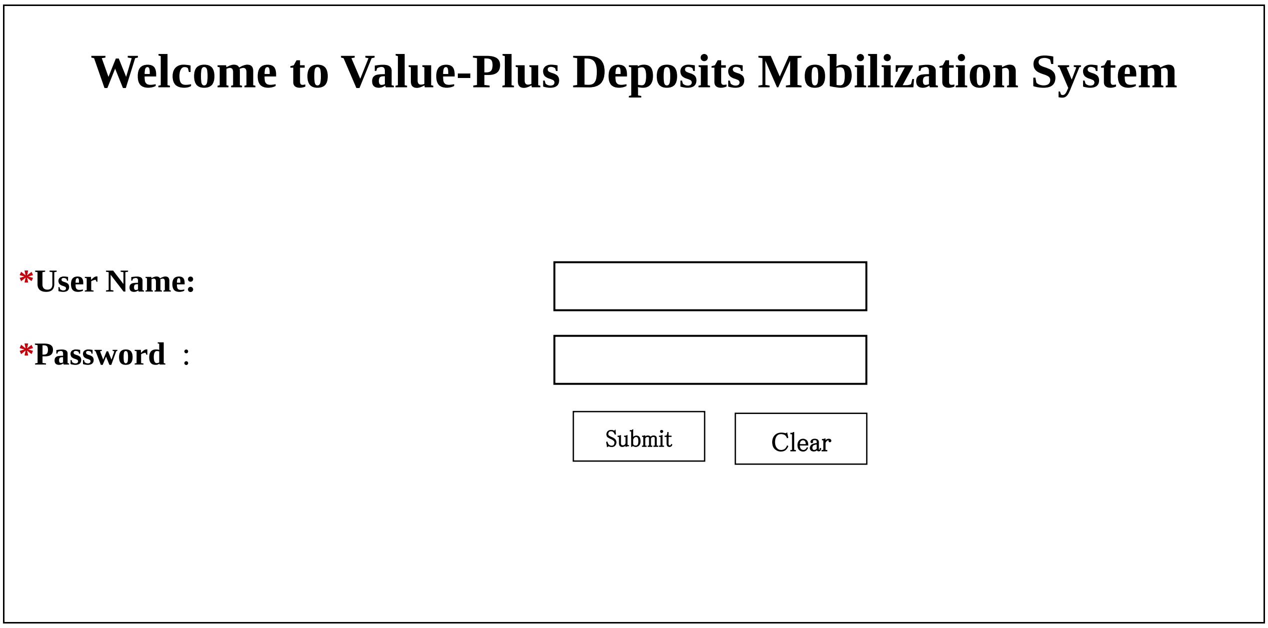
Screen Design

1. Login Screen

This is the initial screen displayed when the system is launched



The users are employees of the bank and have the Username and Password issued by the bank. There are two types of users – Campaign manager and Sales agent. Campaign manager can create a campaign and assign the prospective customers to sales agents. Sales agents contact the customers and solicit depsoits.

<u>Validations</u>

a) Validate the Username and Password against the Employee table. The user must be either a campaign manager or a sales agent to use this module.

<u>Processing</u>

a) If the user is a campaign manager, direct the user to “Campaign management” screen
b) If the user is a sales agent, direct the user to “Contact Customers” screen
c) If “Clear” is clicked, refresh the values in Username and Password fields.

2. Campaign Management Menu

This is the menu for managing various campaigns run by the bank.

Campaign Management

Create a New Campaign

Update a Campaign

Assign prospects to Sales Agents

Re-assign prospects to Sales Agents

Monitor campaign effectiveness

Processing

Based on the option selected, Direct the user to corresponding screen.

3. Create a new campaign

The campaign manager uses this screen to launch a new campaign.

Create a new campaign

***Campaign Title :**

***Campaign Description :**

Campaign Criteria

Average Balance >:

Age of Relationship >:

Profession :

***Valid From :** **e.g.: DD/MM/YYYY**

***Valid to :**

Submit Reset Back

Validations

- Valid from should not be later than the Valid to date
- At least one of the campaign criteria should be entered

Processing

- If “Submit” is clicked,
  - store the campaign details in the campaign table.
  - select the prospective customers for the campaign based on the given criteria and store the customer id’s in prospects table
- If “Back” is clicked, display the “Campaign management” screen.
- If “Reset” is selected, refresh the page**.**

4. View Campaigns

This shows the list of all campaigns in the descending order of 'valid to' date.

