select “yes” if you’re a Chase customer or “no” if not → if you are a Chase customer you’ll be redirected to a sign in screen then will have to select schedule a meeting and then click on next , if you’re not a Chase customer you will have to select schedule a meeting and then click on next → you have to input personal/contact information (Name, Email, Phone number, Phone type) then click next → select one of the options that matches your reason for scheduling a meeting → enter a 5 digit Zip code to search for a branch nearby then click search and select one of the banks of your liking → choose a date and time then click next → review details of the appointment, enter phone number to receive a reminder of the meeting then click confirm to finish making appointment.

Business Process #2 – Check up with an Investment advisor

E2E : Click on Invest on the home page → click on connect with an advisor → Select one of the options given for what you are interested in discussing with the advisor, select if you want to be contacted by phone or email, Input personal/contact information(Name, Email, Phone number, Zip code), then click submit

Business Process #3 – Comparing credit cards

E2E : Click on Find a credit card on the home page → click on the box labeled compare for the first credit card → click on +Add Card → click on up to 2 more cards to compare with the first card, then click on compare

Business Process #4 – Opening a new Merchant services account

E2E : Click on Chase for Business on the home page → click on merchant services → click on find your solution → select either accept payments in person or accept payments online or over the phone, then click on sign up on the option that best fits your requirements → Fill out the form required by inputting your personal/contact information, then click on get started

Business Process #5 – Refinancing a mortgage

E2E : Click on Home Lending on the home page → click on the tab labeled “Refinance” → click on the tab labeled “Today’s refinance rates”, then click on start online under “Ready to refinance your mortgage?” → select “yes” or “no” depending on if you have already started an application or not, if you haven’t started an application select if you are a chase customer or not then click on next, if you have started an application click on next → input your personal/contact information, click on the box at the end to verify the information that you provided is correct, then click on next → review the online/mobile e-sign disclosure and consent agreement and digital services agreement, click on the box verifying that you read and agreed to the disclosure and agreements above, then click on agree & continue → input a username and password of your liking if you don’t have a chase account, then click next → click on next after seeing you have been enrolled

Business Process #6 – Getting estimated rates and monthly payments for an auto loan

E2E : Click on Car buying & loans on the home page → click on “Navigate to…” then click on auto loans → select the circle depending on if the loan is for a new or used car, what year the car is, what make it is, what State you are in, estimated credit rating, and the amount of money you want loaned (amount has to be at least $4000) → then click get info and then scroll done to see the results