# Customer Product And Service Eligibility

(Capability)

# 1. Role Definition

This Service Domain maintains a list of products and services for which a customer is eligible. This could include products and services that the customer has had in the past. In order to update the list, periodically or at certain events, the Service Domain calls Product Matching to find additional products for which the customer is eligible. Once a customer acquires a product or a service, this is removed from the current list and added to the customer's recording in Customer Products and Services.

# 2. Example of Use

- Customer Relationship Management re-asseses the eligibility of a customer during a periodical customer analysis.

# 3. Executive Summary

This Service Domain maintains a list of products and services for which a customer is eligible.

# 4. Key Features ⌃

- Provide a list of products and services for which a customer is eligible

- Update the list of products and services for which a customer is eligible, based on a request from customer relationship management and with the help of Product Matching)

# Documentation ⌃

# Properties ⌃

| Property | Value |
|---|---|
| **Service Domain** | |
| API BIAN Portal | Customer Product And Service Eligibility API (https://app.swaggerhub.com/apis/BIAN-3/CustomerProductAndServiceEligibility/12.0.0) |
| Core Business Object | |
| Individual Analytics | customerEligibilityAssessmentAccumulators customerEligibilityAssessmentActivityAnalysis customerEligibilityAssessmentPerformanceAnalysis customerEligibilityAssessmentTrends&Events |
| Portfolio Analytics | customerEligibilityAssessmentPortfolioActivityAnalysis customerEligibilityAssessmentPortfolioMake-UpAnalysis customerEligibilityAssessmentPortfolioPerformanceAnalysis |

| Scenarios | |
|---|---|
| | ⊟ Set Up New Card for Card Application (views/view_55052.html) |
| | ⊟ Perform Customer Eligibility Profile Update (views/view_55074.html) |
| | ⊟ EXT Handle Request for High Volume Account Opening (views/view_54681.html) |
| | ⊟ 1b - Retrieved ASPSP Account Information Trigger NBP (views/view_54959.html) |
| | ⊟ Handle Customer Request for User Access Token Using Bank Authorization Grant and its Client Secret within Active Contact (views/view_54913.html) |
| | ⊟ Handle Request to Use Direct Debits as Payment Instrument (views/view_55659.html) |
| | ⊟ Handle Request for Loan that Requires Syndication (views/view_55083.html) |
| | ⊟ EXT Handle Request to Open Retail Current Account (views/view_55487.html) |
| | ⊟ Perform Customer Product Matching and Selection (views/view_55621.html) |
| | ⊟ Handle Request to Open Savings Account (views/view_55628.html) |
| | ⊟ Handle Request for Corporate Loan (views/view_55212.html) |
| | ⊟ Handle Request for Product Support (views/view_55511.html) |
| | ⊟ Process Internal Customer Upgrade (views/view_55263.html) |
| | ⊟ Handle Request for Credit Facility (views/view_55481.html) |
| | ⊟ Handle Request to Open Retail Current Account (views/view_55365.html) |
| | ⊟ Handle Request for BNPL Financing by Bank where Buyer Is Existing Customer (views/view_55517.html) |
| | ⊟ Conduct Relationship Development Planning (views/view_55535.html) |
| | ⊟ 1a - Retrieved ASPSP Account Information Triggers NBP (views/view_55684.html) |
| | ⊟ Handle Request for Product Selection (views/view_55673.html) |
| | ⊟ Handle Request for BNPL Financing-II (views/view_55329.html) |
| | ⊟ Perform Customer Relationship Development Planning (views/view_55161.html) |
| | ⊟ Handle Request for Bank Guarantee (views/view_55341.html) |
| | ⊟ 6 - Trigger and "recalculate product eligibility" (views/view_35566.html) |
| | ⊟ Handle Request for Consumer Loan Checks and Options (views/view_54741.html) |
| | ⊟ EXT Handle Request to Open Term Deposit Agreement for Retail Customer (views/view_55007.html) |
| | ⊟ Handle Request to Open Term Deposit Agreement (views/view_55179.html) |
| | ⊟ Handle Request to Issue Letter of Credit (views/view_55618.html) |
| Service Role | Maintain a profile of the product and services for which the customer is eligible and any specific terms or other applicable considerations (supports relationship development and sales activity) |

**BIAN Life Cycle**

| Registration Status | Registered |
|---|---|

**Stereotypes**

| stereotype | |
|---|---|
| | ServiceDomain |

## Appears on ⌃

(views/view_50878.html)

(views/view_51270.html)



BIAN Coreless 2.0 Wireframe



Relationship Development

(views/view_51564.html)

(views/view_51594.html)



Customer Product And Service Eligibility…
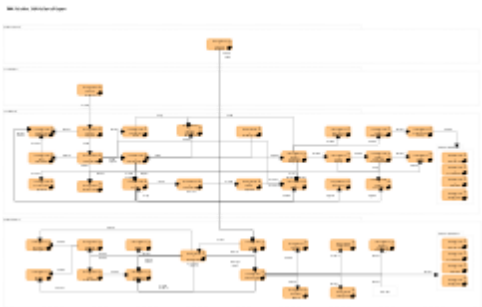