List of campaigns

Campaign Title	Valid from	Valid to

Back

<u>Processing</u>

- If the user clicks on a specific campaign title, display the "Update Campaign" screen.
- If "Back" is clicked, display the "Campaign management" screen.

5. Update Campaign

This screen is used to update the validity period of the campaign.

Update campaign

***Campaign Title**	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
***Campaign Description**	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
Campaign Criteria		
Average Balance >	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
Age of Relationship >	xxxxxx	
Profession	xxxxxxxxxxxxxxxxxxxxxx	
***Valid From**	[ ]	**e.g.: DD/MM/YYYY**
***Valid to**	[ ]	

[Submit] [Refresh] [Back]

Validations

- Valid from should not be later than the Valid to date

Processing

- If “Submit” is selected, update the changes in Campaign table.
- If “Refresh” is selected, reload the data from Campaign table.
- If “Back” is selected, display the “List of Campaigns” screen.

6. Assign Prospects to Sales Agents

This function is used by Campaign managers to assign prospective customers to sales agents for follow-up.

Assign prospects to Sales Agents

Campaign [▽] Search

Check | Campaign Name | Customer name | Phone Number

Employee's name [▽] Assign Cancel

Validations

a) At least one customer should be selected

Processing

- Only those campaigns which are still open should be populated into the drop-down box of campaign.
- If a campaign is selected, customers of that campaign, who have not yet been assigned to a sales agent, should be displayed. If a campaign is not selected, display prospective customers of all open campaigns.
- When assign is clicked, update the prospective customer table with the id of sales agent and change the status to "assigned".
- If "Cancel" is selected, return to "Campaign management" screen.

7. Re-assign Prospects

This function is used by Campaign managers to re-assign prospective customers from one sales-agent to another sales agent.

Re-assign prospects

Sales Agent [▽] [Search]

Check	Campaign Name	Customer name	Phone Number
☐			
☐			
☐			
☐			

Reassign to [▽] [Re-assign] [Cancel]

Validations

a) At least one customer should be selected

Processing

- Only those sales-agents who have customers in "assigned" status should be populated into the drop-down box of sales agent.
- When re-assign is clicked, update the prospective customer table with the re-assigned to id.
- If "Cancel" is selected, return to "Campaign management" screen.

8. Monitor Campaign Effectiveness

This is used by campaign managers to monitor the progress and effectiveness of campaign.

Monitor Campaign Effectiveness

Campaign [▽]

Total prospects **xxx**

Unassigned prospects **xxx**

Sales Agent	Assigned Prospects	Follow-up in progress	Not interested	Committed

[Back]

Processing

- For the selected campaign, display the total number of prospects and the number of prospects who are still unassigned.
- For the assigned prospects, provide a status summary by sales agent.
- If "Back" is clicked, display the "Campaign management" screen.

9. Contact Customers

This screen is used by sales agents to contact prospective customers.

List of Prospective Customers

Logout

Campaign title	Prospect Name	Contact Number	Status

Processing

- Display the list of prospective customers assigned to the sales agent in the order of status
- When clicked on a campaign name, display the "Update campaign details" form. However, the details will not be editable.
- If the user clicks on a specific prospect name, display the "Prospect details" screen.
- If "logout" is clicked, clear the session and display the login page.

10. Prospect details

This screen is used to update the status of a prospect. In addition to the prospect details, it provides status history of the prospect.

Update Prospect

***Campaign Title**	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
***Campaign Description**	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Customer name	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Contact number	xxxxxxxxxxxx
Average Balance	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Age of Relationship	xxxxxx
Profession	xxxxxxxxxxxxxxxxxxxxxx
*** Status**	

Status History

Date	Status	Remarks

Submit Refresh Back

Processing

- If “Submit” is selected, update the new status in Prospect table.
- If “Refresh” is selected, reload the data from Prospect table.
- If “Back” is selected, display the “Contact Customers” screen.