BIAN Coreless 3.0 Wireframe

(views/view_51705.html)

(views/view_51723.html)
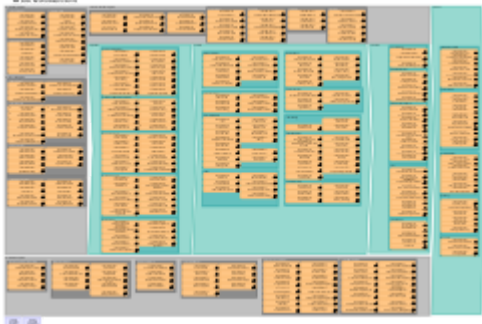


BIAN Service Landscape V12.0 Value Ch…



TPP Backend

(views/view_51891.html)

BIAN Service Landscape V12.0 Matrix Vi…

# Relations

| | |
|---|---|
| aggregated by | Customer Management (object_25.html?object=130142) |
| | Wave 2 (object_25.html?object=153742) |
| | Wave 1 (object_25.html?object=153747) |
| | Relationship Management (object_25.html?object=172032) |
| | TPP Backend (object_25.html?object=83605) |

| | |
|---|---|
| gets input from | Customer Relationship Management (object_21.html?object=30437) |
| | Term Deposit (object_21.html?object=30653) |
| | Party Routing Profile (object_21.html?object=31558) |
| | Servicing Order (object_21.html?object=32295) |
| | Corporate Current Account (object_21.html?object=34221) |
| | Cash Management And Account Services (object_21.html?object=36789) |
| | Current Account (object_21.html?object=37122) |
| | Customer Offer (object_22.html?object=39968) |
| | Customer Campaign Execution (object_22.html?object=40236) |
| | Customer Position (object_22.html?object=41136) |
| | Consumer Advisory Services (object_22.html?object=44522) |
| | Lead and Opportunity Management (object_22.html?object=45446) |
| | Session Dialogue (object_23.html?object=48273) |

| | |
|---|---|
| is associated with | Customer Product And Service Eligibility (object_44.html?object=38405) |
| | Customer Product And Service Eligibility (object_44.html?object=38451) |

| | |
|---|---|
| is equal to | Customer Product And Service Eligibility (object_37.html?object=36793) |

| | |
|---|---|
| is part of | Customer Management (object_25.html?object=130142) |

| realized by | Customer Eligibility Assessment_ Analytics Object (object_25.html?object=111333) |
| | Customer Productand Service Eligibility_SD_Operations (object_19.html?object=119607) |
| | Customer Eligibility_Instantiation (object_19.html?object=119609) |
| | Customer Eligibility_Invocation (object_19.html?object=119614) |
| | Customer Eligibility_Reporting (object_19.html?object=119638) |
| | Customer Productand Service Eligibility_SD_Service Group (object_19.html?object=240317) |
| | Customer Eligibility Assessment (object_24.html?object=29976) |
| | Up CR Update the product/service eligibility record (e.g. for newly sold products) (object_14.html?object=36376) |
| | Ex CR Execute an automated action against an active evaluation (e.g. provide additional data) (object_14.html?object=36868) |
| | Up BQ Update details about a next best eligibility test (object_14.html?object=38193) |
| | Gr CR Obtain a permission grant reflecting eligibility (perhaps defining a term or other considerations) (object_15.html?object=38826) |
| | Ec CR Accept, reject, verify etc. an eligibility assessment (object_15.html?object=39547) |
| | Customer Eligibility (object_24.html?object=40363) |
| | Ev CR Evaluate a customer's eligibility for a product/service (object_16.html?object=43276) |
| | Re BQ Retrieve details about an eligibility assessment (object_16.html?object=43543) |
| | Re CR Retrieve details about an eligibility request (object_16.html?object=45786) |
| | Re BQ Retrieve details about a next best test (object_16.html?object=46544) |
| | Rq CR Request manual intervention in an evaluation (e.g. engage a specialist or negotiator) (object_17.html?object=47682) |
| | Assess (object_28.html?object=58027) |

| serves | Customer Management (object_6.html?object=126743) |

| triggered by | Customer Relationship Management (object_21.html?object=30437) |
| | Servicing Order (object_21.html?object=32295) |
| | Corporate Current Account (object_21.html?object=34221) |
| | Customer Product And Service Eligibility (object_21.html?object=36792) |
| | Customer Offer (object_22.html?object=39968) |
| | Product Matching (object_22.html?object=44814) |
| | Loan Syndication (object_23.html?object=47935) |
| | Session Dialogue (object_23.html?object=48273) |

triggers

Product Directory (object_21.html?object=34953)

Customer Product And Service Eligibility (object_21.html?object=36792)

Customer Position (object_22.html?object=41136)

Customer Product and Service Directory (object_22.html?object=41591)

Consumer Advisory Services (object_22.html?object=44522)

Product Matching (object_22.html?object=44814)